



# WHERE ARE THE **AUDIENCES?**

**Māori report**

**AUGUST 2021**

- **Te Hiringa Hauora aims to inspire all New Zealanders to lead healthier lives. It leads and delivers innovative, high quality and cost-effective programmes in the following areas:**
  - Alcohol, health education resources, immunisation, mental health, minimising gambling harm, nutrition and physical activity, skin cancer prevention, tobacco control, workplace well-being.
- **It achieves these objectives by:**
  - Promoting health and well-being
  - Enabling health promotion initiatives and environments
  - Informing health promotions policy and practice
- **Therefore effectively reaching key New Zealand audiences is critical to achieving Te Hiringa Hauora’s objectives and mission. New Zealand On Air’s (NZ On Air) “Where Are The Audiences?” study is an important input for Te Hiringa Hauora to understand how to reach New Zealanders overall and harder to reach audiences in particular. These audiences are:**
  - 15-24 year olds
  - Māori
  - Pacific Island peoples
  - Lower socio-economic groups
- **This report summarises the results from NZ On Air’s 2021 “Where Are The Audiences?” study based on Māori.**
  - It compares the 2021 results to all previous studies among Māori, as well as comparing to the 2021 results among all New Zealanders.

# Impact of Covid 19 on the 2020 study

- **The Where Are The Audiences? study has always been conducted in April and May to ensure results are not influenced by seasonal audience patterns.**
- **However in 2020 the study was delayed to May-June due to levels 3 and 4 Covid 19 lockdown prior to this period. Interviewing was then conducted while New Zealand was at Covid 19 levels 1 and 2.**
- **Comparing the 2020 results to the 2021 results and to trends over time shows that levels 1 and 2 had only a minor impact on audience behaviour among Māori in 2020 and mainly impacted some digital media.**
- **For some digital media the impact is reflected in slightly boosted audience sizes among Māori in 2020 that have now declined slightly (eg. SVOD and on demand). This trend is also evident in some of the main digital media providers (Netflix, YouTube (for video), Facebook (for video), Spotify and TVNZ OnDemand.**
- **A slightly bigger impact is seen in the 2020 boost and 2021 decline in time spent viewing SVOD, suggesting this media received a slight lift in engagement in 2020 which has now declined.**
- **Overall however the specific impact of Covid 19 levels 1 and 2 on 2020 audience behaviour was relatively minor and the results of the 2020 study are not strongly anomalous in the context of ongoing trends over time.**

- **The first priority in the design and conduct of the 2021 study was to ensure valid and robust comparisons to the previous three studies. Therefore the research approach including methodology, sampling and respondent definition, question flow and wording, and weighting factors were kept consistent with all previous 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 creation 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.**
- **For the NZ On Air main study, a total sample of n=1,420 was developed among all New Zealanders aged 15 and over, with representative samples created for each day of the week so that results can be accurately extrapolated to represent a “typical” day. This sample included a sub-sample of N=231 Māori.**
- **In order to boost the robustness of this report based on Māori alone and enable more detailed and reliable analysis of subgroups within Māori, a separate booster sample of n=215 Māori was commissioned by Te Hiringa Hauora. This sample was developed via online interviewing using the Dynata research panel. This booster sample has been combined with the Māori sub-sample from the main study.**
- **This report is therefore based on n = 446 Māori who were included in the main study and booster sample.**
  - **This sample has a maximum margin for error of +/-4.6%.**
  - **The results contained in this report will differ from the NZ On Air report’s Māori results as this report merges both samples.**

- **As in all previous studies, a mixed methodology of telephone and online interviewing was used to conduct the main NZ On Air study.**
- **For the main study 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. This upweights the proportion of online interviews compared to previous studies to better reflect the declining incidence of landlines in New Zealand (based on Nielsen CMI data).**
  - **The online interviews in the main study were conducted among New Zealanders without access to a home landline.**
- **The online interviews for Te Hiringa Hauora booster sample were conducted among all Māori 15+ with and without landlines.**
- **All interviewing was conducted between April 27 and May 24.**
- **Respondents were defined as all New Zealanders aged 15 and over.**
- **Sampling included regional stratification and minimum quotas for males, 15-24 year olds and ethnic groups were implemented.**
- **The samples from the main study and booster sample have been combined and then post-weighted as per the 2018 Census by age and gender to ensure it is representative of the 15+ Māori population.**
  - **Note that these age weights are significantly different to the total 15+ population due to the much younger profile of the Māori population compared to the general 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.**
- **Two key aspects were not included in this or previous studies;**
  - **Device used to consume media. (Ownership and access to devices was collected.)**
  - **Simultaneous media consumption.**

# Changes made to the 2021 Where Are The Audiences? study

- **The 2021 Where Are The Audiences? study is the first time it has been conducted one year after the previous study as opposed to two years. The charts in this report have been adjusted so the 2021 data points reflect the correct time scale to ensure time series trends are not visually impacted.**

## Online Video

- **Online video has been split into two categories. The definition of these are:**
  - **Watch a video online using an overseas site/app like YouTube or Vimeo, Facebook, Snapchat, Instagram, or TikTok.**
  - **Watch a video online using a New Zealand site/app like NZ Herald, WatchMe, Stuff, Play Stuff, Re:, Radio NZ, the Coconet, NZ On Screen or The Spinoff.**
- **The total online video category which is compared to previous studies is based on the net reach of these two categories.**
- **Snapchat and TikTok have been included in the study for the first time.**
- **The New Zealand online video sites/apps are primarily news sites, with NZ On Screen included in this media for the first time.**

## Other Changes

- **The weekly reach question was removed from the study in 2021 due to interview length constraints.**
- **Neon and Lightbox merged after the 2020 study. The results for “Neon” represent the merged provider in 2021.**
- **The news provider question has been adjusted to ask about news consumption in general as opposed to during Covid 19.**

# Abbreviations used in charts

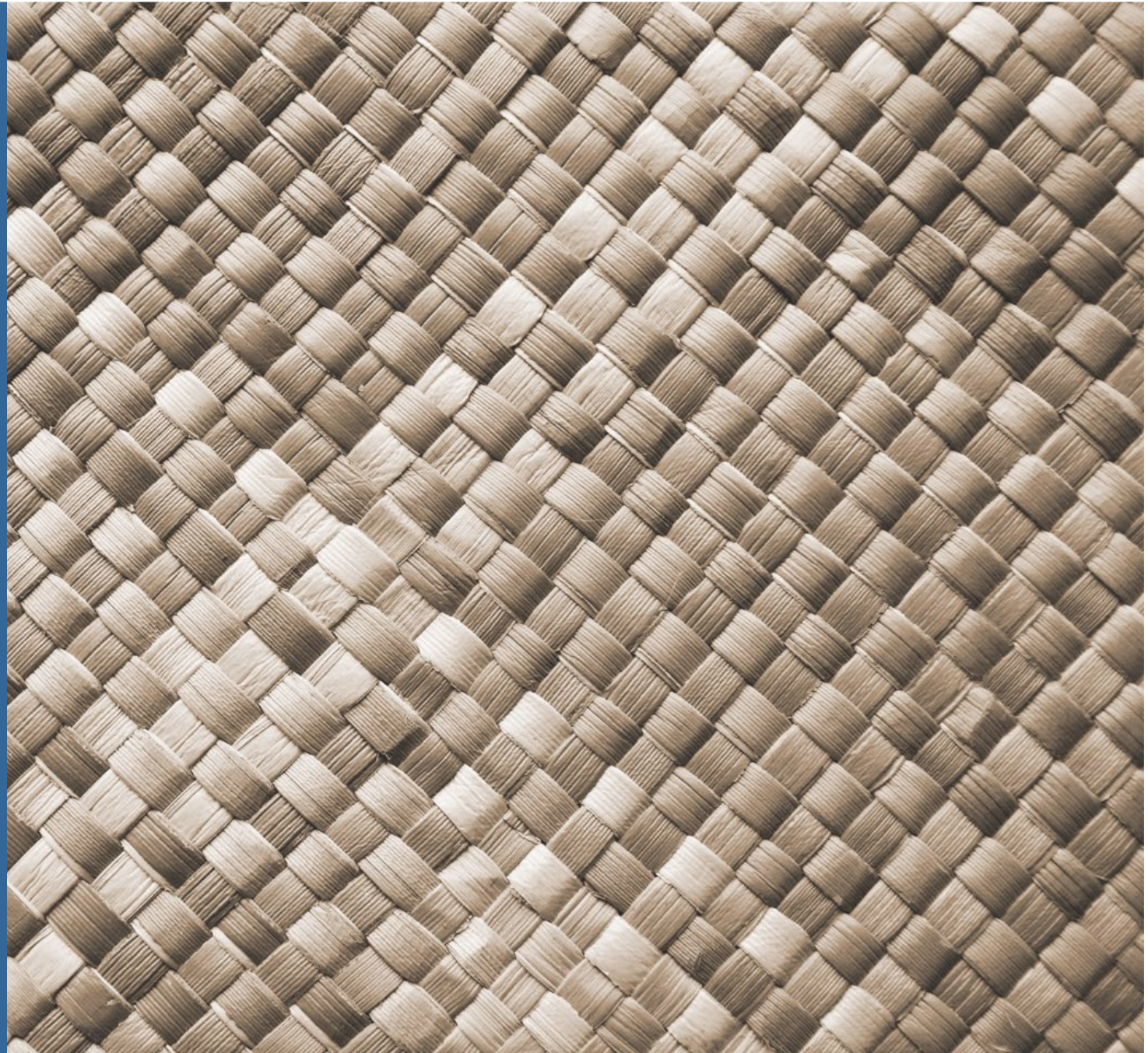
Abbreviation	Media Type
TV Total	Total (net) Linear TV
Radio	Live NZ Radio
OS Online Video (new 2021)	Online Video e.g. YouTube, Facebook
NZ Online Video (new 2021)	Online Video e.g. NZ Herald, Stuff
SVOD Total	Total (net) SVOD
NZ SVOD	NZSVOD (e.g. Netflix, Lightbox)
OS SVOD	Overseas SVOD (e.g. Netflix, Hulu)
TV Pay	TV (via a pay TV platform)
TV FTA	TV (via free to air platform)
Music	Music (iPod, CDs)
Music Stream	Music online/streamed (e.g. YouTube, Spotify)
Online Radio	Online NZ radio

