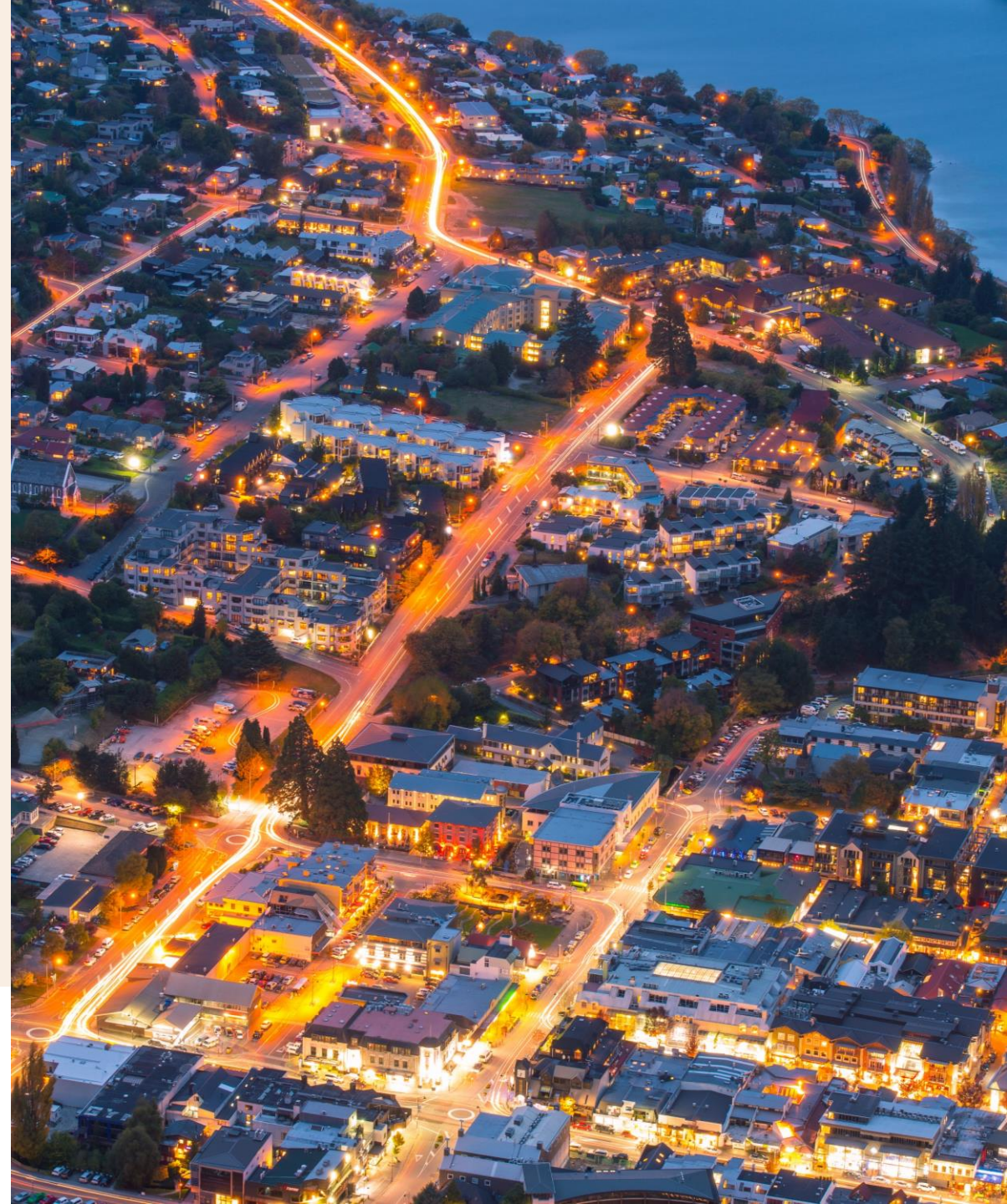


Where are the Māori audiences?

Presentation

Jay Carlsen, Correna Matika & Nan Wehipeihana

23 July 2024



Purpose

In this research project, we set out to understand:

- How Māori audiences in Aotearoa New Zealand consume media
- What content they prefer...
- ... and what their motivations are for consuming content.

NZ On Air and Te Māngai Pāho will use this information to inform investment strategies, and to fund authentic content that meets Māori wants and needs, on the platforms they use.

QUALITATIVE STAGE

- 8 focus groups (47 people)
- Auckland, Gisborne, Manawatū, Wellington
- 25 February - 20 March 2024
- One group with 16-19 years and 60+ years
- Two groups with 20-29 years, 30-39 years and 40-59 years

QUANTITATIVE STAGE

- Nationwide phone and online interviews
- 704 Māori (15 years +)
- 15 April - 10 May 2024
- Maximum margin of error of +/- 3.7%
- Data matches Māori 15 years+ population characteristics (age by gender, and region)



Not Even

A group of 20-something Māori and Pasifika stumble their way through Wellington City and cultural identity in this original new comedy series.

Watch on [SkyGo](#)



Kura

Billy-john and his best mate Hotene navigate the life and times of Papakura, South Auckland.

Watch on [TVNZ+](#)



Into the Valley

This four-part documentary delves into the lives of people from both sides of the line that were impacted by raids on Tūhoe in 2007.



West Coasters

This new series follows the triumphs and challenges of Māori who are keeping the home fires burning in the most remote, most beautiful places across the motu.

Sought specific feedback on a range of local programmes

A choice of programmes funded by NZ on Air and Te Māngai Pāho

We created a login-link

View at least 2 programmes for at least 10 minutes

Provide written feedback

- Why did you choose this programme?
- What did you like/not like?
- Would you watch it again?

Captured feedback electronically and in the focus group (n=29)

This was a pre-group homework task

Key findings

Māori have access to smartphones and smart TVs

- Online video is the most popular activity
- Gaming has the largest share of time

Overall, Māori don't tend to be on the platforms where local content exists

- But nearly 1 in 10 do watch Māori+
- This doubles among those fluent in te reo

Māori watch content to relax, to unwind and to be entertained

- 9% watch shows because they reflect Māori culture
- This doubles among those fluent in te reo

Key findings

For NZ content, Māori want to relate

- This includes NZ faces and places, Kiwi humour, relatable NZ stories, Māori culture and history, and NZ music

Most Māori prefer content with some te reo in terms of encouraging them to watch NZ shows

15-24 year olds display key differences

- More likely to consume global online media
- Far more likely to discover new content via social media

