Glasshouse

WHERE ARE THE AUDIENCES?

2024

Irirangi Te Motu
NZ On Air

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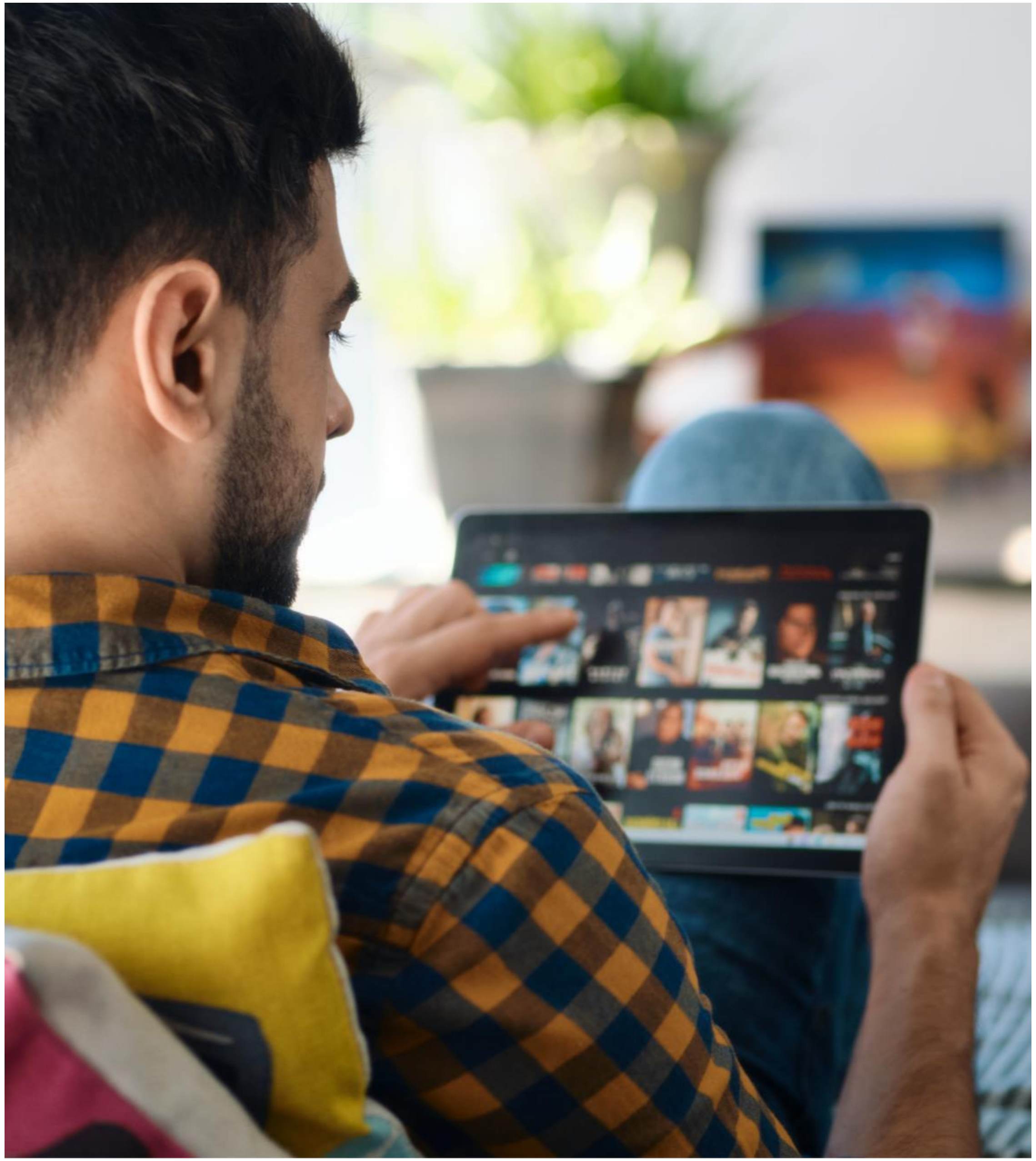

01

INTRODUCTION

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New Zealand On Air (NZ On Air) supports and funds public media content for New Zealand audiences, focussing on authentic NZ stories and songs that reflect New Zealand's cultural identity and help build social cohesion, inclusion and connection.

It is therefore essential NZ On Air has an accurate understanding of the evolving media behaviour of NZ audiences.

The Where Are The Audiences? study (WATA) delivers an objective measure of NZ audience behaviour at a time when continuous single source audience measurement is still in development.

This document presents the findings of the 2024 study. This is the seventh wave of the study since the benchmark in 2014 and provides not only a snapshot of current audience behaviour but also how behaviour is evolving over time.

NZ On Air's vision is "New Zealanders connected through our stories and our songs". The 2024 Where Are The Audiences? study will contribute to this goal by:

- Informing NZ On Air's investment strategy as well as the assessment of specific content proposals.
- Positioning NZ On Air as a knowledge leader with stakeholders.
- Maintaining NZ On Air's platform neutral approach to funding and support, and ensuring decisions are based on objective, single source, multi-media audience information.

RESEARCH APPROACH

The first priority in the design and conduct of the WATA study is to ensure valid and robust comparisons to previous studies. Therefore, the research approach, including methodology, sampling and respondent definition, question flow and wording, and weighting factors have been kept consistent with all previous WATA studies.

This includes the key technique of asking respondents about their behaviour "yesterday" within specific time periods between 6am and midnight. This technique enables the development of accurate survey-based measures of actual behaviour by grounding responses in behaviour that is fresh in respondents' minds and within specific parts of an actual day.

This results in daily reach being the key audience metric in this study.

A total sample of n=1,408 was developed, with representative samples created for each day of the week so that results can be accurately extrapolated to represent a "typical" day.

The total sample has a maximum margin for error of +/-2.6%.

The results in this study will not exactly match data from sources such as TV ratings, radio surveys, or online analytics as the methodologies are different. However, this study does provide an objective, single source comparison across all media.

As in all previous studies, a mixed methodology of telephone and online interviewing was used:

- N=800 interviews were completed by telephone using random digit dialling and n=600 interviews were completed online using Consumer Link's Flybuys research panel. Interviewing was conducted between April 10th and May 13th, 2024.
- Respondents were defined as all New Zealanders aged 15 and over.
- Regional sample stratification and minimum quotas for males, 15–24-year-olds and ethnic groups were implemented.
- The total sample has been post-weighted by access to a landline, gender, age and ethnicity to ensure it is representative of the 15+ NZ population.*

The study measured media consumed "yesterday", for how long and which channels, stations and sites were used. This approach measured the daily audience behaviour of the main broadcast, print, online and music media and forms the bulk of this report.

Respondents were also asked about how they use on demand, how they become aware of new TV shows, their use of captioning and audio description, and sources of music discovery.

*Weighting based on Statistics NZ provisional estimates of the 2023 population; 2023 Census data not yet released.

CHANGES TO THE APPROACH IN 2024

The questionnaire for each measure of the WATA study is always updated to reflect changes in branding of specific channels, sites and stations, to introduce or remove channels, sites and stations, and amend question options as necessary.

There are also some definition changes this year to better reflect how TV, video and radio content is provided and consumed in 2024.

New definitions / changes in definitions

This year we are reporting a “Total TV” figure, which is a measure of the consumption of any TV content provided by an NZ Broadcaster. It is a net aggregate of viewing across any delivery platform i.e. linear, live streaming or catch-up/on demand. It will be referred to as Total TV in the charts, and TV in any commentary.

- We will also continue to provide a breakdown of the categories of viewing within this i.e. Linear (and where relevant Linear via FTA platform or via PayTV platform) and NZ Broadcaster Video on Demand (BVOD), (this was previously referred to as On Demand).

Similarly, we are also reporting a “Total Radio” figure – a net aggregate of any listening across broadcast or online NZ radio. It will be referred to as Total Radio in the charts and Radio in any commentary.

The category “Global video sharing platforms” was previously referred to as “Overseas online video”. “Total online video” (a net aggregate of overseas online video and NZ online video) is not included this year.

Major changes to questions

- Awareness of New Zealand made TV shows *“In which of the following ways do you usually become aware of New Zealand made TV shows”*
  - Combined “TV ads for programmes” and “Ads on TV sites” into one option (i.e. combined Linear TV/BVOD)
  - Added Radio – commentary, reviews, interviews, broadcast or online
  - Added Billboards / outdoor advertising
- Usage of NZ BVOD platforms *“Thinking about when you used TVNZ+, ThreeNow, Māori+ or SKY Go yesterday did you use it to...”*
  - Added “Used the App to stream live television”
  - Changed to a multi-selection question
- Streaming/downloading/torrenting *“Which of the following have you done recently i.e within the last month?”*
  - Removed two previous questions “ever done” and “frequency”, amended to one single question (in the last month).
  - Added “Used a login or password belonging to someone outside your household so you can watch shows on an overseas site such as Netflix”
- Devices owned / accessed. *“Which of the following do you personally own or have access to.”*
  - Changed definition of ‘Working TV” to be any type of TV.
  - If yes, added “Is this a smart TV that can connect to the internet?”

ABBREVIATIONS AND TERMINOLOGY

Name	Media type – description / definition
TV (Total TV)*	All (net) TV viewing including Linear and BVOD (live streaming or on demand)
TV Linear Total	All (net) Linear TV (traditional broadcast) viewing
TV Linear FTA	TV viewing via free-to-air platform
TV Linear Pay	TV viewing via Pay TV platform (i.e. Sky TV) – n.b. may include viewing of free-to-air channels
NZ BVOD**	NZ Broadcaster Video on Demand e.g. TVNZ+, ThreeNow
Global video sharing platforms***	Viewing of video on global video platforms and social sites e.g. YouTube, Facebook, Instagram
NZ online video	Viewing of video on NZ sites e.g. Stuff, NZHerald
SVOD	Subscription Video on Demand including international and local SVOD sites

Name	Media type – description / definition
Radio (Total Radio)	All (net) radio listening including broadcast and online
Radio Broadcast	Any radio listening via broadcast (NZ)
Online NZ Radio	Any radio listening online – NZ sites
Music stream	Music online/streamed e.g. Spotify, Apple, YouTube
Music	Music on physical formats and non-streaming (e.g. iPod, CDs)
Online Gaming	Played games online on a gaming console, PC/laptop, phone or tablet
Podcast	Listened to a podcast
Newspaper	Read a newspaper
Magazine	Read a magazine

*In previous years, “TV” referred to Linear TV only.
**In previous years referred to as “On Demand”
** Referred to in 2021 and 2023 as Overseas online video.

02

KEY FINDINGS

KEY FINDINGS AND OVERALL AUDIENCE TRENDS

New Zealanders consume a broad range of media across a typical day – including content provided by global and local players and across a range of delivery platforms. After strong growth from 2021 to 2023, **most digital media show little change** in 2024.

Global video sharing platforms reach the highest number of New Zealanders at 64% (up from 63% in 2023). This modest year on year change is driven by an increase in reach for those aged 40-59, however there is **a decrease among younger audiences**.

TV is the second most popular, reaching 6 out of 10 New Zealanders each day. The reach of TV overall has decreased year on year due to a steady decline in reach of Linear TV, while NZ BVOD is stable following significant growth from 2021 to 2023.

NZ BVOD had the most significant increase of any media between 2021 – 2023 (from 23% to 35% daily reach). This year, there has **been an increase in reach among younger audiences** but a decline among those aged 40-59, resulting in no overall year-on year change.

Subscription Video On Demand (SVOD) has the third highest reach at 56%. **SVOD has seen a small year-on-year decline in reach**, driven mostly by a decrease among the 40+ audience.

TV has the highest reach during its traditional peak time of 6pm -10.30pm, reaching just under half of the total NZ audience (49% versus 44% for global video; 42% for SVOD).

TV has the highest engagement, with New Zealanders spending **over 2 hours per day** consuming TV across all formats.

In 2024, **one-quarter** of Broadcaster Video On Demand users say they **live stream TV via a BVOD App.**

Around 1 ½ hours per day is spent consuming global video platforms and SVOD. A slight increase for global video platforms means this media is now ahead of SVOD for time spent (which has declined by 8 minutes per day compared to a year ago).

KEY FINDINGS AND OVERALL AUDIENCE TRENDS

Music streaming reaches just under half of all New Zealanders each day, while radio reaches 46%. Almost the same amount of time is spent per day listening to streamed music (73 minutes) as radio (72 minutes). Radio delivered via broadcast has shown an increase in reach, while online NZ radio has slightly declined.

Podcast listening has grown consistently since it was first measured in 2018 (7%), now reaching 18% of New Zealanders each day (up from 15% in 2023), however time spent has stabilised this year. Spotify remains the most common source for finding new podcasts and this has increased significantly in the past year.

The impact of **age** differentiating our media behaviour is slowly diminishing as **digital media use becomes a core part** of most New Zealanders daily media consumption. However, in 2024 it **does remain as a differentiator**, reflected in the **level** of digital use**, and the use of globally versus locally provided media**.

Ethnicity is also a differentiator, particularly Pasifika and Asian audiences who are more likely to consume digital media, and content provided by global providers rather than local (except for NZ Online video for Pasifika and Asian).

The incidence of Connected TVs has grown consistently. Of those who have a TV in the home, almost 8 out of 10 are Connected TV's, equating to 6 out of 10 New Zealanders now owning or having access to a Connected TV. Ownership skews towards those aged 40-64.

TVNZ News and Stuff are now equal as the most popular source of news; however, TVNZ remains the **most trusted** by a significant margin.

AUDIENCE BEHAVIOUR OVER THE DAY

Global video sharing platforms attract the biggest audience overall and attract the biggest or equal biggest audience during the day (6am – 6pm).

However, TV attracts the biggest audience during its traditional peak viewing time of 6pm - 10.30pm (49% versus 44% for global video; 42% for SVOD)

TV's reach is particularly dominant from 6-8.30pm (44% versus 36% for global video and 35% for SVOD), while later in the timeslot (8pm-10.30pm) the reach is very similar for Global video platforms (31%); TV (29%) and SVOD (28%).

The peak time reach for Global video platforms has increased year-on-year (from 42% to 44%), while SVOD has decreased (from 44% to 42%). *(A measure for TV is not available in 2023 for comparison).*

Radio, in all formats, has the second highest reach during its traditional peak listening time of 6-9am, at 35%. Music streaming reaches 31% in the early morning timeslot then increases from 9am – 6pm (to 37%) making it more popular than radio, which reaches 34% throughout the day.

TIME SPENT USING MEDIA AND ENGAGEMENT

TV overall has the highest engagement levels. New Zealanders spend 2 hours and 5 minutes consuming TV per day, significantly more time than global video platforms (92 minutes) and SVOD (89 minutes).

However, time spent consuming TV has declined year on year, driven predominantly by a decrease in time spent viewing Linear TV (BVOD is slightly down).

Time spent consuming global video platforms has increased very slightly, while SVOD has decreased by 8 minutes per day.

New Zealanders spend 1 hour 13 minutes consuming Radio each day, no change on last year at the overall level however there is a slight increase in time spent listening to Broadcast radio and a slight decrease for online NZ radio.

Time spent streaming music increased significantly from 2021 to 2023 and this trend has continued with New Zealanders now spending 1 hour and 12 minutes per day consuming this media, virtually equal with Radio.

Among only the users of each media, TV drives the highest level of engagement of any media in 2024 with viewers dedicating almost three and a half hours to watching TV each day. Linear TV viewers are particularly engaged at just over three hours, virtually no change from 2023, with those accessing via a Pay TV platform the highest within Linear at 2 hours 52 minutes (down from 3 hours in 2023). NZ BVOD viewers spend a little under 2 hours (1 hour 52 minutes per day), a slight (6 minute) decrease from 2023.

SVOD generates the second highest levels of engagement at 1 hour 40 minutes each day, however this has declined by 12 minutes since 2023.

Music streaming, online gaming and global video platforms are each showing a steady increase in engagement, with users spending close to 2 ½ hours a day on each of these (148 minutes, 147 minutes and 144 minutes respectively).

Users of Broadcast radio spend 2 hours 18 minutes per day listening (virtually no change year on year), while online radio users dedicate 1 hour 55 minutes per day (down slightly from 2 hours per day in 2023).

DIFFERENTIATING FACTORS: THE THREE GENERATIONS OF MEDIA USAGE

15-39

Highly digital and generally more likely to consume globally provided content than local.

Global video platforms reach 8 out of 10 daily however this has declined year-on-year. Music streaming and SVOD reach close to 7 out of 10 of this group.

Around 2 hours per day spent with global video platforms, SVOD and music streaming.

TV reaches 45% per day and they spend over an hour a day viewing TV (67 minutes).

Year-on-year increase in reach for NZ BVOD to 30%, now higher than Linear TV (27%).

Almost 4 in 10 listen to radio daily, while one-quarter listen to Podcasts.

40-59

Consume a broad range of media, global and local; generally, more digital.

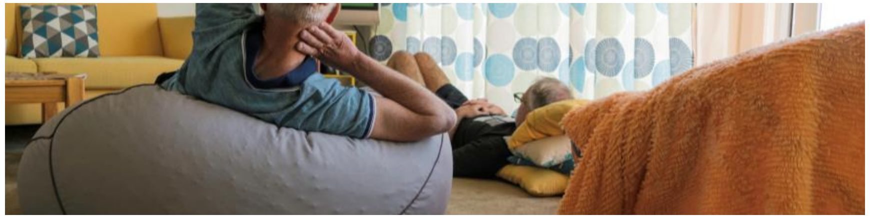
The reach of global video platforms has increased significantly year-on-year to 63% however TV reaches slightly more (64%) each day.

Significantly more time spent consuming TV at over 2 hours per day.

A little under 1 ½ hours spent consuming global video platforms and SVOD.

Radio and music streaming reach just under half of this audience with around 1 hour spent consuming each media.

BVOD has trended upwards for the last five years but has seen a decline in 2024.



60+

Continued high consumers of "traditional" media, however accessing content via both traditional and digital delivery.

TV dominates reaching 8 out of 10 with 3 ½ hours per day spent consuming TV content.

Linear TV reaches 72% (slight year on year decline) while NZ BVOD reaches just under 4 out of 10 (stable year on year).

Radio reaches 56% with over half via Broadcast radio; and over 1 ½ hours listening to broadcast radio.

The daily reach of global video platforms increased significantly from 2021 to 2023 but has remained stable this year (39%), while SVOD, also with a previous increase, has declined in 2024 (35%).

Printed newspapers continue to be popular reaching just under 1 in 4 of this age group.

DAILY REACH OF SPECIFIC PLATFORMS/SITES, CHANNELS AND STATIONS

Linear TV

Just five TV channels reach 5% or more New Zealanders each day.

TVNZ 1 has continued to gradually decline over the last five years, however, remains the most popular TV channel, reaching just under one in three New Zealanders each day (32%).

Three reaches the second biggest audience with 17% (no change year on year) watching this channel each day.

TVNZ 2 reaches a little over one in ten New Zealanders each day (12%), slightly up from a year ago, while the Sky Sport group of channels remain steady on 8%.

NZ BVOD

TVNZ+ remains the most popular local on demand platform by some margin, reaching more than one in four New Zealanders each day (26%). Its audience increased significantly from 17% daily reach in 2021 to 27% in 2023. In 2024 it has grown its younger audience however a year-on year decline among those aged 40+ has decreased its overall reach slightly.

ThreeNow has grown steadily in the last two-years to now reach 1 in 10 New Zealanders each day. The year-on-year gain is driven by increased reach among both the 15-39- and 40–59-year-old age groups.

While users continue to generally skew a little older, the increase in younger audiences has resulted in NZ BVOD platforms now being accessed daily by a wide cross section of age groups.

Viewers use BVOD platforms for a couple of different reasons – including “catching up” (54%), their primary (online only) source of content (42%) and, to stream live television (25%).

DAILY REACH OF SPECIFIC PLATFORMS/SITES, CHANNELS AND STATIONS

Global video sharing platforms

Following growth from 2021 to 2023, most of the major global sites have remained stable or showing a slight year on year decline in 2024.

Both YouTube and Facebook have seen a decline in their younger (15–39-year-old) audiences, while the 40-59 audience has grown slightly for both, resulting in little overall change for each platform.

YouTube (for video) remains the most popular site, reaching more than four in ten New Zealanders each day (44% reach) with Facebook (for video) below this at 36%.

Instagram has shown steady growth in the last three years since measurement began. The year-on-year growth is driven by an increase among the 40–59-year-old age group.

Both TikTok and Snapchat, whose audiences are predominantly under 40, have increased slightly among youth (15-24s) in 2024, but have seen a small year-on-year decline among the 15–39-year-olds.

NZ Online Video

There has been little change in audiences watching online video on NZ based sites in the last year, or in fact since 2018.

Stuff (11%, a slight decline from 12% in 2024) and NZ Herald (10%) continue to be most popular and reach about one in ten New Zealanders each day.

TVNZ News has shown a slight year-on-year increase.

SVOD

Netflix is the most popular SVOD provider by a significant margin, reaching 38% of New Zealanders each day. However, after trending upwards since 2018, its reach has declined this year from 42% in 2023. The decline is across all ages, particularly for the under 60's, and most significantly among those aged 25-34.

Disney Plus is the second most popular SVOD provider, reaching 13% of New Zealanders each day, a slight year on year decrease.

Amazon Prime, is the only SVOD to have increased this year and reaches just under one in ten New Zealanders (11%).

Neon has declined and Sky Sport Now remains stable with no year-on year change.

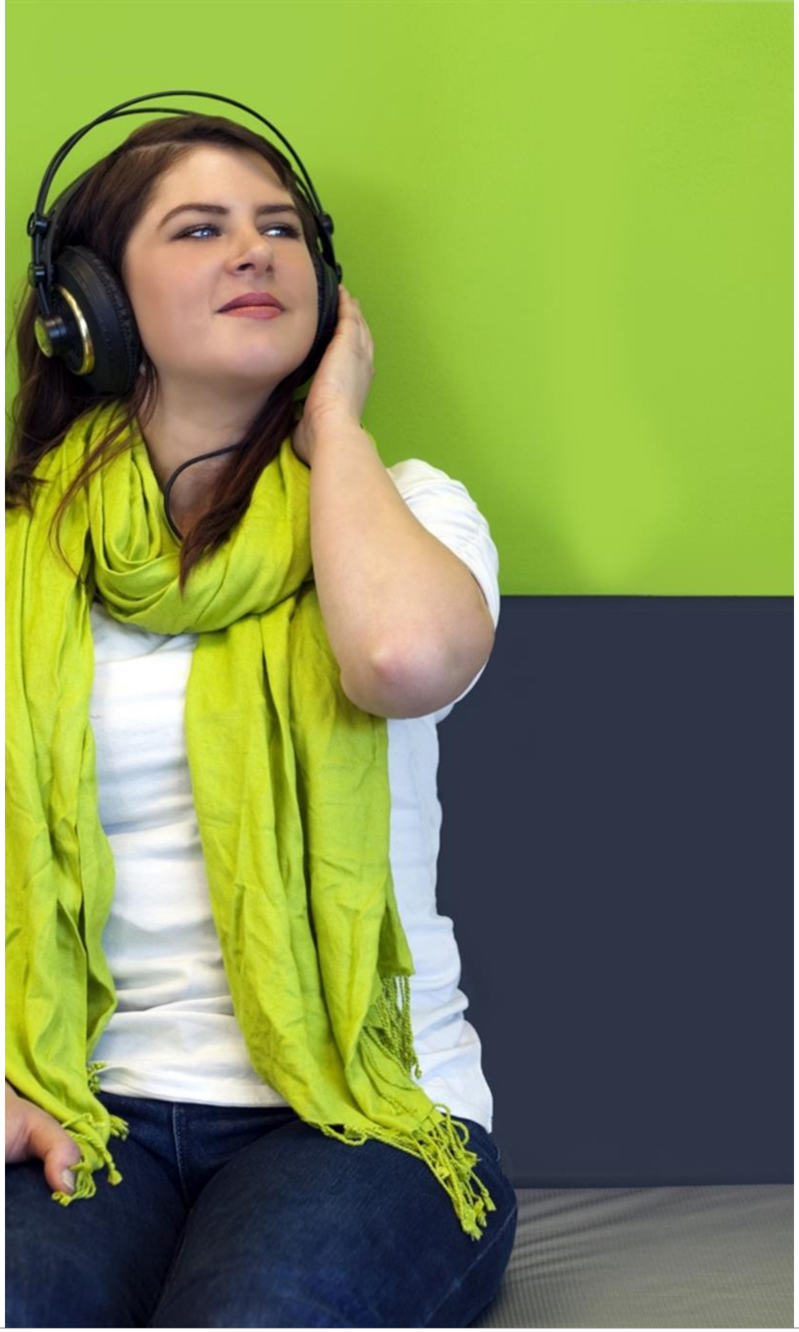
DAILY REACH OF SPECIFIC PLATFORMS /SITES, CHANNELS AND STATIONS

Streamed music

Spotify continues to grow its daily audience among New Zealanders with over one in three (35%) now listening each day.

YouTube (for music) is second most popular, but its daily audience is stable at 18%.

Streaming services are now clearly the most common source for finding new music with 56% of New Zealanders finding music in this way, compared to 45% who find new music via radio.



Radio

Newstalk ZB has the biggest audience each day with 8% daily reach.

RNZ National is the second most popular station with 7% tuning in.

RNZ National increased its reach from 2018 to 2021 however has since shown a steady decline.

Newstalk ZB’s slight increase has resulted in its daily reach to be just ahead of RNZ National for the first time since this survey began in 2014.

Most other commercial stations have remained relatively stable over the last three-five years, with only The Edge showing any significant growth this year to 6%.

SOURCES OF NEWS AND INFORMATION

New Zealanders keep up to date with news from a wide range of sources.

Following growth by Stuff as a major source of news, it has declined slightly in the last year with TVNZ News and Stuff now being equal as the most popular source of news (46% regularly use).

TVNZ remains the most trusted source (22%) by a significant margin. Stuff and NZ Herald are the next most trusted, each at 11% (Stuff has declined from 13% while NZ Herald has remained the same).

While Social media of all types had become a more widely used source of news and information between 2021 to 2023, each of these have declined slightly in 2024. Very few New Zealanders see social media as their most trusted source.

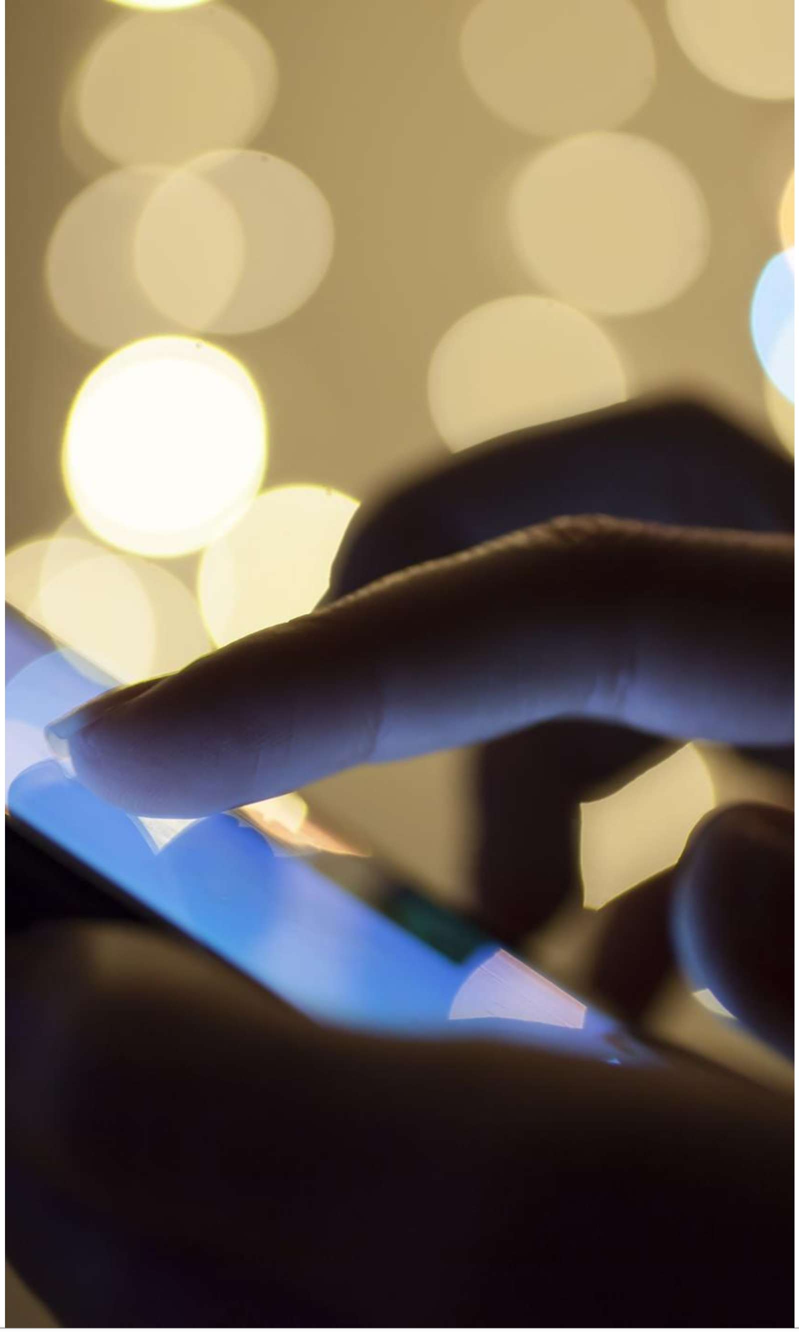
SUMMARY OF OTHER TOPICS

Source of awareness of NZ made TV shows

Promotion of shows on TV remains the most common source of awareness of NZ made TV shows. (Note that this year we combined Linear and BVOD, where previously they were asked as separate options).

Friends and family, social media and surfing through channels are the next most popular and there is no change from last year for any of these.

In 2024 we added two new sources – Radio, which is the fifth most popular this year at 14%, and Billboards/Outdoor advertising which is cited by just over one in ten New Zealanders as a source.



Captioning and audio description

Use of captioning while watching TV continues to increase. Close to half (48%) now use captioning.

Audio description is much less widely used and has declined slightly year on year to 8%.

Streaming, downloading and torrenting

Undertaking “unauthorised” activities such as torrenting, illegally downloading, using a VPN to access overseas content or sharing passwords is more prevalent with youth and males.

15% of New Zealanders have “shared a password” (i.e. used a login belonging to someone outside the household to watch content on subscription services).

6 out of 10 New Zealanders have not undertaken any unauthorised activities in the last month.

03

DAILY AUDIENCE BEHAVIOUR

DAILY AUDIENCE 2024 - SUMMARY

All New Zealanders 15+
% Daily Reach

Global video platforms reach the biggest audience daily, at 64%, followed by TV, reaching 6 out of 10 New Zealanders each day.

SVOD (Subscription Video on Demand) reaches 56% of the population.

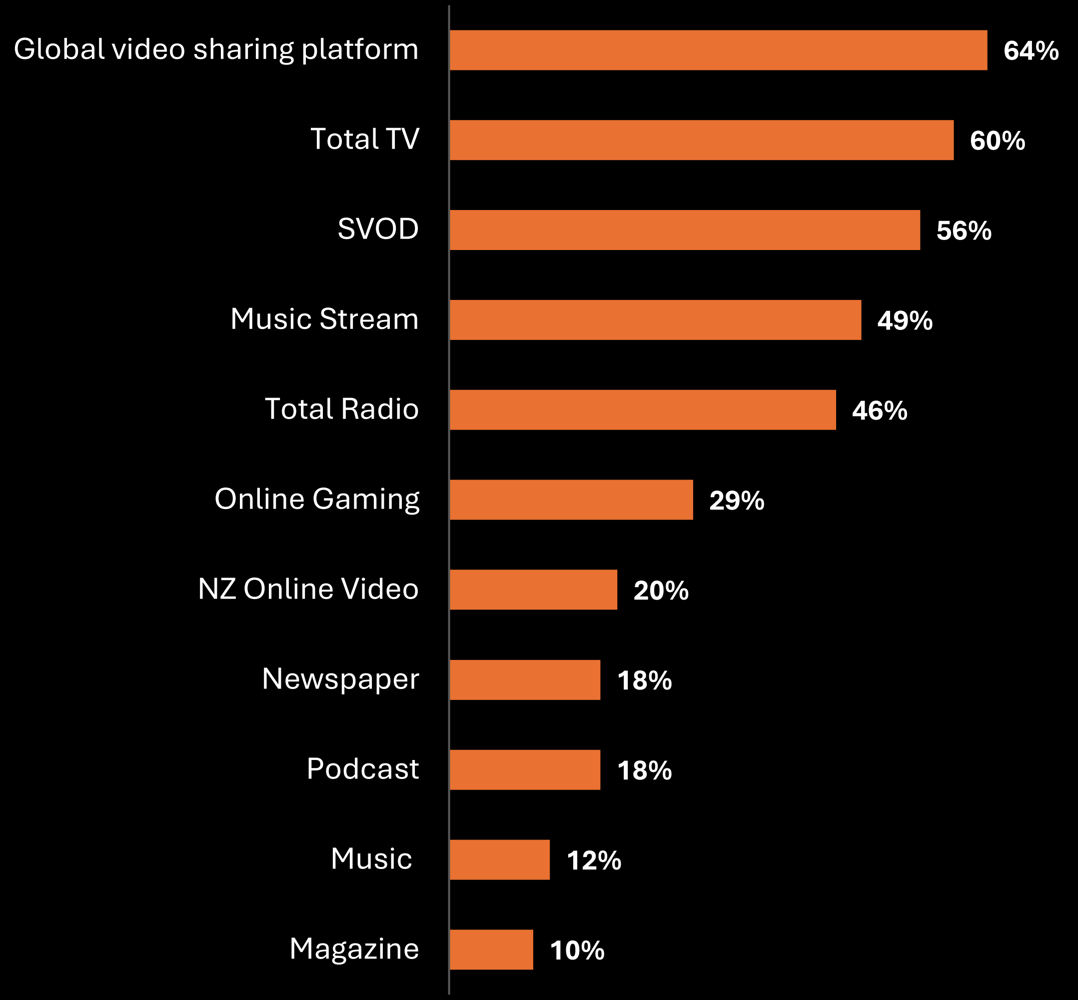
Just under half listen to streaming music and 46% listen to radio on a typical day.

Online gaming reaches just under 3 in 10, while 2 out of 10 access video on NZ online sites.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All respondents (2024 n = 1,404)

Daily Audience 2024



Q. I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following types of entertainment, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

DAILY AUDIENCE 2024 - DETAIL

All New Zealanders 15+
% Daily Reach

This chart shows daily reach of the sub-categories of TV and Radio.