Abbreviation	Media Type
NZ OD	NZ Ondemand
Newspaper	Newspaper (including online)
Magazine	Magazine (including online)
Spotify	Listen to music on Spotify
Podcasts	Listen to podcasts
Music YT	Listen to music on YouTube
iHeartRadio	Listen to music on iHeartRadio
Pirate TV	Streamed, downloaded, torrented TV shows
Download Music	Downloaded songs/albums for free
Online gaming	Played games online on a gaming console, PC/laptop, phone or tablet





# Summary & Conclusions



- **Overall, Māori audiences are heavier consumers of media than average – in terms of both audience size and longer time spent.**
- **In particular Māori are more likely to use digital media than traditional media compared to overall New Zealanders. Online video now attracts the biggest Māori audience each day, with SVOD, TV and streamed music attracting the second biggest audiences.**
- **In addition, while TV remains the media that New Zealanders overall dedicate the most time to, Māori audiences now spend more time watching SVOD each day than TV, with online video only slightly below TV.**
- **Use of digital media is even more widespread among younger Māori, while older Māori continue to watch TV and listen to the radio in greater numbers.**
- **The most popular media providers among Māori audiences are now the international digital providers Youtube, Netflix and Facebook, with Spotify attracting the same audience size as the most popular traditional media provider TVNZ 1.**
- **Online video is the only media to have increased its audience among Māori since 2020 with all others stable or down slightly. Similarly, with the exception of growth in time spent watching online video and listening to streamed music, the time Māori audiences spend using media has also declined since 2020. This suggests Covid 19 levels 1 and 2 drove a boost in media consumption among this audience.**

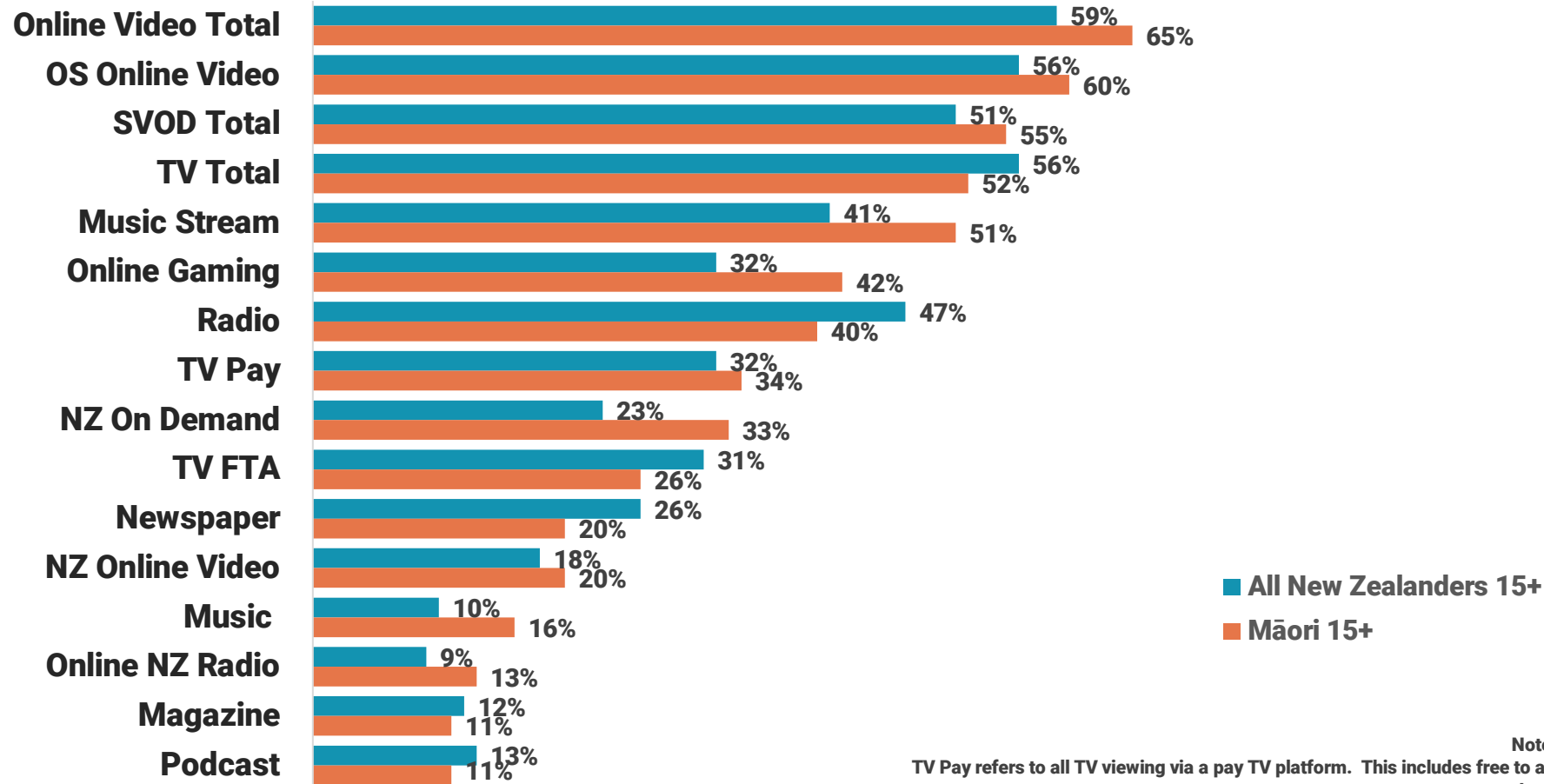
- **While Māori audiences demonstrate higher media use than average, they are also less likely to have access to some devices and platforms including a smartphone, working TV, PC/laptop, radio, smart TV connected to the Internet, tablet, and PVR.**
  - They are more likely to have access to a gaming console, Neon and Disney Plus.

**Daily audience sizes 2021.** Online video, mainly overseas video, SVOD, TV and music streaming attract the biggest audiences each day among Māori. Māori are more likely to use these digital video media, play online games and watch on demand than all New Zealanders 15+. They are less likely to watch TV, listen to the radio, or read a newspaper.



**Daily reach of media 2021 – All New Zealanders 15+ and Māori 15+**

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.

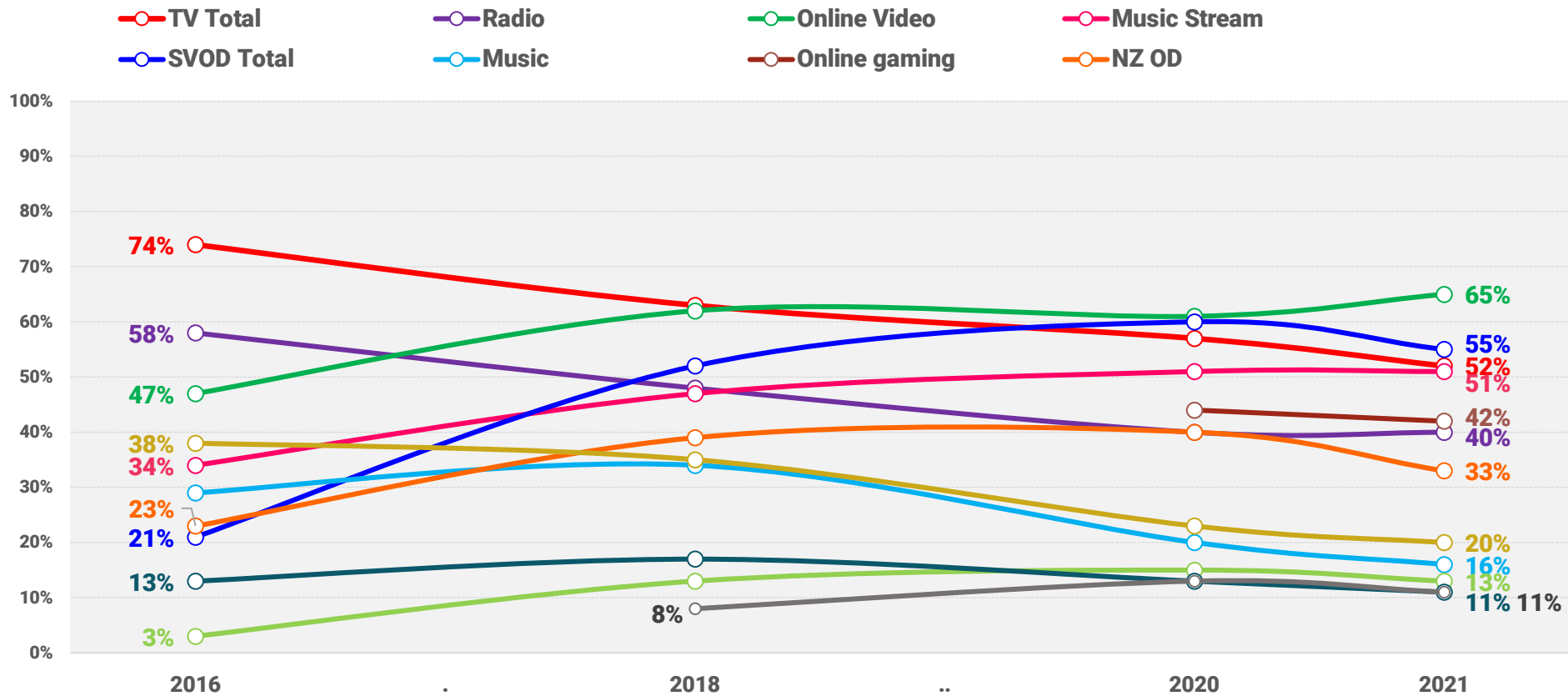


Note:  
TV Pay refers to all TV viewing via a pay TV platform. This includes free to air content.  
TV viewing includes live and time shifted viewing, in and out of home.

**Daily audience sizes over time.** Online video is the only media to grow its audience among Māori since 2020 with all others stable or down slightly. SVOD, TV and streamed music attract the second biggest audience each day but are significantly less popular than online video. The decline of some media (eg. SVOD, on demand) suggests a slight boost in audiences during Covid 19 levels 1 and 2.