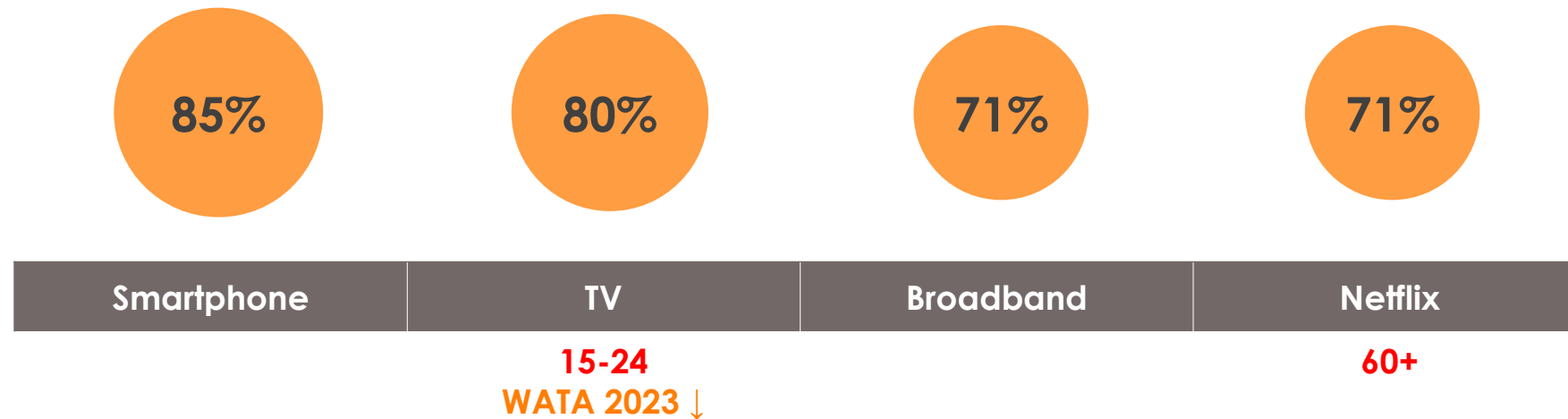
How do Māori audiences consume media?



Most Māori have access to a smartphone, smart TV and broadband. Netflix is the most popular streaming platform.

Which of the following, if any, do you personally own or have daily access to?

Top four devices or services



Source: Q19. Which of the following, if any, do you personally own or have daily access to?

Base: Māori (n=704)

Almost all Māori watch online videos. Young Māori are less likely to engage with TV and radio.

Which of the following activities did you do for 5 minutes or more yesterday?

Total categories | Top three activities



Source: Q1. Which of the following activities did you do for 5 minutes or more yesterday?

Base: Māori (n=704)

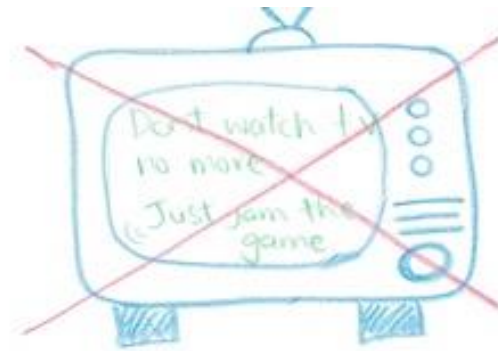
Verian | Iirangi Te Motu, NZ On Air in partnership with Te Māngai Pāho

XX / XX WATA 2023 significantly higher / lower

XX / XX Significantly higher / lower than rest of sample | 7



Gaming is popular,
particularly with tāne Māori



"I don't watch TV anymore I just jam the game." (Tāne, 16-19)



"You can control everything through your PlayStation controller. When I'm not gaming I'm chatting to friends who are gamers. And then I might flick to Crunchyroll to watch some Anime'" (Tāne, 20-29)

A third of Māori game online and spend on average two hours a day doing so. Older Māori spend the most time watching TV.

And for about how long in minutes yesterday did you (insert activity)?

Total categories | Top three activities



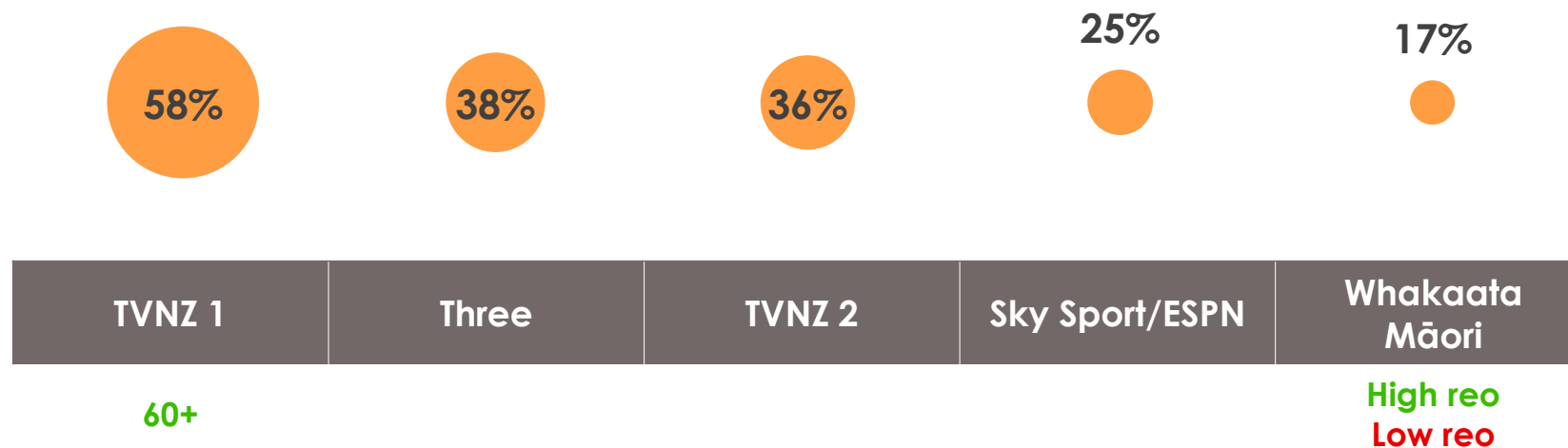
Source: Q2a. And for about how long in minutes yesterday did you (insert activity)?

Base: In table

Of those who watch TV, three in five watch TVNZ 1. 17% watch Whakaata Māori, doubling for those with high reo fluency.

Thinking about yesterday overall which TV channels did you watch?