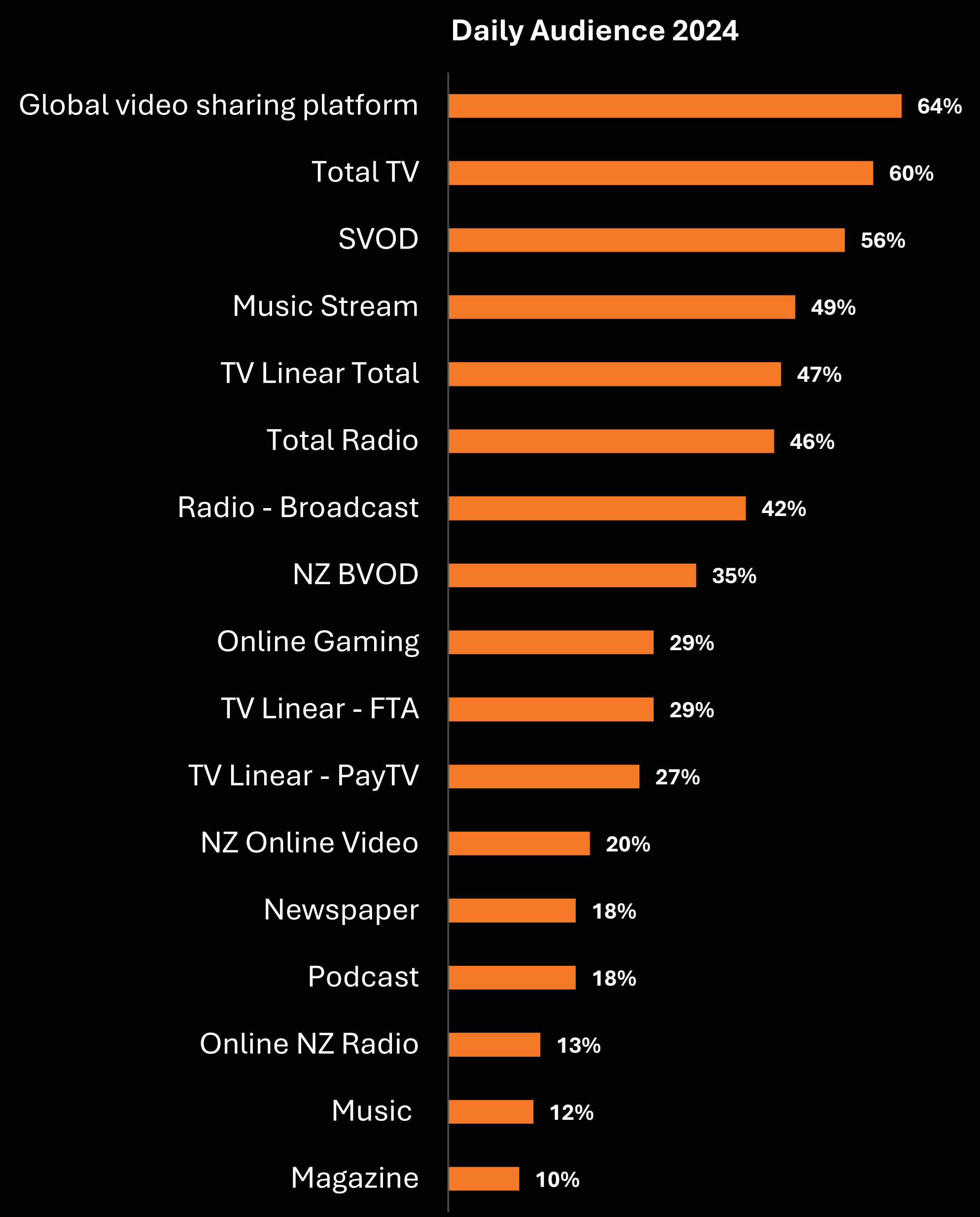
Linear TV reaches 47% of the population each day; within this, the percentage who access via an FTA (free to air) platform or via a Pay TV platform is relatively similar, at 29% and 27%, respectively.

NZ BVOD reaches over one-third, or 35% of the population each day.

Radio – via traditional broadcast – reaches over 4 in 10 (42%) New Zealanders each day, while Online NZ radio reaches 13%.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All respondents (2024 n = 1,404)



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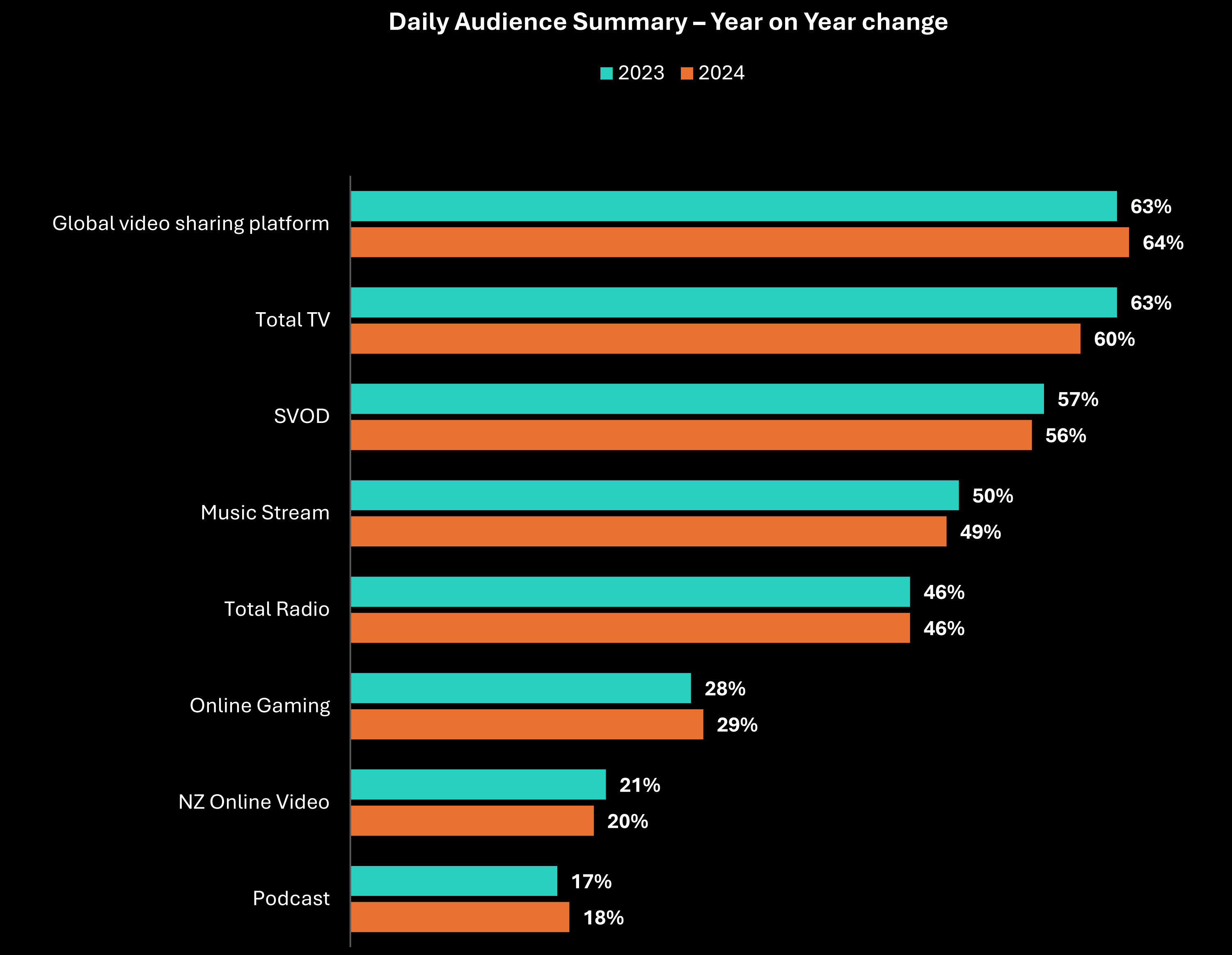
DAILY AUDIENCE – SUMMARY YEAR ON YEAR CHANGE

All New Zealanders 15+
% Daily Reach (more than 15%)

In 2023, the reach of TV and global video platforms was equal at 63%. In 2024, global video platforms daily reach increased slightly while TV has declined (driven by Linear TV reach declining – see following chart).

Very little change among the other major media categories in the last year.

Both SVOD and music streaming have stabilised or decreased slightly. Radio remains steady, NZ online video slightly down, online gaming and podcast listening slightly up.



N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All respondents (2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)

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DAILY AUDIENCE OVER TIME - DETAIL

All New Zealanders 15+
% Daily Reach

Linear TV reach has continued to decline in the last 5 years, and while NZ BVOD has shown steady growth over this time, it has remained stable this year, resulting in an overall year-on-year decline in daily reach for TV.

In 2024, global video platforms reach has increased slightly, now at 64%, ahead of TV with the second highest reach at 60%.

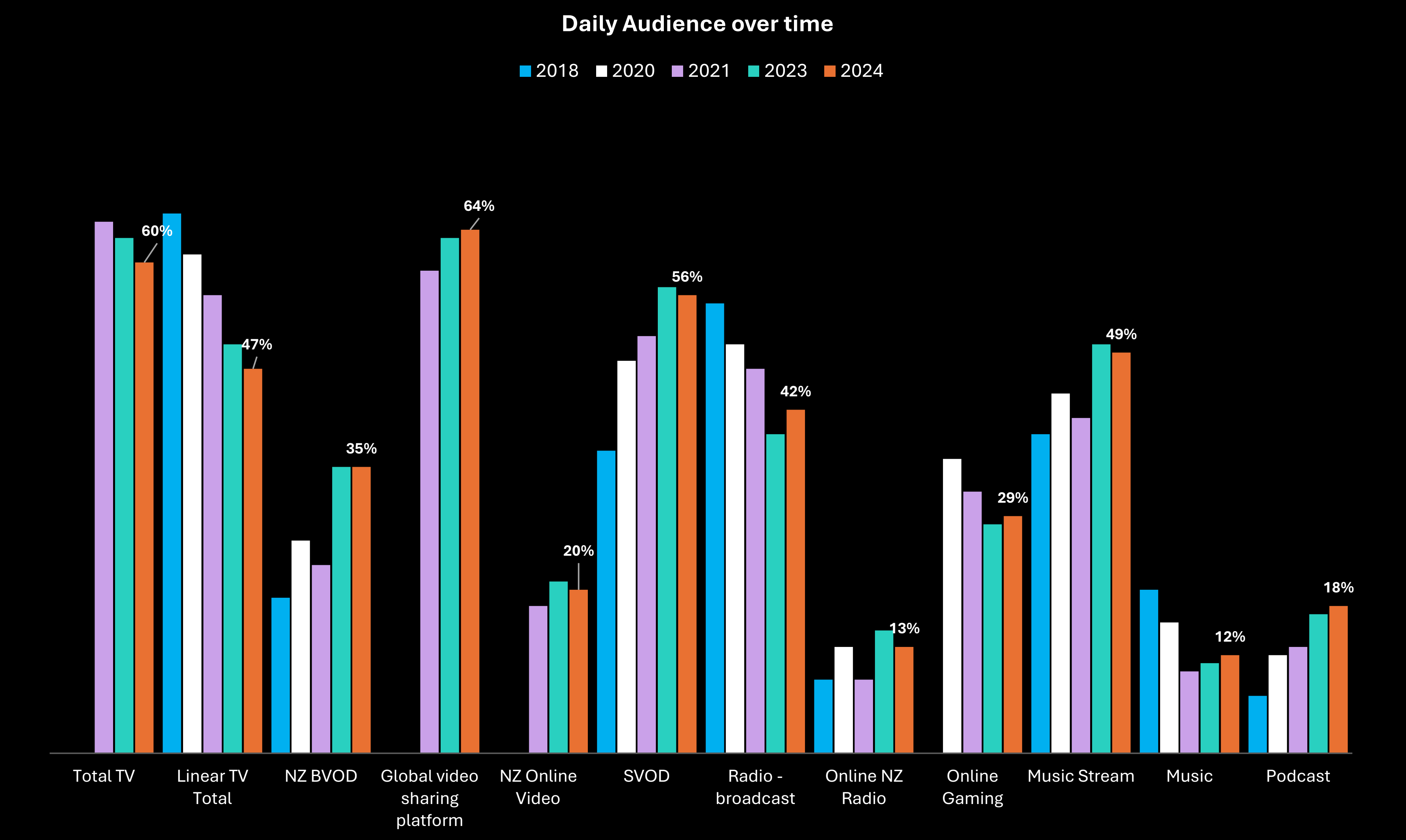
SVOD and music streaming showed strong growth from 2018 to 2023, which has stabilised in 2024.

Radio listening via radio broadcast has increased year-on-year; with online listening slightly down.

Online gaming is slightly up and podcast listening continues to steadily increase.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All respondents (2018 n = 1,414; 2020 n = 1,511; 2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)



N.B. Note the different year comparisons i.e. two-year gap from 2018 – 2020 and from 2021 - 2023

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DAILY REACH ACROSS THE DAY

All New Zealanders 15+

% Reach by Daypart

The way New Zealanders engage with media changes throughout the day.

Global video platforms, with the highest overall reach, dominate during the day.

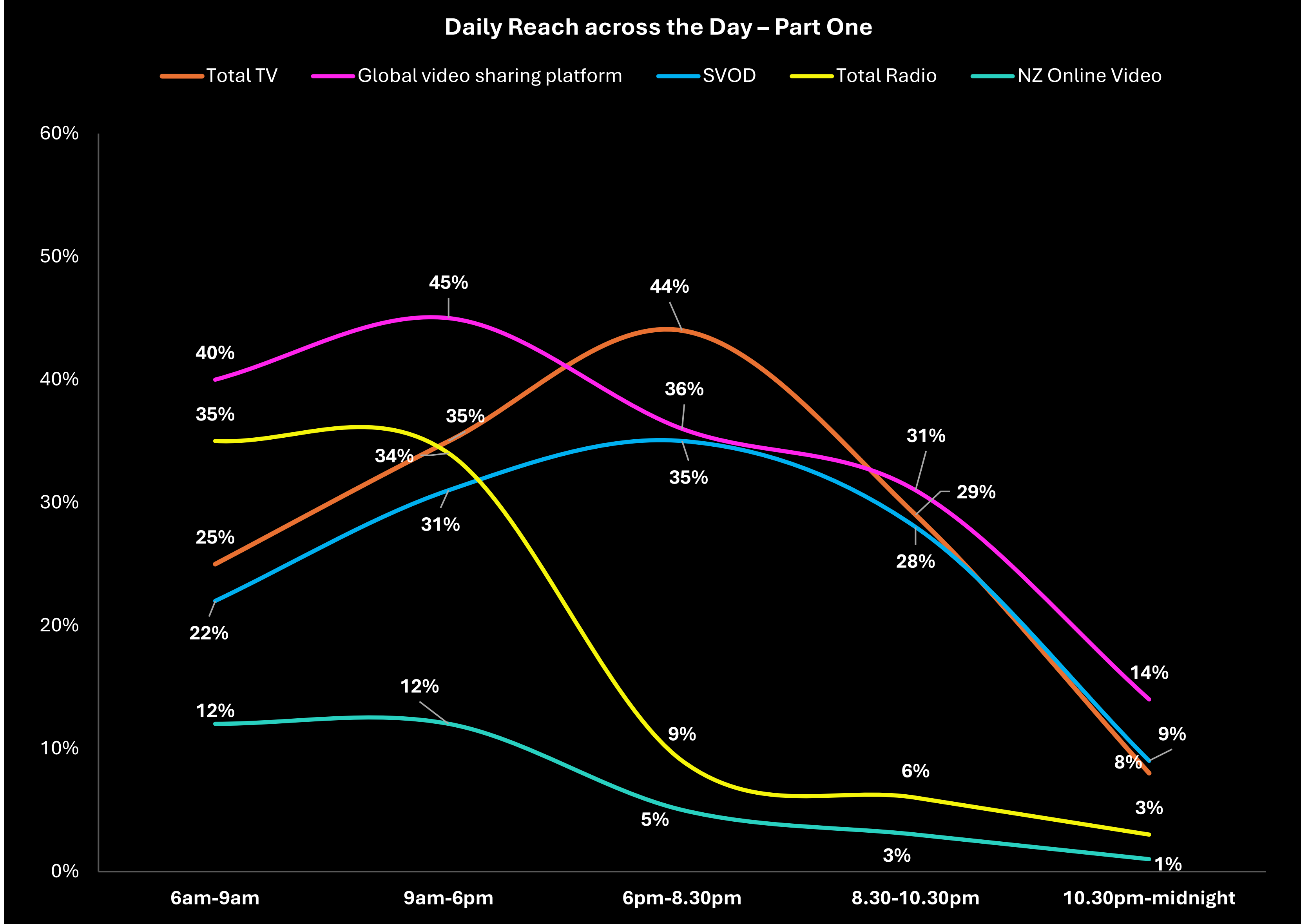
TV builds its audience during the day and has the highest overall reach in the traditional TV viewing period of 6pm - 10.30pm (49% versus 44% for global video; 42% for SVOD). It attracts the largest audience from 6pm-8.30pm. In the later evening (8.30pm-10.30pm), global video platforms, TV and SVOD have similar reach (31%, 29% and 28% respectively).

Radio has the second highest reach in the morning at 35%, dropping slightly during the day to be just behind TV, then declining in the evening.

NZ online video reaches 12% across the whole day then drops off in the evening.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All respondents (2024 n = 1,404)



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DAILY REACH ACROSS THE DAY

All New Zealanders 15+
% Reach by Daypart

For comparison to this set of activities radio has been included in this chart as well as the former chart.

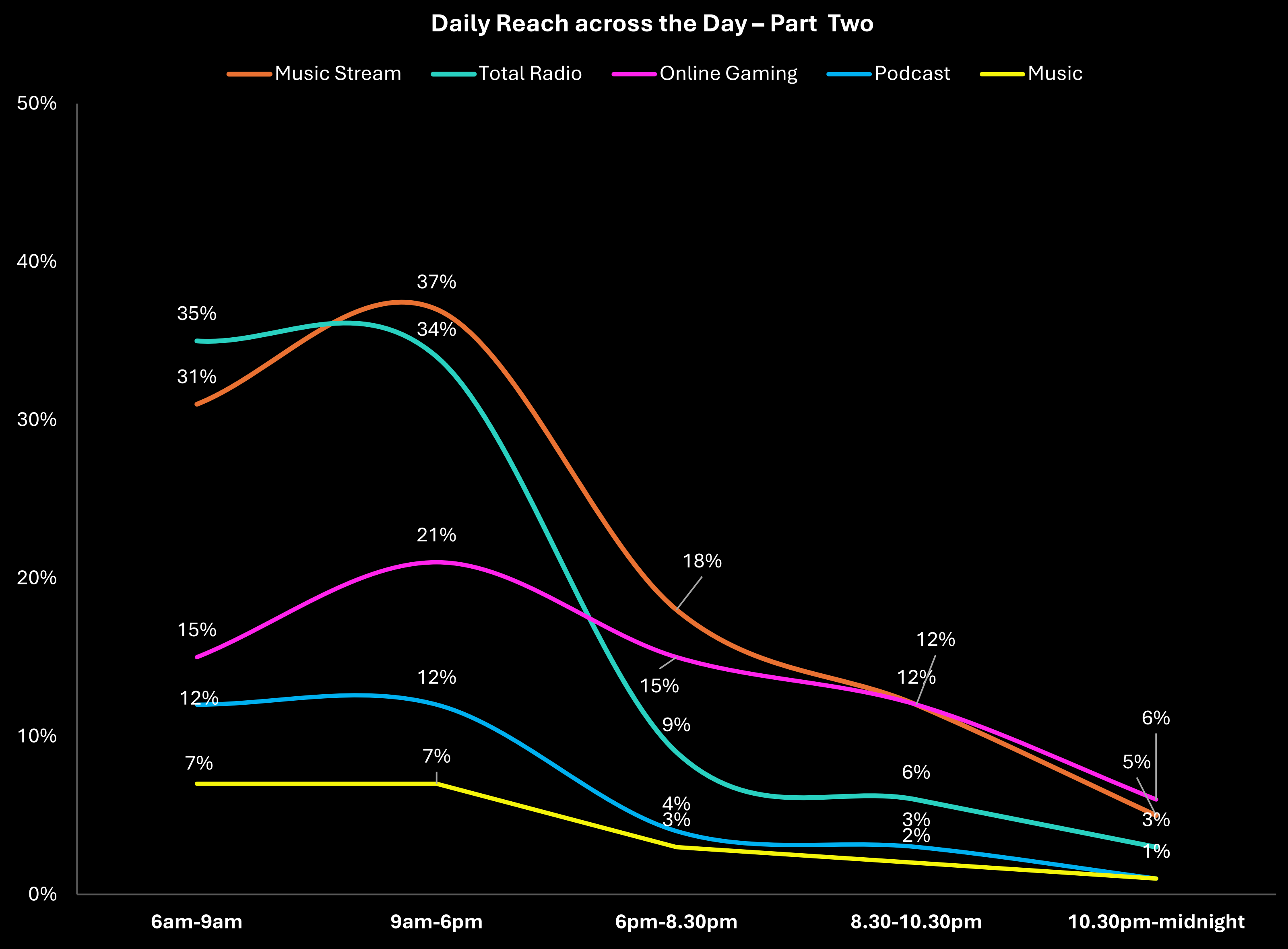
Music streaming has a lower reach than radio in the "breakfast" daypart (6am-9am), however is ahead of radio through the day (9am-6pm) where it peaks at 37% .

Online gaming also peaks during the day, reaching 21% during this period then tapers off and has a similar evening reach to music streaming.

Podcasts and music on physical formats are most popular during the daytime prior to 6pm.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All respondents (2024 n = 1,404)



Q. I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the **time period** I read out. It doesn't matter if you were also doing something else at the time.

PEAK TIME REACH (6PM-10.30PM)

All New Zealanders 15+
% Reach 6pm – 10.30pm

TV reaches just under half of the total NZ audience during the peak viewing period of 6pm-10.30pm, while global video platforms and SVOD reach similar sized audiences at 44% and 42%, respectively.

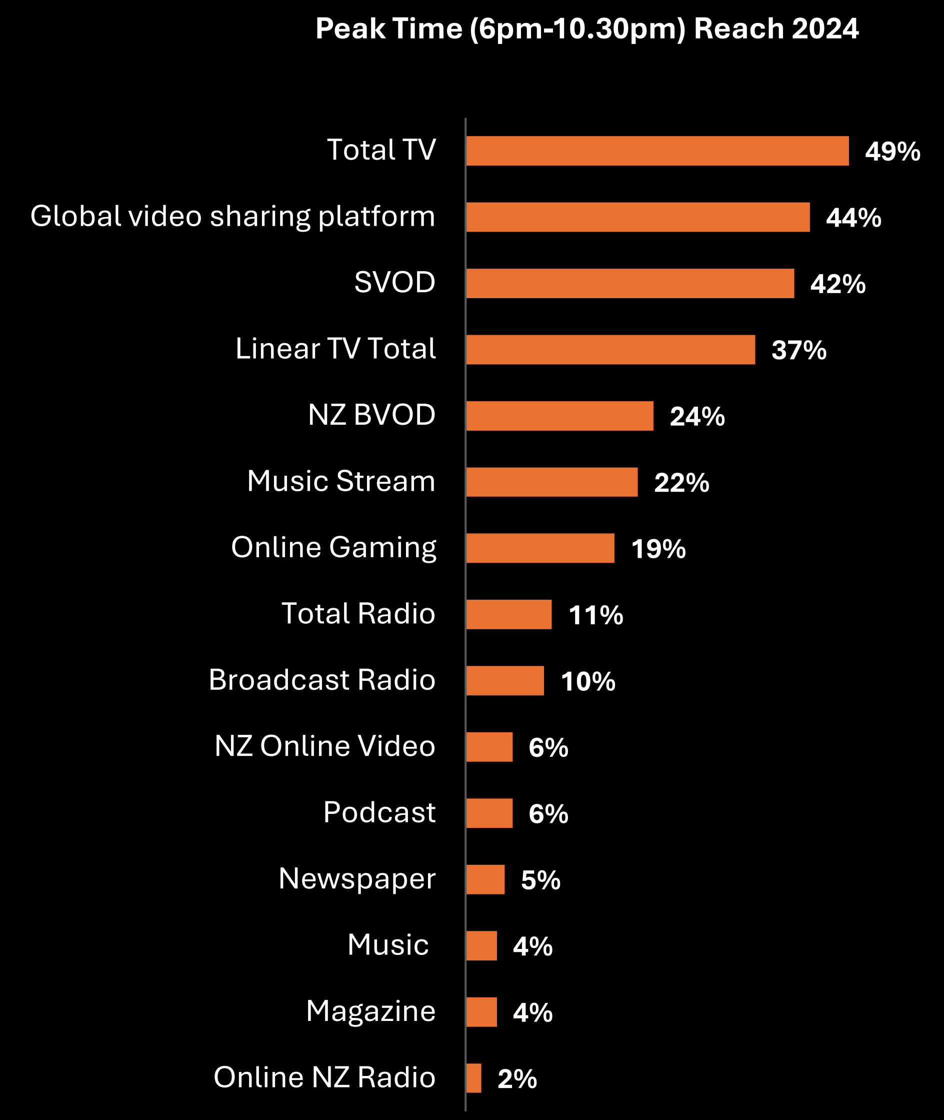
Looking at TV in more detail, Linear TV reaches 37% (a decline since 2023) while BVOD reaches just under a quarter of New Zealanders aged 15+ (the same as last year).

Music streaming and online gaming reach around 1 in 5 New Zealanders.

Radio (predominantly Broadcast radio) is the only other media which reaches more than 10% during this time period.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All respondents (2024 n = 1,404)



Q. I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following types of entertainment, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

TIME SPENT CONSUMING MEDIA

All New Zealanders 15+
Average minutes per day
Ranked in order of Daily Reach

In 2024, New Zealanders spend 2 hours 5 minutes viewing TV each day, over 30 minutes higher than global video platforms.

A similar amount of time is spent consuming global video platforms and SVOD at around 1 ½ hours per day.

Within TV, we spend more time watching Linear TV, (87 minutes), than BVOD (39 minutes).

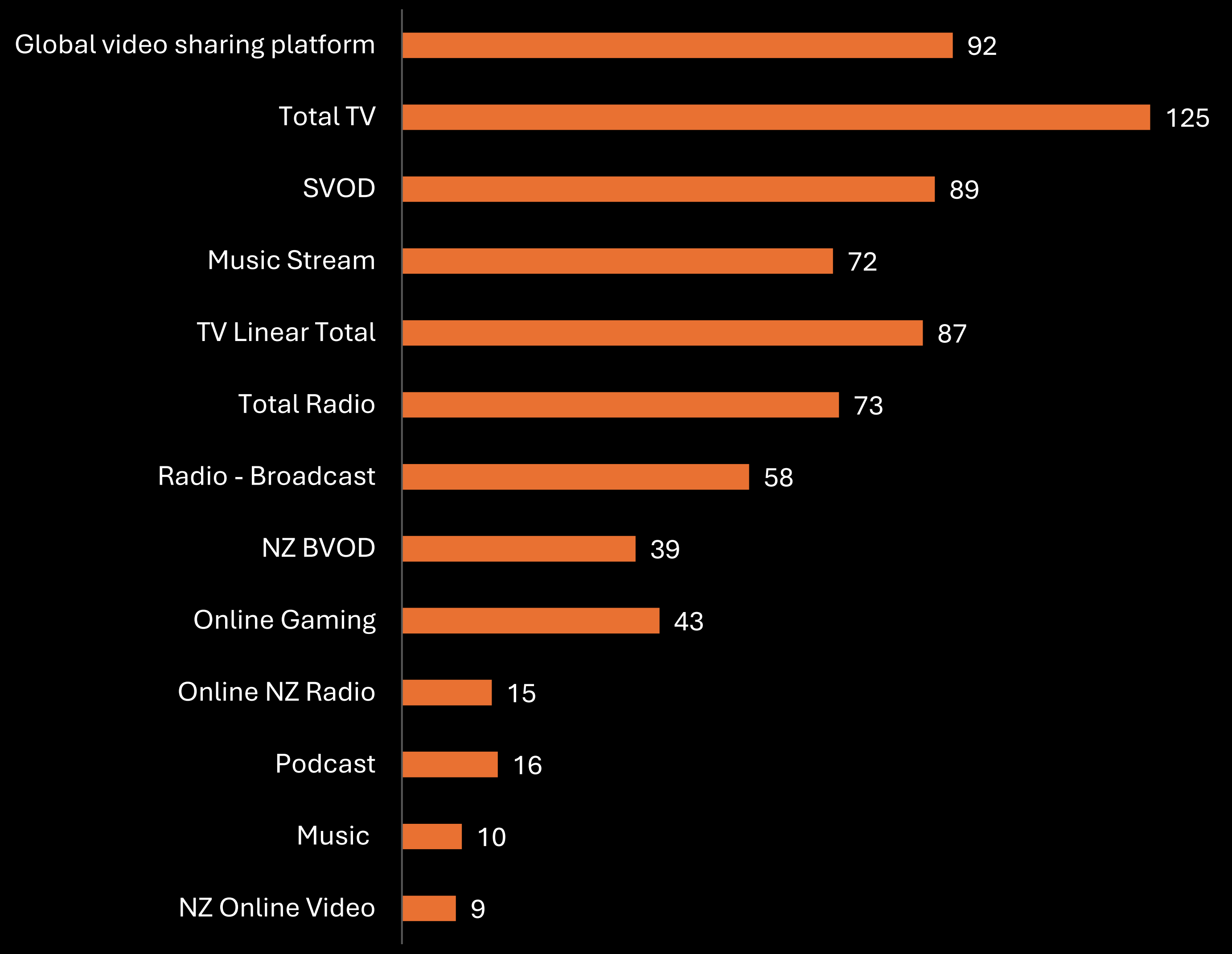
Around an hour and 10 minutes is spent music streaming and consuming Radio (just under one hour broadcast and 15 minutes online), with just under three-quarters of an hour for online gaming.

Podcast, music and NZ online video are all less than 20 minutes per day.

N.B. Average minutes are based on all New Zealanders and therefore includes those who did not use each media (i.e. includes zero minutes)

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All respondents (2024 n = 1,404)



Q. Between **(time period)**, about how long did you (activity) for?

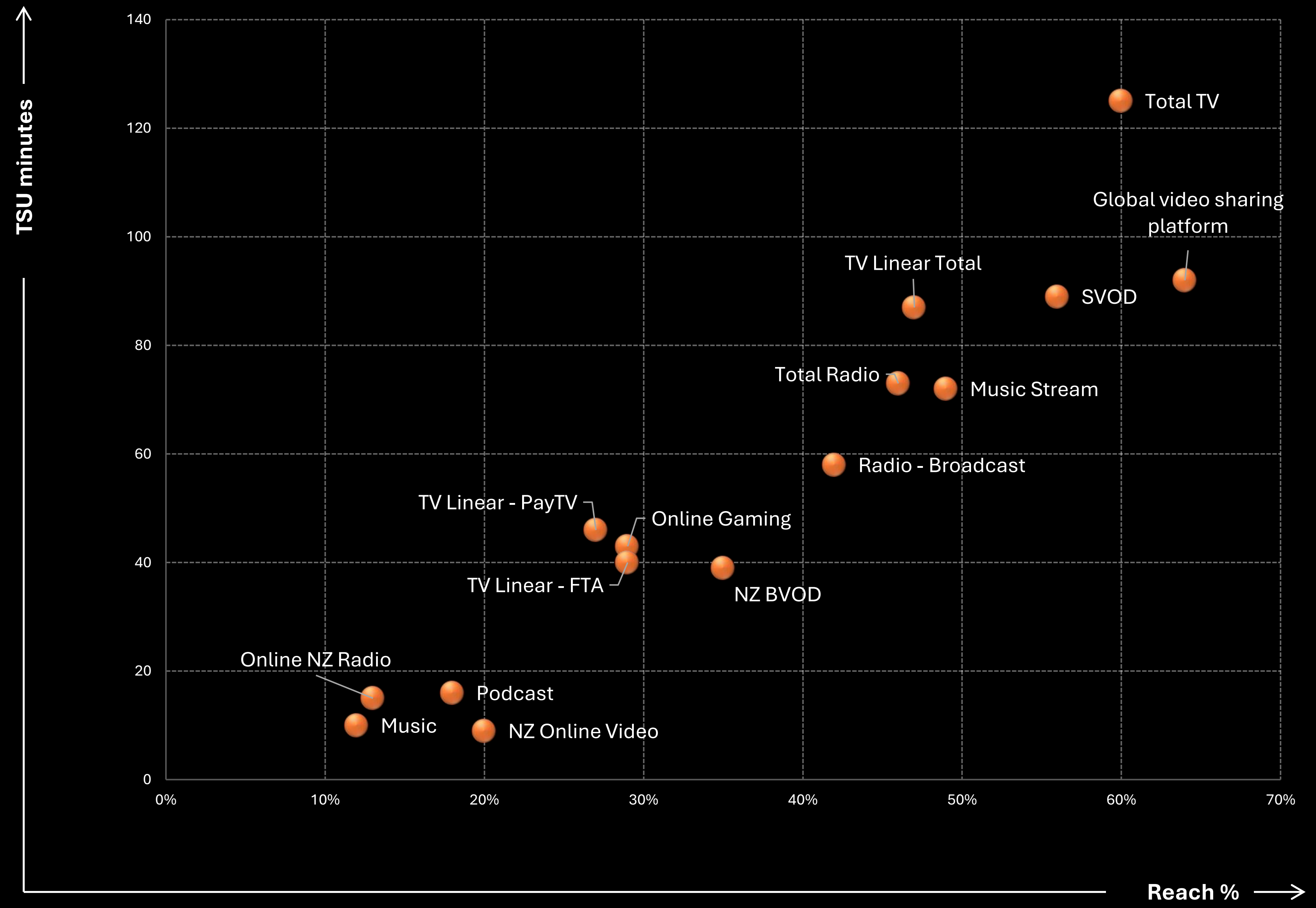
DAILY REACH AND TIME SPENT USING MEDIA 2024

All New Zealanders 15+

Here we can see the relationship between reach and time spent using media. Similar to 2023, the media with high reach also tend to attract the highest time spent.

In 2024, for all New Zealanders, TV is high on both measures – with a 60% daily reach and over 2 hours spent viewing per day.

Global video platforms have a higher daily reach (64%) with time spent a little lower at 92 minutes, while SVOD reaches 56% with time spent at 89 minutes per day.



N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All respondents (2024 n = 1,404)

TIME SPENT CONSUMING MEDIA - SUMMARY

All New Zealanders 15+
Average minutes per day
Ranked in order of Daily Reach

While TV attracts the most amount of time spent on any media in 2024, this has declined slightly since 2023.