**Daily reach of media over time – All Māori 15+**

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



▶ The rate of decline of TV and magazines continues to be relatively consistent over time, while radio and newspaper audiences are more stable in 2021.

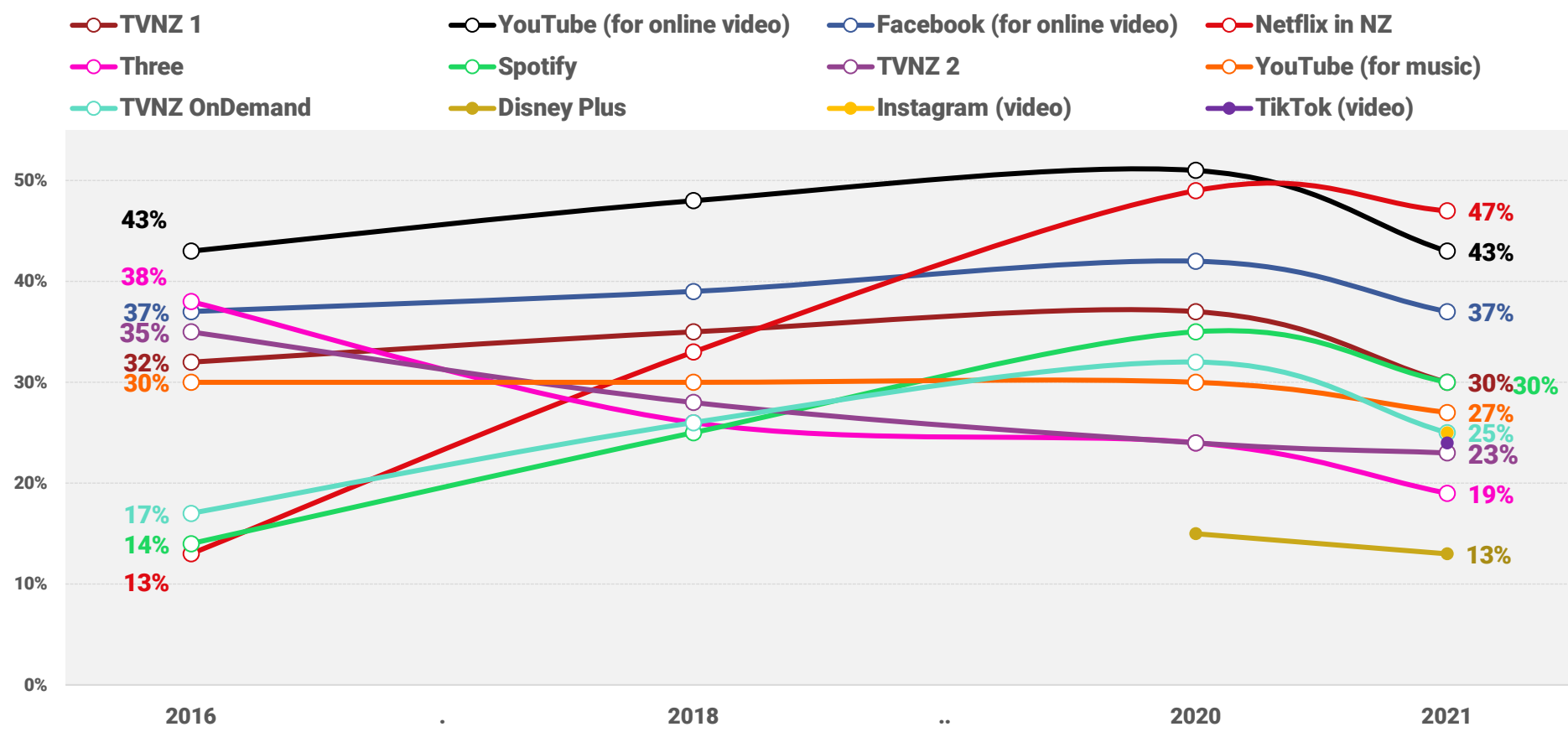
▶ Overall, digital media now narrowly attracts bigger audiences each day than traditional media among Māori audiences.

Note: TV viewing includes live and time shifted viewing, in and out of home.

# Top channels, sites and stations 2021. Netflix now attracts the biggest daily audience among Māori over YouTube (for video). However all the biggest sites, channels and stations show a decline in audience size since 2020. Compared to overall New Zealanders 15+, the media repertoire of Māori is wider with many sites, channels and stations attracting significant audiences each day.

## Most popular channels, sites & stations – all Māori 15+

Q: Which of the following did you use yesterday?



### Next six:

- Snapchat 15%
- Neon 9%
- Mai FM 9%
- NZ Herald 9%
- The Edge 8%
- Amazon Prime 8%
- Stuff (video) 8%
- 3NOW 8%
- Prime 7%
- The Breeze 7%

- **The generation gap that influences media consumption overall is also a strong influence on the behaviour of Māori audiences. Māori overall are a younger cohort resulting in an overall tendency to consume digital media in greater numbers than traditional media.**
- **The generation gap appears at slightly different ages across different media but typically manifests itself among Māori between the ages of 40 and 49. Below 40 digital media dominates Māori media consumption, while above 50 years old traditional media is still most popular.**



# Daily Media Consumption

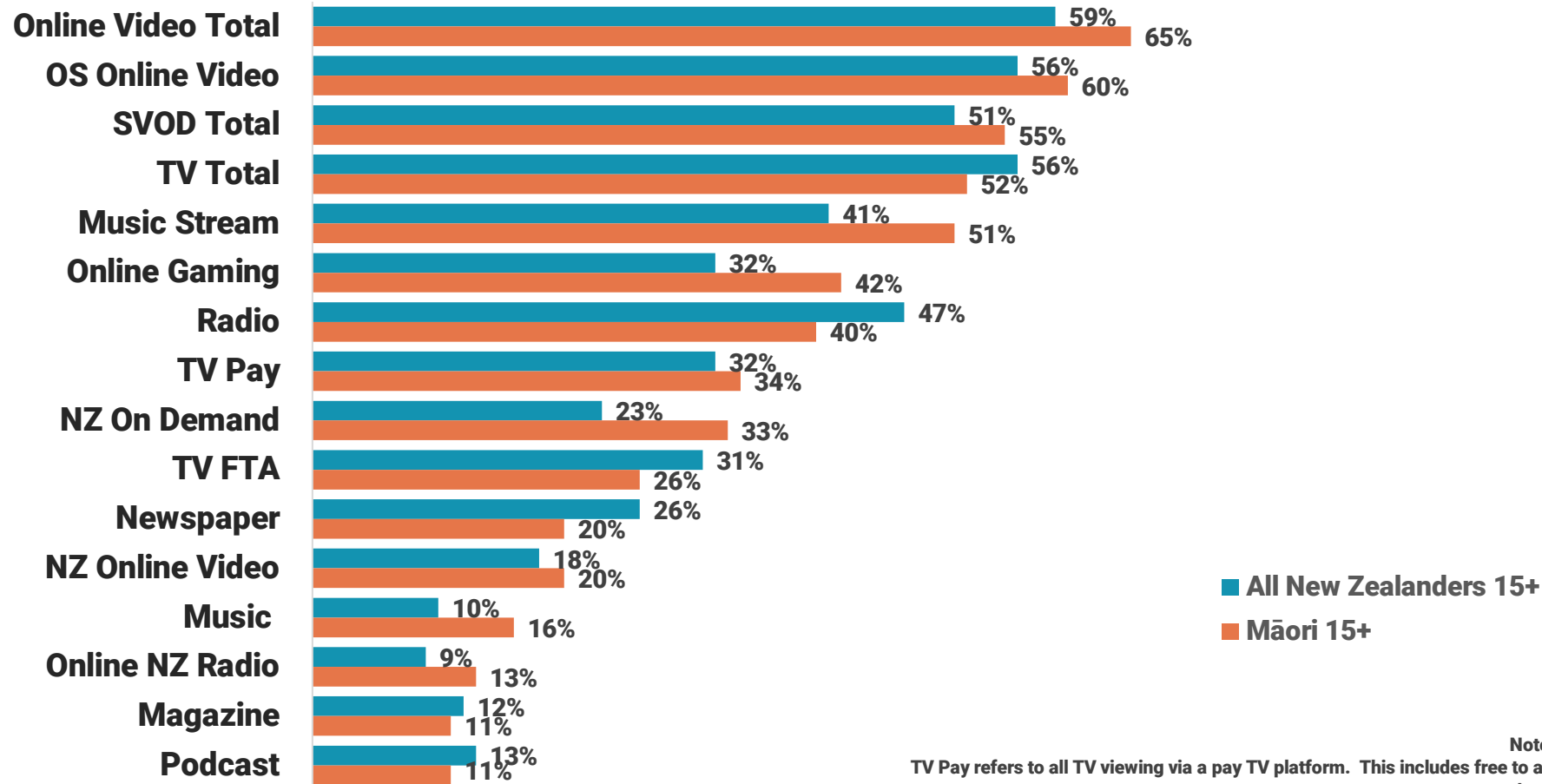




**Online video, mainly overseas video, SVOD, TV and music streaming attract the biggest audiences each day among Māori. Māori are more likely to use these digital video media, play online games and watch on demand than all New Zealanders 15+. They are less likely to watch TV, listen to the radio, or read a newspaper.**

**Daily reach of media 2021 – All New Zealanders 15+ and Māori 15+**

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.