Top five TV channels

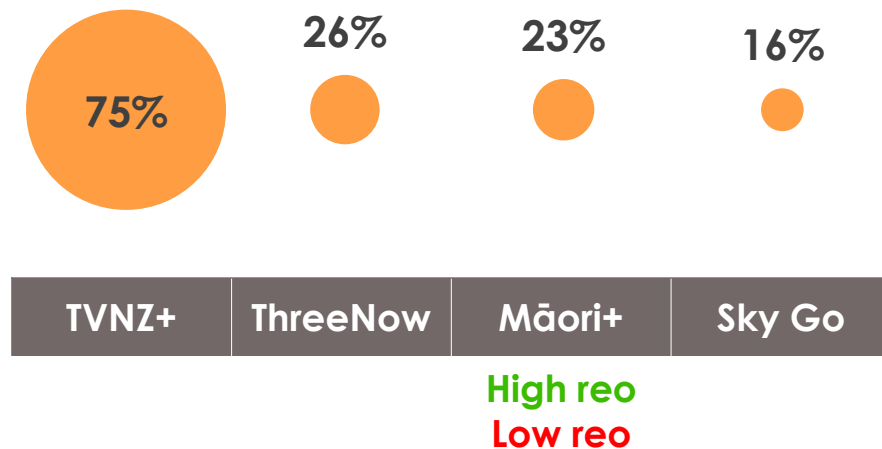


Source: Q3. Thinking about yesterday overall which TV channels did you watch?

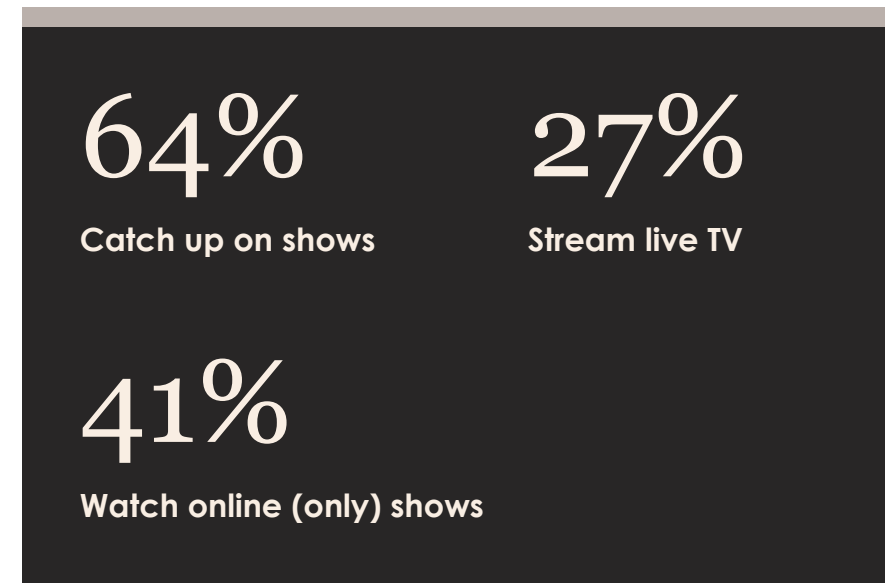
Base: Māori who watched live or recorded TV (n=335)

Māori watch videos on TVNZ+, while around one quarter use Māori+. Most use these services to catch up on shows.

Thinking about yesterday overall which of the following websites or apps did you use?
Top four websites/apps



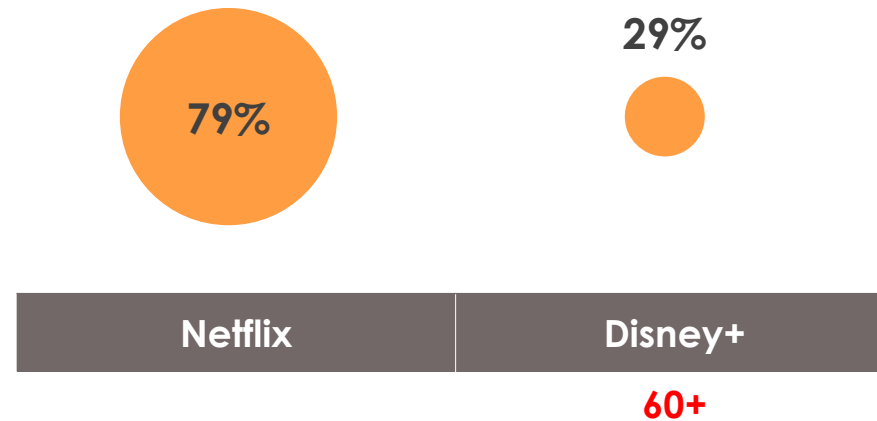
Thinking about when you used TVNZ +/TVNZ OnDemand, ThreeNow, Whakaata Māori TV On Demand/Māori+ or Sky Go yesterday did you use it to do any of the following?



The majority of Māori who watch videos on a streaming service use Netflix.

Thinking about yesterday overall which of the following websites/services did you use to watch TV shows or movies?

Top two websites/services



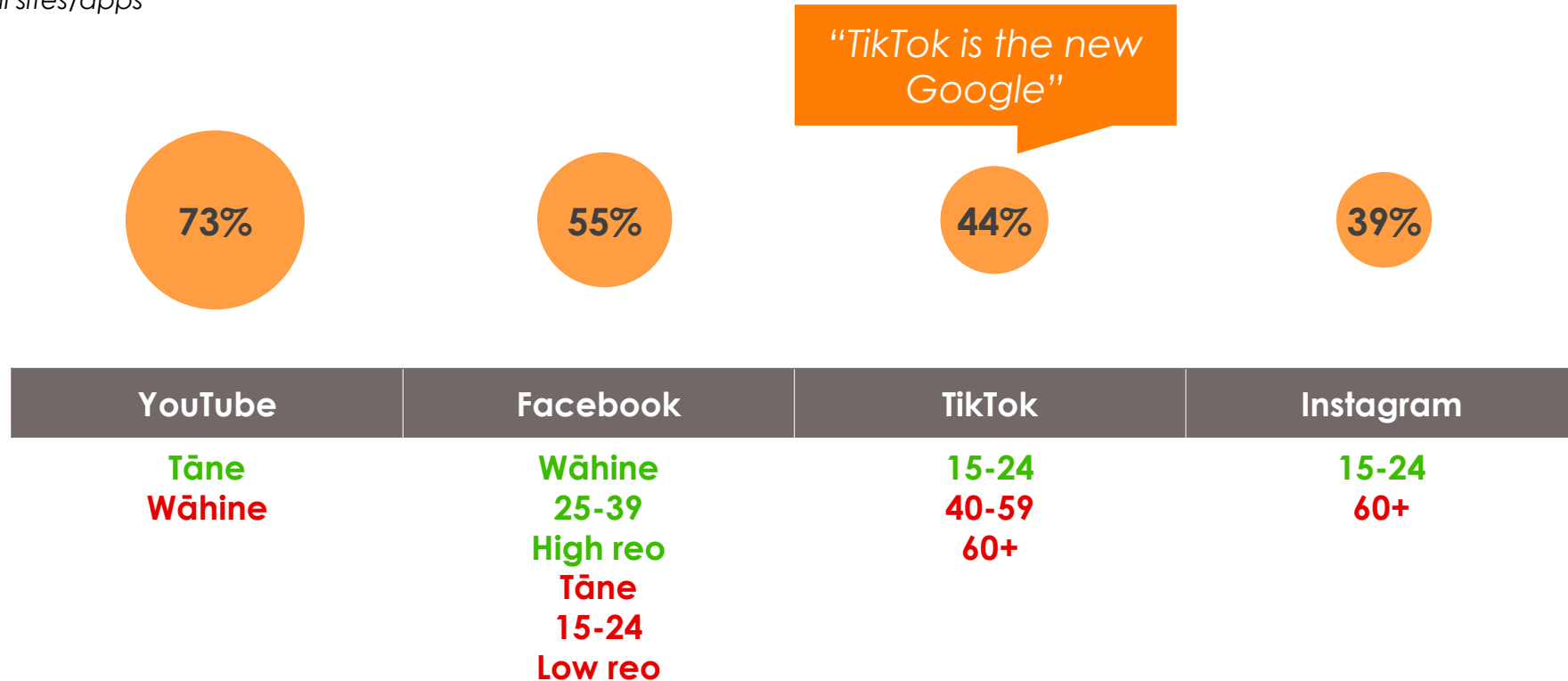
Source: Q4b. Thinking about yesterday overall which of the following websites/services did you use to watch TV shows or movies?