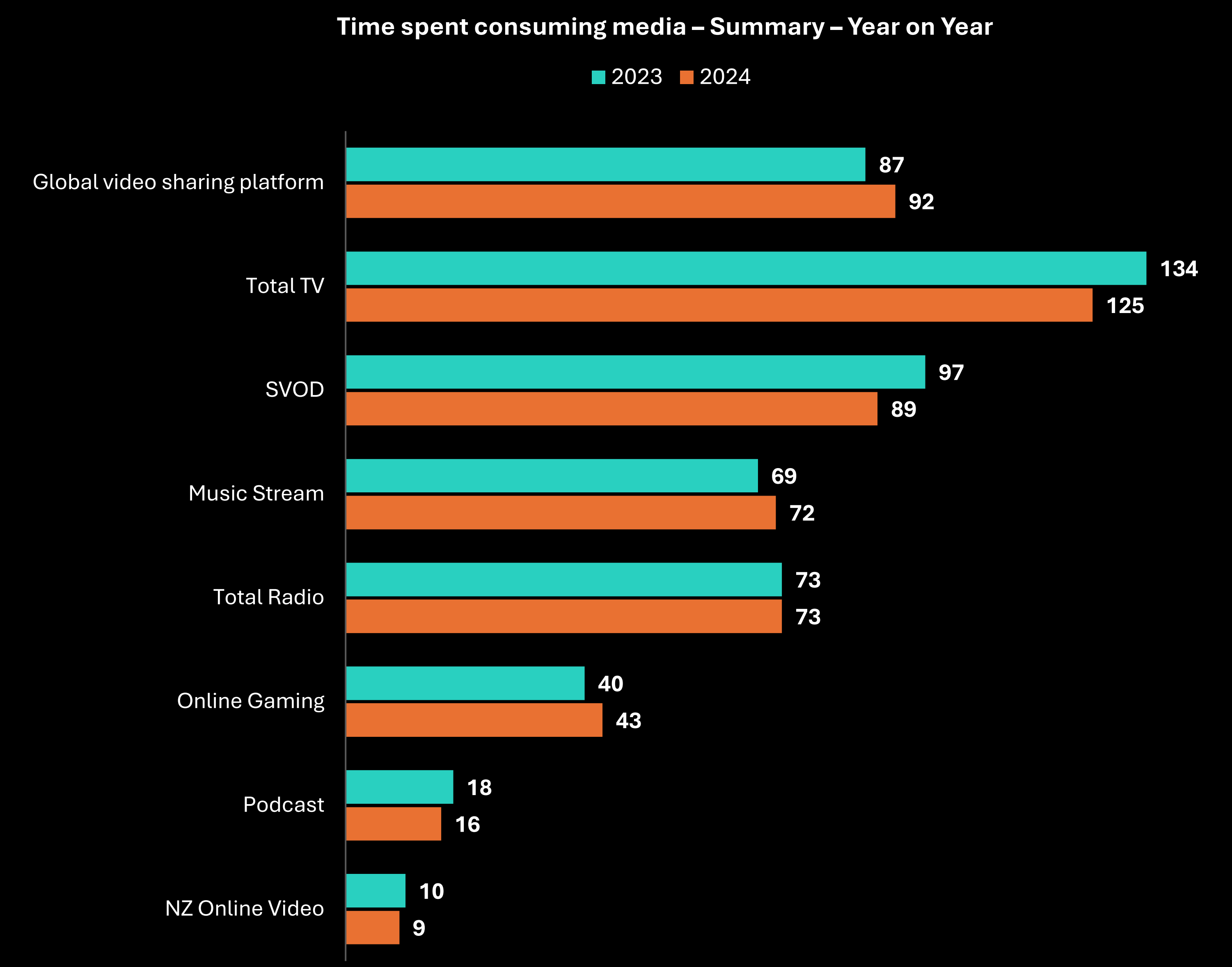
Time spent consuming global video platforms is slightly up year-on-year – by 5 minutes, meaning it is now ahead of SVOD which has declined by 8 minutes compared to a year ago.

The time spent on music streaming and most other media shown here have remained relatively steady year on year.

N.B. Average minutes are based on all New Zealanders and therefore includes those who did not use each media (i.e. includes zero minutes)

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All respondents (2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)



Q. Between **(time period)**, about how long did you (activity) for?

TIME SPENT CONSUMING MEDIA OVER TIME - DETAIL

All New Zealanders 15+
Average minutes per day

While TV attracts the most amount of time spent on any media in 2024, this has been declining since 2021, driven by the decrease in time spent viewing Linear TV.

Time spent consuming global video platforms is slightly up – by 5 minutes – year on year, while SVOD has declined by 8 minutes.

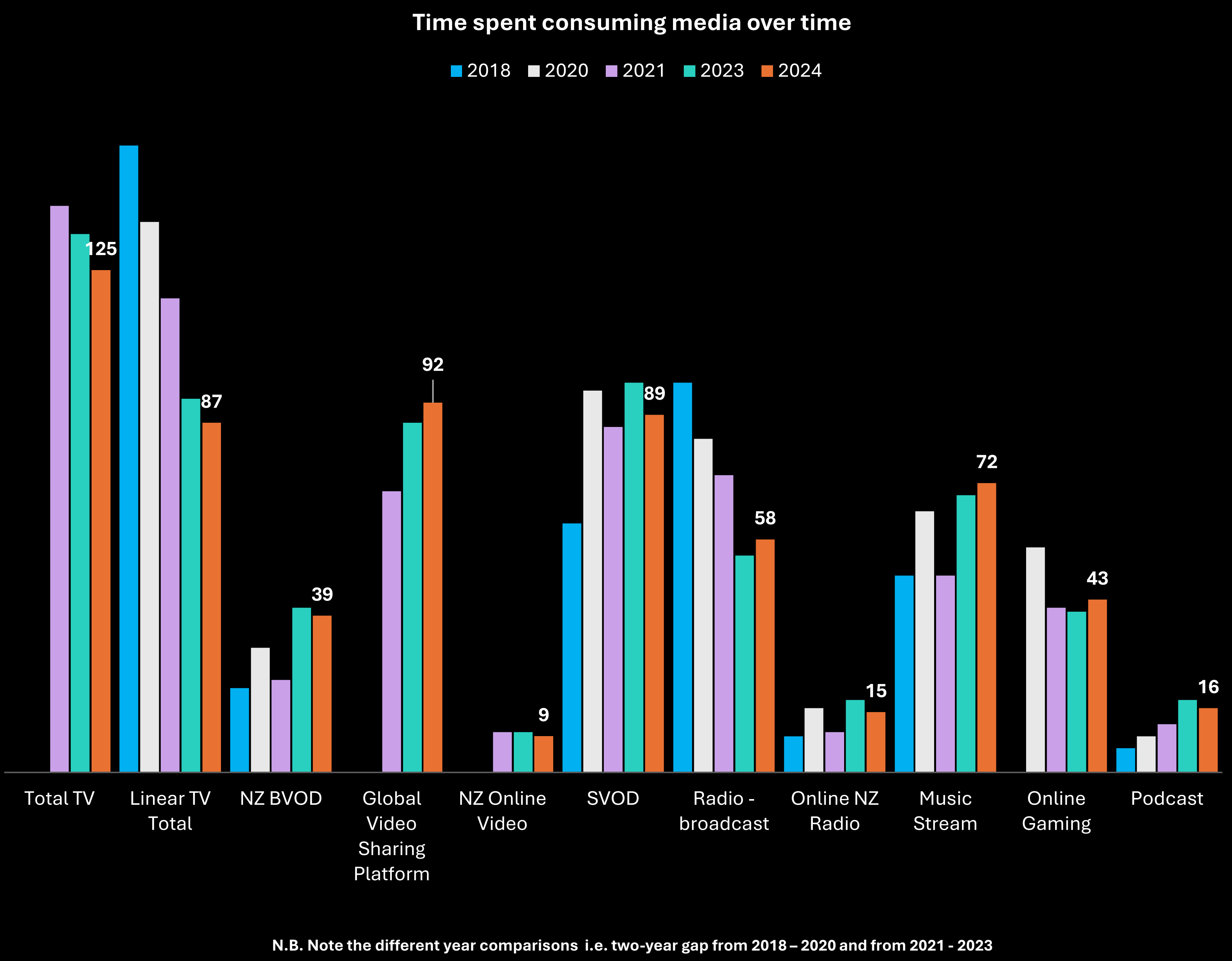
This chart illustrates the effect of our initial Covid outbreak in 2020 for some media e.g. SVOD, Online Radio, Music Stream and Online Gaming which all increased then declined in 2021.

Following a decline for the last few years, time spent listening to radio via broadcast has increased in 2024 .

Music stream has increased since 2021, while podcast is slightly down.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All respondents (2018 n = 1,414; 2020 n = 1,511; 2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)



Q. Between **(time period)**, about how long did you (activity) for?

ENGAGEMENT WITH MEDIA

Among all users of each media

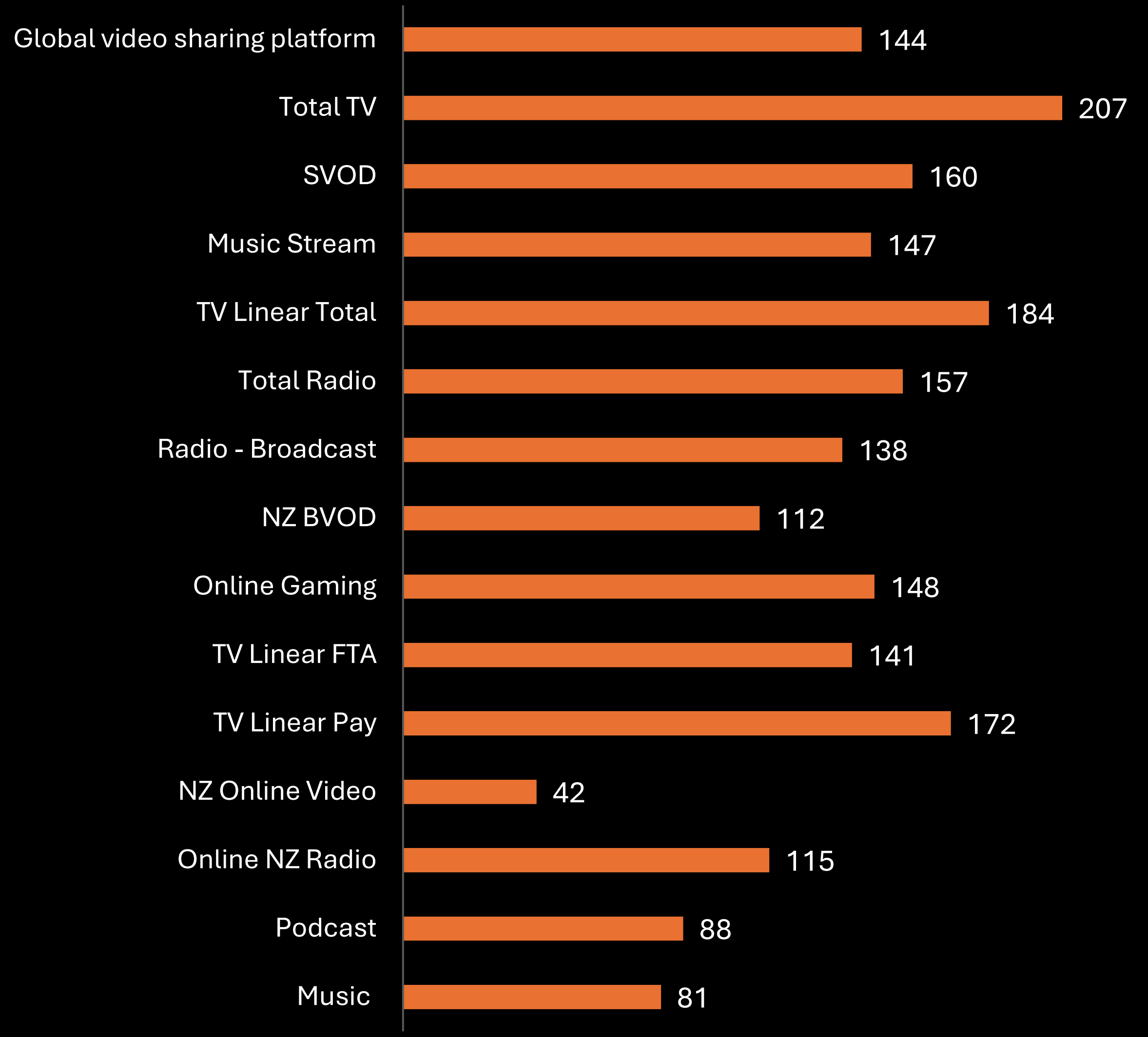
Average minutes per day. Ranked in order of overall daily reach All People 15+

This is a measure of engagement among users of each media. 2024 is the first year we can report this measure for "Total" TV, and here we can see that TV viewing, across all formats, continues to drive the highest level of engagement with viewers dedicating almost three and a half hours to TV each day.

SVOD generates the second highest level of engagement among viewers at 2 hours 40 minutes, closely followed by Radio (2 hours 37 minutes).

Users engage with streamed music, online gaming and global video platforms for slightly less than 2.5 hours each.

Time spent consuming media by users - 2024



Base: All respondents (2024 n = 1,404)

Note: Average minutes are based on all users of each media and therefore excludes those who did not use each media (ie. excludes zero minutes)

Q. Between **(time period)**, about how long did you (activity) for?

ENGAGEMENT WITH MEDIA

Among all users of each media
Average minutes per day. Ranked in order of overall daily reach All People 15+

Linear TV continues to drive the highest level of engagement among users in 2024, sitting at just over 3 hours per day. However, this has declined in the last three years. NZ BVOD engagement increased from 2021 to 2023 but has slightly decreased in 2024.

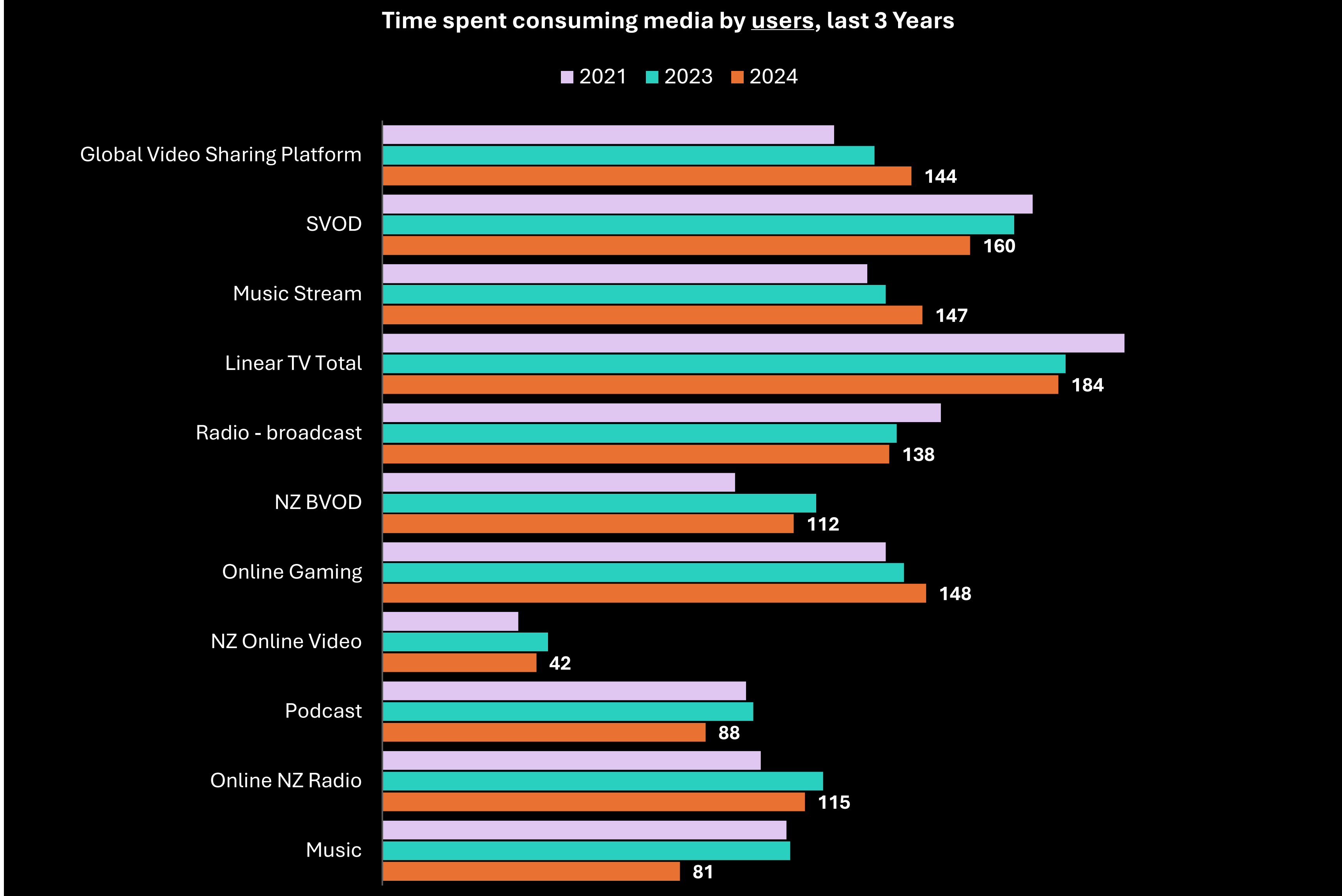
SVOD has the second highest level of engagement, at 2 hours 40 minutes, however this has declined steadily over the last three years.

Music Stream, Online Gaming and global video platforms are each showing a steady increase in engagement, with users spending close to 2 ½ hours a day on each of these.

Podcast has seen a decline in engagement which could be due to a continued increase in reach; i.e. those who are new to the medium may be lighter users (at least initially).

Base: All respondents (2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)

Note: Average minutes are based on all users of each media and therefore excludes those who did not use each media (i.e. excludes zero minutes). A measure for Total TV is not available prior to 2024.



Q. Between **(time period)**, about how long did you (activity) for?

TOTAL DAILY REACH (ALL NEW ZEALANDERS) AND TIME SPENT AMONG USERS - VIDEO

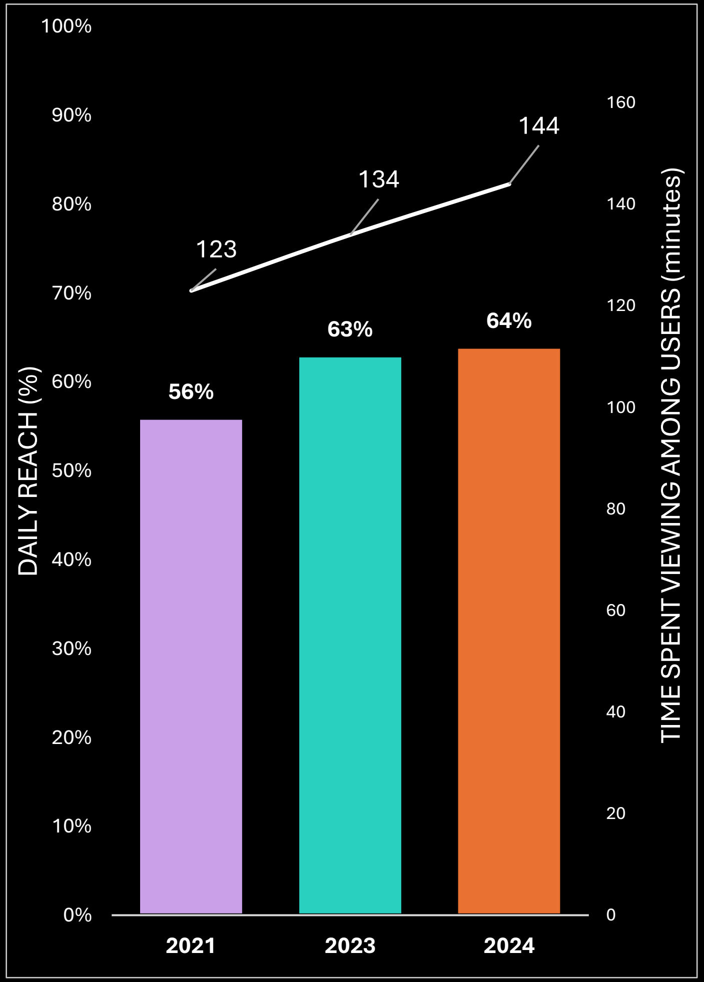
All New Zealanders 15+

All users of each media (time spent)

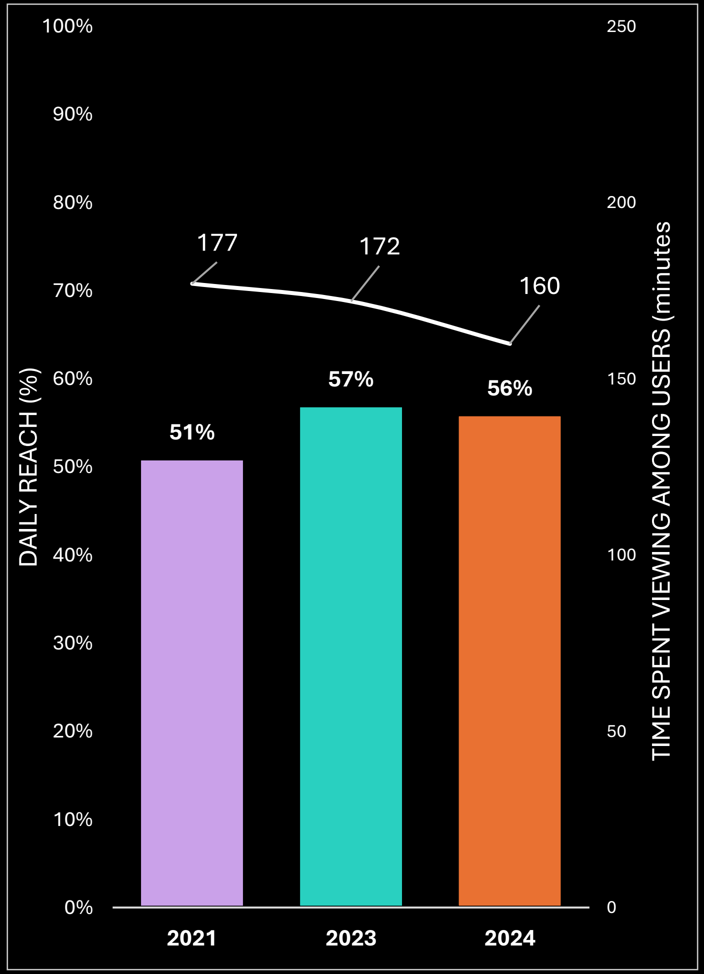
Reach of global video platforms has grown steadily since 2021, and levels of engagement have also increased slightly. This looks to be driven predominantly by an increase in time spent with this media by the overall 40–59-year-old audience (there is a decrease in time spent by 15-39's).

For SVOD, reach has slightly declined in the last year, and levels of engagement have also been slightly decreasing since 2021.

Global Video Sharing Platform



Subscription Video on Demand (SVOD)



Base: REACH: All respondents (2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404); TIME SPENT VIEWING – All Users of each media.

TOTAL DAILY REACH (ALL NEW ZEALANDERS) AND TIME SPENT AMONG USERS - TV

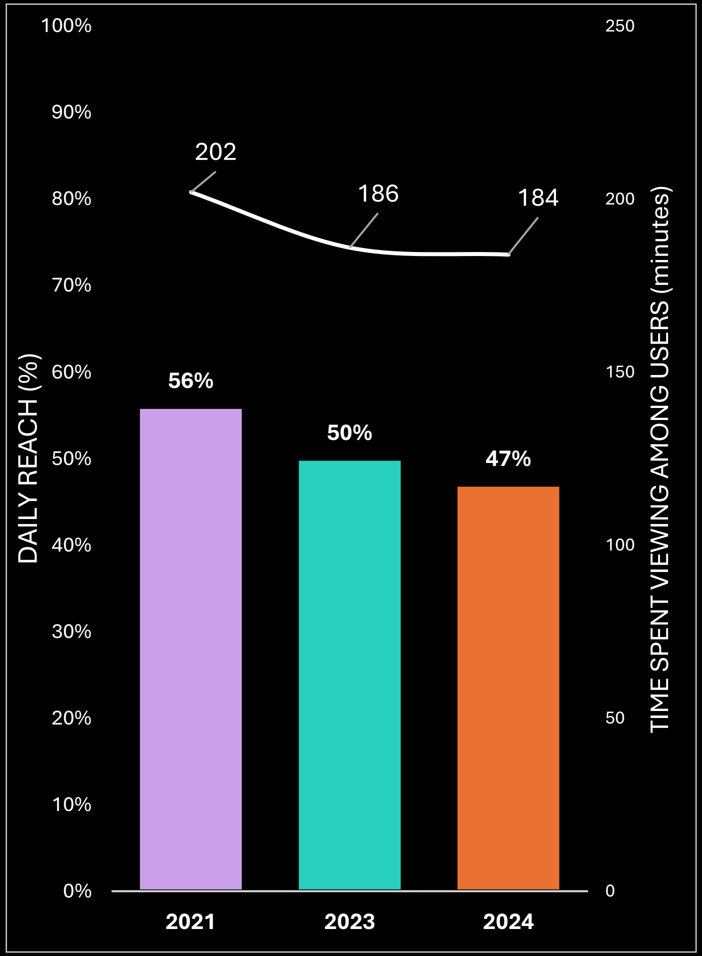
All New Zealanders 15+

All users of each media (time spent)

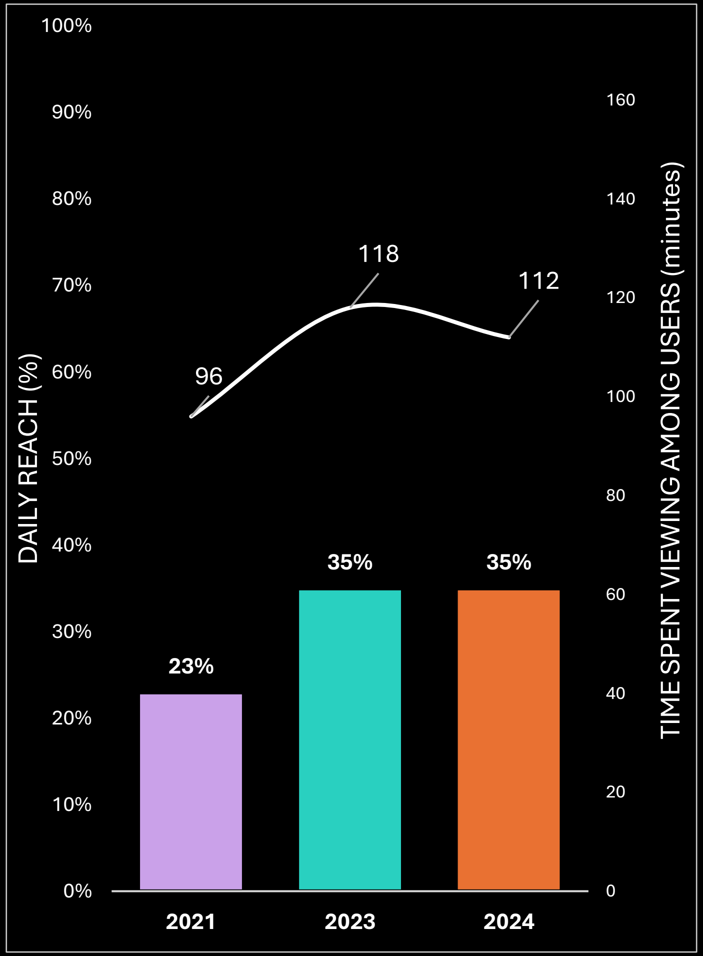
While Linear TV reach continues to decline, in the last year, the engagement level has remained virtually the same for users at about 3 hours per day.

Following significant growth from 2021 to 2023 BVOD reach has stabilised in 2024. Engagement grew at a similar rate however has slightly declined in the last year. This could be due to an increase in the younger audience who may be spending slightly less time viewing.

Linear TV Total



NZ Broadcaster Video on Demand (BVOD)



TOTAL DAILY REACH (ALL NEW ZEALANDERS) AND TIME SPENT AMONG USERS - RADIO

All New Zealanders 15+

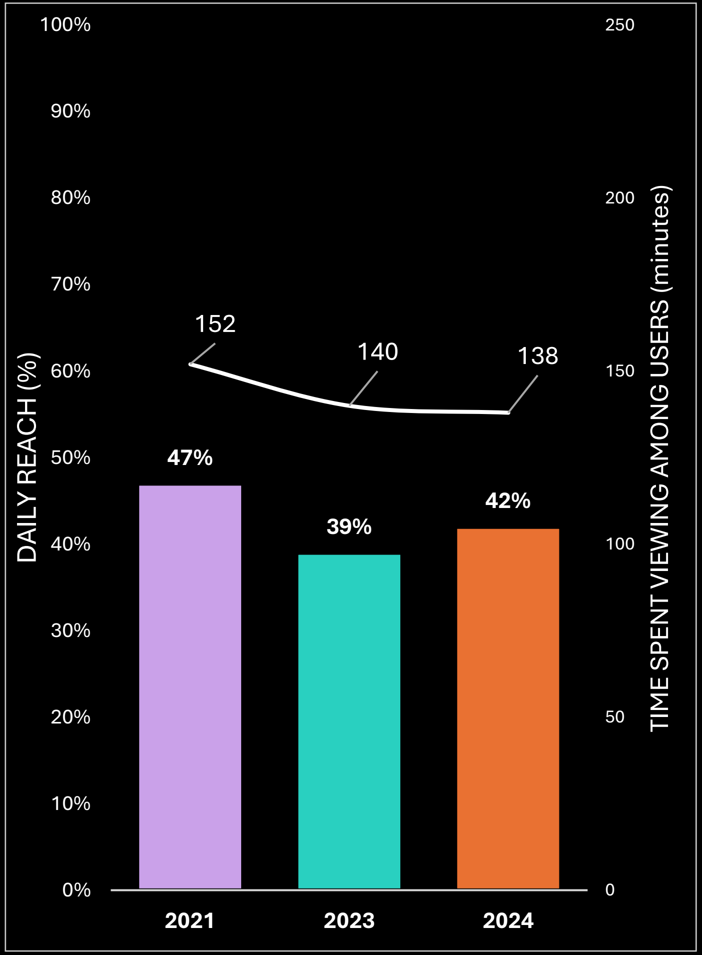
All users of each media (time spent)

After a significant decline for Broadcast Radio 2021 to 2023 daily reach has increased in 2024.

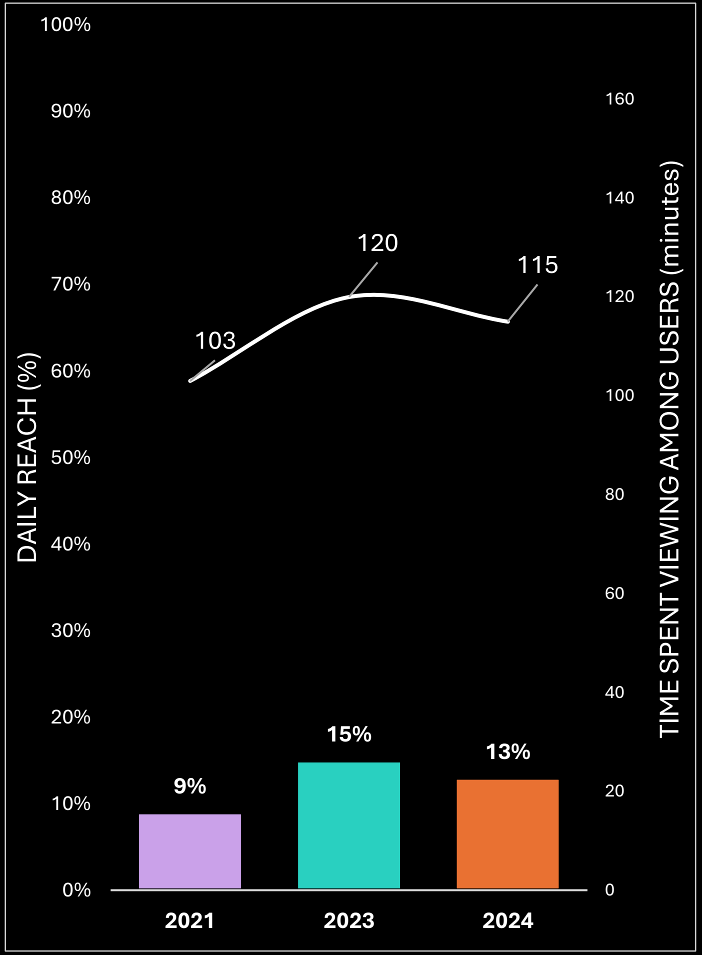
However, engagement has declined slightly /remained the same among broadcast radio listeners. This would suggest that while radio has attracted some new listeners in 2024, they are lighter users.

The reach of online radio has declined slightly, as has engagement.

Radio Broadcast



Radio Online



TOTAL DAILY REACH (ALL NEW ZEALANDERS) AND TIME SPENT AMONG USERS - MUSIC

All New Zealanders 15+

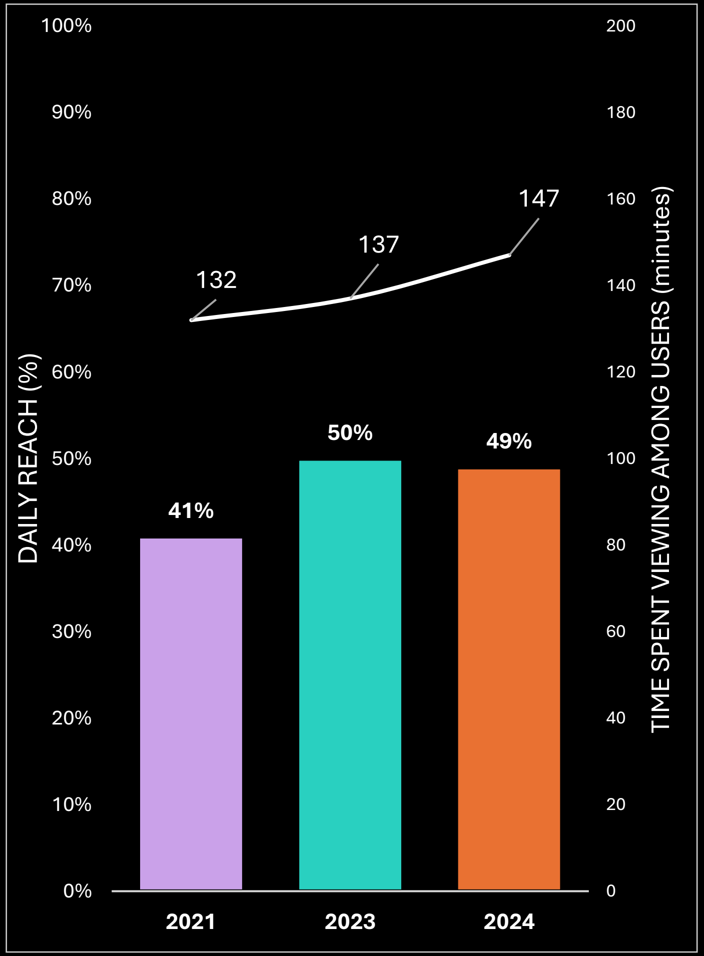
All users of each media (time spent)

After significant growth from 2021 to 2023, the reach of music streaming has stabilised in 2024.