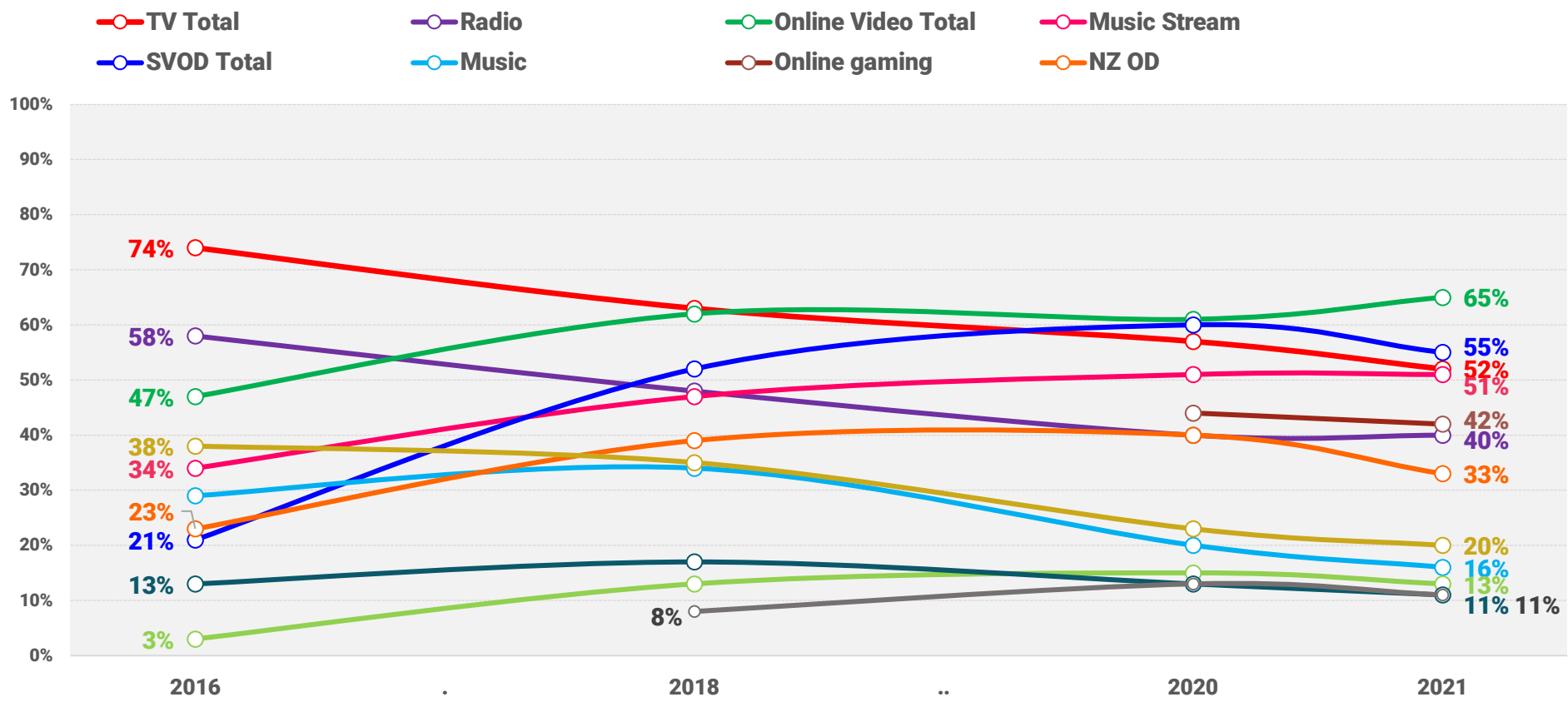


Note:  
TV Pay refers to all TV viewing via a pay TV platform. This includes free to air content.  
TV viewing includes live and time shifted viewing, in and out of home.

**Online video is the only media to grow its audience among Māori since 2020 with all others stable or down slightly. SVOD, TV and streamed music attract the second biggest audience each day but are significantly less popular than online video. The decline of some media (eg. SVOD, on demand) suggests a slight boost in audiences during Covid 19 levels 1 and 2.**

**Daily reach of media over time – All Māori 15+**

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



▶ The rate of decline of TV and magazines continues to be relatively consistent over time, while radio and newspaper audiences are more stable in 2021.

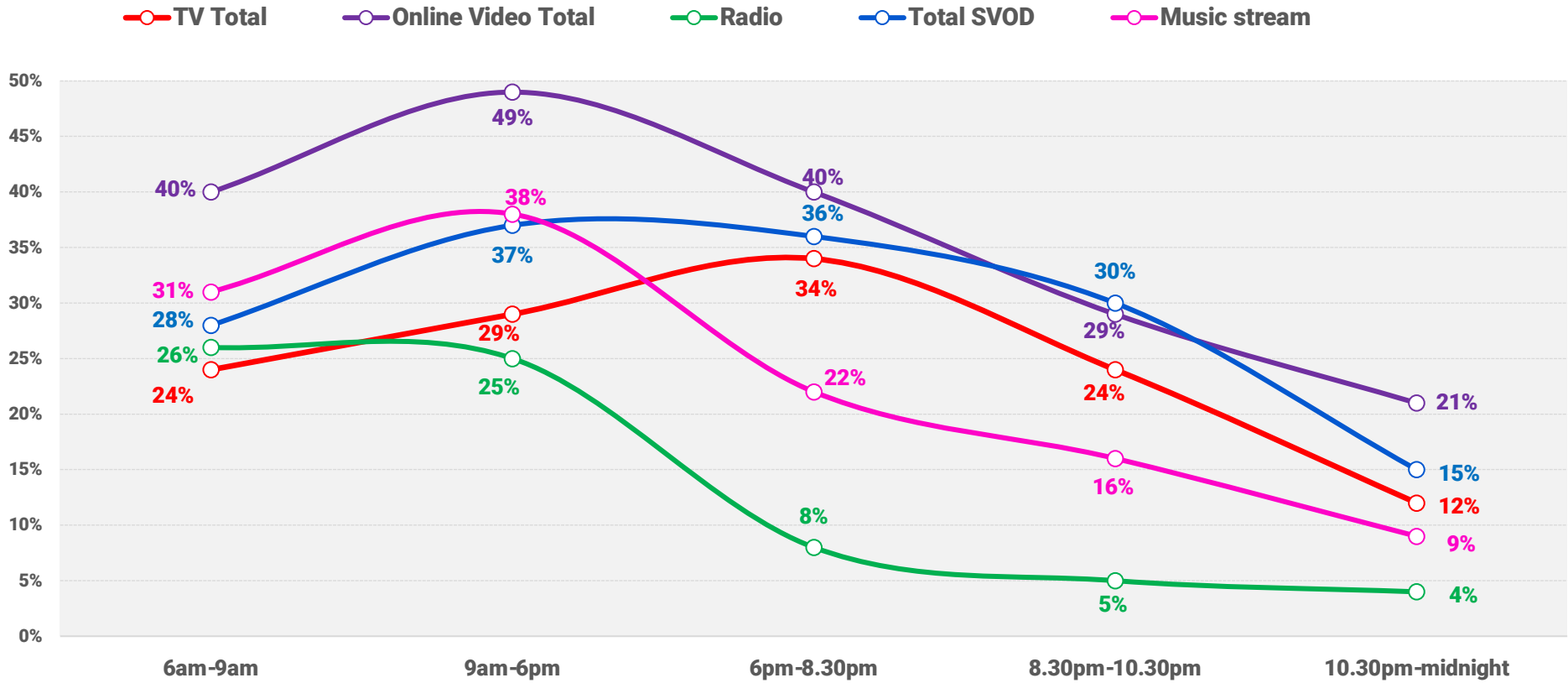
▶ Overall, digital media now narrowly attracts bigger audiences each day than traditional media among Māori audiences.

Note: TV viewing includes live and time shifted viewing, in and out of home.

The way Māori audiences consume media changes over the day. Online video attracts the biggest audience during the day by significant margin over SVOD and music streaming. Online video, SVOD and TV attract similar sized audiences during the traditional TV peak period (6pm – 10.30pm), although the audience watching TV has fallen below these two digital media since 2020.

### Reach of media over the day 2021 – all Māori 15+

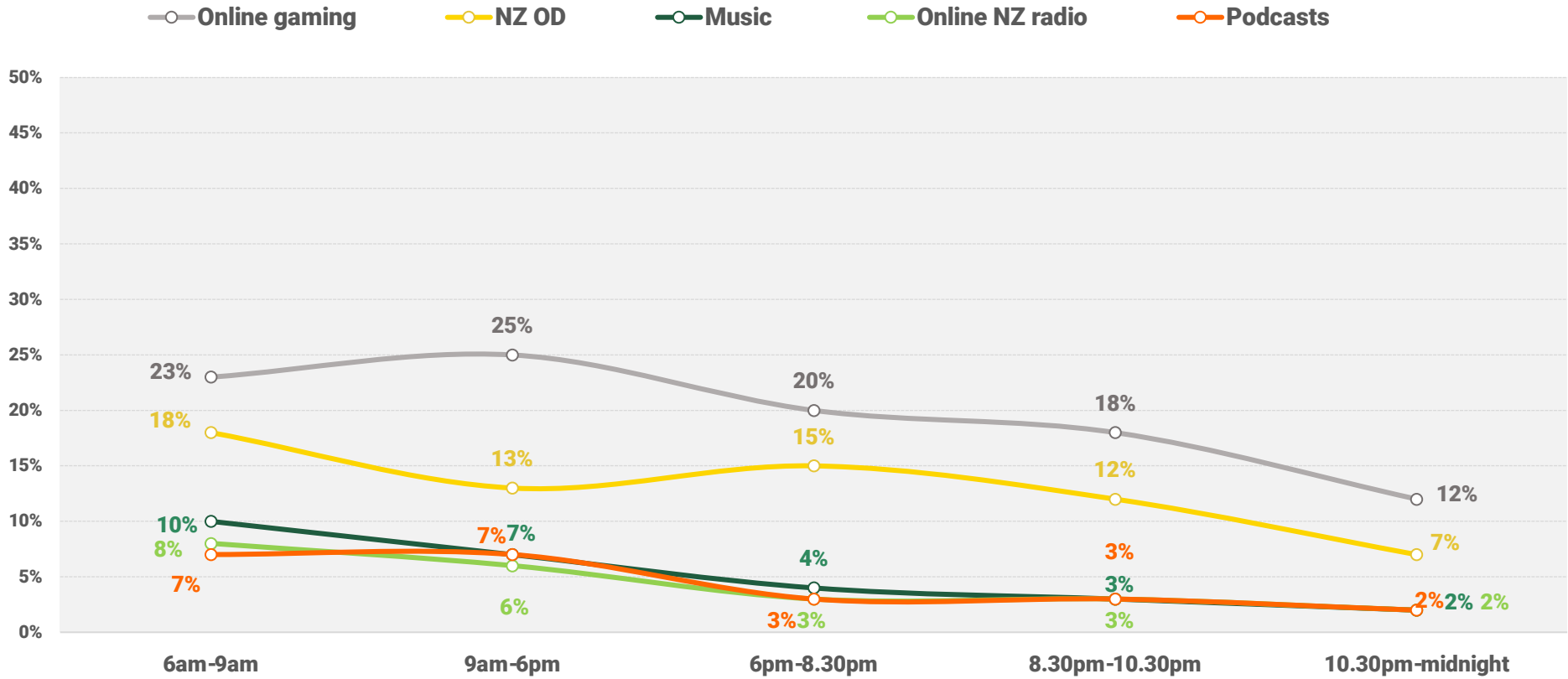
Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.