Base: Māori who watched a TV show or other video content on a website/service (n=383)

YouTube is the most popular international online video site, while TikTok and Instagram are preferred by 15-24s.

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

Top four international sites/apps



Source: Q4c. Thinking about yesterday overall, which of the following international websites/apps did you use to watch video?

Base: Māori who watched a video online using an international site/app (n=441)

Of those who use NZ sites to watch videos online, six in ten use NZ Herald, followed by Stuff.

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

Top four NZ websites



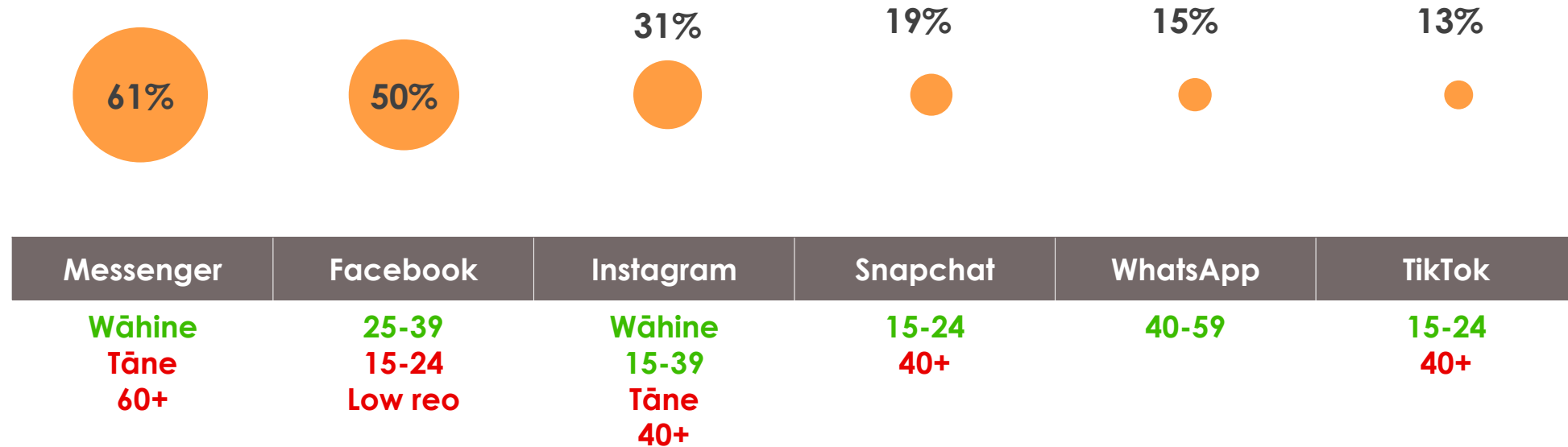
Source: Q4d. Thinking about yesterday overall, which of the following New Zealand sites did you use to watch video online?

Base: Māori who watched a video online using a NZ site (n=142)

While Messenger and Facebook are the most used social media, 15-24s congregate on Instagram, Snapchat and TikTok.

Which social media sites did you use yesterday to engage with friends or family?

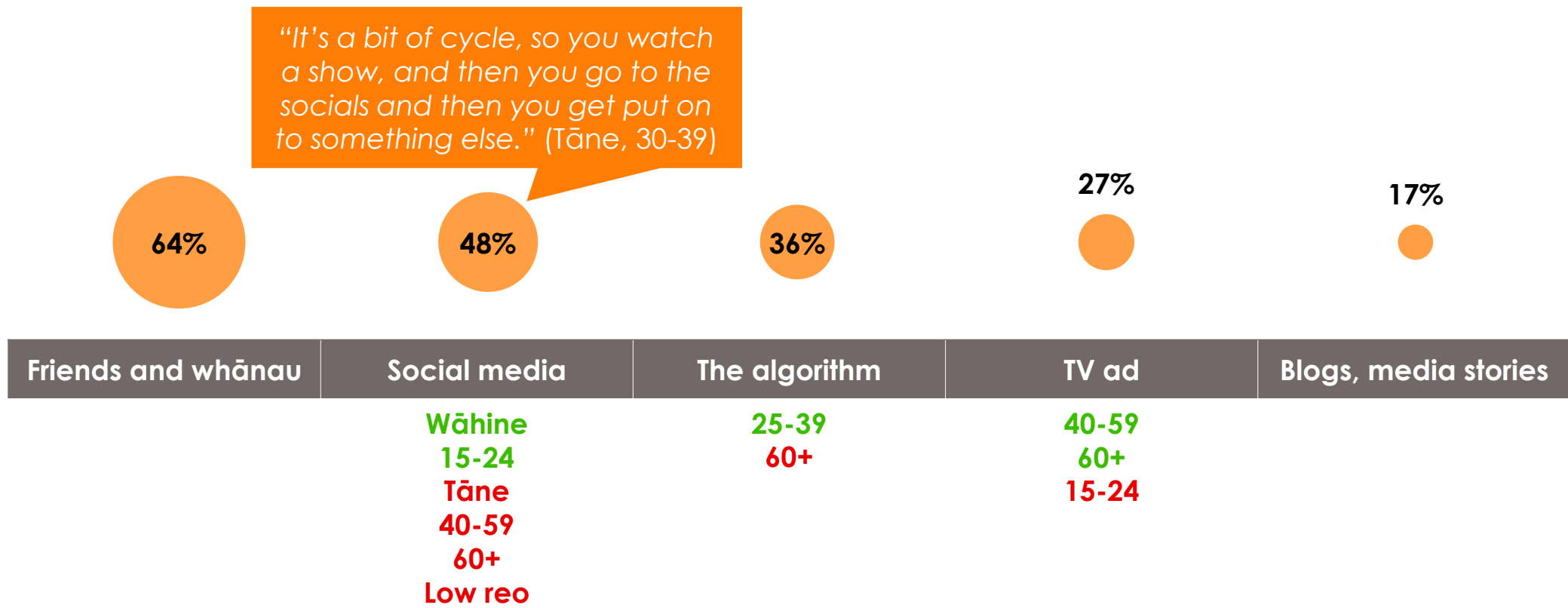
Top two social media sites people use to engage with friends or family



Source: Q7. Which social media sites did you use yesterday to engage with friends or family?
Base: Māori (n=703)

Māori are most likely to discover new content through friends and whānau, followed by social media (driven by wāhine and 15-24 year olds). Those aged 40+ are more likely to be influenced by TV advertising.