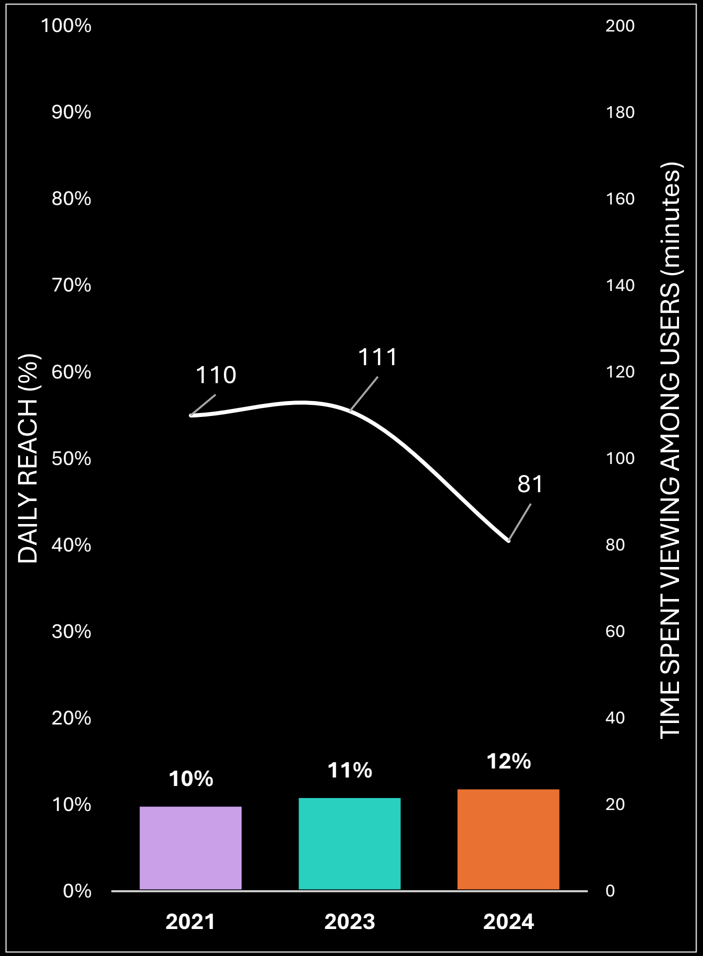
However, users are spending more time with the medium, an increase of 10 minutes per day from 2023 to 2024.

Music on physical formats has shown a small increase in reach, however, a substantial decline in engagement. This would suggest new users who are spending less time listening.

Music Streaming



Music on CD's/ Vinyl / iPod



04

HOW DO DIFFERENT AUDIENCES COMPARE IN 2024?

DAILY AUDIENCE - 2024

New Zealanders aged 15-39
% Daily Reach

Global video platforms dominate usage among this group, reaching over 8 out of 10 of 15–39-year-olds each day.

Music streaming reaches almost 7 out of 10, while SVOD reaches over two-thirds of this younger audience.

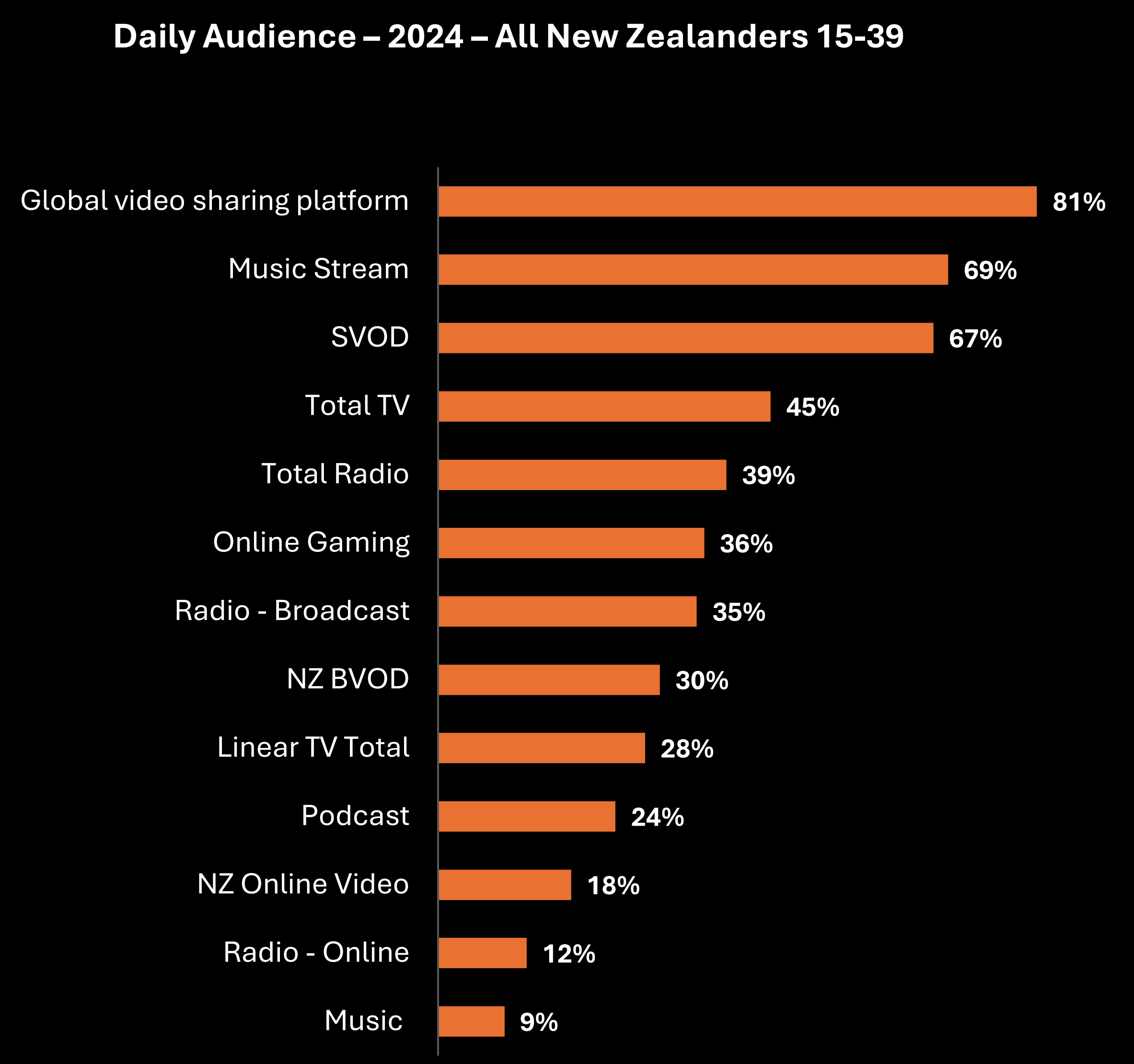
TV reaches 45% on a typical day, while just under 4 out of 10 are reached by radio. Online gaming has the next highest reach at 36%.

NZ BVOD, reaching 3 in 10 each day, is now ahead of Linear TV (28%) for this group.

Podcasts are popular, reaching one-quarter of 15–39-year-olds each day.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All 15 – 39-year-olds (2024 n = 551)



Q. I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following types of entertainment, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

DAILY AUDIENCE OVER TIME

All New Zealanders 15-39
% Daily Reach

While global video platforms have the highest reach, this has declined year-on-year, from 86% to 81%.

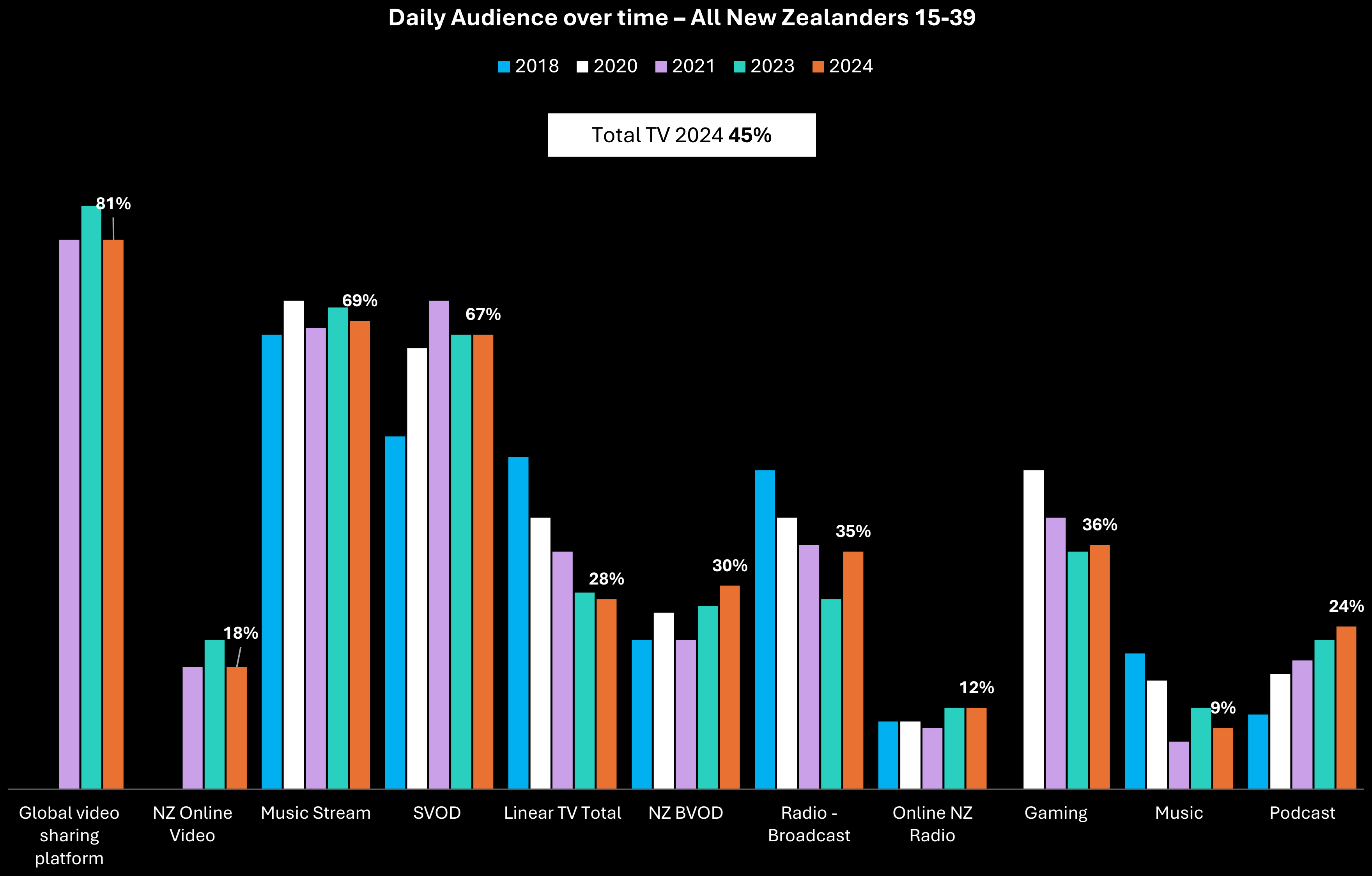
Music streaming has also declined slightly year-on-year, while SVOD has stabilised in the last two-years (following strong growth until 2021).

This group have steadily migrated to viewing TV digitally. While reach of Linear TV has declined steadily, BVOD has trended upwards, showing a solid increase from 27% in 2023 to 30% this year, resulting in TV reaching 45%.

Interestingly, listening to radio via broadcast has increased year-on-year. Gaming is stable while podcast listening continues to increase.

N.B. A measure for TotalTV is only available for demographic splits from 2024.

Base: All 15 – 39-year-olds (2018 n = 577; 2020 n = 630; 2021 n = 587; 2023 n = 580; 2024 n = 551)



N.B. Note the different year comparisons i.e. two-year gap from 2018 – 2020 and from 2021 - 2023

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DAILY REACH AND TIME SPENT USING MEDIA 2024

All New Zealanders 15 – 39

Among 15–39-year-olds, global video platforms, SVOD and music streaming dominate not only audience size but also the time dedicated to each of these media (global video 123 minutes; SVOD – 118 minutes; music streaming – 110 minutes).

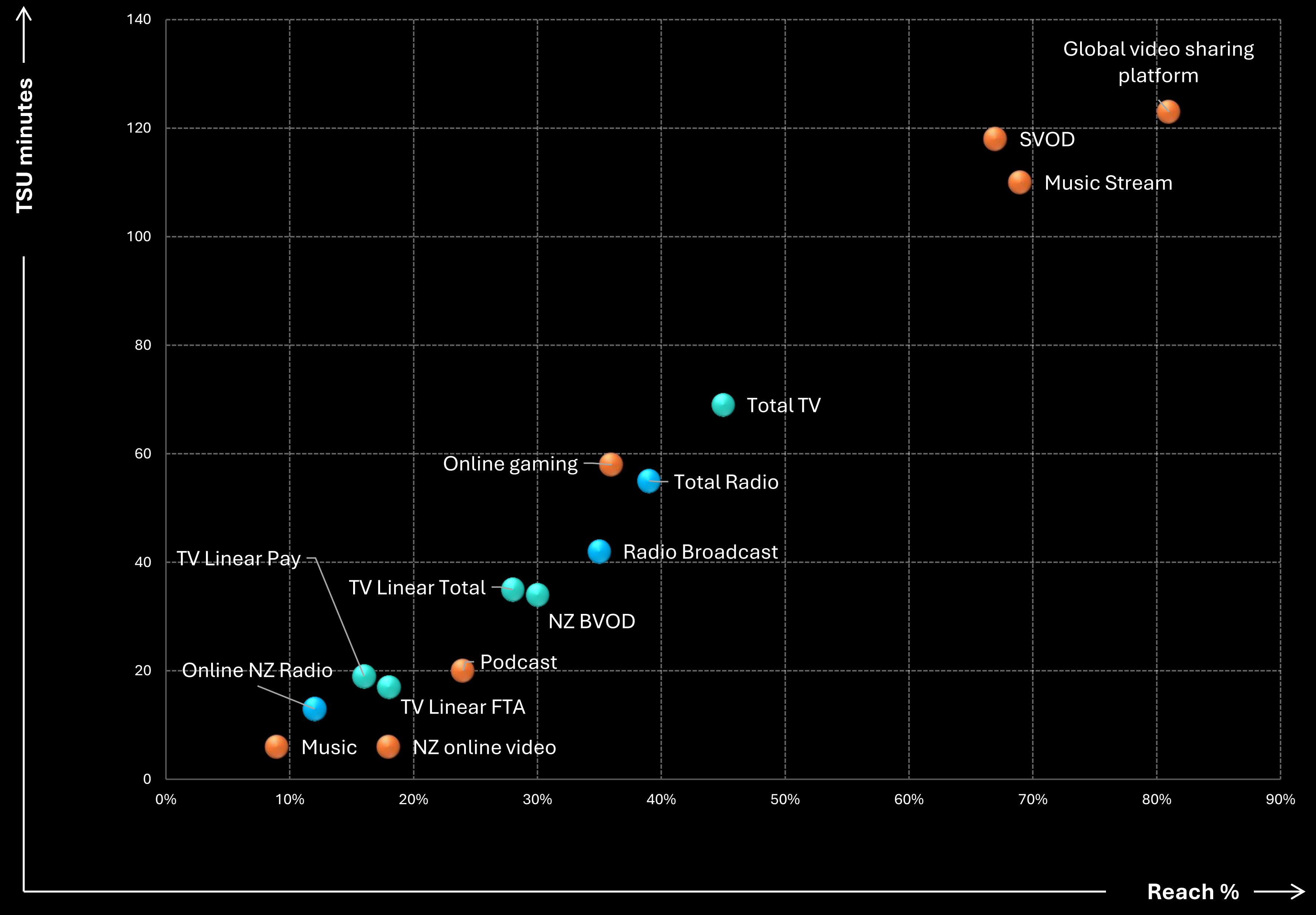
TV is the only other media where this audience spend more than 1 hour per day (69 minutes).

Just under 1 hour (58 minutes) is spent gaming, and 55 minutes with Radio (42 minutes of this is broadcast radio).

Otherwise, this age group spend no more than 40 minutes using any other media per day.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All 15 – 39-year-olds (2024 n = 551)



DAILY AUDIENCE 2024

All New Zealanders 40-59
% Daily Reach

TV has the highest reach among 40–59-year-olds at 64%, just ahead of global video platforms which reach 63% daily.

SVOD has the third highest reach at 57%.

Linear TV, music streaming and Radio all reach just less than half of this audience each day.

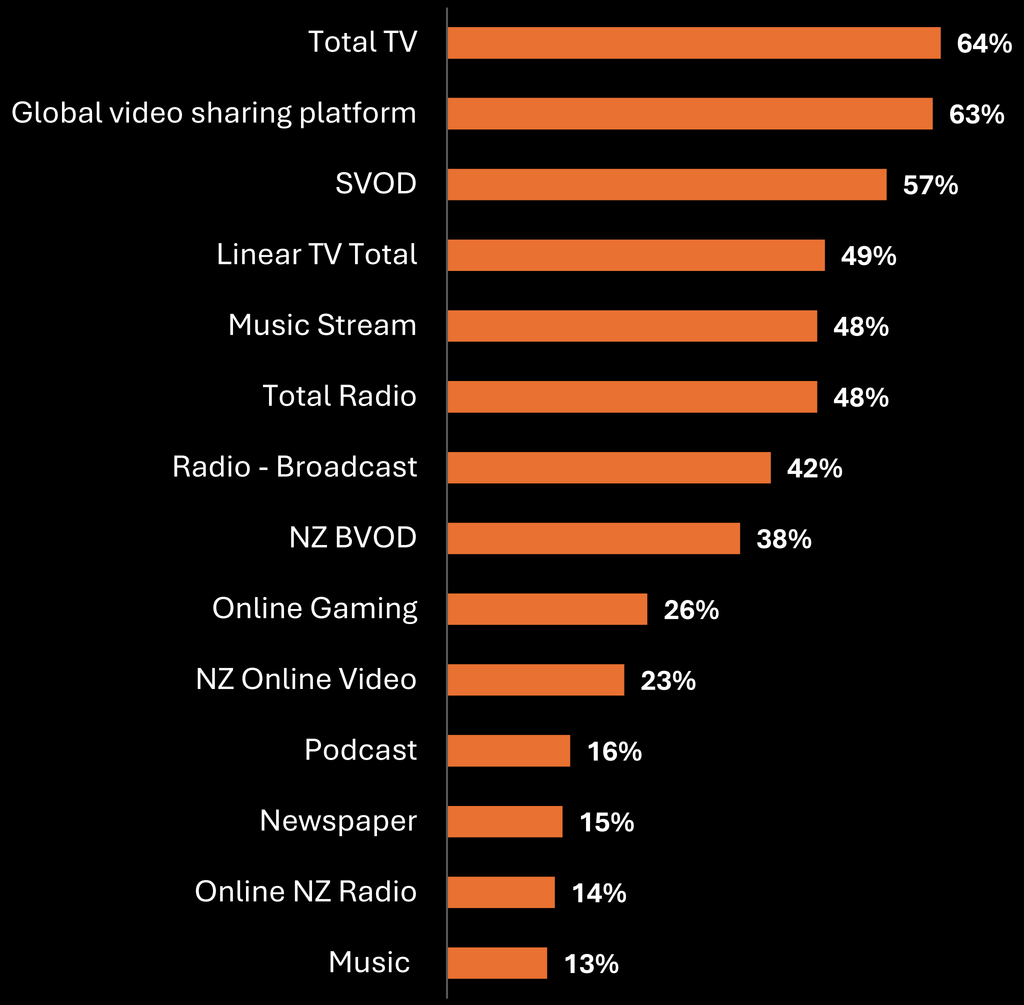
Broadcast radio reaches 42% while NZ BVOD is a little below on 38% reach.

Online gaming is the next highest, reaching slightly more than a quarter of this group each day, with NZ online video at 23%.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All 40–59-year-olds (2024 n = 495)

Daily Audience – 2024 – All New Zealanders 40-59



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DAILY AUDIENCE OVER TIME

All New Zealanders 40-59
% Daily Reach

Among 40–59-year-olds, the reach of Linear TV has steadily declined over the past 5 years. NZ BVOD, having previously trended upwards, with a large increase between 2021 and 2023, has declined this year.

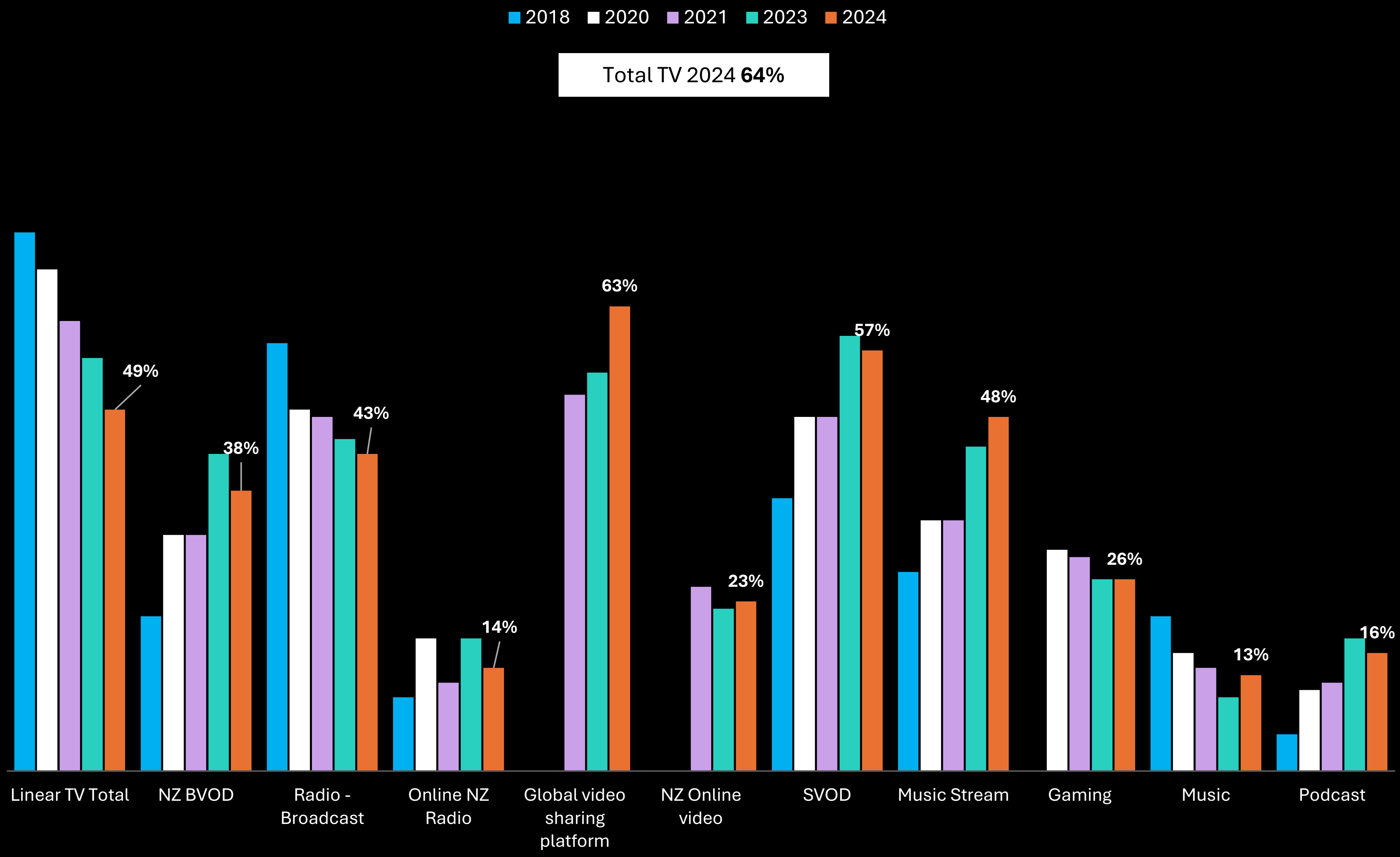
The reach of global video platforms has increased significantly for this group from 2023 to 2024, to 63%, now just behind TV.

SVOD having also seen growth from 2018 has declined slightly year on year to 57%. Music streaming is showing a steady increase, now reaching close to half of this audience.

N.B. A measure for Ttoal TV is only available for demographic splits from 2024.

Base: All 40–59-year-olds (2018 n = 458; 2020 n = 463; 2021 n = 452; 2023 n = 459; 2024 n = 495)

Daily Audience over time – All New Zealanders 40-59



N.B. Note the different year comparisons i.e. two-year gap from 2018 – 2020 and from 2021 - 2023

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DAILY REACH AND TIME SPENT USING MEDIA 2024

All New Zealanders 40-59

For those aged 40-59, time spent consuming TV (2 hours 6 minutes) is significantly higher than other forms of media. 86 minutes per day is spent with Linear TV; 40 minutes BVOD.

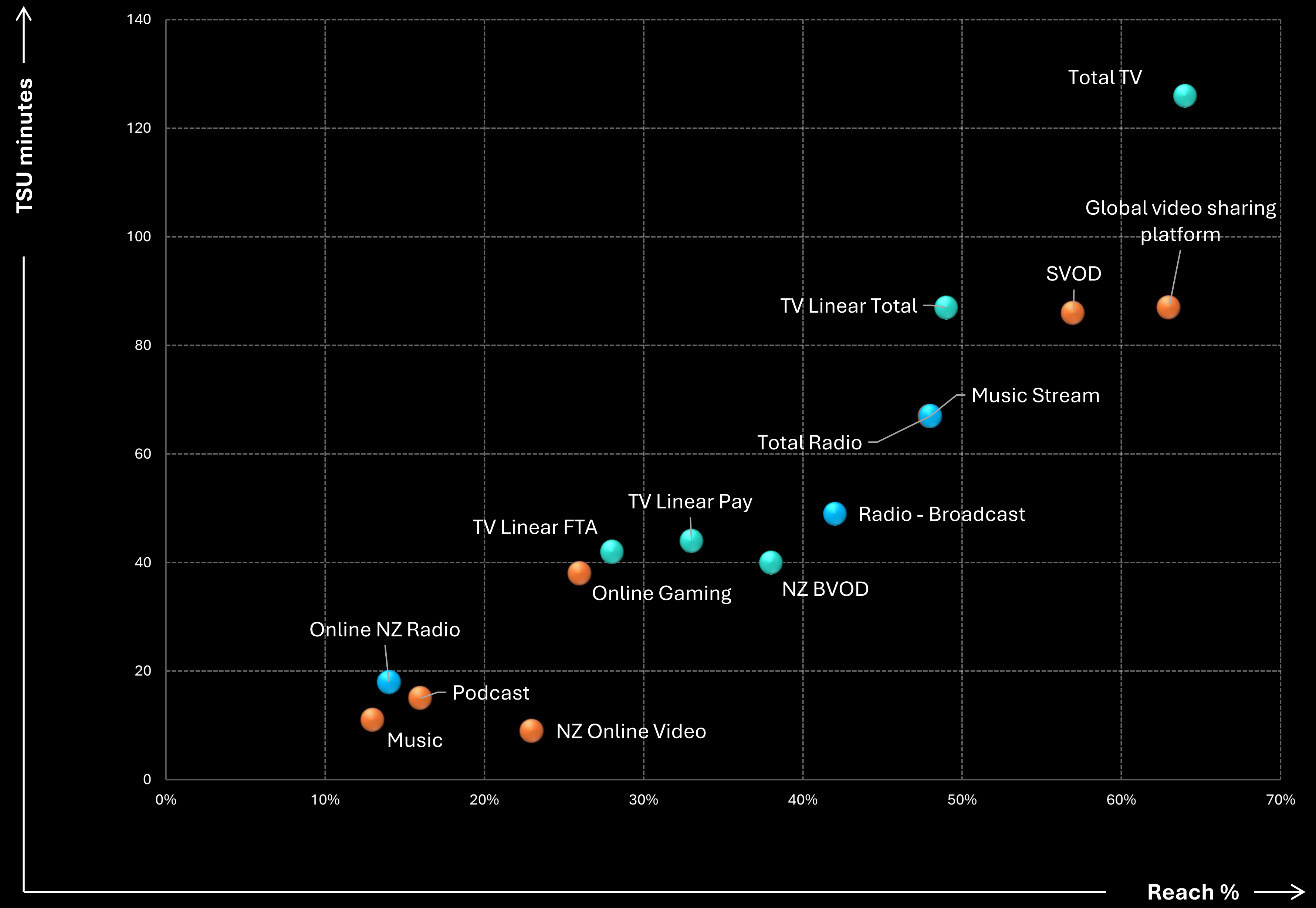
Time spent daily with global video platforms and SVOD is very similar (87 and 86 minutes respectively) for this group.

They spend just over one hour (67 minutes) streaming music and listening to radio (49 minutes broadcast; 18 minutes online radio).

38 minutes per day is spent online gaming by this audience. The least time is spent listening to podcasts (15 minutes); music (11 minutes) and NZ online video (9 minutes).

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All 40–59-year-olds (2024 n = 495)



DAILY AUDIENCE 2024

All New Zealanders 60+
% Daily Reach

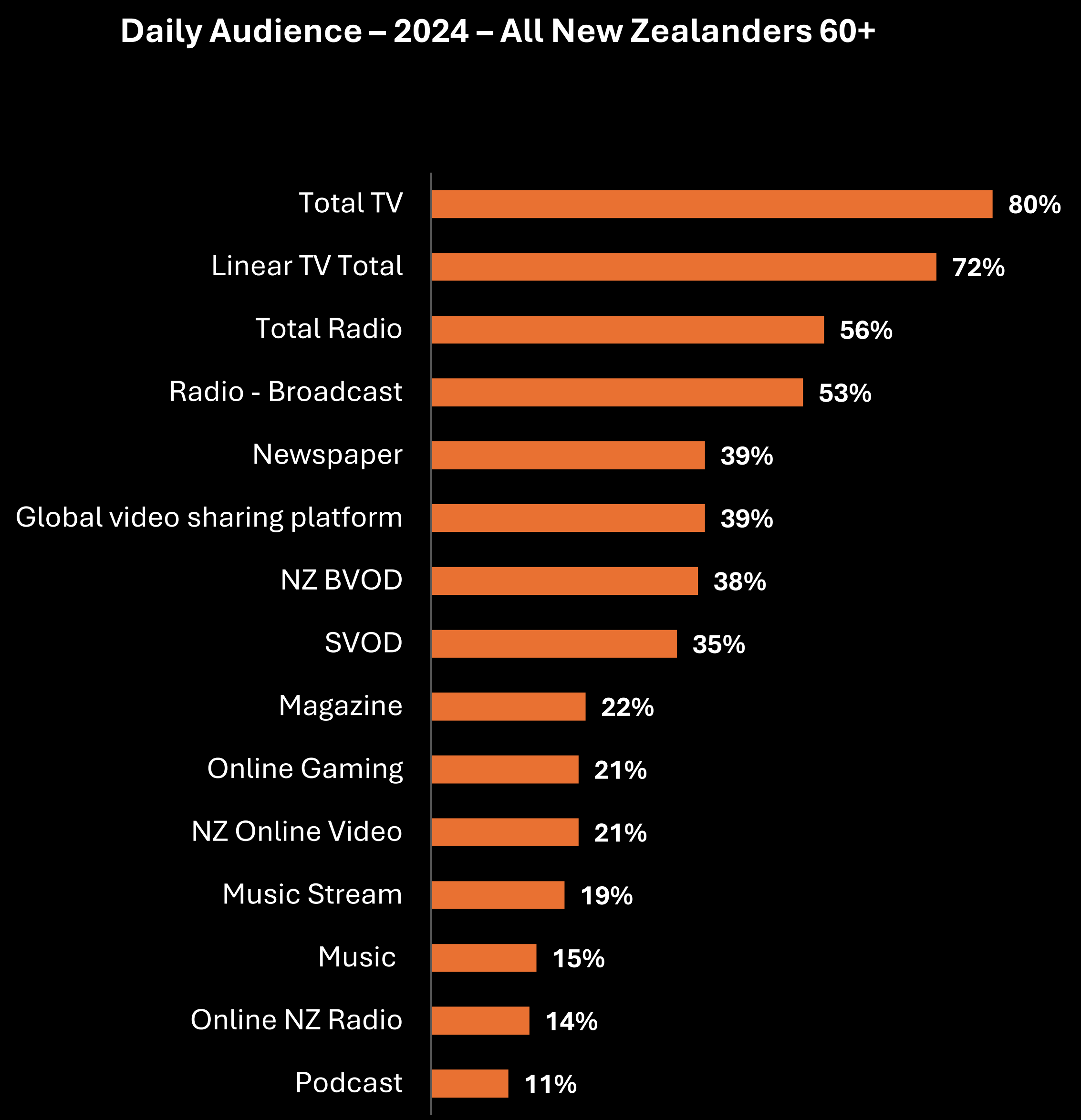
TV continues to be the dominant media for this group. TV reaches 8 out of 10 on a typical day, with Linear TV reaching 72%.

Over half this audience (53%) listen to Broadcast radio, with Radio reaching 56%.