# Online gaming attracts similar sized audiences as radio and TV among Māori during the day but this declines during traditional TV peak. On demand also has a relatively steady audience until late in the evening.

## Reach of media over the day 2021 – all Māori 15+

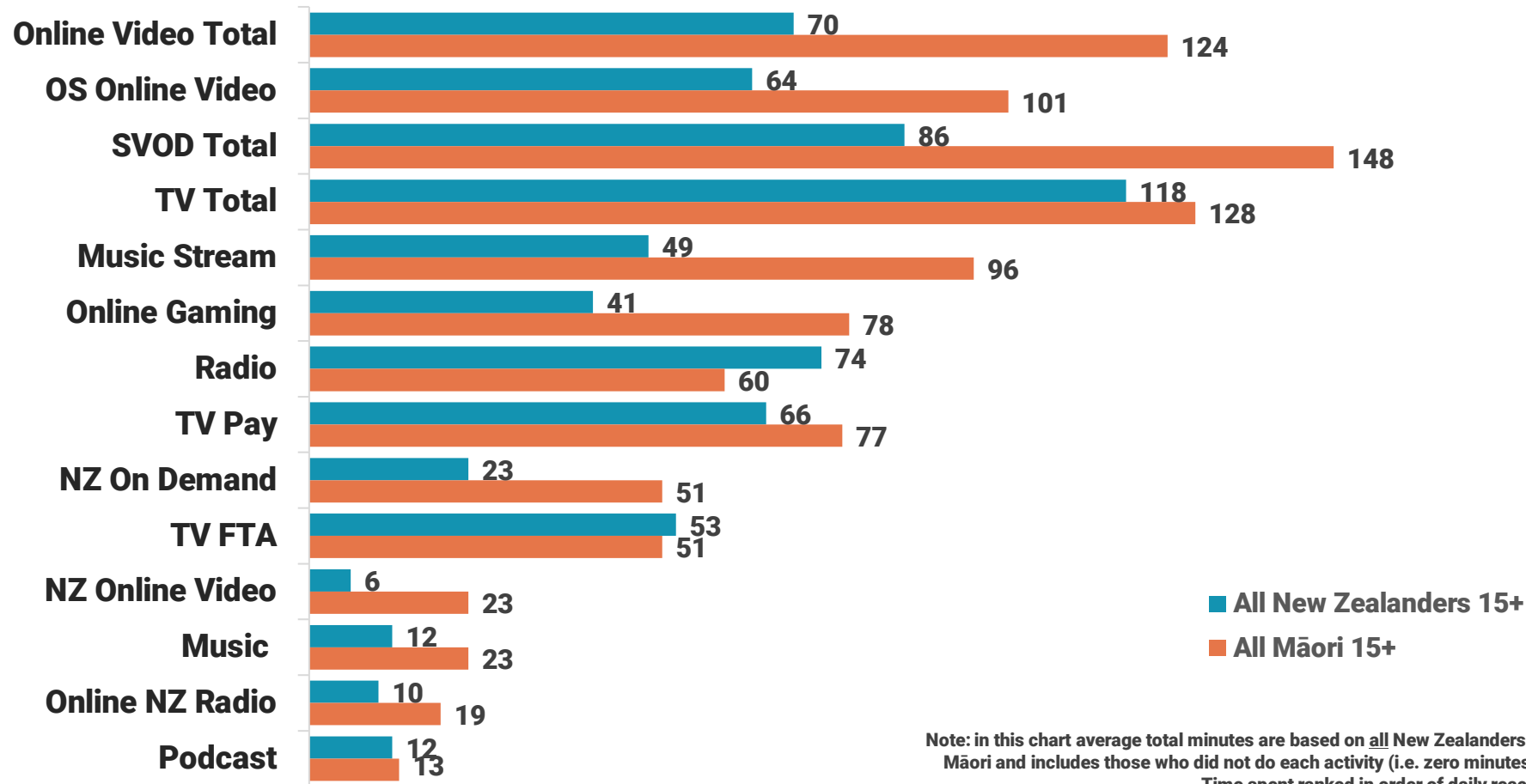
Q: I'd like to ask you about the different types of entertainment or media you used yesterday. For each of the following, I'd like you to tell me if you did that activity for 5 minutes or more during the time period I read out. It doesn't matter if you were also doing something else at the time.



**Māori spend significantly more time using almost all media than New Zealanders 15+, with the difference most apparent for SVOD, online video and gaming. Māori spend the second most time watching TV, but only narrowly above online video.**

**Time spent consuming media 2021 – average minutes per day. All New Zealanders 15+ and Māori 15+**

Q: Between (TIME PERIOD) about how long did you do (activity) for?



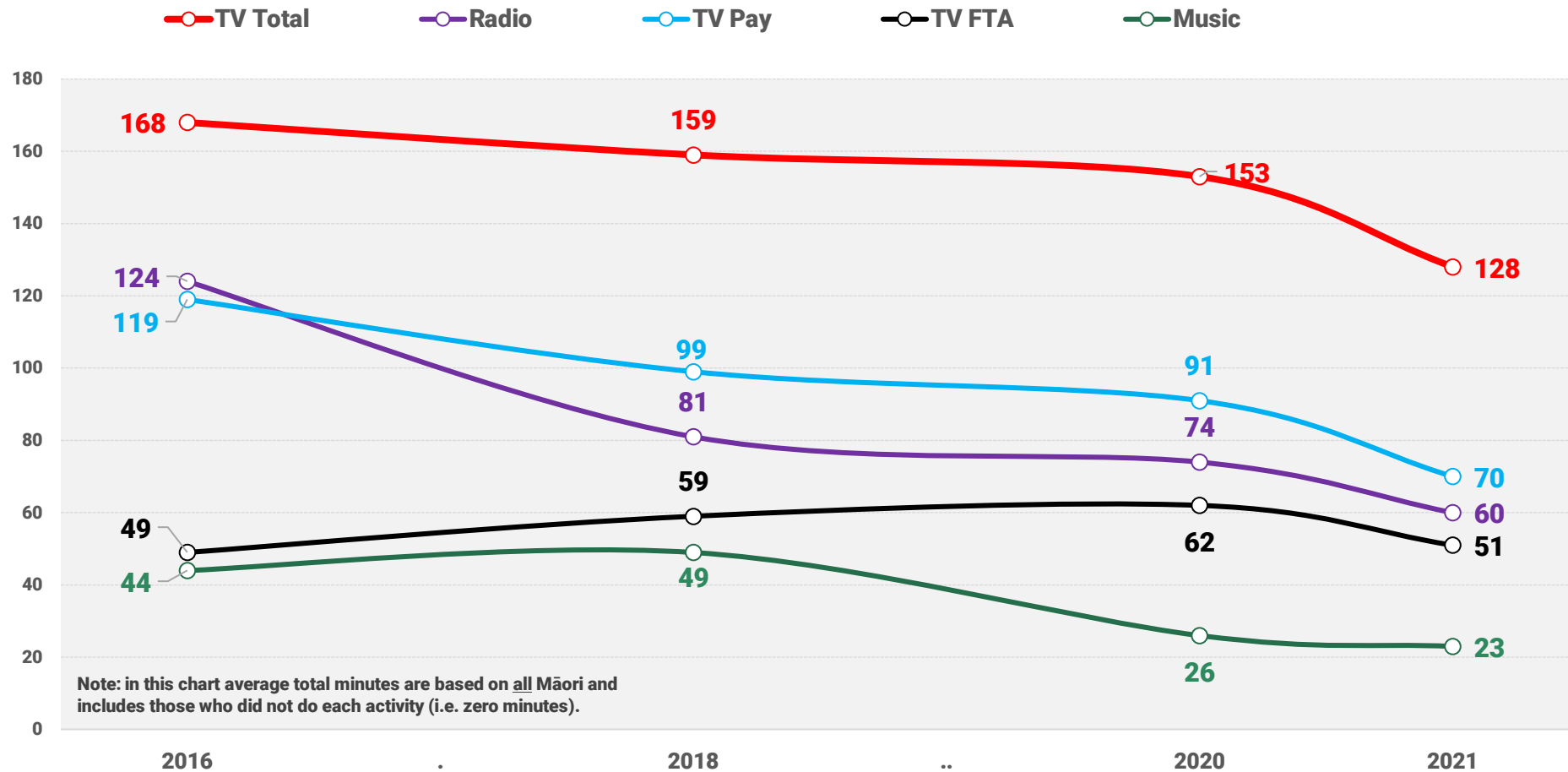
- ▶ **Māori dedicate the most time per day to SVOD (2½ hours per day)**
- ▶ **TV and online video are each viewed for about two hours per day.**
- ▶ **The time Māori dedicate to online video is mainly watching overseas video sites. Time spent watching online video on NZ sites will also be shorter due to the number of news sites which have shorter videos.**

Note: in this chart average total minutes are based on all New Zealanders & Māori and includes those who did not do each activity (i.e. zero minutes). Time spent ranked in order of daily reach.

# Time spent using nearly all traditional media has declined among Māori since 2020, and these rates have accelerated in the last 12 months. The exception is the audience listening to music on physical formats which is stable since 2020.