Thinking about shows that can be watched on streaming services like Netflix or Disney+, or on TV channels such as Whakaata Māori, TVNZ 1 and 2, Three or Sky, in which of the following ways do you usually find out about new things to watch?



Source: Q11. Thinking about shows that can be watched on streaming services like Netflix or Disney+, or on TV channels such as Whakaata Māori, TVNZ 1 and 2, Three or Sky, in which of the following ways do you usually find out about new things to watch?

Base: Māori (n=527)

Verian | Iirangi Te Motu, NZ On Air in partnership with Te Māngai Pāho

XX / XX Significantly higher / lower than rest of sample | 16

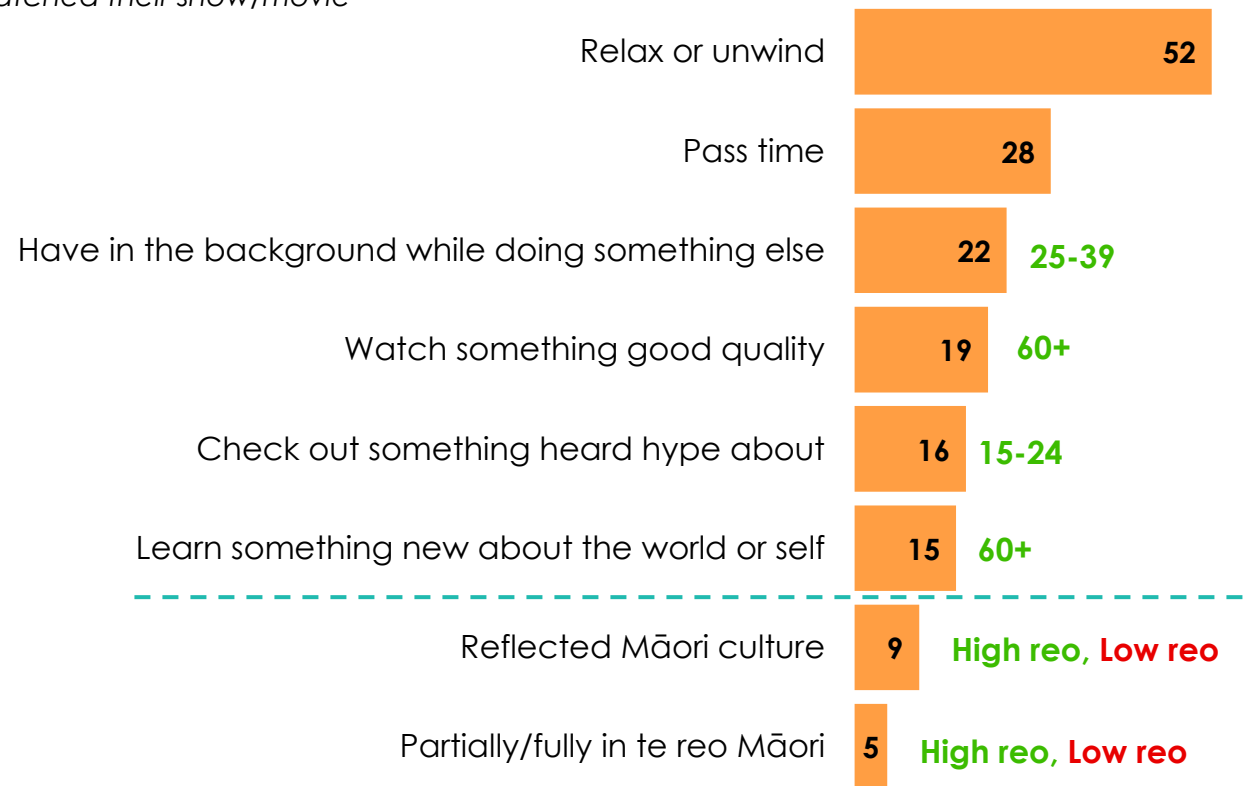
What content do Māori audiences prefer?



The primary drivers of watching shows are passive in nature, while one in ten are driven by content that reflects Māori culture.

Please think about what you watched yesterday on TV, OnDemand or online streaming services like Netflix or Disney+. Which of the following best describes why you chose to watch what you did?