4 in 10 read a Newspaper each day, access video on a global video platform and watch TV content via BVOD.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All 60+-year-olds (2024 n = 359)



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DAILY AUDIENCE OVER TIME

All New Zealanders 60+
% Daily Reach

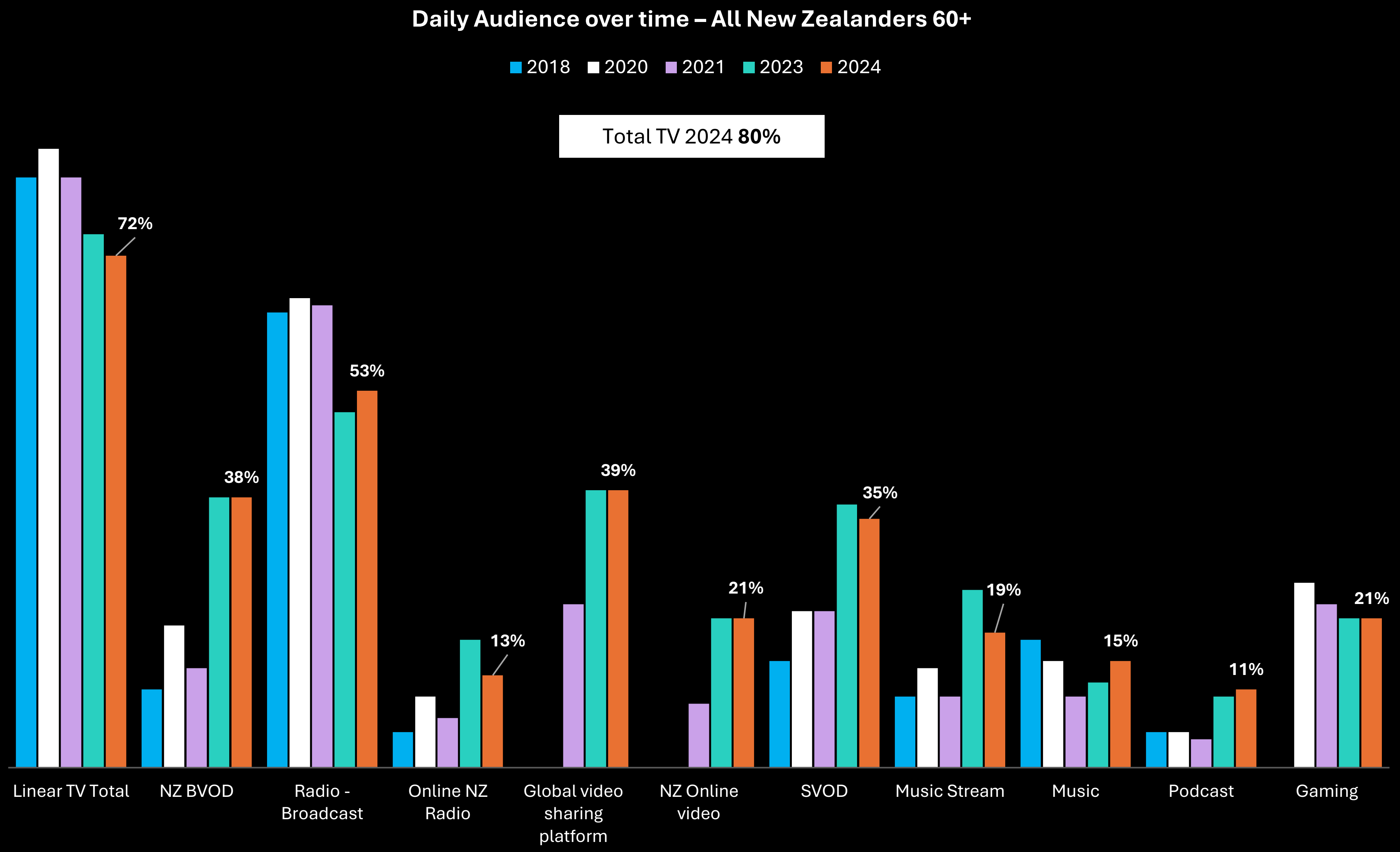
While showing a downward trend over the last three-five years, Linear TV continues to reach over 7 out of 10 of this group per day. BVOD had very high growth from 2021 to 2023 which has stabilised in 2024, resulting in an overall daily reach of 80% for TV.

The daily reach of both global video platforms and SVOD also increased significantly among this audience from 2021 to 2023. In 2024, global video has stabilised at 39%, while SVOD has declined slightly to 35%.

Listening to broadcast radio declined significantly from 2021 to 2023 however has increased in the last year.

N.B. A measure for Total TV is only available for demographic splits from 2024.

Base: All 60+-year-olds (2016 n=463; 2018 n=458; 2020 n=463; 2021 n=452, 2023 n=370; 2024 n = 359)



N.B. Note the different year comparisons i.e. two-year gap from 2018 – 2020 and from 2021 - 2023

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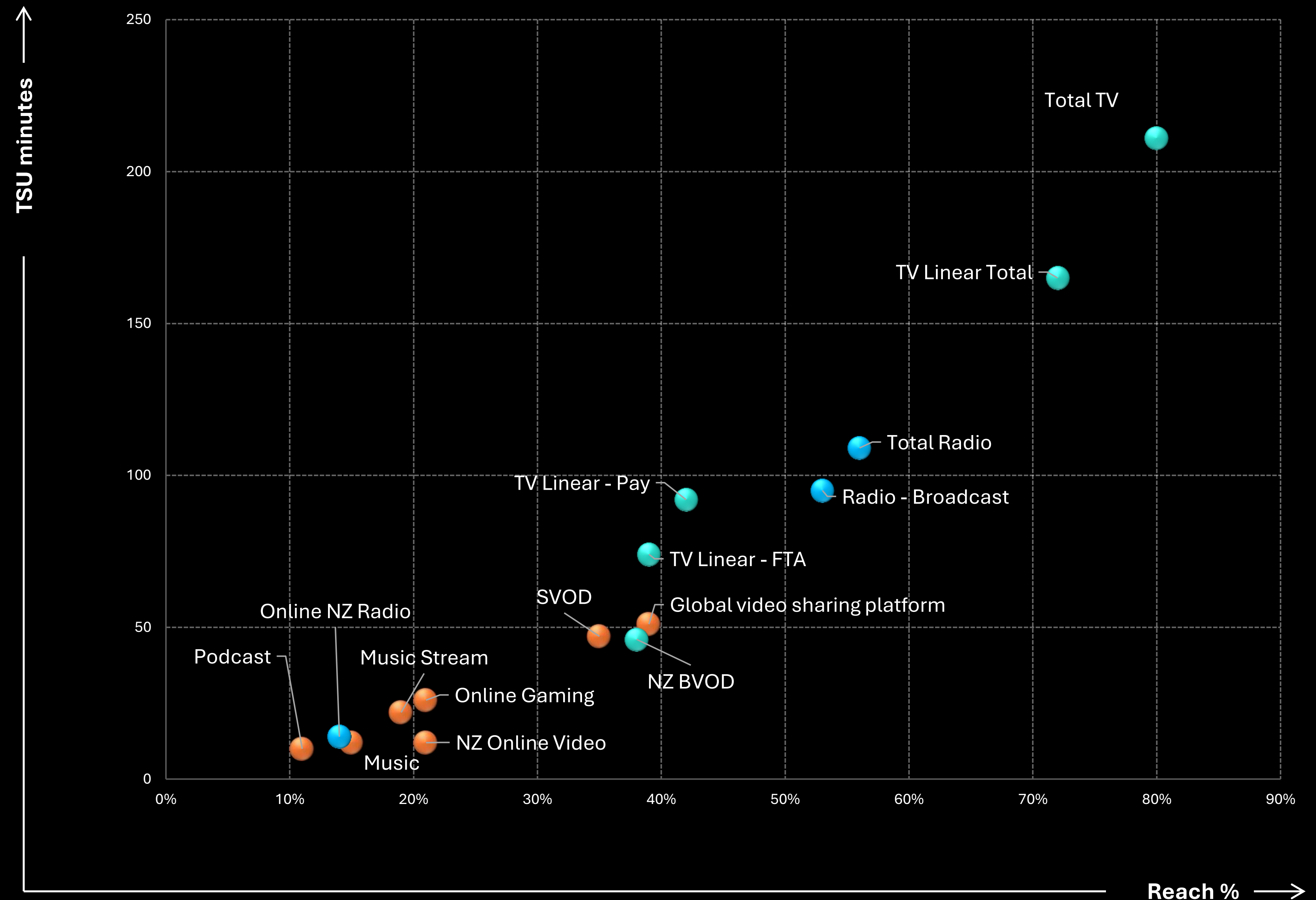
DAILY REACH AND TIME SPENT USING MEDIA 2024

All New Zealanders 60+

This group spend a lot of time viewing television – with just over 3 ½ hours consuming TV. This is made up of 2 ¾ hours via Linear delivery, and 45 minutes via BVOD.

In total they spend 1 hour 49 minutes listening to radio – most of this – 1 hour 35 minutes is broadcast radio.

51 minutes per day is spent with global video platforms and 47 minutes on SVOD.



N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All 60+-year-olds (2024 n = 359)

05

HARDER TO FIND AUDIENCES

DAILY REACH OF MEDIA 2024 – YOUTH (15-24)

All New Zealanders 15-24
All New Zealanders 15+

Compared to the total population, this group have very high usage of digital forms of media, particularly global video platforms, reaching 9 out of 10 per day and music streaming reaching over 8 out of 10 per day.

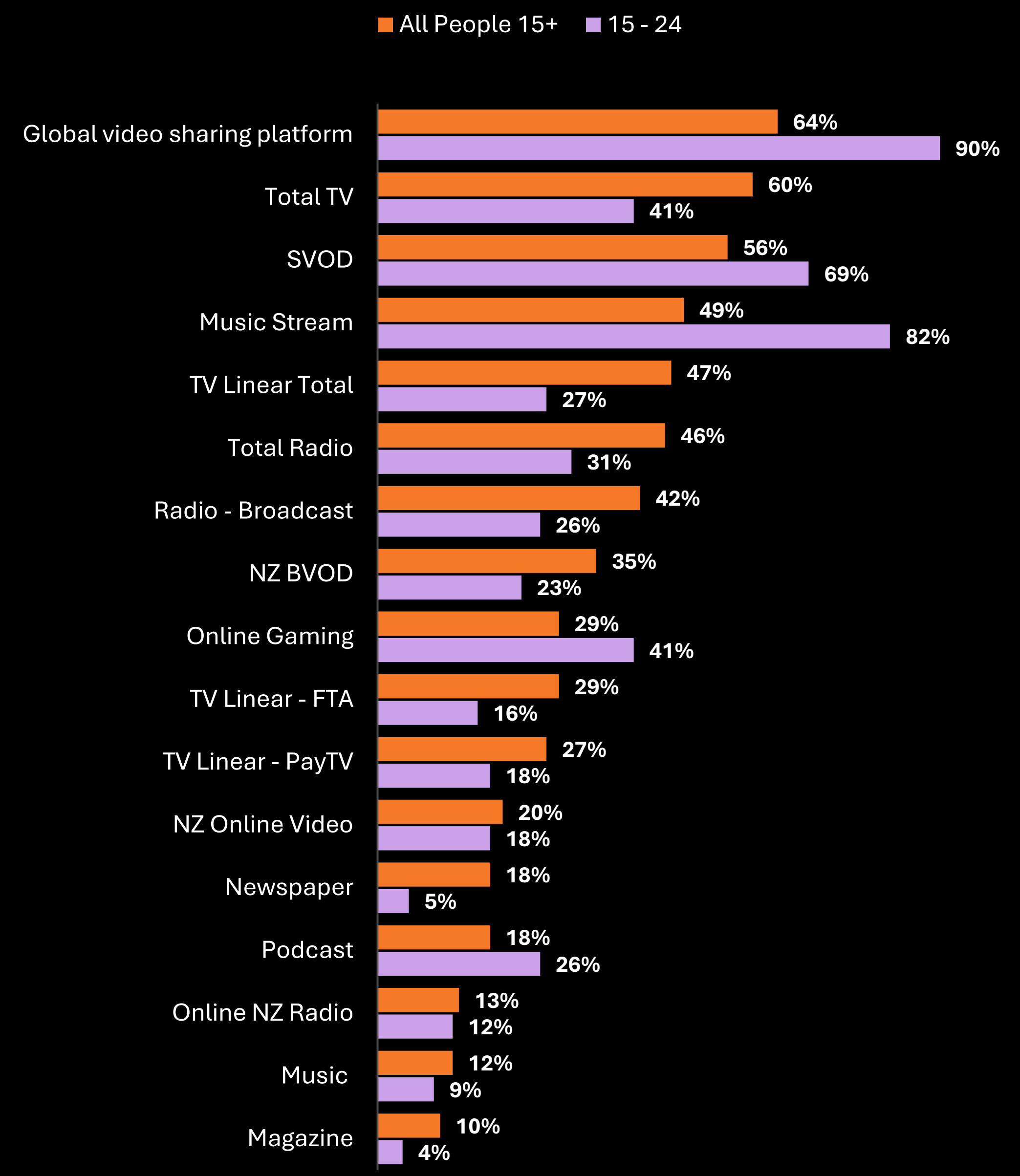
They are also well above average for online gaming and podcasts.

Reach of NZ BVOD and Linear TV is lower than average, resulting in TV reaching 4 out of 10 per day, versus 6 out of 10 for the overall NZ population. It is also interesting to note that despite being more likely to consume digital media, Linear TV has a higher reach than NZ BVOD for this audience.

This group are similar to the overall population for NZ online video and Online NZ radio, while below average for broadcast radio.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All New Zealanders 15+ (n = 1,404); All 15–24-year-olds (2024 n = 219)



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DAILY REACH OF MEDIA OVER TIME – YOUTH

All New Zealanders 15 - 24
% Daily Reach

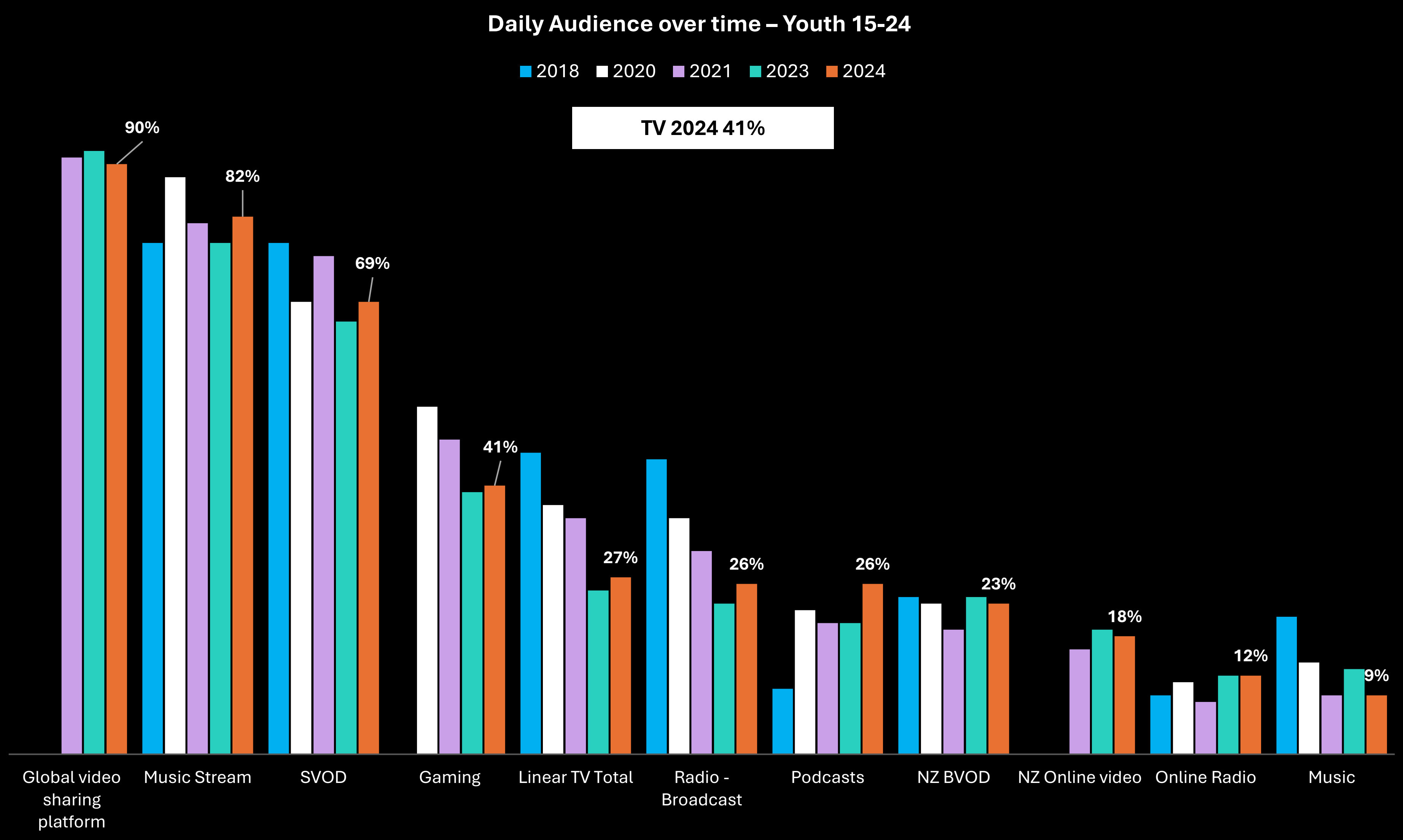
Over the last three to five years the reach of global video platforms and music streaming has remained relatively stable, while SVOD, which has been trending downwards has increased in the last year.

Gaming has declined since 2020 (when first measured), while podcasts have had a significant increase this year.

After a steady decline, Linear TV has stabilised in 2024, while NZ BVOD has remained at a similar level for the past 5 years.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All Youth 15-24: (2016 n=249; 2018 n=264; 2020 n=262; 2021 n=251, 2023 n=245; 2024 n = 219)



N.B. Note the different year comparisons i.e. two-year gap from 2018 – 2020 and from 2021 - 2023

Q. I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following types of entertainment, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

DAILY REACH OF MEDIA 2024 - MĀORI

Māori 15+

All New Zealanders 15+

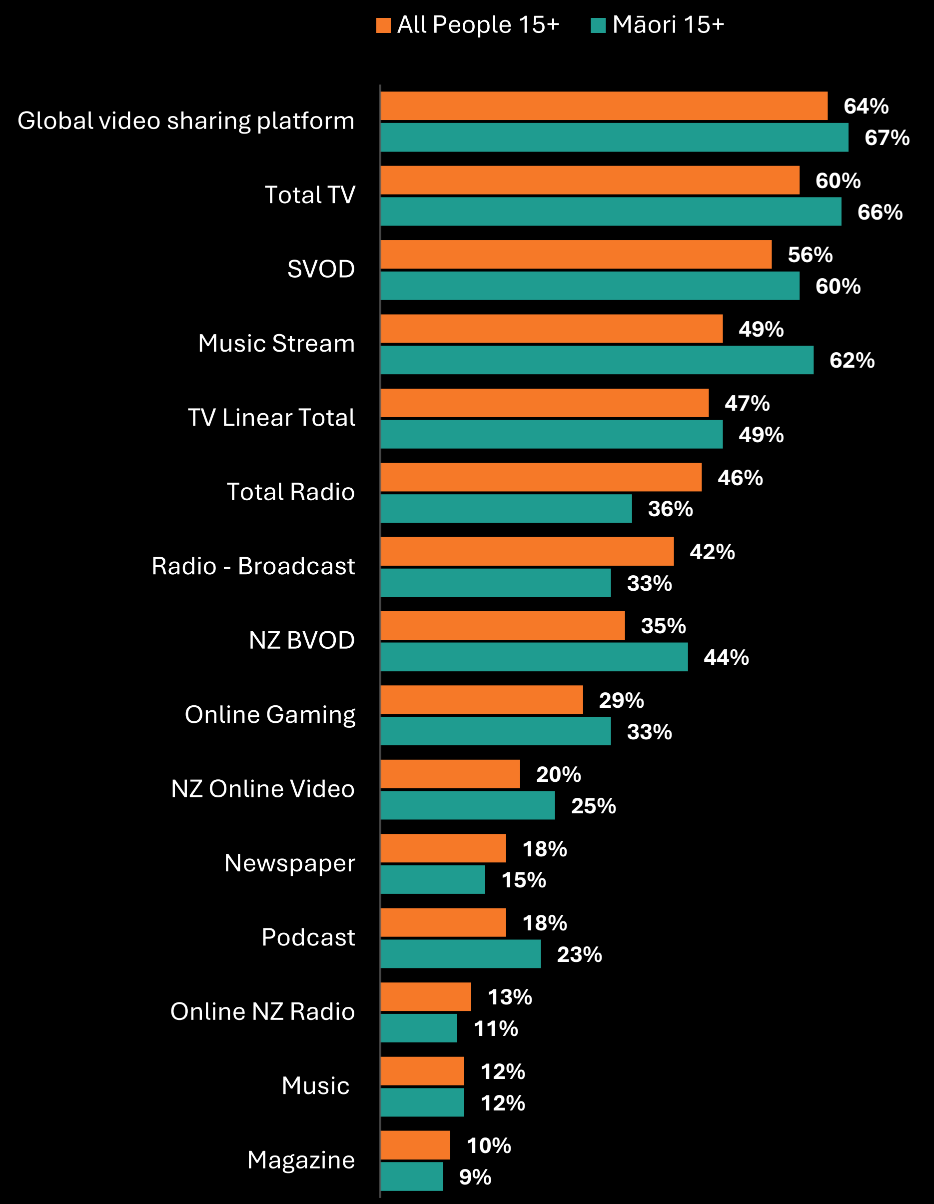
Compared to the total population, Māori audiences are high consumers of most media, except for radio.

They are higher than average on virtually all digital media – including music streaming, NZ BVOD, SVOD, global video platforms, online gaming, NZ online video and podcasts.

This cohort are also high TV consumers; as well as being 26% more likely to be reached by NZ BVOD, they are also slightly higher than average for Linear TV. This results in a 66% daily reach for TV among Māori audiences compared to 60% for the overall population.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All New Zealanders 15+ (n = 1,404); All Māori 15+ (2024 n = 196)



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DAILY REACH OF MEDIA OVER TIME – MĀORI

Māori 15+
% Daily Reach

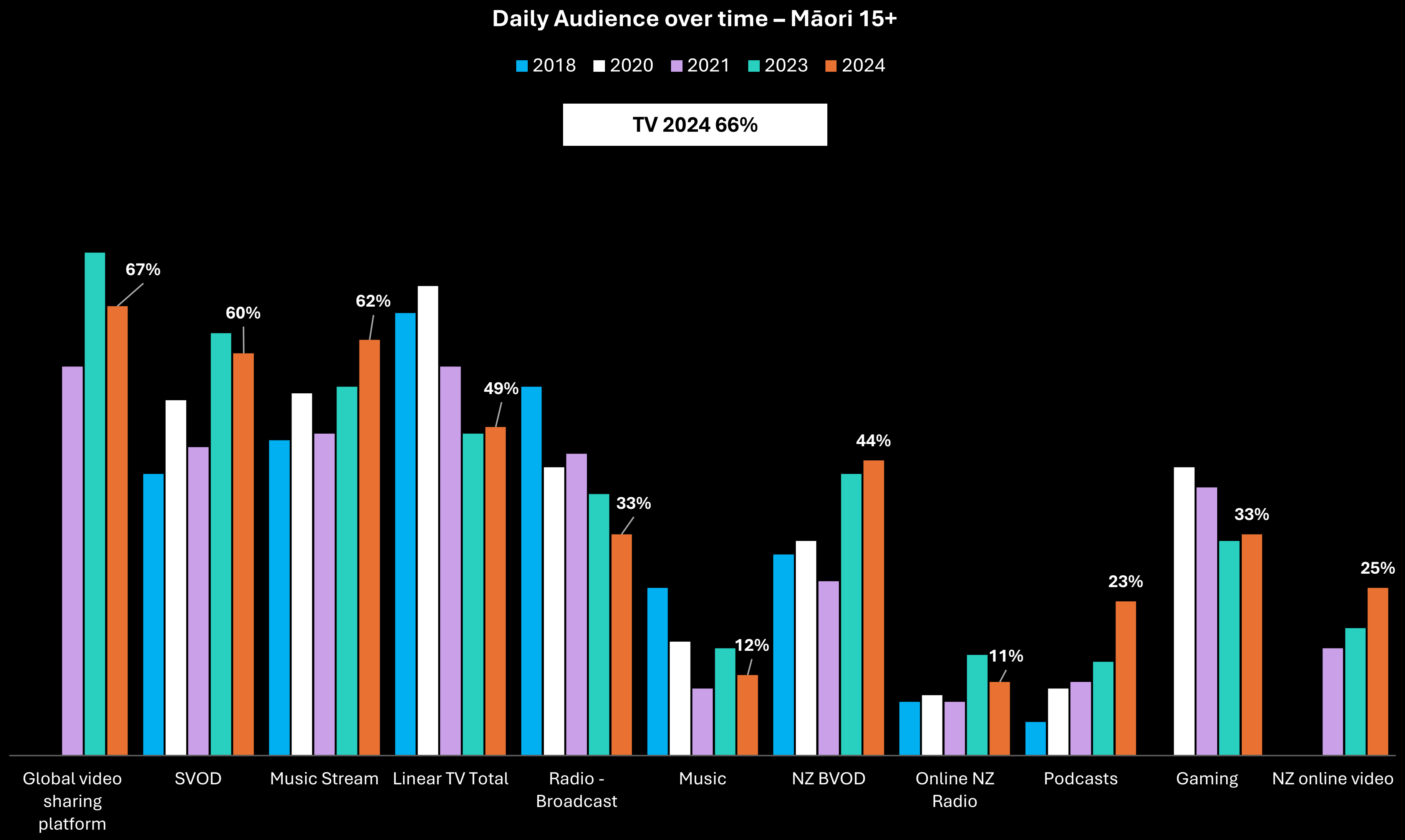
The reach of global video platforms has declined from 2023 to 2024, while SVOD has also decreased year-on-year.

NZ BVOD has been trending upwards and Linear TV reach has stabilised this year.

Gaming is up slightly, while Music streaming, podcasts (up significantly from 14% to 23% in 2024) and NZ online video have all shown steady increases over the last three-five years.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All Māori: (2018 n=202; 2020 n=232; 2021 n=231; 2023 n = 197; 2024 n = 196).



N.B. Note the different year comparisons i.e. two-year gap from 2018 – 2020 and from 2021 - 2023

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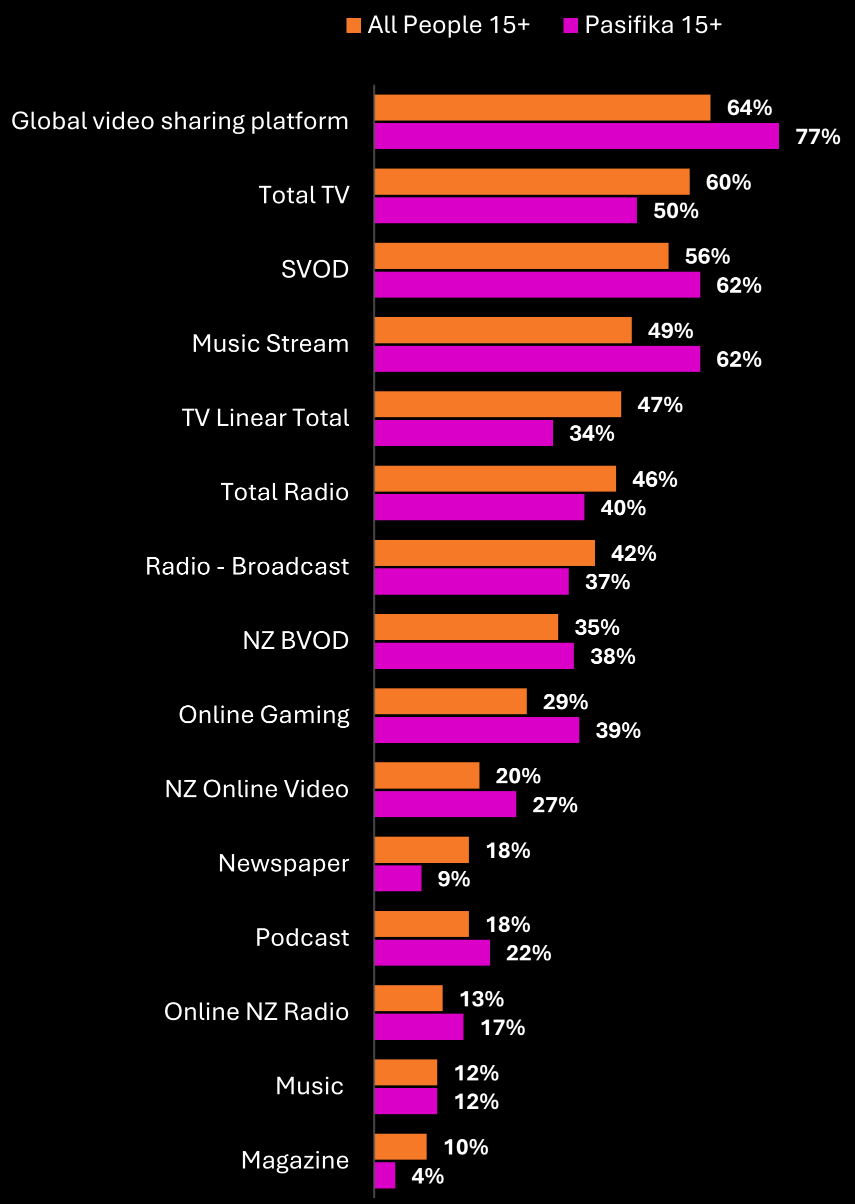
DAILY REACH OF MEDIA 2024 PASIFIKA

Pasifika 15+
All New Zealanders 15+

Pasifika people are a younger group, and this is reflected in their media usage.

They are higher than average on all digital media – global video platforms; SVOD; music streaming; online gaming; NZ BVOD; NZ online video; podcasts and online NZ radio.

While reach of NZ BVOD is higher (38%) than the population (35%) their Linear TV usage is lower than average, resulting in TV reaching 5 in 10 of this group each day compared to 6 out of 10 for the total population.



N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All New Zealanders 15+ (n = 1,404); All Pasifika (2024 n = 94)
N.B. Small sample size, results indicative only

Q. I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following types of entertainment, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

DAILY REACH OF MEDIA OVER TIME – PASIFIKA

Pasifika 15+
% Daily Reach

The reach of global video platforms has increased significantly from 2023 to 2024, while SVOD is showing a year-on-year decline.

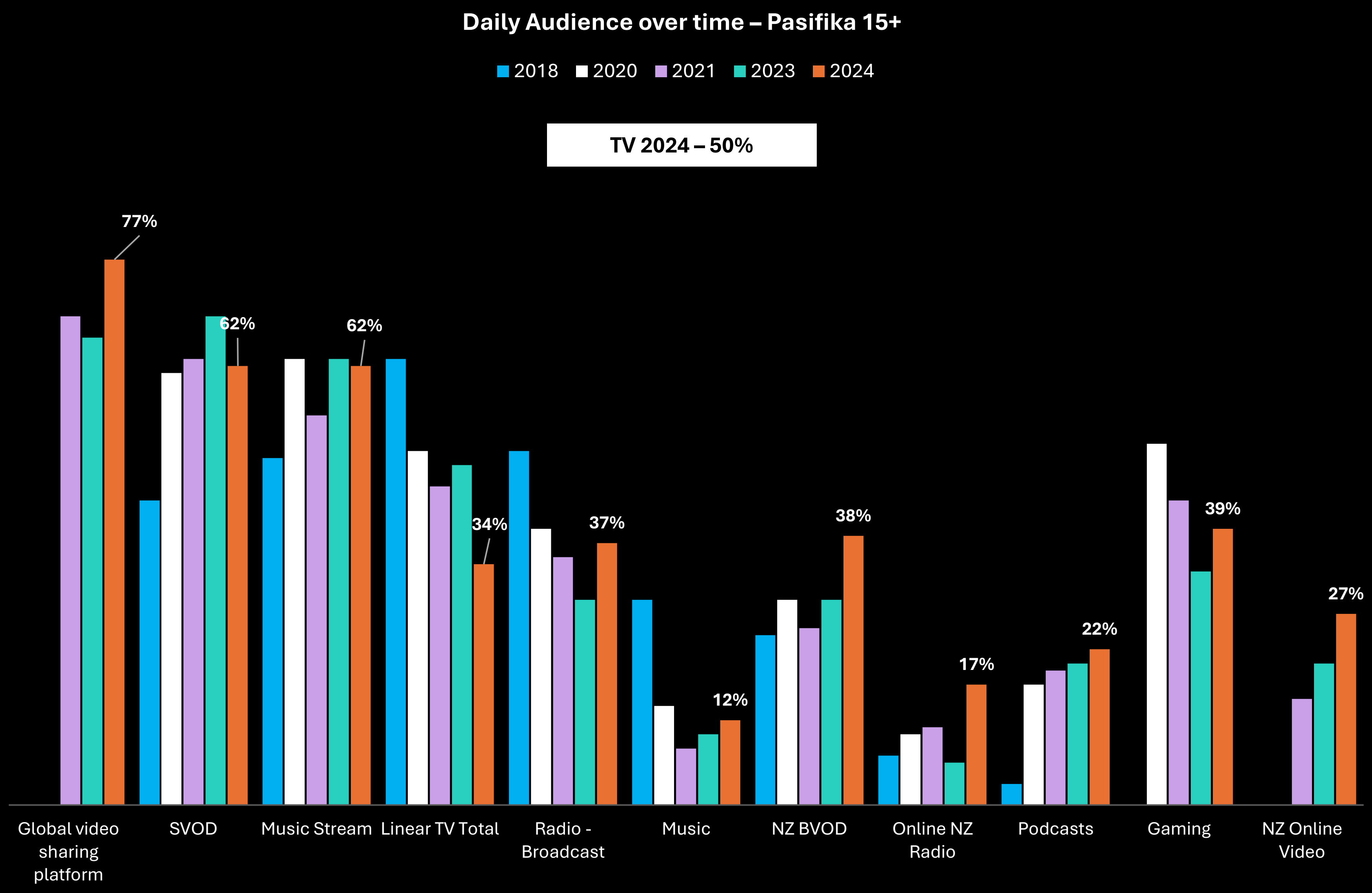
NZ BVOD has also grown significantly in the last year, as have NZ online video and Online NZ radio.

After a steady decline, reach of broadcast radio has increased in the last year.

Podcasts show a steady increase for the past five years.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All Pasifika*: (2018 n=86; 2020 n=110; 2021 n=105; 2023 n=94, 2024 n = 94).
N.B. Small sample size, results indicative only



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DAILY REACH OF MEDIA 2024 – ASIAN

Asian 15+
All New Zealanders 15+

Compared to the total population, Asian audiences are significantly higher consumers of global video platforms and music streaming. They have higher than average daily reach for podcasts, NZ online video and are slightly ahead for SVOD and online gaming.