## Time spent consuming traditional media over time – average minutes per day. All Māori 15+

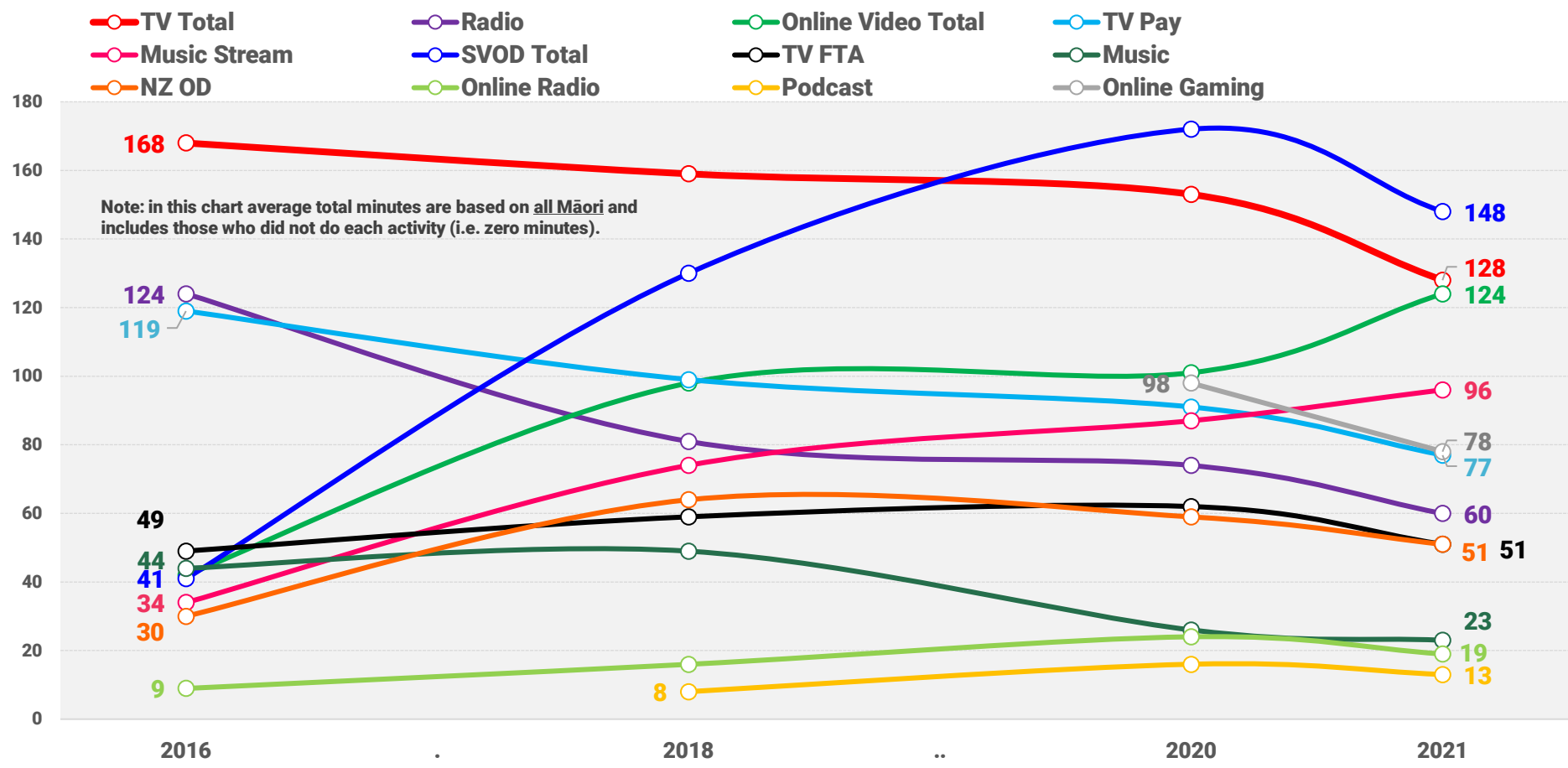
Q: Between (TIME PERIOD) about how long did you do (activity) for?



**Time spent using nearly all media has declined since 2021 and significantly so for TV, SVOD, gaming and radio. This decline suggests a peak in not just Māori audiences sizes but time spent using some media due to Covid 19 levels 1 and 2. The only media Māori are dedicating more time to in 2021 is online video and streamed music.**

**Time spent consuming all media over time – average minutes per day. All Māori 15+**

Q: Between (TIME PERIOD) about how long did you do (activity) for?



► The increase in time spent watching online video results in Māori spending almost as much time using this media as watching TV.

► Time spent listening to streamed music has also moved ahead of online gaming.



# How do audiences vary across different media?

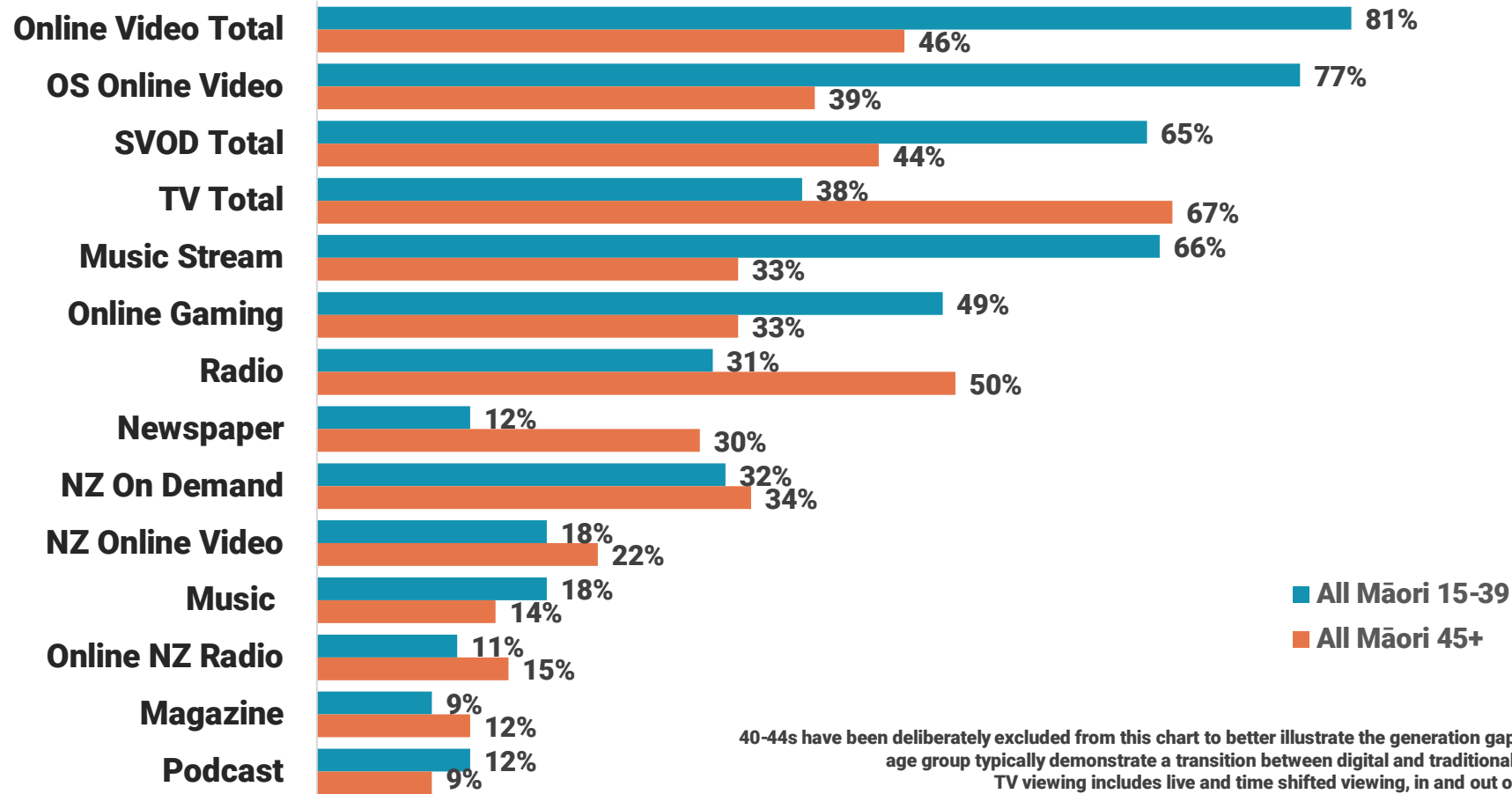




The generation gap evident in media consumption among all New Zealanders also applies to Māori audiences. Among younger Māori online video, particularly overseas video, SVOD, music streaming and online gaming attract the majority of this audience each day, whereas TV and radio continue to attract the biggest audiences among older Māori.

Daily reach of media 2021 – Māori 15-39 cf. Māori 45+

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.



Note:  
 40-44s have been deliberately excluded from this chart to better illustrate the generation gap as this age group typically demonstrate a transition between digital and traditional media.  
 TV viewing includes live and time shifted viewing, in and out of home.  
 Results ranked based on all Māori.