Top six reasons why peopled watched their show/movie

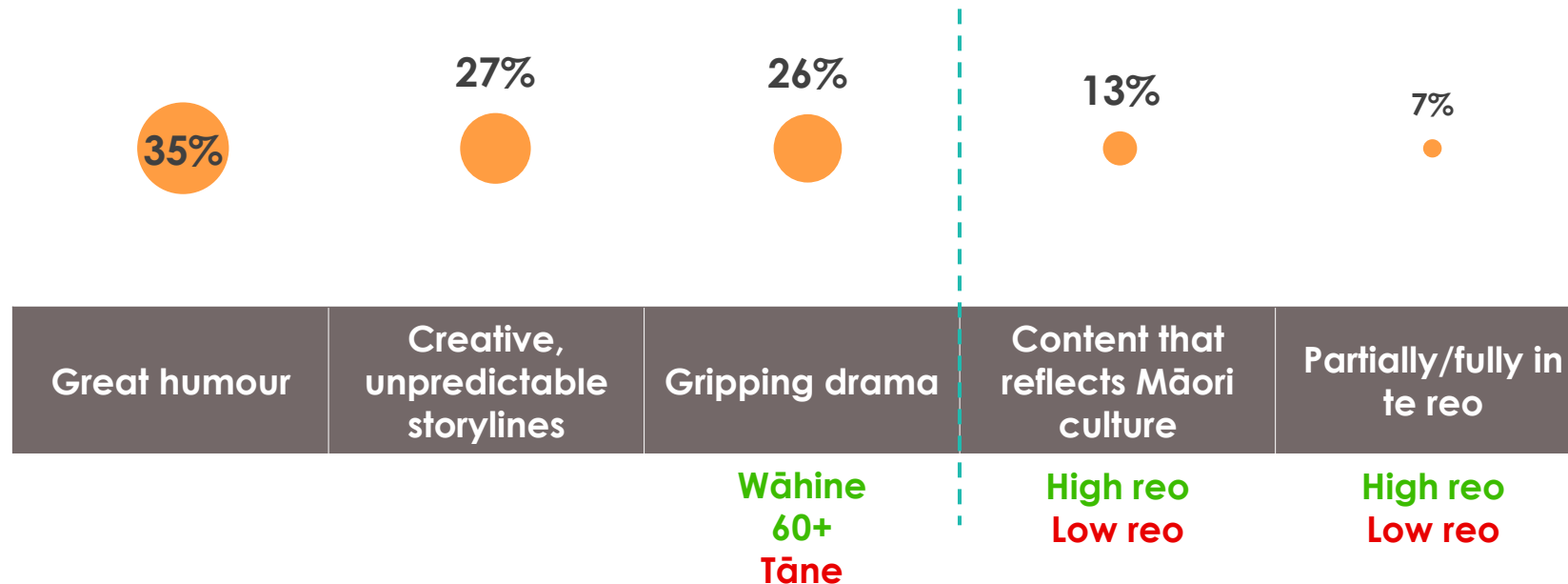


Source: Q13a. Please think about what you watched yesterday on TV, OnDemand or online streaming services like Netflix or Disney+. Which of the following best describes why you chose to watch what you did?
 Base: Māori who watched TV, On Demand or SVOD (n=661)

Māori are drawn to watching shows (on TV or streaming services) with humour, creative storylines, and drama.

Which of the following best describes what you like most about the shows you watch on TV or streaming services like Netflix and Disney+?

Top three qualities that Māori like about shows



Source: Q14a. Which of the following best describes what you like most about the shows you watch on TV or streaming services like Netflix and Disney+?
Base: Māori (n=704)



Humour is a key drawcard. Māori enjoy quick wit, banter and people laughing at themselves (and others)

"This looked like fun and after watching something wholesome, I wanted to have a katakata... I liked the banter and ribbing in this programme." (Wāhine, 40-59, Hui Hoppers)

"I enjoy reality TV series and anticipated that this one would provide both humour and inspiration. I appreciated the humour and the approach they took to reconnect with their iwi, and I admired the rawness of the show." (Wāhine, 30-39, Haututu Hunters)

"I enjoyed watching these guys who were super-fit sportsmen and role models years ago accepting the challenge of becoming healthier and fitter. Loved the honesty of their struggles, their humour and determination." (Tāne, 40-49, Match Fit)

"I picked this show because it was entertaining, Francis is a crack up. It's a lighter take on how working with heartbreak and death can be shown to be loving and happy" (Wāhine, 20-29, Casketees).



Māori like programmes with drama, good storylines, characters and actors.

"I enjoy a touch of drama, and I believed this would be something that would satisfy that preference, which it certainly did. I really appreciated the incorporation of te reo Māori. I had mixed feelings about the storyline. On one hand, I enjoyed the glimpses into each person's story, but on the other hand some things bothered me. It might just be because it's not what I'm used to." (Wāhine, 30-39, Ahikaroa)

"I enjoyed the amount of drama and enthusiasm the actors used in the short 10 minutes I watched it, was really funny to watch and made me want to keep watching. There wasn't really anything I didn't like. And yes, I would probably watch more in the series." (Wāhine, 16-19, Hui Hoppers)

"The characters are just so strong, the story telling is exaggerated and the emotions are exaggerated. That's the whole point of Anime. They are very animated characters and as you watch you become more invested in those characters ... their story." (Tāne, 20-29)

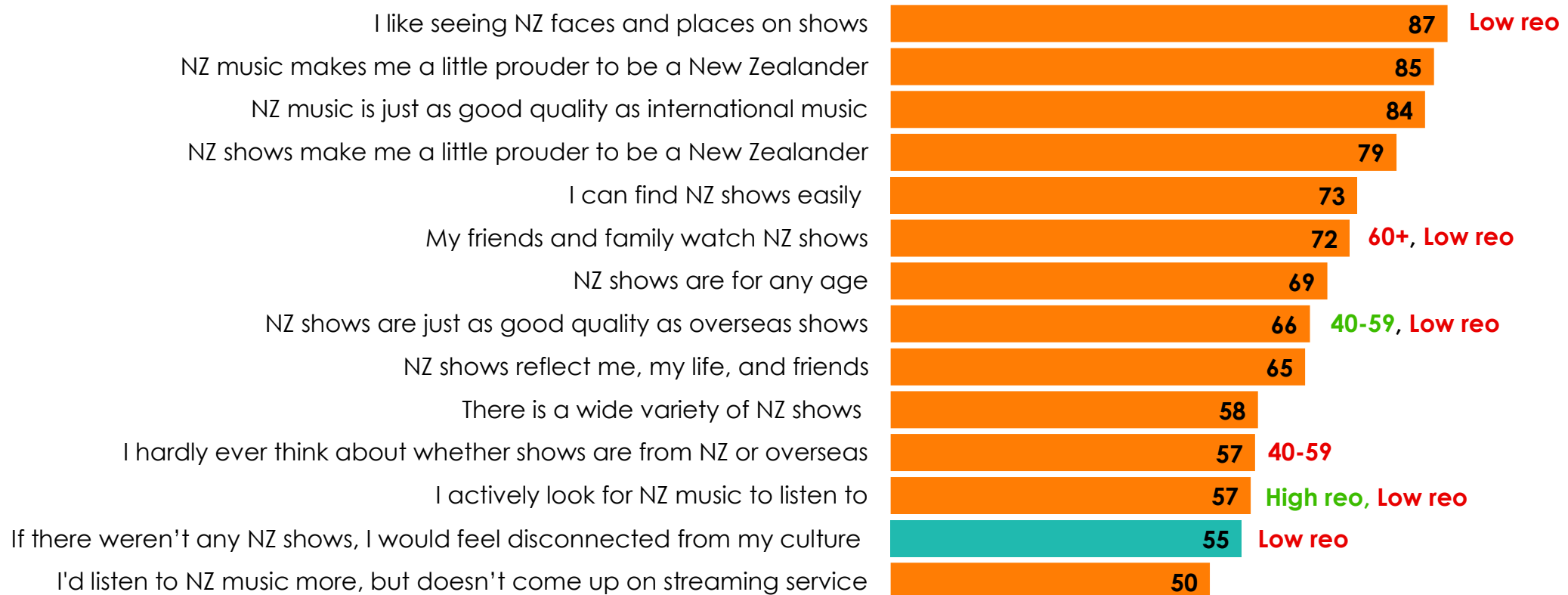
What are the motivations for consuming local content?



Over half of Māori would feel disconnected from their culture if there weren't any NZ shows.