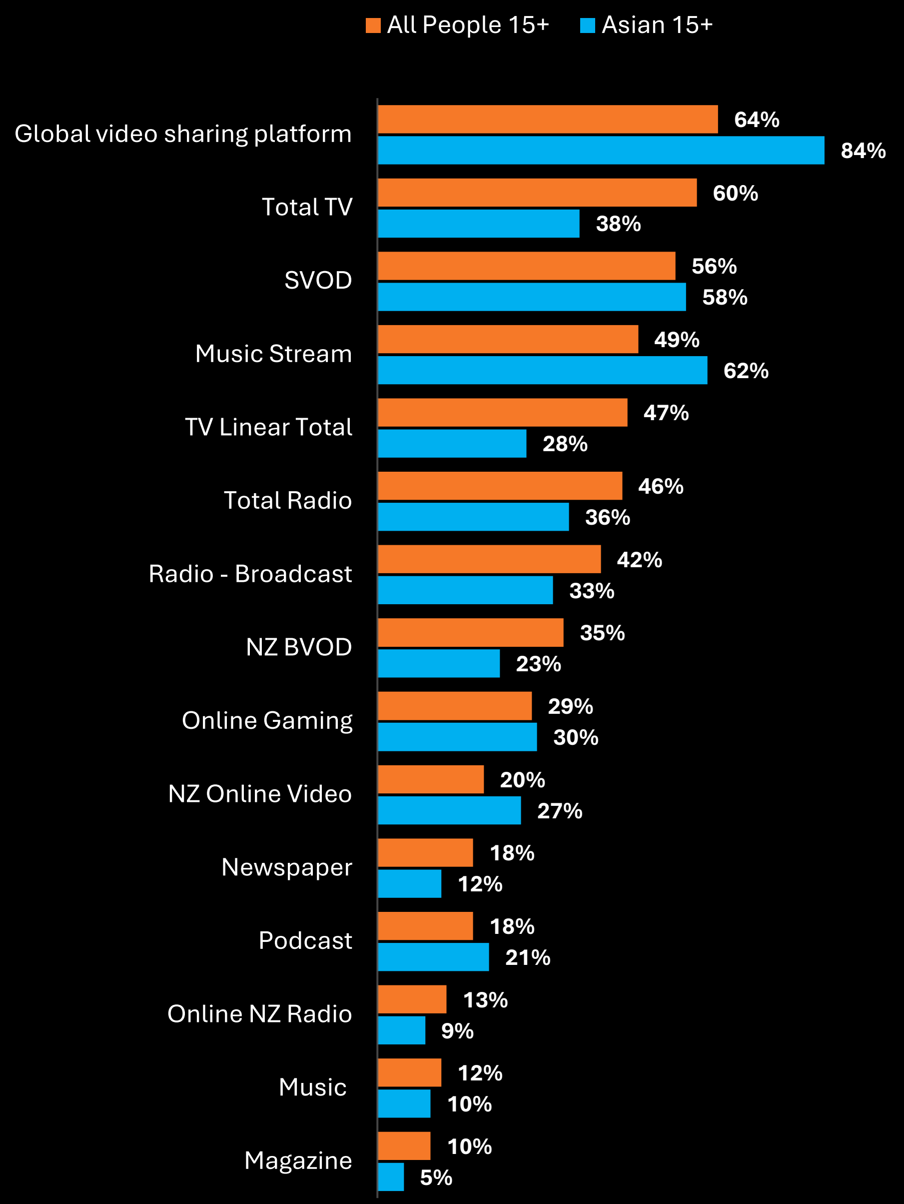
They are lower than average for all local NZ media i.e. NZ BVOD, Linear TV, radio broadcast and Online NZ radio.

This has resulted in the reach of TV (38%) being the lowest of all the “hard to reach” audiences (including youth).

Radio (36%) is similar to Māori and Pasifika audiences and higher than Youth.

N.B. TV is all TV viewing (net) of content provided by a NZ Broadcaster i.e. Linear or BVOD (live streaming or on demand)

Base: All New Zealanders 15+ (n = 1,404); All Asian 15+ (2024 n = 209)



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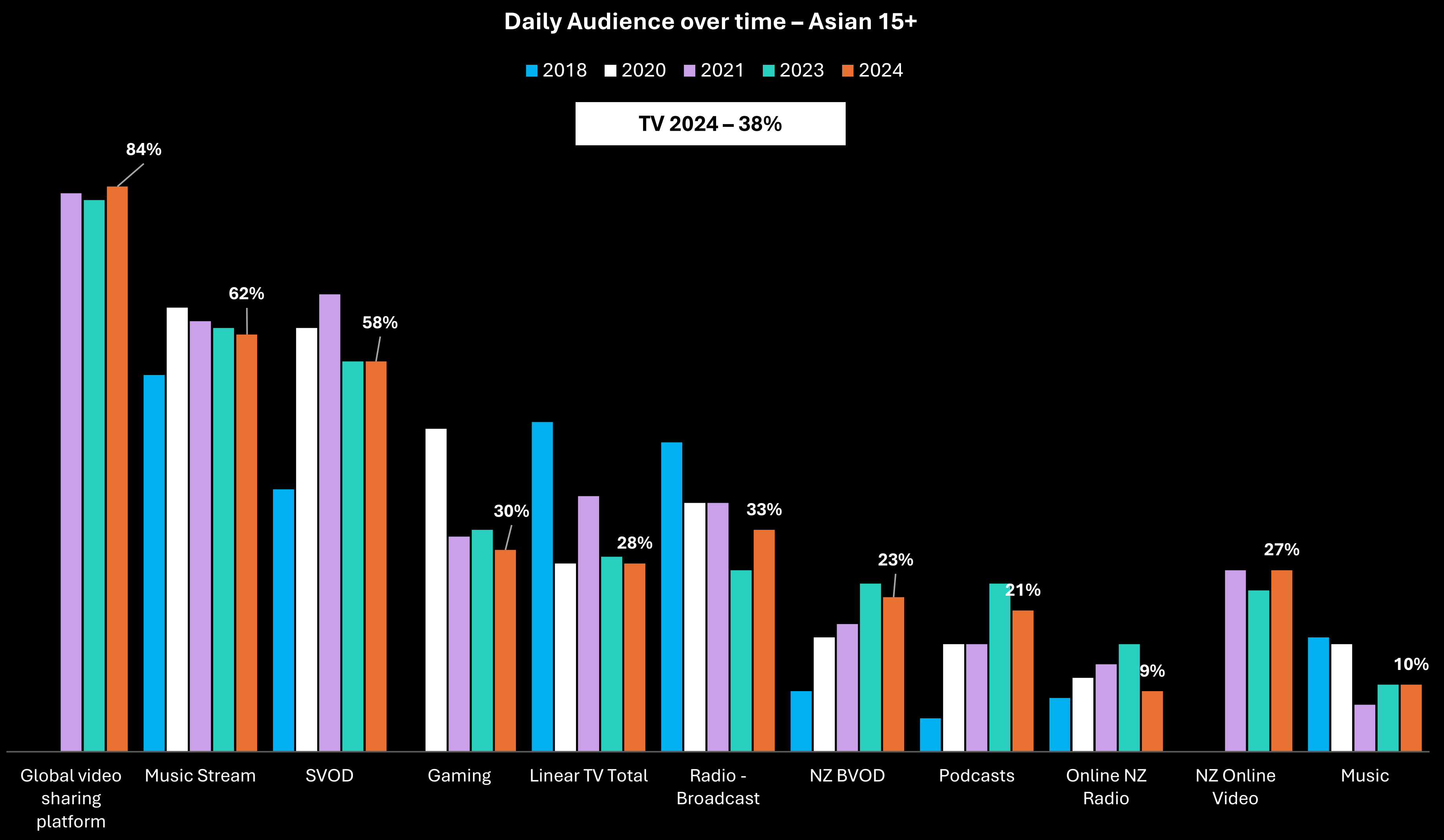
DAILY REACH OF MEDIA OVER TIME – ASIAN

Asian 15+
% Daily Reach

The reach of global video platforms is relatively stable among this group, while music streaming and SVOD have both shown some decline.

Gaming has declined from a 2020 peak (when first measured).

Linear TV has been trending downwards, while NZ BVOD, having steadily increased since 2018, has declined slightly this year for Asian audiences.



N.B. Note the different year comparisons i.e. two-year gap from 2018 – 2020 and from 2021 - 2023

Base: All Asian: (2018 n=170; 2020 n=215; 2021 n=202; 2023 n=209; 2024 n = 209).

Q. I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following types of entertainment, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

06

DAILY MEDIA CONSUMPTION BY CHANNEL, SITE AND STATION

NET DAILY AUDIENCES BY PROVIDER

All New Zealanders 15+

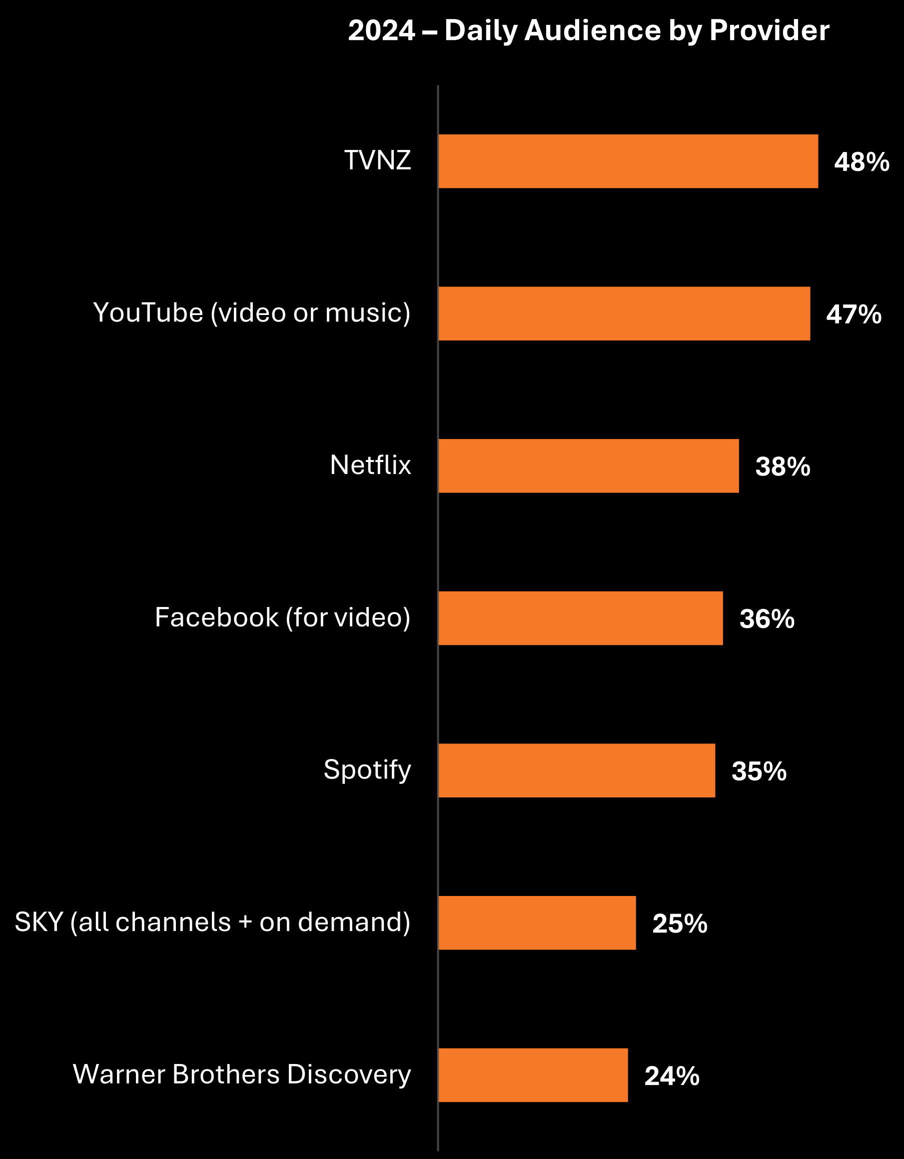
When net daily reach is calculated, the combined audience of all TVNZ channels and its digital platform, TVNZ+, reaches a slightly bigger daily audience than YouTube.

TVNZ includes:
- TVNZ 1
- TVNZ 2
- Duke
- TVNZ +

Sky Television includes:
- All Sky Linear channels measured
- SkyGo
- Sky Sport Now
- Neon

Warner Brothers Discovery includes:
- Three
- Rush
- Eden
- HGTV
- Bravo
- ThreeNow

Base: All respondents (2024 n = 1,404)



Q: Which of the following did you use yesterday?

DAILY REACH OF GLOBAL VIDEO SHARING PLATFORMS

All New Zealanders 15+

After declines in 2021, both YouTube and Facebook increased in 2023. In 2024, YouTube has declined slightly, while Facebook (for video) remains stable.

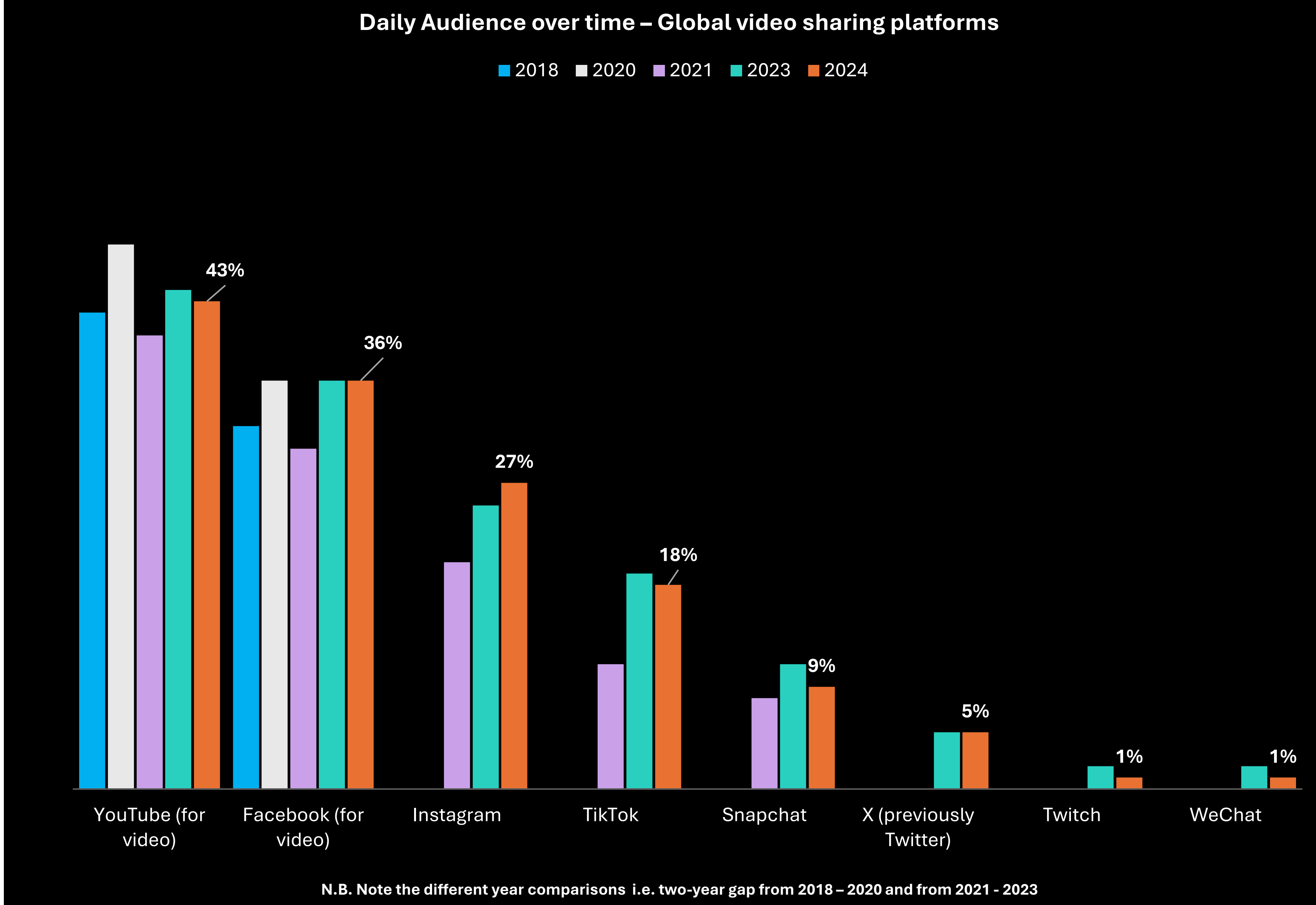
Both YouTube and Facebook have seen a decline in their younger (15–39-year-old) audiences, while the 40-59 audience has grown slightly for both, resulting in little overall change for each platform.

Instagram has shown steady growth in the last three years since measurement began. The year-on-year growth is driven by an increase among the 40–59-year-old age group.

Both TikTok and Snapchat, whose audiences are predominantly under 40, have increased slightly among youth (15-24s) in 2024, but have seen a small year-on-year decline among the 15–39-year-olds.

N.B in 2024, respondents are asked about their use of video on Facebook including Messenger, and Instagram including Threads.

Base: All respondents ((2018 n = 1,414; 2020 n = 1,511; 2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)



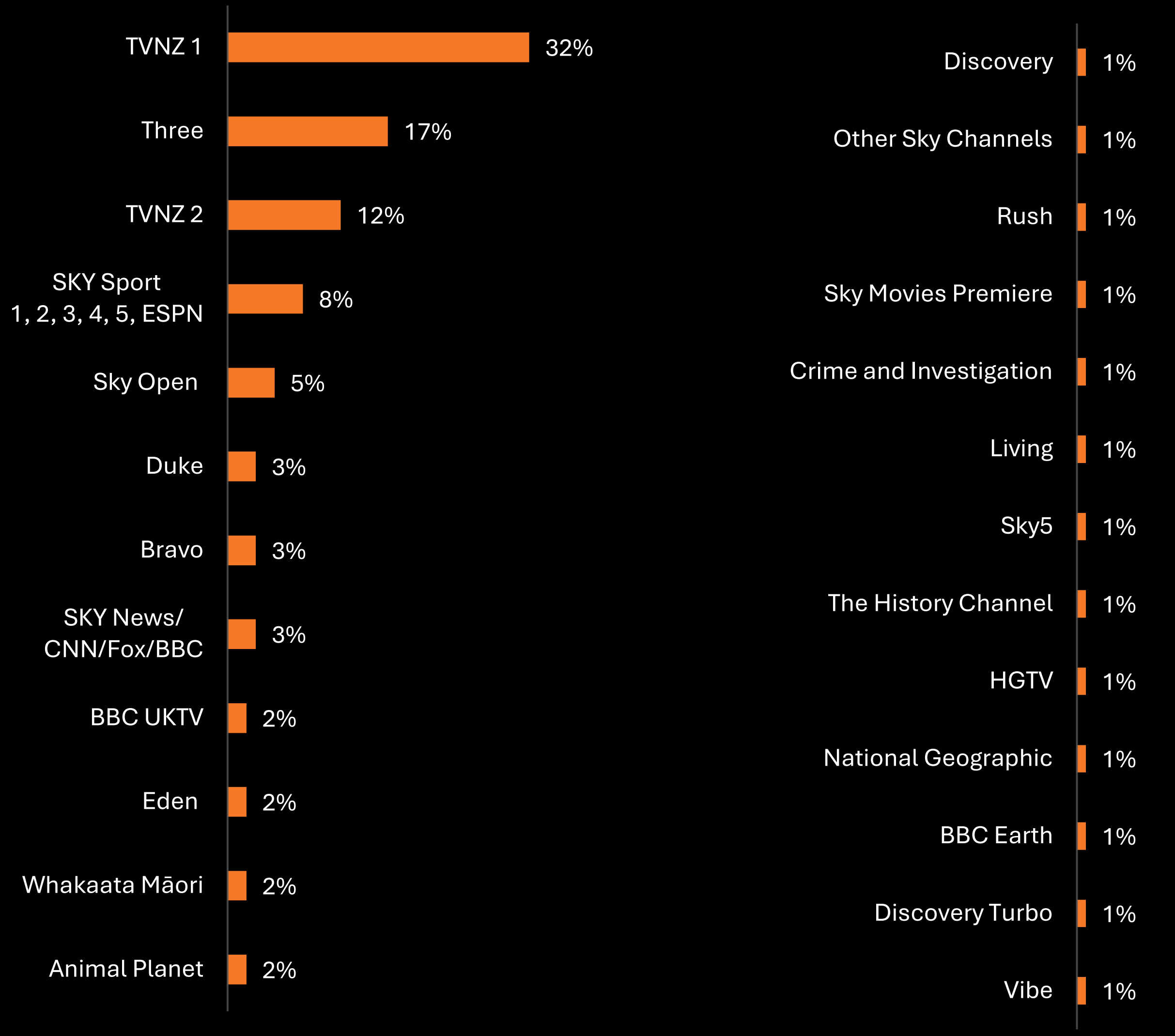
Q. Thinking about yesterday overall, which of the following overseas websites/apps did you use to watch video?

DAILY REACH OF LINEAR TV CHANNELS

All New Zealanders 15+

TVNZ1 continues to reach the biggest daily audience on Linear TV, reaching just under one in three New Zealanders.

Three and TVNZ2 reach the second and third biggest audiences on Linear TV each day.



Base: All respondents (2024 n = 1,404)

Q. Thinking about yesterday overall which TV channels did you watch?

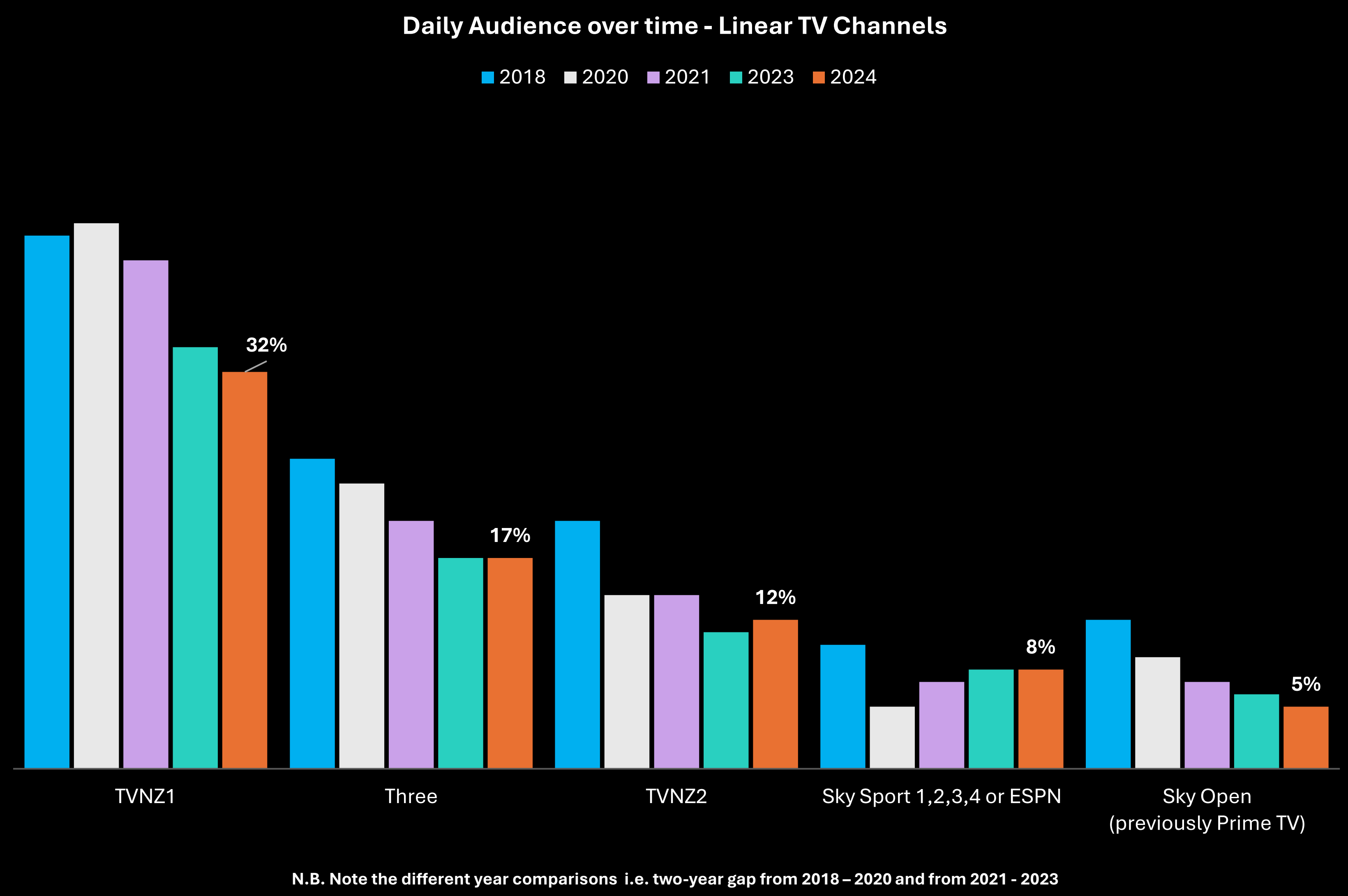
DAILY REACH OF LINEAR TV CHANNELS OVER TIME

All New Zealanders 15+

Five Linear TV channels reach 5% or more New Zealanders each day.

TVNZ1 has continued to gradually decline for the last five years as has Sky Open. Three and TVNZ2 have been trending downwards however have stabilised in the last year.

The reach of Sky's Sport channels on Linear has remained stable.



Base: All respondents ((2018 n = 1,414; 2020 n = 1,511; 2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)

Q. Thinking about yesterday overall which TV channels did you watch?

NET DAILY REACH – LINEAR TV AND BVOD 2021 - 2024

All New Zealanders 15+

Here we can see how watching NZ Broadcaster TV has changed since 2021 in terms of the mix of Linear and BVOD, and the effect this has on Total TV reach.

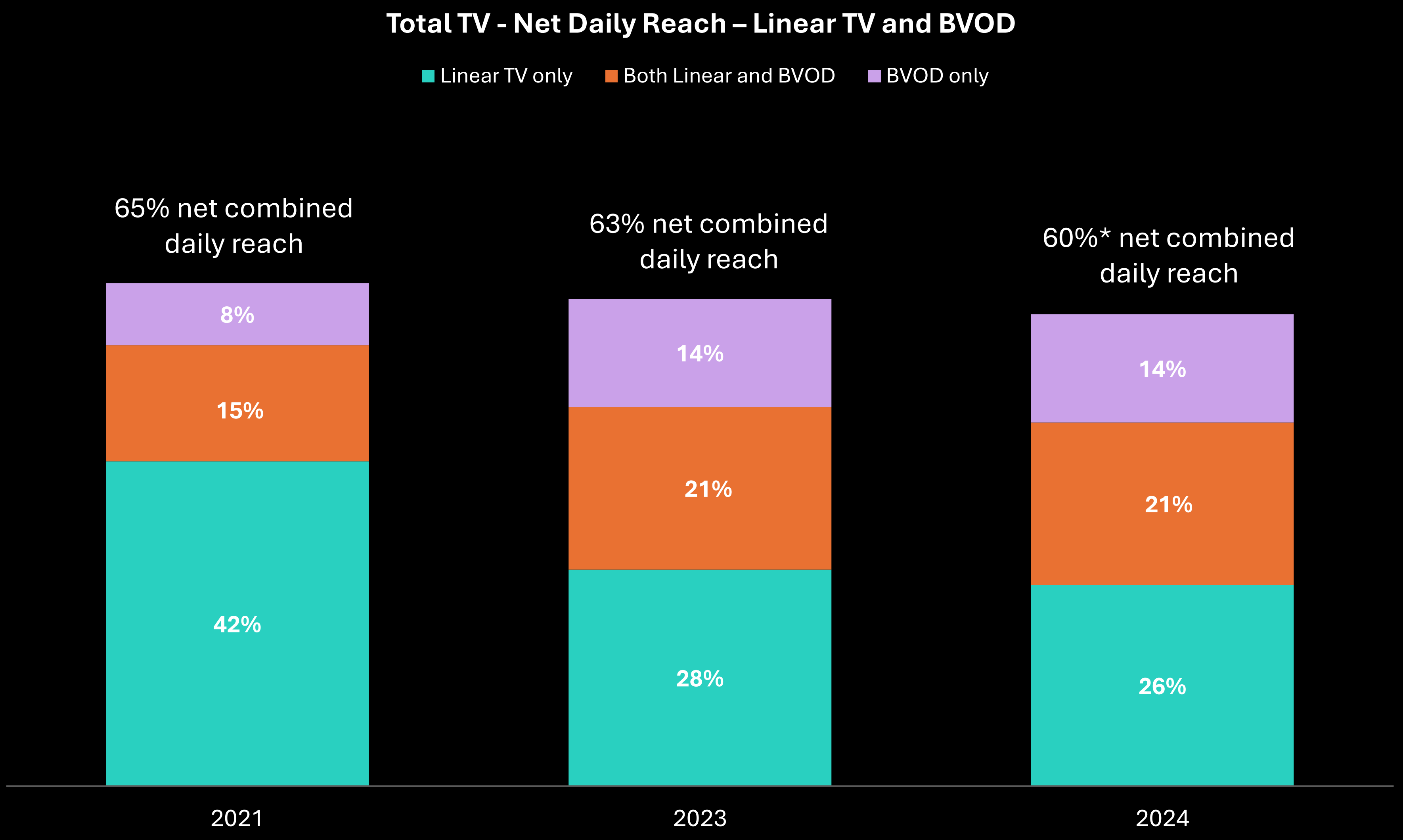
There was a large decrease in Linear TV only viewing from 2021 to 2023, with an increase in viewing of both Linear /BVOD and BVOD only.

In 2024, the continued decline in Linear only viewing is contributing to the overall decrease in Total TV viewing.

Note: This chart summarises the mutually exclusive daily audiences watching Linear TV and/or BVOD.

*Rounding brings the 2024 net reach figure to 60%.

Base: All respondents (2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)



Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.

DAILY REACH OF NZ BROADCASTER VIDEO ON DEMAND (BVOD)

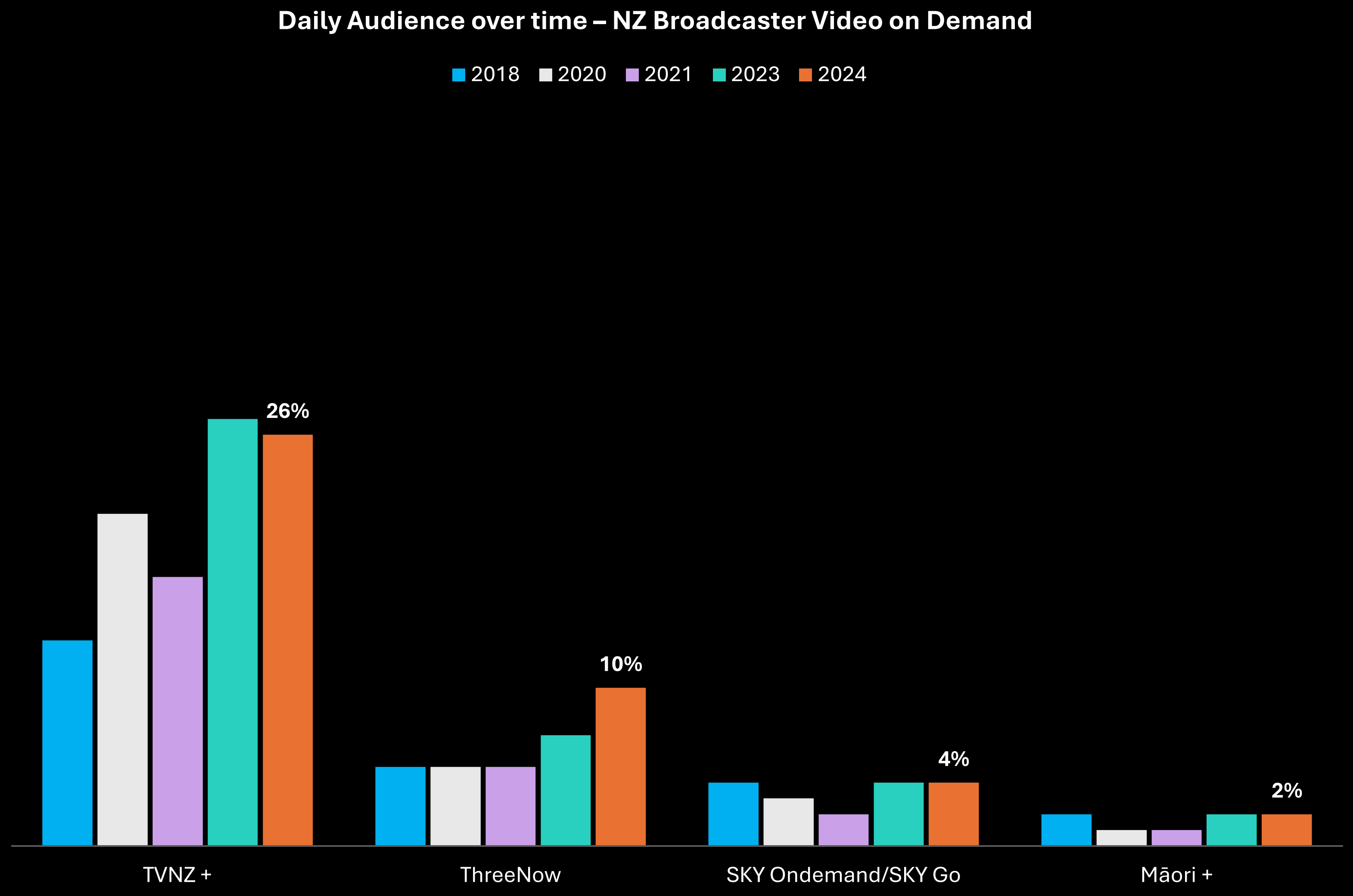
All New Zealanders 15+

Following very strong growth from 2018 to 2023, TVNZ+ has stabilised in 2024, however remains the most popular local platform by some margin.

In the last year, TVNZ+ reach among 15-39's has increased however it has shown a slight decline among those aged 40+.

ThreeNow has grown steadily in the last two-years to now reach 1 in 10 New Zealanders each day. The year-on-year gain is driven by increased reach among the 15-39- and 40–59-year-old age groups.

Base: All respondents ((2018 n = 1,414; 2020 n = 1,511; 2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)



N.B. Note the different year comparisons i.e. two-year gap from 2018 – 2020 and from 2021 - 2023

Q. Thinking about yesterday overall which of the following websites or apps did you use to watch content such as TV shows or movies?

HOW NEW ZEALANDERS USE NZ BVOD PLATFORMS

All NZ BVOD users

Users of BVOD typically use the platforms for a couple of different reasons, with more than half saying, “to catch up” and 4 in 10 saying “it’s to watch something they always watch online or is only online”.

In 2024 when asking about usage of NZ BVOD sites/apps, we added a new question “Did you use the App to stream live television”.

Just under a quarter said they do so, with Males and those aged 40-59 being more likely to stream live television via a BVOD App.

With more New Zealanders now having a Connected TV, watching TV via the internet may be the only option for some people, and we would expect to see this number to rise in the future.