# What is the daily profile of Māori consumers of different media?

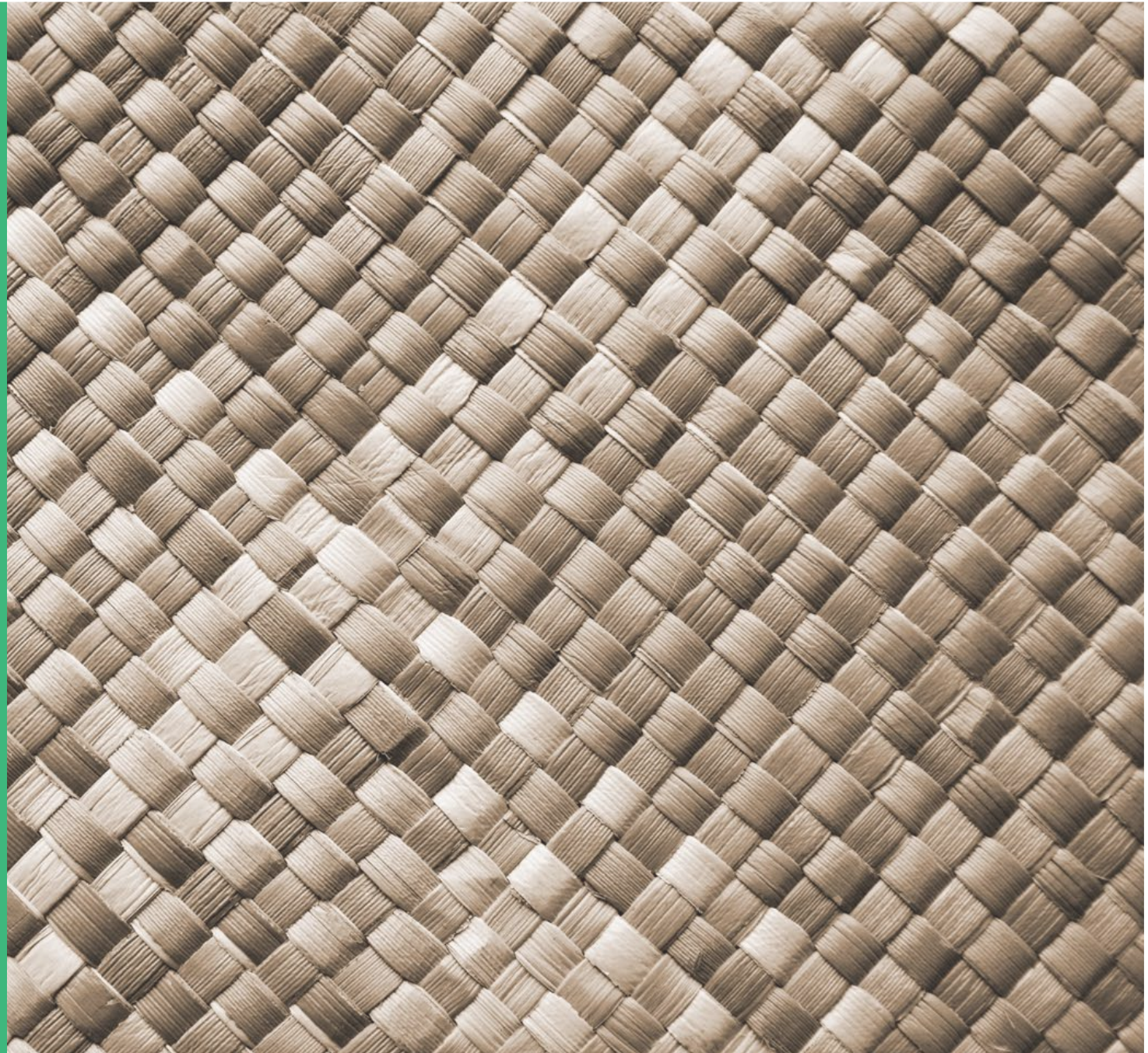
MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
<b>Linear TV</b> 52% daily reach overall	<ul style="list-style-type: none"> <li>• Females (42%)</li> <li>• 15-39 year olds (38%)               <ul style="list-style-type: none"> <li>– Students (40%)</li> </ul> </li> <li>• Lower white collar workers (43%)</li> <li>• Blue collar workers (45%)</li> <li>• Unemployed (41%)</li> <li>• Home-makers (37%)</li> <li>• Younger, no kids (32%)</li> <li>• Aucklanders (40%)</li> </ul>	<ul style="list-style-type: none"> <li>• Males (62%)</li> <li>• 60+ year olds (82%)               <ul style="list-style-type: none"> <li>– retirees (85%)</li> <li>– empty nesters (75%)</li> </ul> </li> <li>• Upper white collar workers (63%)</li> <li>• High income earners (\$80,000+ = 64%)</li> <li>• South Islanders (58%)</li> </ul>
<b>Online video</b> 65% daily reach overall	<ul style="list-style-type: none"> <li>• Males (61%)</li> <li>• 45+ year olds (46%)               <ul style="list-style-type: none"> <li>– Esp. 60+ (20%)</li> <li>– Retirees (22%)</li> <li>– Empty nesters (34%)</li> <li>– 1-2 person homes (48%)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Females (68%)</li> <li>• 15-39 year olds (81%)               <ul style="list-style-type: none"> <li>– Esp. 15-24s (89%)</li> <li>– Students (94%)</li> <li>– Flatting (77%)</li> <li>– 3+ person homes (74%)</li> </ul> </li> <li>• Younger, no kids (76%)</li> <li>• Blue collar workers (75%)</li> </ul>
<b>SVOD</b> 55% daily reach overall	<ul style="list-style-type: none"> <li>• Males (48%)</li> <li>• 45+ year olds (44%)               <ul style="list-style-type: none"> <li>– Esp 60+ (30%)</li> <li>– Retirees (32%)</li> <li>– Empty nesters (30%)</li> <li>– 1-2 person homes (42%)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Females (62%)</li> <li>• 15-39 year olds (65%)               <ul style="list-style-type: none"> <li>– Students (69%)</li> </ul> </li> <li>• Home-makers (70%)</li> </ul>
<b>Radio</b> 40% daily reach overall	<ul style="list-style-type: none"> <li>• 15-39 year olds (31%)               <ul style="list-style-type: none"> <li>– Esp. 15-24s (21%)</li> <li>– Students (22%)</li> </ul> </li> <li>• Younger, no kids (28%)</li> <li>• Home-makers (28%)</li> <li>• Unemployed (27%)</li> </ul>	<ul style="list-style-type: none"> <li>• 60+ year olds (59%)               <ul style="list-style-type: none"> <li>– Retirees (61%)</li> <li>– Empty Nesters (51%)</li> </ul> </li> </ul>

# What is the daily profile of Māori consumers of different media?

MEDIA	LESS LIKELY TO ENGAGE	MORE LIKELY TO ENGAGE
<b>Music streaming</b> 51% daily reach overall	<ul style="list-style-type: none"> <li>• <b>45+ year olds (33%)</b> <ul style="list-style-type: none"> <li>- <b>Esp. 60+ (11%)</b></li> <li>- <b>Retirees (5%)</b></li> <li>- <b>Empty nesters (30%)</b></li> <li>- <b>1-2 person homes (33%)</b></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>15-39 year olds (66%)</b> <ul style="list-style-type: none"> <li>- <b>Esp. 15-24s (82%)</b></li> <li>- <b>Students (85%)</b></li> <li>- <b>Flatting (65%)</b></li> <li>- <b>3+ person homes (61%)</b></li> </ul> </li> <li>• <b>Home-makers (67%)</b></li> </ul>
<b>On demand</b> 33% daily reach overall	<ul style="list-style-type: none"> <li>• <b>15-24 year olds (24%)</b> <ul style="list-style-type: none"> <li>- <b>Students (16%)</b></li> <li>- <b>Flatting (24%)</b></li> </ul> </li> <li>• <b>60+ year olds (22%)</b> <ul style="list-style-type: none"> <li>- <b>Retirees (24%)</b></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Families with kids under 15 (49%)</b></li> </ul>
<b>Newspaper</b> 20% daily reach overall	<ul style="list-style-type: none"> <li>• <b>Females (16%)</b></li> <li>• <b>15-39 year olds (12%)</b> <ul style="list-style-type: none"> <li>- <b>Esp. 15-24s (7%)</b></li> <li>- <b>Flatting (9%)</b></li> <li>- <b>Students (10%)</b></li> </ul> </li> <li>• <b>Younger, no kids (10%)</b></li> <li>• <b>Lower white collar workers (21%)</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Males (25%)</b></li> <li>• <b>60+ year olds (45%)</b> <ul style="list-style-type: none"> <li>- <b>Retirees (39%)</b></li> <li>- <b>Empty nesters (32%)</b></li> </ul> </li> </ul>
<b>Magazine</b> 11% daily reach overall	<ul style="list-style-type: none"> <li>• <b>Flatting (2%)</b></li> <li>• <b>Younger, no kids (5%)</b></li> </ul>	



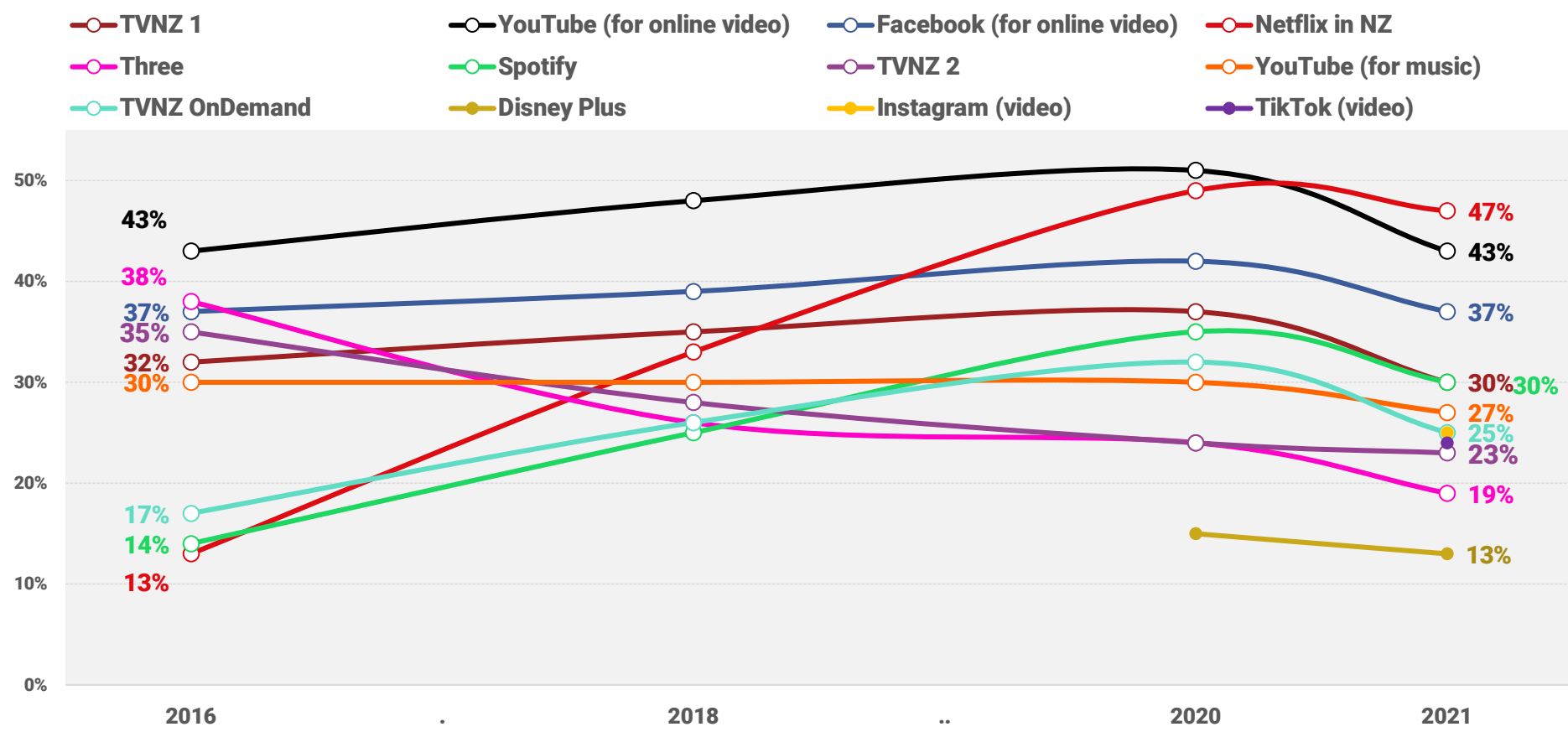
# Daily Media Consumption By Channel, Site & Station