For each one, please tell me whether you strongly or slightly agree or strongly or slightly disagree

Slightly/strongly agree%

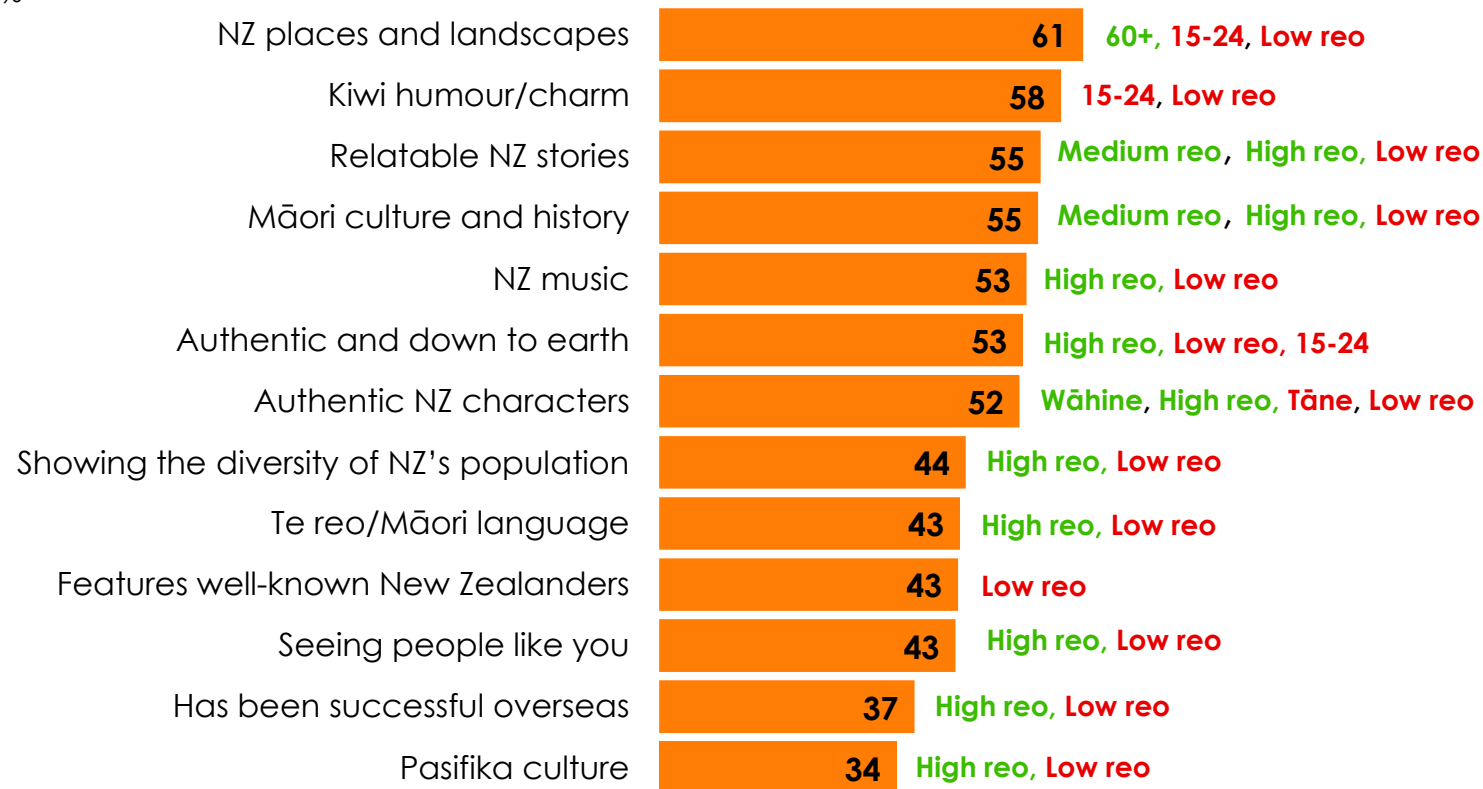


Source: Q17a. Below are some things people have said about New Zealand TV shows and music. For each one, please tell me whether you strongly or slightly agree or strongly or slightly disagree.
Base: Māori (n=504)

Māori are most motivated to watch NZ made shows by NZ places and landscapes, followed by Kiwi humour.

And thinking about NZ shows, on a scale of 1 to 10 where 1 means not at all appealing and 10 means very appealing, please tell me how appealing each of the following is in terms of encouraging you to watch NZ shows.

8-10 very appealing %



Source: Q18. And thinking about NZ shows, on a scale of 1 to 10 where 1 means not at all appealing and 10 means very appealing, please tell me how appealing each of the following is in terms of encouraging you to watch NZ shows.

Base: Māori (n=504)

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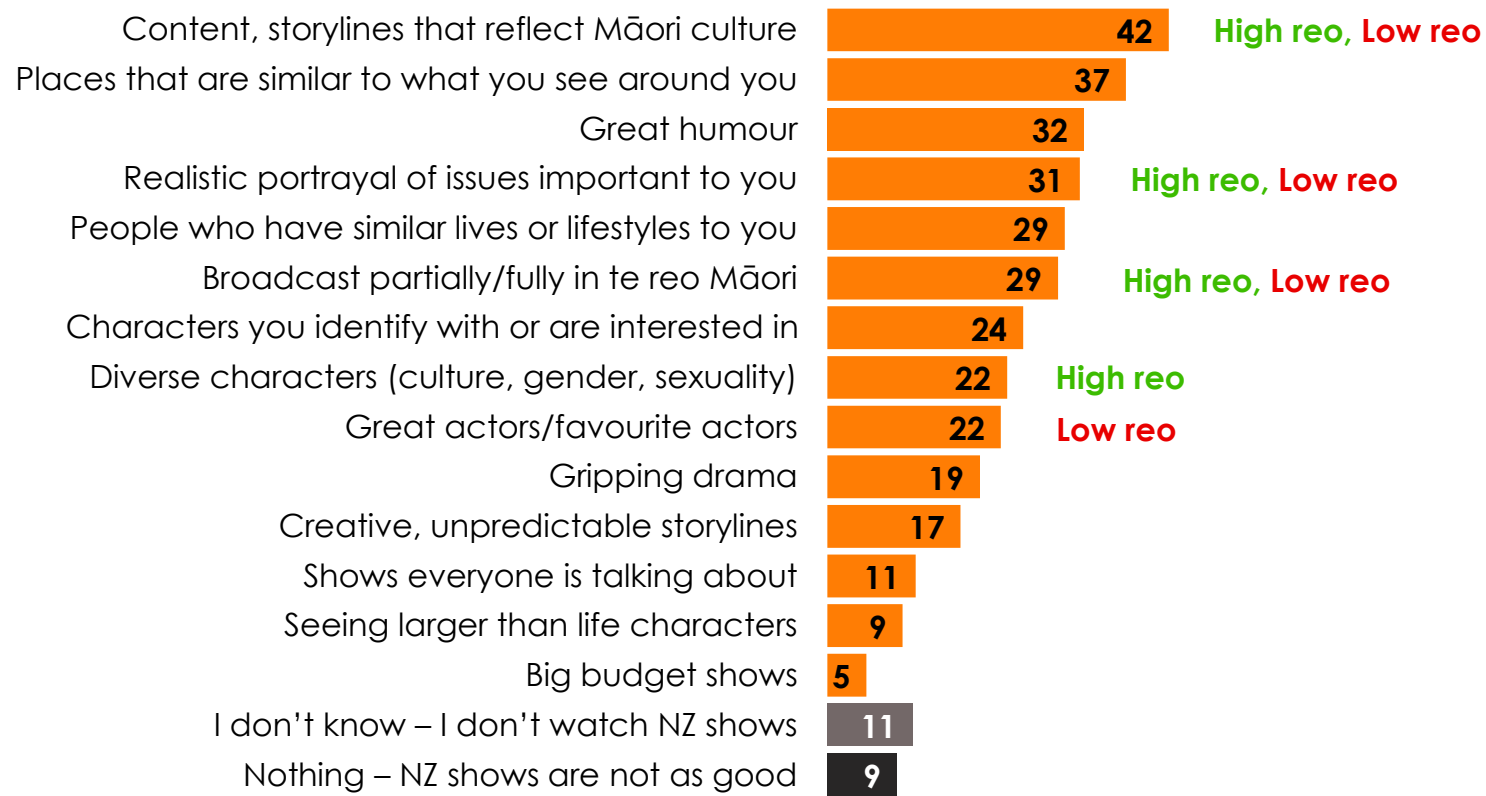
What do Māori think about local content?