Viewing Behaviour	All	Male	Female	15-39	40-59	60+
Catch up with all or part of a show missed on TV	54%	53%	55%	51%	56%	54%
Watch a show that you usually watch online and not on TV, or is available online only	42%	39%	**45%**	**49%**	43%	32%
Use the App to stream live television	24%	**28%**	21%	21%	**27%**	25%

Base: Used On Demand site yesterday (2024 n = 445)

Q. Thinking about when you used TVNZ+, ThreeNow, Māori TV+ or SKY GO yesterday did you use it to… (select all that apply)

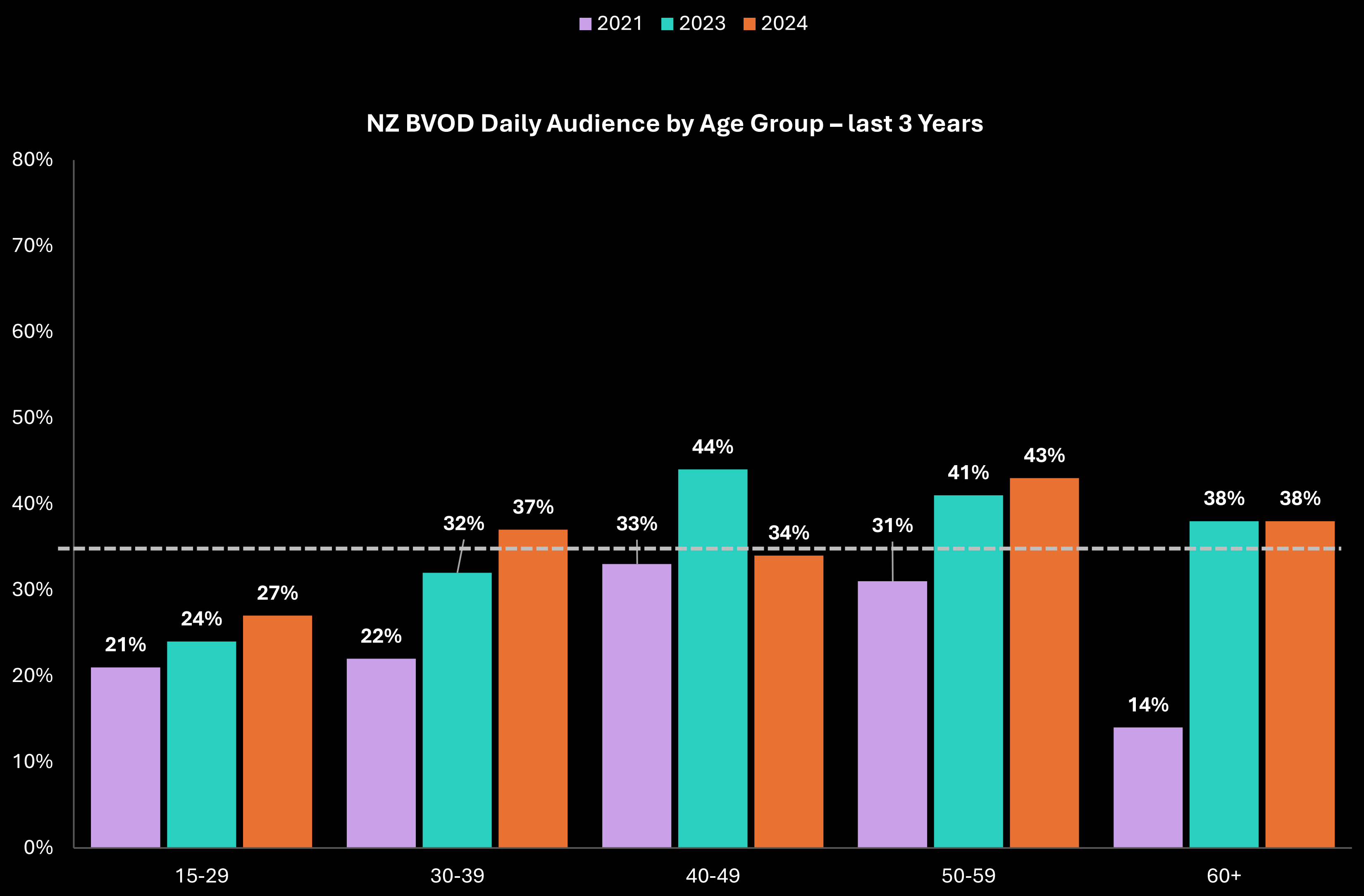
BVOD AGE GROUP PROFILE OVER LAST 3 YEARS

% Daily Reach by age group

Daily reach for NZ BVOD has remained stable year-on year at 35% for the total population.

Following significant growth in reach for those aged 40+ (and very high increases for 50+ and 60+) from 2021 to 2023, this growth has now slowed and in fact we have seen a decline among 40-49's.

Meanwhile the reach has increased steadily among the 15-39 's, resulting in NZ BVOD platforms now being accessed daily by a wide cross section of age groups.



N.B. Note the different year comparisons i.e. two-year gap from 2018 – 2020 and from 2021 - 2023

Base: All respondents (2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)

Glasshouse Irirangi Te Motu NZ On Air

SOURCE OF AWARENESS OF NZ MADE TV SHOWS

All New Zealanders 15+

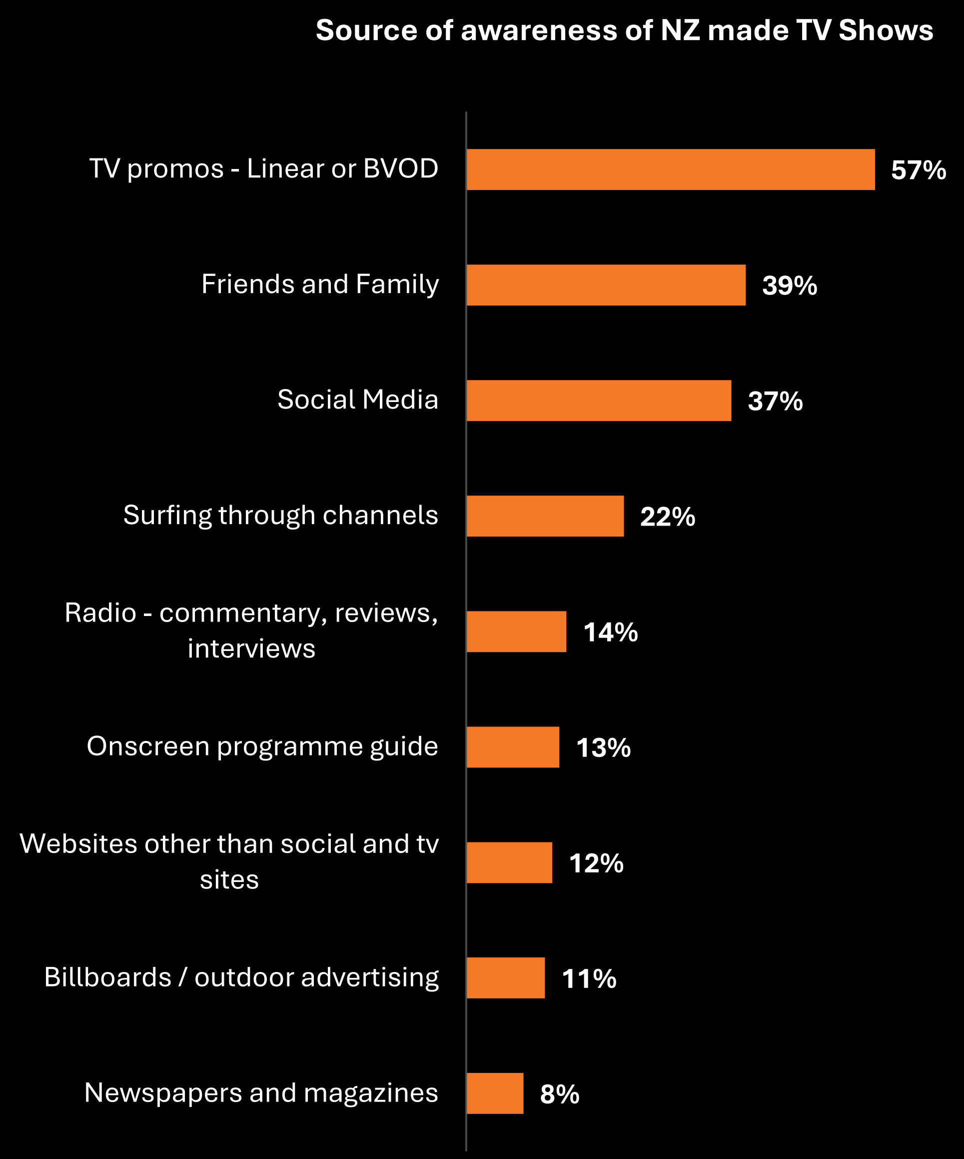
Promotion of shows on TV remains the most common source of awareness of NZ made TV shows. (Note that this year we combined Linear and BVOD, where previously they were asked as separate options).

Friends and family, social media and surfing through channels are the next most popular and there is no change from last year for any of these.

In 2024 we added two new sources – Radio, which is the fifth most popular this year at 14%, and Billboards/Outdoor advertising which is cited by just over one in ten New Zealanders as a source.

There is very little change year on year for any of the other sources of awareness.

Base: All respondents
(2024 n = 1,404)



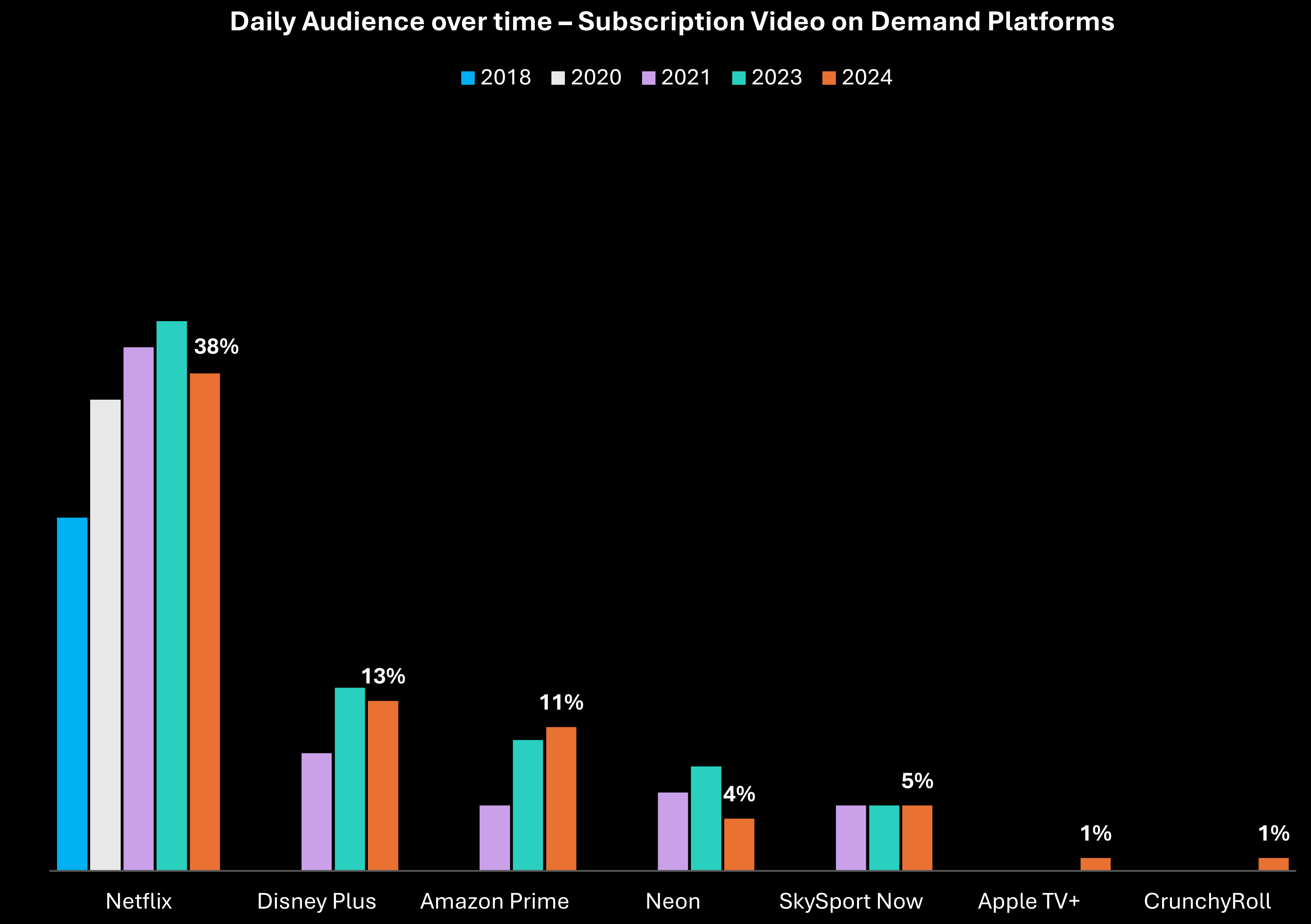
Q. In which of the following ways do you usually become aware of New Zealand made TV shows?

DAILY REACH OF SUBSCRIPTION VIDEO ON DEMAND PLATFORMS (SVOD)

All New Zealanders 15+

Following growth from 2018 - 2023, the reach of Netflix has declined in the last year. The decline is across all ages, particularly for the under 60's, and most significantly among those aged 25-34.

Most other SVOD platforms have declined or have stabilised in the last year.



N.B. Note the different year comparisons i.e. two-year gap from 2018 – 2020 and from 2021 - 2023

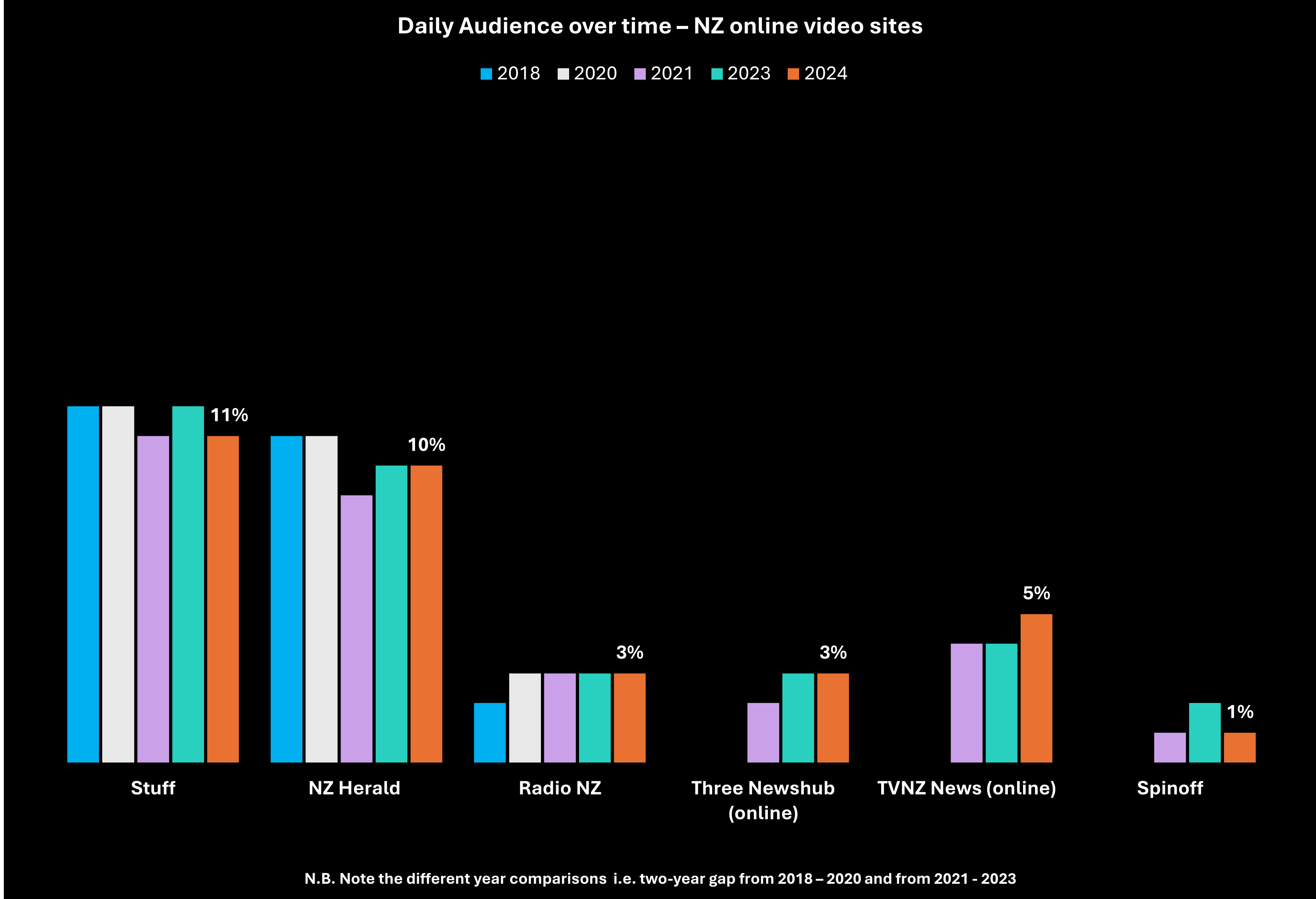
Base: All respondents ((2018 n = 1,414; 2020 n = 1,511; 2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)

Q. Thinking about yesterday overall which of the following websites or apps did you use to watch content such as TV shows or movies?

DAILY REACH OF NZ ONLINE VIDEO SITES

All New Zealanders 15+

Very little change in the daily reach over time for NZ sites used to watch video.



N.B. At the time of this survey, the Newshub brand and website was still in existence (shut down was 6th July). The announcement that Stuff would take over running TV3's 6pm bulletin and Newshub would be closing, was on 16th April, just as fieldwork commenced.

Base: All respondents ((2018 n = 1,414; 2020 n = 1,511; 2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)

Q. Thinking about yesterday overall, which of the following New Zealand sites did you use to watch video online?

DAILY REACH OF RADIO STATIONS

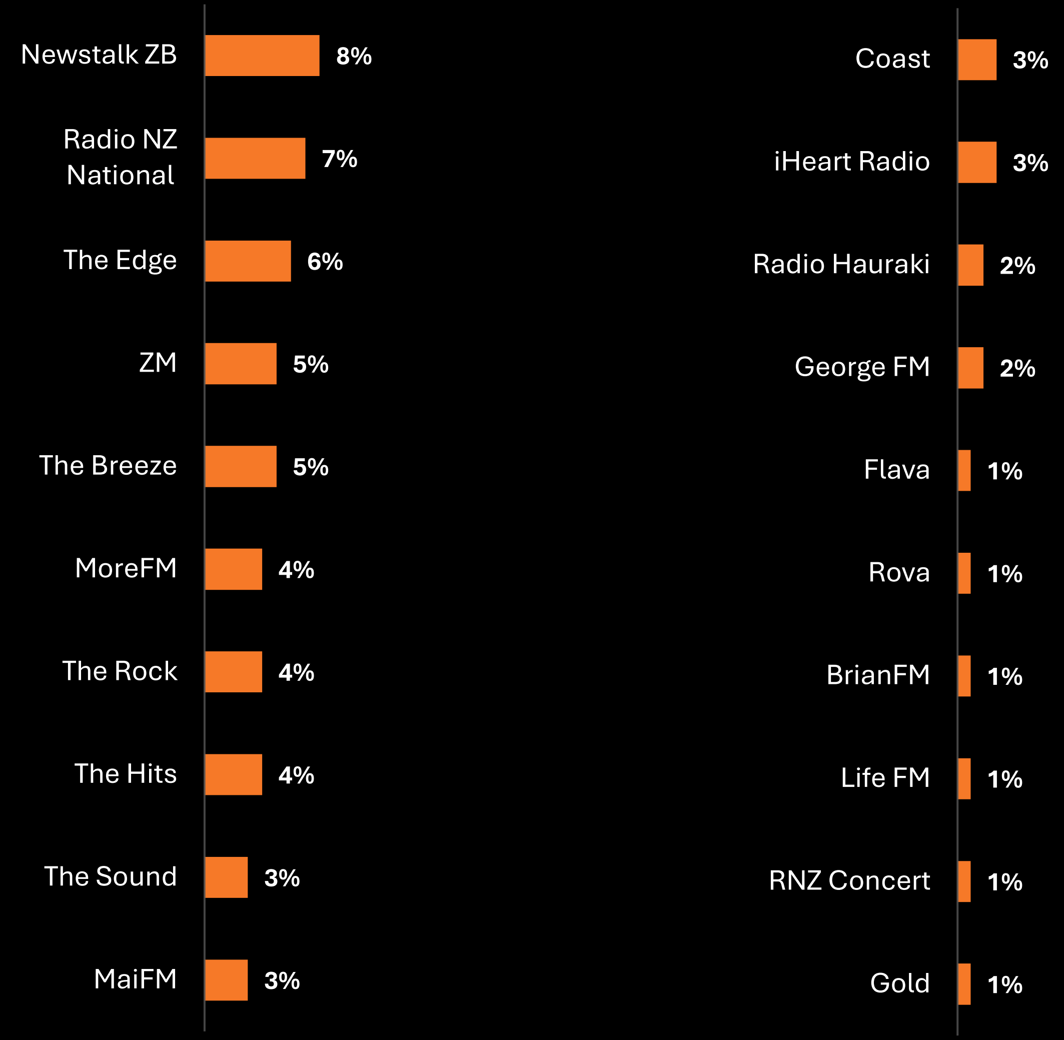
All New Zealanders 15+

Newstalk ZB reaches just under one in ten New Zealanders each day with RNZ National slightly below this.

This is the first time since this survey began that Newstalk ZB is ahead of RNZ National.

The Edge, ZM and The Breeze are the next most popular stations.

The radio market remains fragmented and there is a long tail of stations which reach less than 1% of New Zealanders each day.



Base: All respondents (2024 n = 1,404)

Q. Thinking about yesterday overall what New Zealand radio stations did you listen to either on radio or online?

DAILY REACH OF RADIO STATIONS OVER TIME

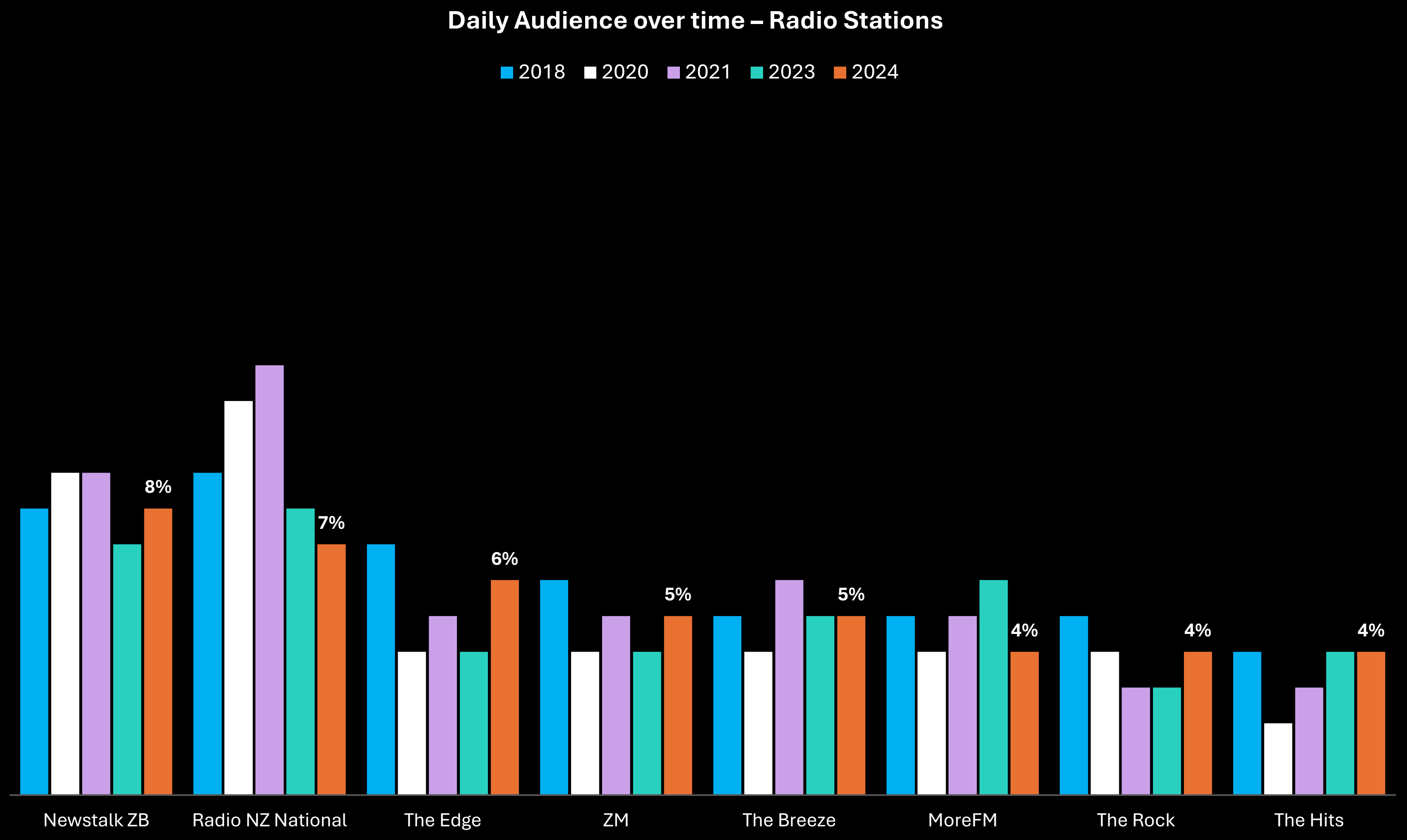
All New Zealanders 15+
Stations with reach of 4% or more

Most of the commercial stations have remained relatively stable over the last three-five years.

RNZ National increased its reach from 2018 to 2021 however has since shown a steady decline.

Newstalk ZB has increased slightly year on year, and this has resulted in its daily reach to be just ahead of RNZ National for the first time since this survey began in 2014.

Base: All respondents ((2018 n = 1,414; 2020 n = 1,511; 2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)



N.B. Note the different year comparisons i.e. two-year gap from 2018 – 2020 and from 2021 - 2023

Q. Thinking about yesterday overall what New Zealand radio stations did you listen to either on radio or online?

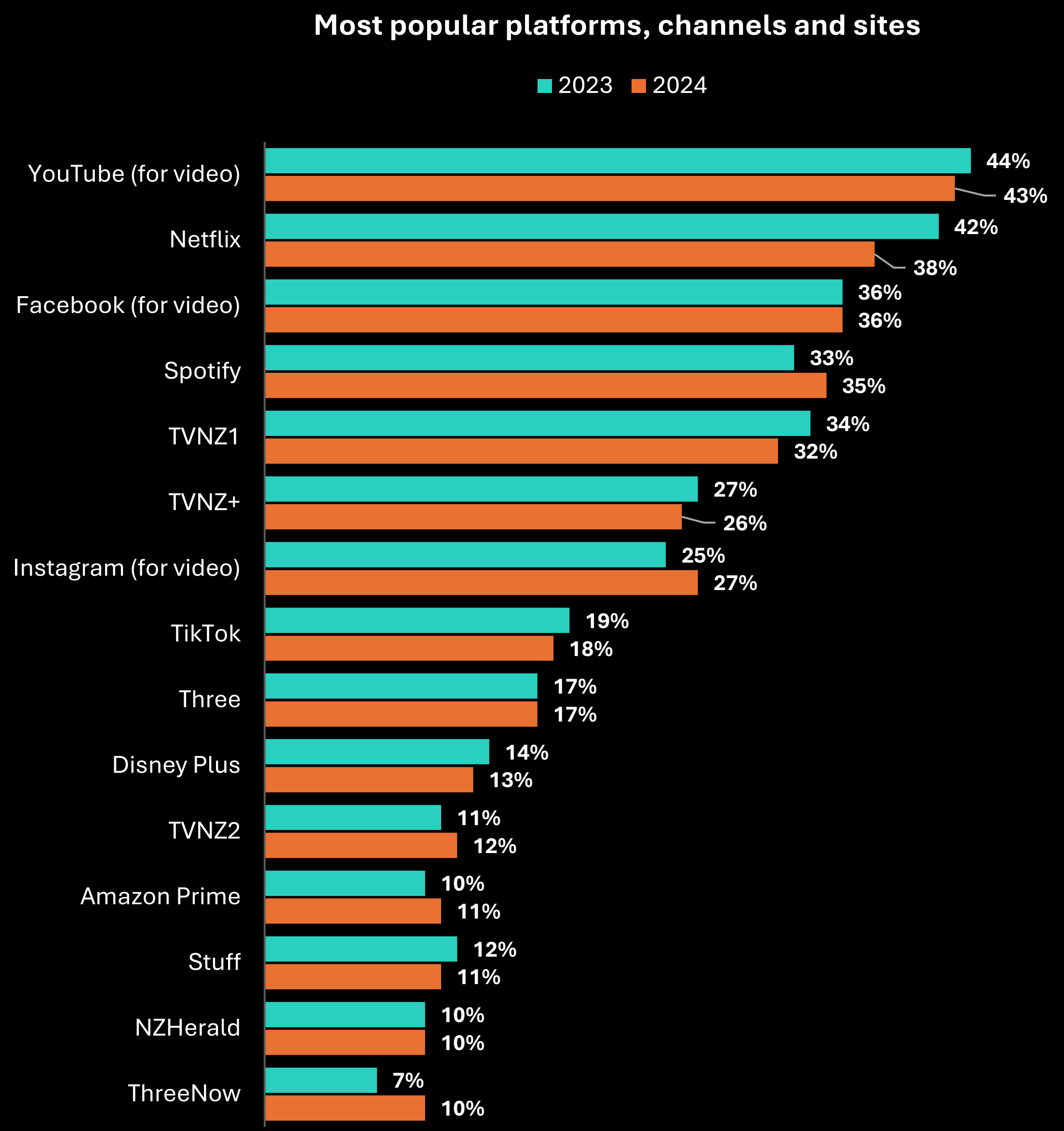
SUMMARY – MOST POPULAR CHANNELS, PLATFORMS AND SITES YEAR ON YEAR CHANGE

All New Zealanders 15+
Daily Reach 10% or more

Here we can see the daily reach and relativities of the most popular platforms, channels and sites across the categories of SVOD, global video sharing platforms, linear TV channels, music streaming, BVOD and NZ Online video.

Both YouTube and Netflix have declined year on year however remain as the highest daily reaching individual content providers in 2024.

Base: All respondents (2023 n = 1,408; 2024 n = 1,404)



Q. Which of the following did you use yesterday?

07

MUSIC CONSUMPTION AND BEHAVIOUR

DAILY REACH OF STREAMING MUSIC PLATFORMS

All New Zealanders 15+

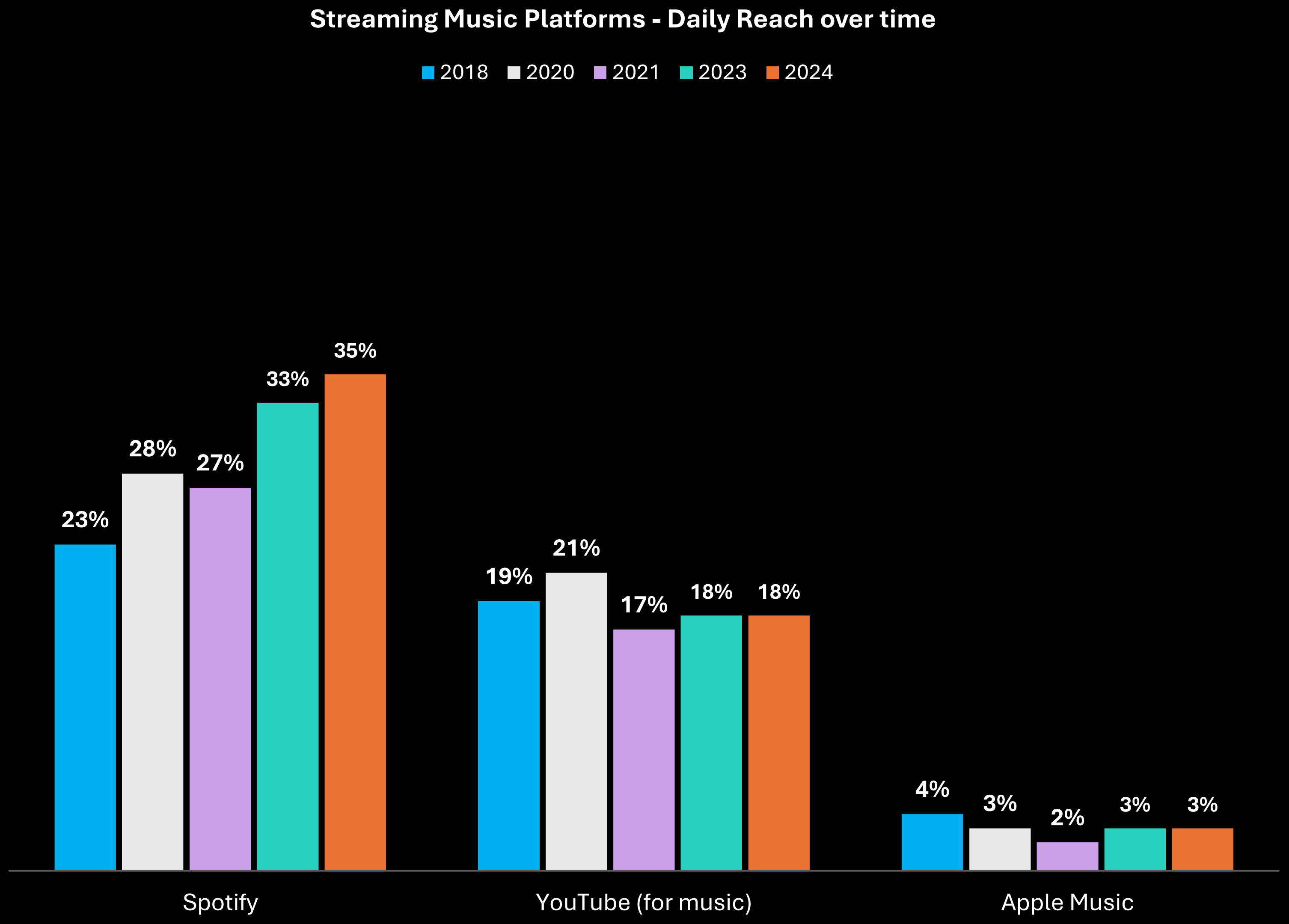
Spotify has grown steadily and remains the dominant platform reaching more than one in three New Zealanders each day, while YouTube (for music) and Apple Music are stable.