Māori feel NZ made shows deliver content and storylines that reflect Māori culture better than international shows.

And which of the following, if any, do you think New Zealand made shows deliver better than international shows?

%



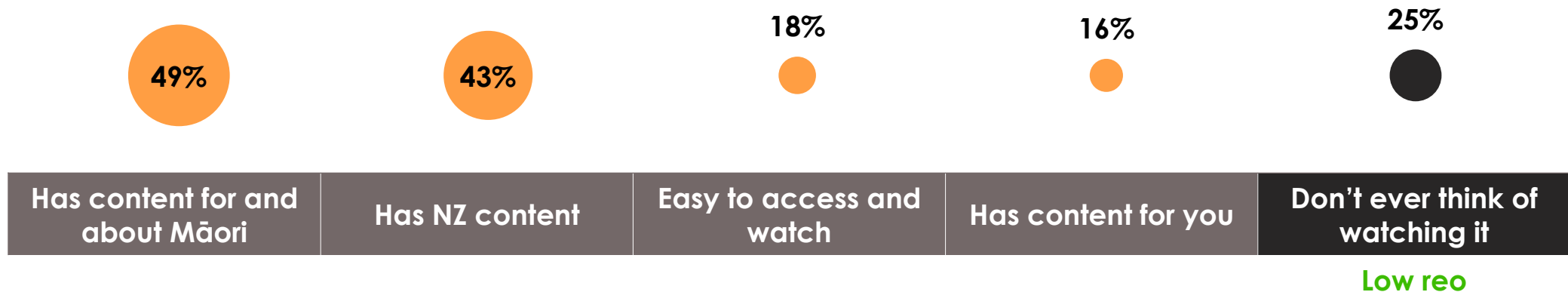
Source: Q14b. And which of the following, if any, do you think New Zealand made shows deliver better than international shows?

Base: Māori (n=704)

Whakaata Māori/Māori+ is most likely to be seen as offering content for and about Māori, as well as offering NZ content.

Please select up to three that you think best describe the following: Whakaata Māori

Top five characteristics of Whakaata Māori/Māori+



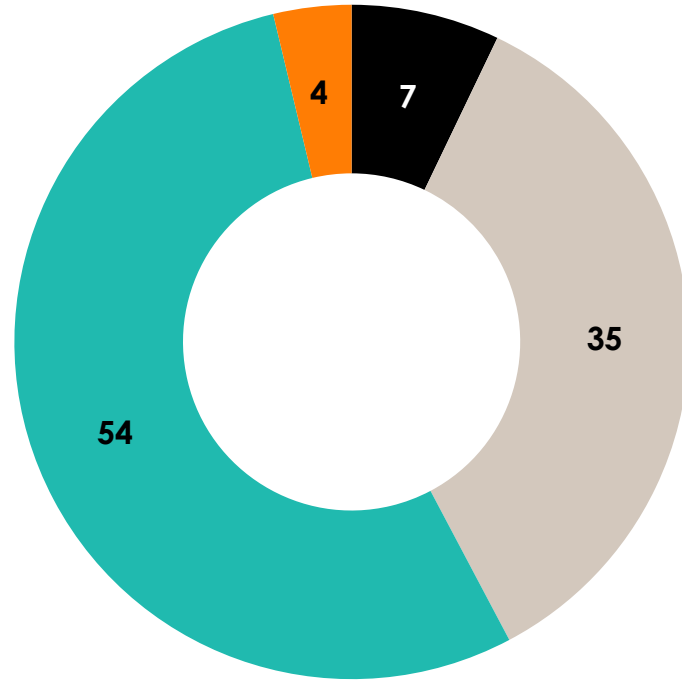
Source: Q16. Below are some words and phrases people have used to describe different channels, websites and services that provide TV shows. Please select up to three that you think best describe the following...

Base: Māori who answered about Whakaata Māori/Māori+ (n=527); New Zealand TV channels (n=131); TV On Demand sites (n=130); Online video sites (n=132); Streaming services (n=134)

Māori prefer NZ shows with simple conversations in te reo.

And thinking about the level of te reo Māori within NZ shows, which of the following is most appealing in terms of encouraging you to watch NZ shows?

%



■ Show with no te reo Māori

Low reo, Medium reo

■ Show with few words in te reo Māori

Low reo, Medium reo, High reo

■ Show with simple te reo Māori conversations

Wāhine, Tāne
Medium reo, High reo, Low reo

■ Show in full te reo Māori

High reo, Low reo

Source: Q18b. And thinking about the level of te reo Māori within NZ shows, which of the following is most appealing in terms of encouraging you to watch NZ shows?
Base: Māori (n=704)

In conclusion



Unique subgroup: Rangatahi (15-24 year olds)



Base: Māori aged 15-24 years (n=127)

Summary

- Māori tend to speak positively about the channels where local content exists, as well as the content itself.
- But they go to other channels (and platforms) for their content needs.
- This is even more prevalent among young Māori, who habitually consume global online media.
- Māori can be further enticed to watch local shows by focusing on humour, as well as local, relatable content such as places and landscapes, culture and history, music and authentic characters.
- Language plays a key role in encouraging Māori to watch NZ shows.
- While word of mouth is the primary way in which Māori discover new content, social media is the destination for 15-24 year olds, specifically Instagram, Snapchat and TikTok.

He pātai āu?