Other niche sites include:

- iTunes (2%)
- Rova (2%)
- Soundcloud (1%)
- iHeart Radio (1%)

- *Bandcamp reaches 1% of 15-39s*

Base: All respondents ((2018 n = 1,414; 2020 n = 1,511; 2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)



N.B. Note the different year comparisons i.e. two-year gap from 2018 – 2020 and from 2021 - 2023

Q. Thinking about yesterday overall, which of the following did you use to listen to music online yesterday?

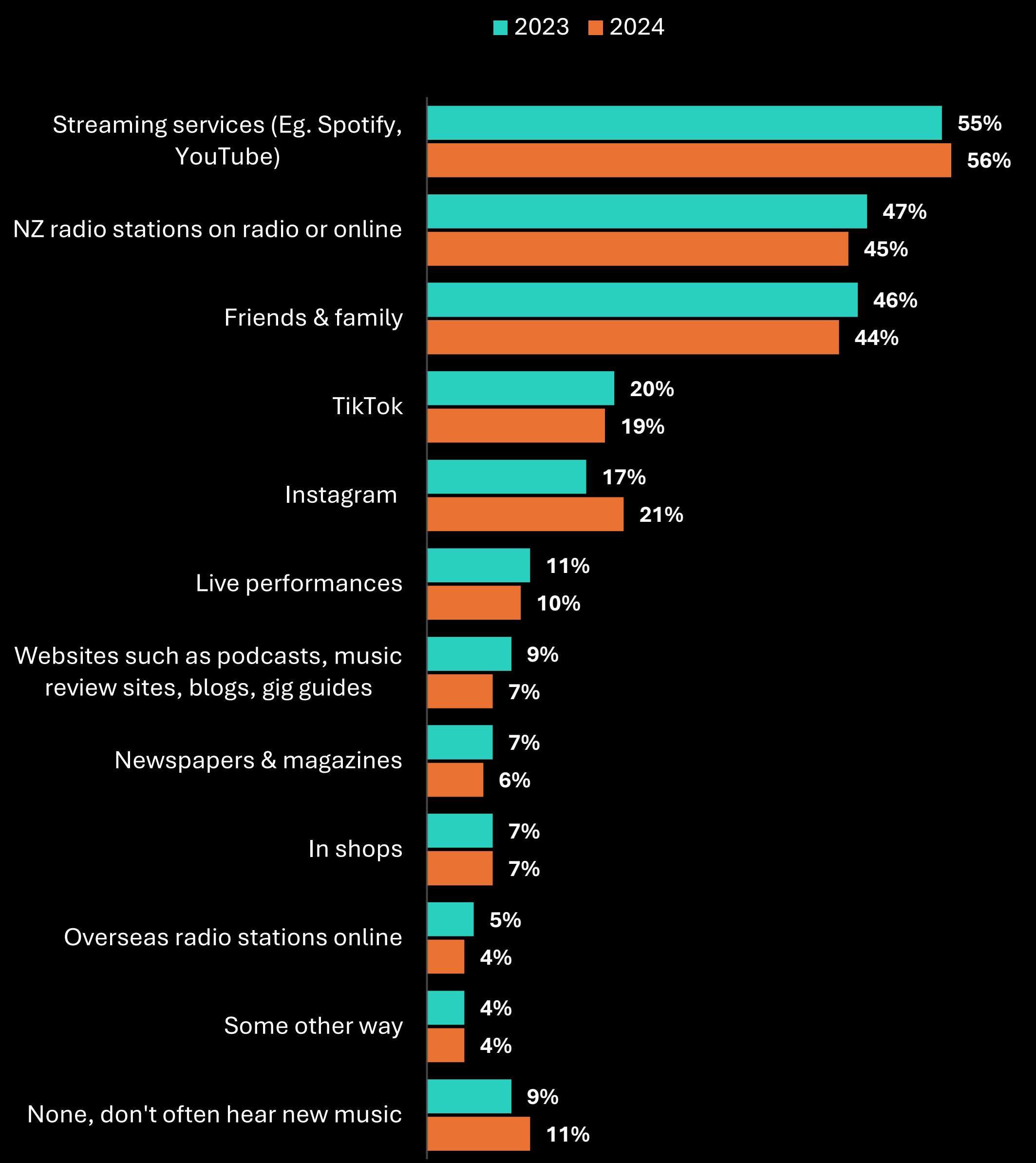
SOURCE OF AWARENESS OF NEW MUSIC - 2024

All New Zealanders 15+

Streaming services such as Spotify and YouTube remain the most influential sources of music discovery, these have been slowly growing over time, with a slight increase from last year.

Radio and friends and family are the next most influential, both have declined slightly year on year.

TikTok grew rapidly from when it was first measured in 2021 and has since stabilised, while Instagram has increased significantly in the last year.



Base: All respondents (2023 n = 1,408; 2024 n = 1,404)

Q. In which of the following ways, if any, do you usually find out about new music?

08

SOURCES OF NEWS AND INFORMATION AND SOURCES OF PODCASTS

SOURCES OF NEWS

All New Zealanders 15+

New Zealanders keep up to date with news from a wide range of sources.

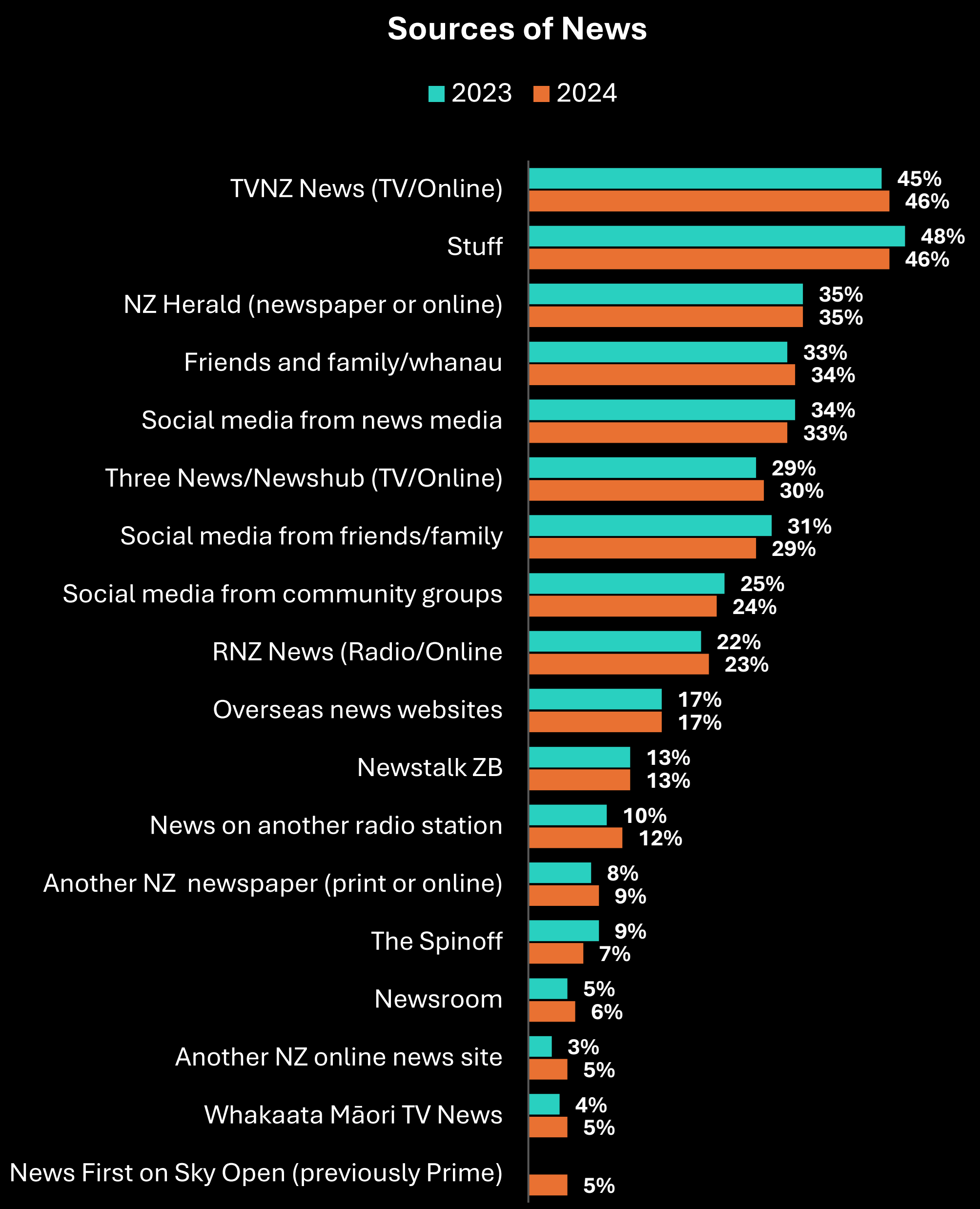
Following growth by Stuff as a major source of news, it has declined slightly in the last year with TVNZ News and Stuff now being equal as the most popular source of news.

NZ Herald has remained stable while ThreeNews/Newshub shows a slight increase.

There is little year-on-year change for other sources of news.

N.B. At the time of this survey, the Newshub brand and website was still in existence (shut down was 6th July). The announcement that Stuff would take over running TV3's 6pm bulletin and Newshub would be closing, was on 16th April, just as fieldwork commenced.

Base: All respondents (2023 n = 1,408; 2024 n = 1,404)



Q. Which of the following sources of news and information do you regularly use to keep up to date? (select all that apply)

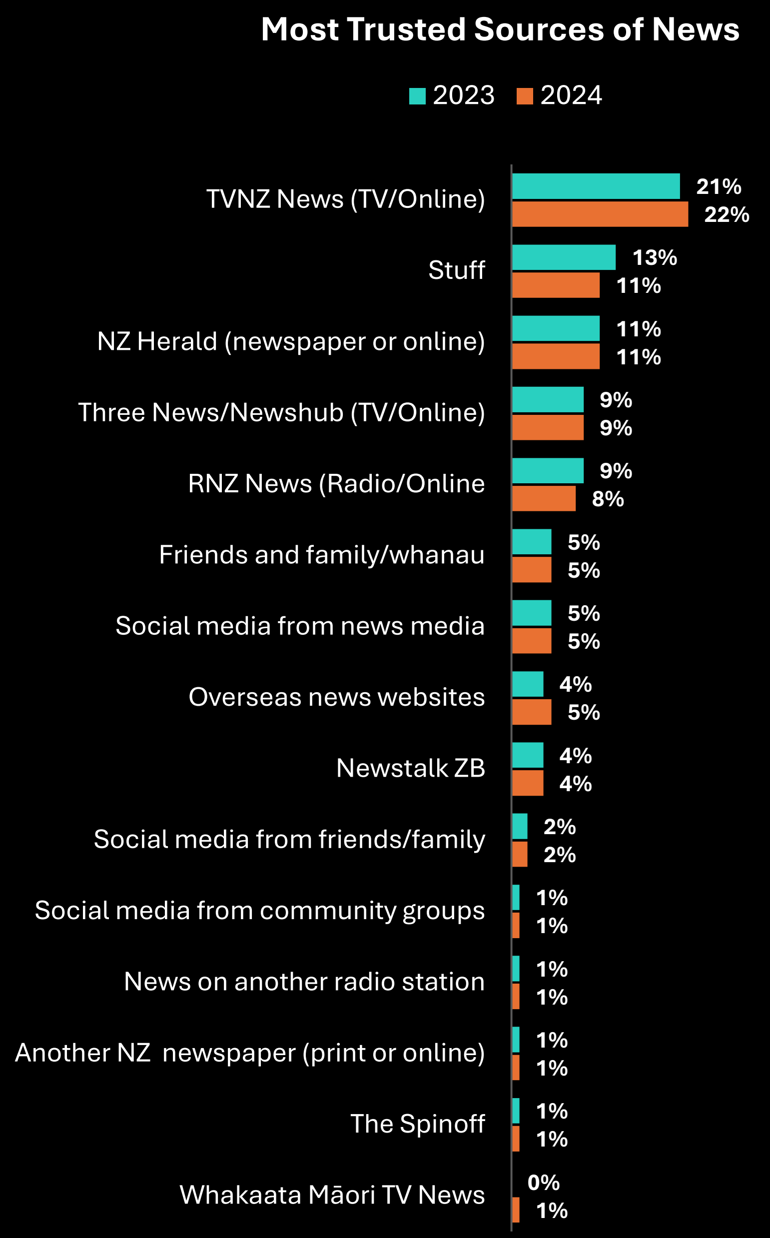
MOST TRUSTED SOURCE OF NEWS

All New Zealanders 15+

While Stuff and TVNZ News are equal as the most popular source of news, TVNZ News is the most trusted by a significant margin.

Stuff has in fact slightly declined in trust, now equal with NZ Herald for this measure.

Three News/Newshub and RNZ News have a similar level of trust.



N.B. At the time of this survey, the Newshub brand and website was still in existence. The announcement that Stuff would take over running TV3's 6pm bulletin and Newshub would be closing, was on 16th April, just as fieldwork commenced.

Base: All respondents (2023 n = 1,408; 2024 n = 1,404)

Q. And of these which is your most TRUSTED source of news? (select ONE only)

SOURCES OF NEW PODCASTS – 2024 COMPARED TO 2023

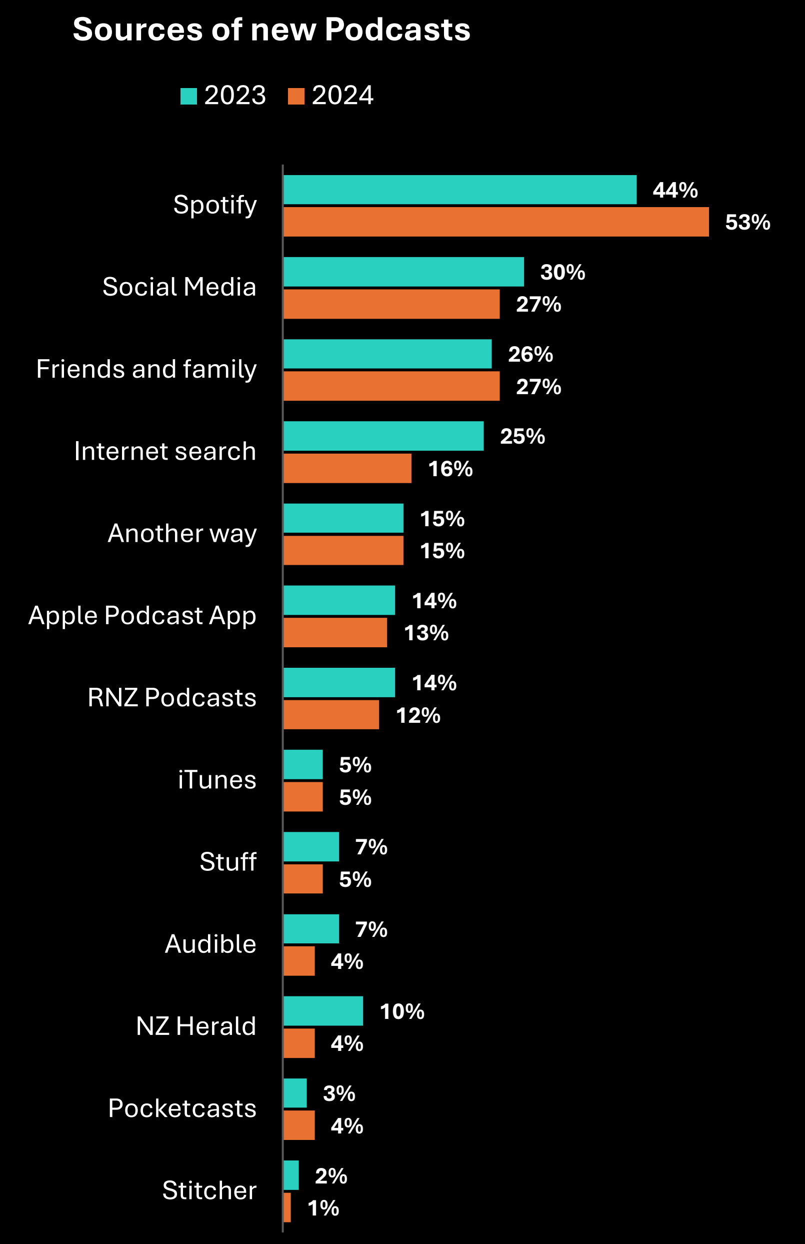
All Podcast listeners

Podcast use has grown from 7% daily reach in 2018 (when first measured in this survey) to 18% reach in 2024.

Podcast listeners are more likely to be younger (One-quarter of those aged 15-39 listen to podcasts on a daily basis) and reside in Auckland or Wellington.

Spotify remains the most common source for finding new podcasts and has increased significantly in the past year. This is followed by social media and friends and family. General internet searching has declined since 2023, and most other sources have declined or remained stable.

Base: All podcast listeners (2023 n = 245; 2024 n = 250)



Q. In which of the following ways do you find new podcasts?

09

STREAMING, DOWNLOADING AND TORRENTING

USE OF UNAUTHORISED PLATFORMS

All New Zealanders 15+

In 2024 we added a new question "used a login or password belonging to someone outside your household so you can watch shows on an overseas site such as Netflix".

15% of all New Zealanders have done this activity in the last month, with a higher incidence among those aged 15-39, especially the 15-24 group (**29%**).

Youth (15-24's) are much more likely to have done any of these other "unauthorised" activities within the last month, while males and those aged 15-39 also have a higher incidence for downloading / torrenting TV shows and downloading music.

Note that in previous years, the survey collected data on "ever used" and frequency of use so an exact trend cannot be provided, although the comparison of monthly use this year to weekly in 2023 suggests that usage is generally stable.

Base: All respondents (2024 n = 1,404)

Activity	All 15+	Male	Female	Youth 15-24	All 15-39
Streamed, downloaded or torrented TV shows from an overseas website	17%	**21%**	13%	**23%**	**22%**
Used a login or password belonging to someone outside your household to watch shows on an overseas site such as Netflix	15%	15%	15%	**29%**	**22%**
Downloaded songs or albums for free from the internet	10%	**12%**	9%	**15%**	14%
Used a VPN or Virtual Private Network to watch shows on an overseas website like Netflix or BBC iPlayer or Hulu	10%	11%	8%	**14%**	11%
None of these	62%	58%	**66%**	**41%**	**51%**

Q. Which of the following have you done recently i.e within the last month?

10

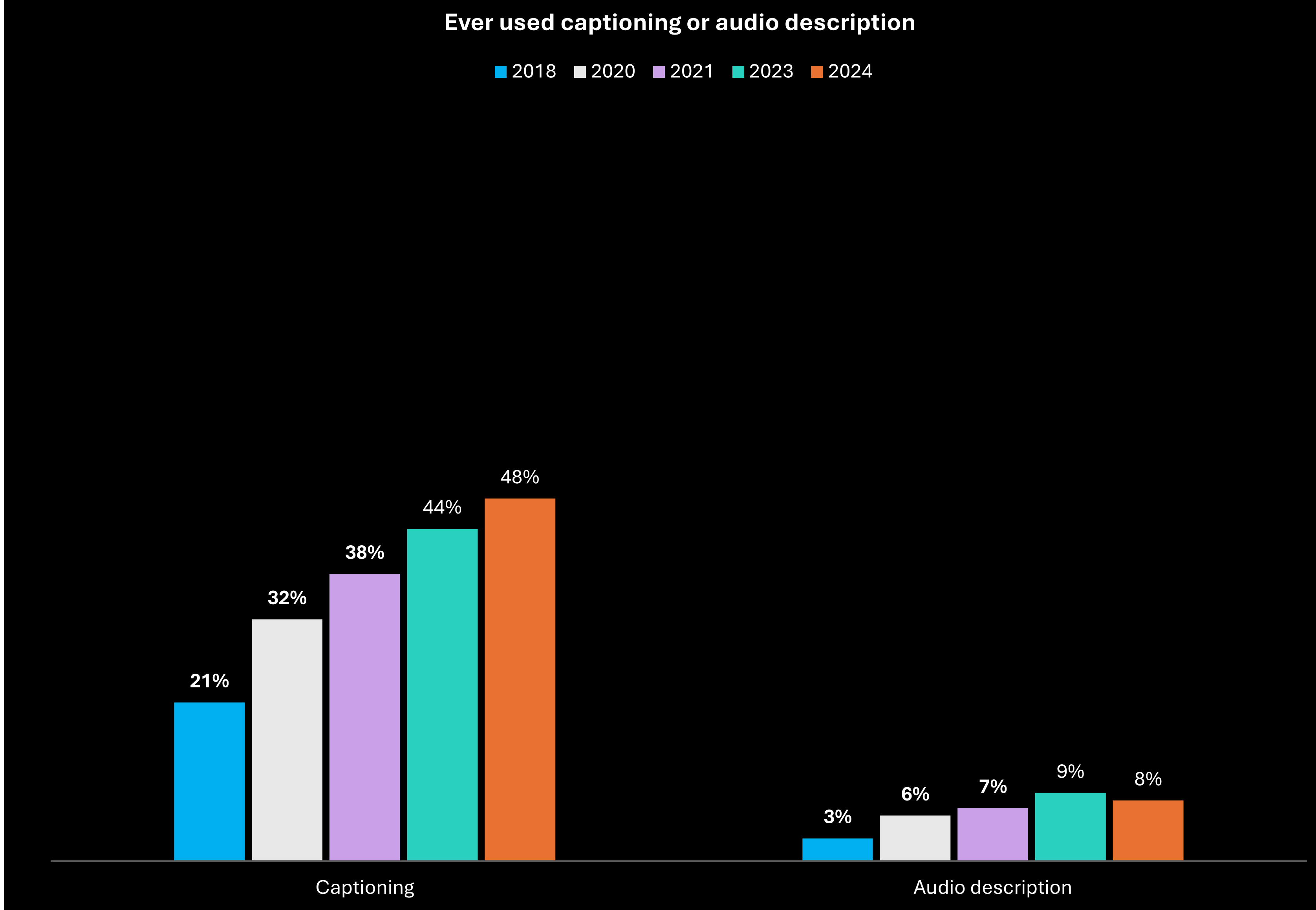
CAPTIONING AND AUDIO DESCRIPTION

EVER USED CAPTIONING OR AUDIO DESCRIPTION WHILE WATCHING TV

All New Zealanders 15+

The proportion of New Zealanders who use captioning while watching TV continues to increase, now close to half of all New Zealanders.

Audio description is much less widely used. It has been trending upwards, however has slightly declined this year.



Base: All respondents ((2018 n = 1,414; 2020 n = 1,511; 2021 n = 1,420; 2023 n = 1,408; 2024 n = 1,404)

Q. Do you ever use audio description while you are watching TV? By audio description we mean the voice-over service that describes what is happening visually on the TV
Q. Do you ever use captioning while you are watching TV? By captioning we mean English subtitles so you can read what people are saying if you are having trouble hearing or understanding them.

11

DEVICES OWNED

DEVICES / SERVICES OWNED OR ACCESSED IN NZ HOMES

All New Zealanders 15+

Over 8 out of 10 of us have a smartphone, while 7 out of 10 have a PC or laptop, no significant change for either of these year on year.

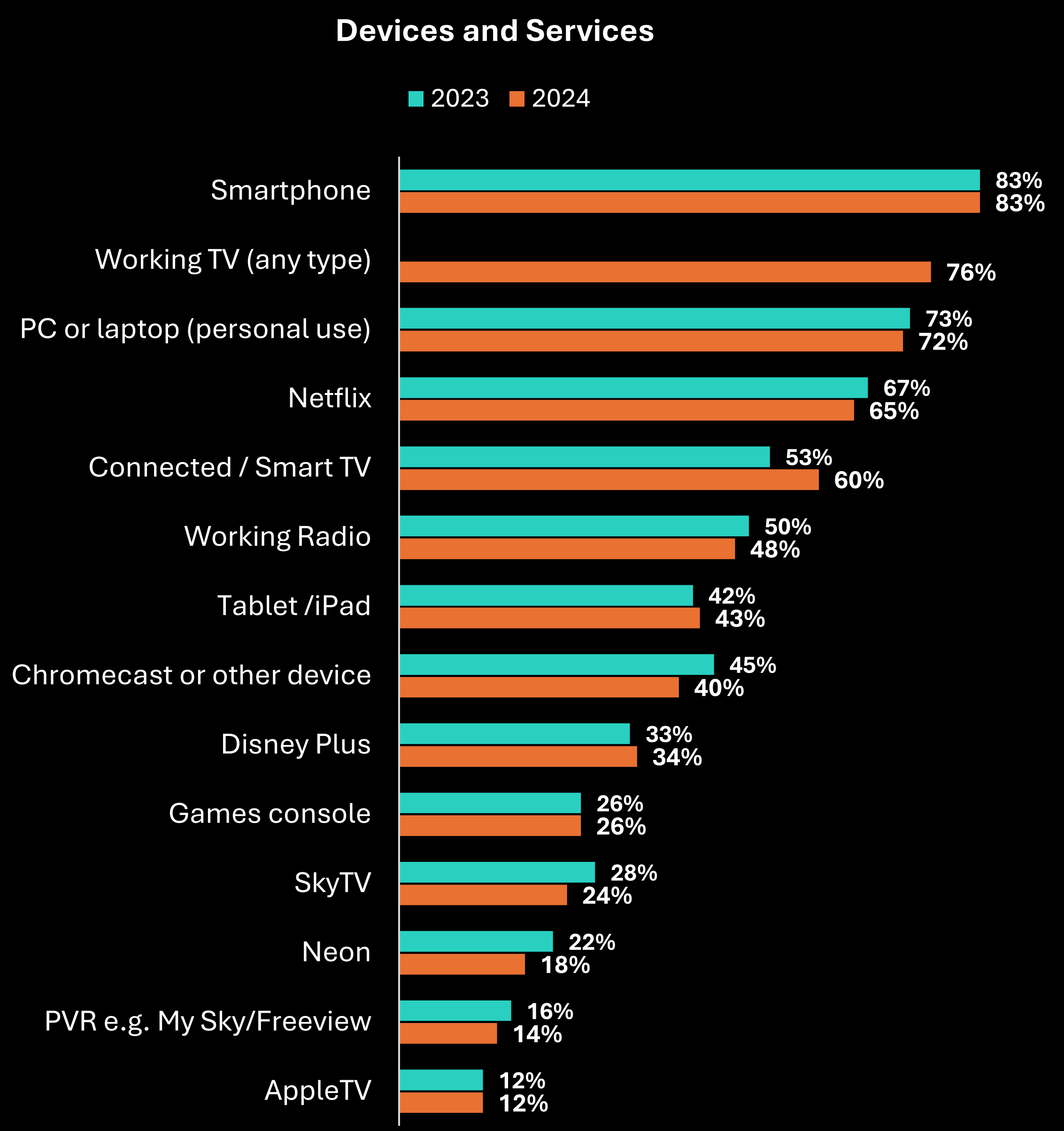
76% report to have (any type) of TV, with 6 out of 10 a Connected or Smart TV – up **from 53% in 2023.** 40% have a Chromecast or other device to connect to the internet which has declined from 45% in 2023, perhaps due to people converting to a Smart TV.

The percentage of New Zealanders having access to Netflix, SkyTV and Neon has declined year on year, which generally aligns with the daily reach figures for these services. Disney Plus access has increased slightly, however daily usage has decreased slightly.

Working radio slightly down, tablet ownership slightly up while games console shows no change year on year.

N.B. The definition for Working TV" was changed in 2024 to include all TV's so the 2023 figure is not comparable.

Base: All respondents (2024 n = 1,404)



Q. Which of the following, if any, do you personally own or have daily access to?
(New question 2024) You mentioned you have a Working TV. Is this a Smart TV that can connect to the Internet?


SERIES
TV
PC
TABLET
PHONE
CALIFORNIA
Starring: John Badman, Susan Philips, Thomas Barry
Action/Drama
Continue Watching
Language/Subs
Add to My List

12

APPENDIX

WHAT IS THE DAILY PROFILE OF CONSUMERS OF DIFFERENT MEDIA?

	More likely to engage	Less likely to engage
Global video sharing platforms (64% daily reach overall)	• 15–39-year-olds (81%) – Students (86%) – Flatting (84%) • Young singles/couples, no kids (72%); 4+ person homes (72%) • Asian (84%); Pasifika (77%) • Aucklanders (73%)	• 50+ year olds (50%) – esp. 65+ year olds (32%) • Empty nesters (37%) • Retirees (43%) • 1-2 person homes (54%)
NZ Online Video (21% daily reach overall)	• 40–54-year-olds (25%) • Aucklanders (26%) • Families with kids (25%) • Homemakers (29%) • Non-European (Māori, Pasifika and Asian) (26%)	• 15–34-year-olds (17%) • Young singles/couples, no kids (16%) • Students (13%)
SVOD (56% daily reach overall)	• 15–39-year-olds (67%) • Flatting (63%) • Young singles or couples, no kids (66%) • Pre-school families (64%) • 5+ person homes (67%) • Pasifika (62%)	• 55+ year olds (39%) – esp. 65+ (35%) • Retiree (36%) • Empty nesters (40%) • 1-2 person homes (42%)

WHAT IS THE DAILY PROFILE OF CONSUMERS OF DIFFERENT MEDIA?

	More likely to engage	Less likely to engage
TV (60% daily reach overall)	• 35+ (67%) – Esp. 45+ (75%) and 60+ (80%) – (28%) • Māori (66%)	• 15–34-year-olds (43%) – 15-24 (41%) – 25-29 (37%) – 30-34 (51%) • Flatting (45%)
Linear TV (47% daily reach overall)	• 45+ year olds (63%) – esp. 60+ (72%) • Retirees (74%) • Empty nesters (71%) • Sky TV homes (74%) • PVR homes (76%) • Male (50%)	• 15–49-year-olds (33%) • Students (31%) • Flatting (28%) • Young singles/couple, no kids (30%) • 5+ person homes (36%) • Asian (28%)
NZ BVOD (35% daily reach overall)	• 45–59-year-olds (42%) • Extended families (38%) • Mid-high-income earners ($50-$150k) (38%) • Māori (44%) • Pasifika (38%)	• 15-24 year-olds (23%) • Students (23%) • Flatting (28%) • Young singles/couple, no kids (28%) • Asian (23%)

WHAT IS THE DAILY PROFILE OF CONSUMERS OF DIFFERENT MEDIA?

	More likely to engage	Less likely to engage
Radio (46% daily reach overall)	• 35+ year olds (50%) • Males (50%) • European (50%) • Retiree (50%) • Family with school age kids	• 15–34-year-olds (37%) • Asian (36%) • Māori (36%) • Younger singles/couples (37%)
Broadcast Radio (42% daily reach overall)	• 50+ year olds (48%) • Empty nesters and older singles (46%) • Retirees (51%) • SKY TV homes (48%)	• 15–39-year-olds (35%) • Students (17%) • Flatting (33%) • Young singles (30%) • 5+ person homes (31%) • Asian (33%) • Māori (33%)
Online NZ Radio (13% daily reach overall)	• Males (15%) • 45+ year olds (15%) • Empty nesters (16%)	• 25–34-year-olds (7%) • Students (7%) • Asian (9%)

WHAT IS THE DAILY PROFILE OF CONSUMERS OF DIFFERENT MEDIA?

	More likely to engage	Less likely to engage

Music streaming
(49% daily reach overall)
	• 15–34-year-olds (70%)
	  – esp. 15-24s (82%)
	• 35-49 (56%)
	• Students (78%)
	• Flatting (71%)
	• Young singles and couples, no kids (63%)
	• Asian (62%)
	• Pasifika (62%)
		• 50+ year olds (31%)
		  – 60+ year olds (19%)
		• Retirees (17%)
		• Empty nesters (27%)
		• 1-2 person homes (39%)

Music on CDs/iPods/Vinyl (12% daily reach overall)	• 50+ year-olds (15%) • Older couple, no kids (14%)	• 15–29-year-olds (8%) • Students (3%)

WHAT IS THE DAILY PROFILE OF CONSUMERS OF DIFFERENT MEDIA?

	More likely to engage	Less likely to engage
Podcasts (18% daily reach overall)	• 15–39-year-olds (24%) • Young singles/couples, no kids (27%) • Families with kids under 15 (27%) • Upper white-collar workers (22%) • Māori (23%) • Aucklanders (20%)	• 45+ year olds (12%) • Retirees (8%) • Empty nesters (12%)
Online gaming (29% daily reach overall)	• 15–39-year-olds (36%) – 15–24-year-olds (41%) • Students (39%) • 5+ person homes (37%) • Flatting (42%) • Pasifika (39%)	• 55+ year olds (20%) • Retirees (20%) • Empty nesters (23%)

WHAT IS THE DAILY PROFILE OF CONSUMERS OF DIFFERENT TV AND ONLINE VIDEO PLATFORMS?

	More likely to engage	Less likely to engage
YouTube (for video) (43% daily reach overall)	• 15–39-year-olds (50%); esp. 15 – 24 (55%) • Male (52%) • Aucklanders (53%) • Asian (65%); Pasifika (55%) • Students (51%); Flatting (48%) • Young singles/couples, no kids (47%)	• 55+ year olds (36%); esp. 60+ year olds (31%) • Female (33%) • Empty nesters (34%) • Retirees (28%) • 1-2 person homes (39%)
TVNZ+ (26% daily reach overall)	• 25-34 (30%); 45+ (30%) • Māori (35%); Pasifika (30%) • Home-maker (37%); Retirees (31%) • Families with kids under 15 (29%); esp. under Kids under 5 (31%) • Older couples or singles (31%) • Higher income - $80K+ (28%), esp. $120K+ (31%)	• Students (14%) • Flatting (17%) • Asian (15%)
ThreeNow (10% daily reach overall)	• 35 – 59 (13%) • Māori (13%); Pasifika (13%) • Home-maker (31%) • Families with kids of mixed ages (14%)	• 15 – 29 (6%) • Students (4%) • Younger singles or couples (5%)

Base: All Respondents (n = 1.404); (You Tube n = 597; TVNZ+ n = 365; ThreeNow n = 137)

WHAT IS THE DAILY PROFILE OF CONSUMERS OF DIFFERENT TV AND ONLINE VIDEO PLATFORMS

	More likely to engage	Less likely to engage
Netflix (38% daily reach overall)	• 15 – 24 (51%); 30 – 44 (49%) • Pasifika (49%); Asian (40%) • Students (49%) • Families (45%); Solo parent (50%) • Households with 3 or more (46%) • Higher income - $80K+ (43%)	• 25 – 29 (34%) • 50+ (29%) – esp. 60+ (24%) • Retirees (24%) • Older couples or singles (26%) – esp. singles (19%)
Disney Plus (13% daily reach overall)	• 15 – 39 (20%); 45 – 49 (40%) • Māori (20%) • Home-maker (26%); Student (20%) • Families with kids of mixed ages (18%) – esp. kids aged 6 to 15 (20%) • Households with 4 or more (18%)	• 50+ (6%) • Retirees (1%) • Older couples or singles (6%)

Base: All Respondents (n = 1.404) (Netflix n = 531; Disney Plus n = 180)

WHAT IS THE DAILY PROFILE OF CONSUMERS OF DIFFERENT ONLINE VIDEO PLATFORMS?

	More likely to engage	Less likely to engage
Facebook (incl. Messenger) (36% daily reach overall)	• 15–39-year-olds (44%); esp. 15 – 24 (49%) • Pasifika (52%); Asian (49%); Māori (43%) • Home-maker (53%) • Females (40%) • Families with kids of mixed ages (49%); Flatting (49%)	• 55+ (22%); esp. 60+ (20%) • Retiree (18%) • Older, no kids (26%) • Males (32%)
Instagram (incl. Threads) (27% daily reach overall)	• 15–39-year-olds (46%); esp. 15-24 (61%) • Pasifika (46%); Asian (42%); Māori (30%) • Females (31%) • Auckland (34%) • Students (61%); Flatting (52%)	• 50+ year olds (11%)'; esp. 60+ (5%) • Retiree (6%) • Older, no kids (12%) • 1-2 person homes (19%)
TikTok (18% daily reach overall)	• 15–39-year-olds (33%); esp. 15-24 (52%) • Pasifika (37%); Asian (25%); Māori (24%) • Student (55%); Flatting (40%) • Female (22%)	• 40+ (9%); esp. 55+ (4%) • Retiree (4%) • Older, no kids (4%)

Base: All Respondents (n = 1.404); (Facebook n = 503; Instagram n = 378; TikTok n = 256)

Glasshouse

WHERE ARE THE AUDIENCES?

2024

Irirangi Te Motu
NZ On Air