**Netflix now attracts the biggest daily audience among Māori over YouTube (for video). However all the biggest sites, channels and stations show a decline in audience size since 2020. Compared to overall New Zealanders 15+, the media repertoire of Māori is wider with many sites, channels and stations attracting significant audiences each day.**

**Most popular channels, sites & stations – all Māori 15+**

Q: Which of the following did you use yesterday?



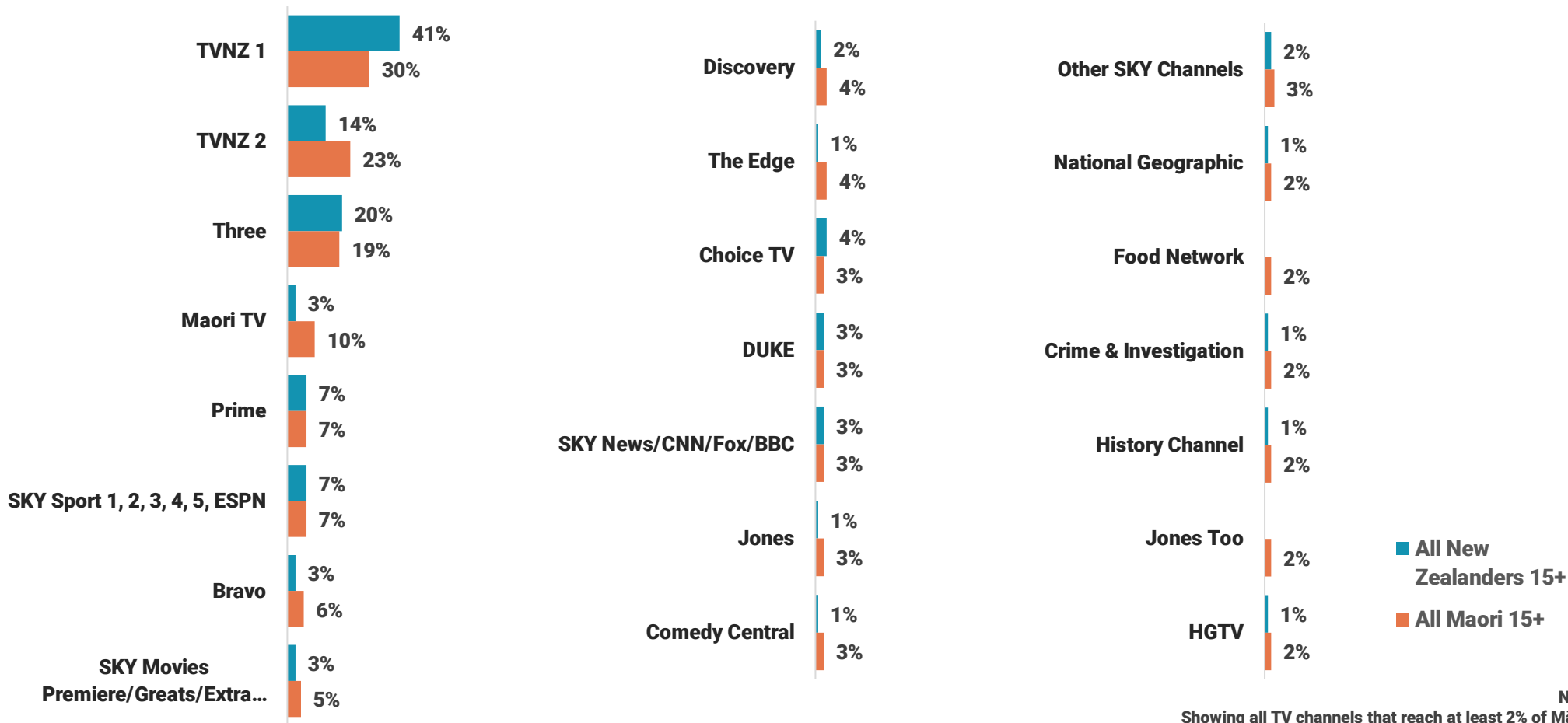
**Next six:**

- Snapchat 15%
- Neon 9%
- Mai FM 9%
- NZ Herald 9%
- The Edge 8%
- Amazon Prime 8%
- Stuff (video) 8%
- 3NOW 8%
- Prime 7%
- The Breeze 7%

**TVNZ 1 attracts the biggest daily audience among Māori each day, but this channel is less popular than among overall New Zealanders 15+. However Māori watch many TV channels more than New Zealanders 15+ overall. In particular TVNZ 2 and Māori Television attract a significantly higher proportion of viewers.**

**Daily reach of TV channels 2021 (2% reach and over) – all New Zealanders 15+ & all Māori 15+**

Q: Thinking about yesterday, which of the following TV channels did you watch?

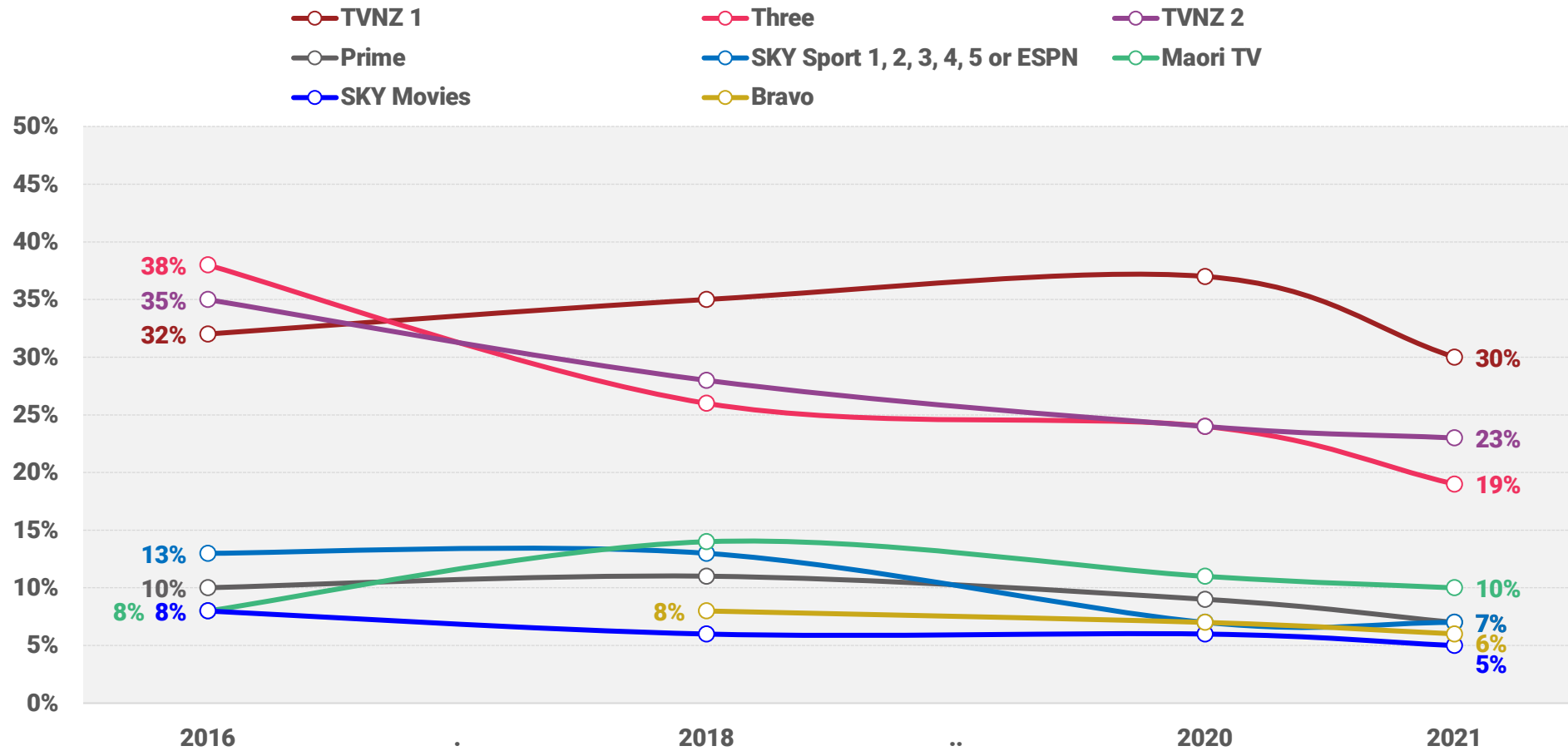


Note:  
Showing all TV channels that reach at least 2% of Māori.

**TVNZ 1 continues to attract the biggest daily audience among Māori, but this audience has declined significantly from 2020. The audience watching Three has also declined while other channels have remained stable since 2020.**

**Daily reach of TV channels (5% reach and over) – all Māori 15+**

Q: Thinking about yesterday overall, which of the following TV channels did you watch?

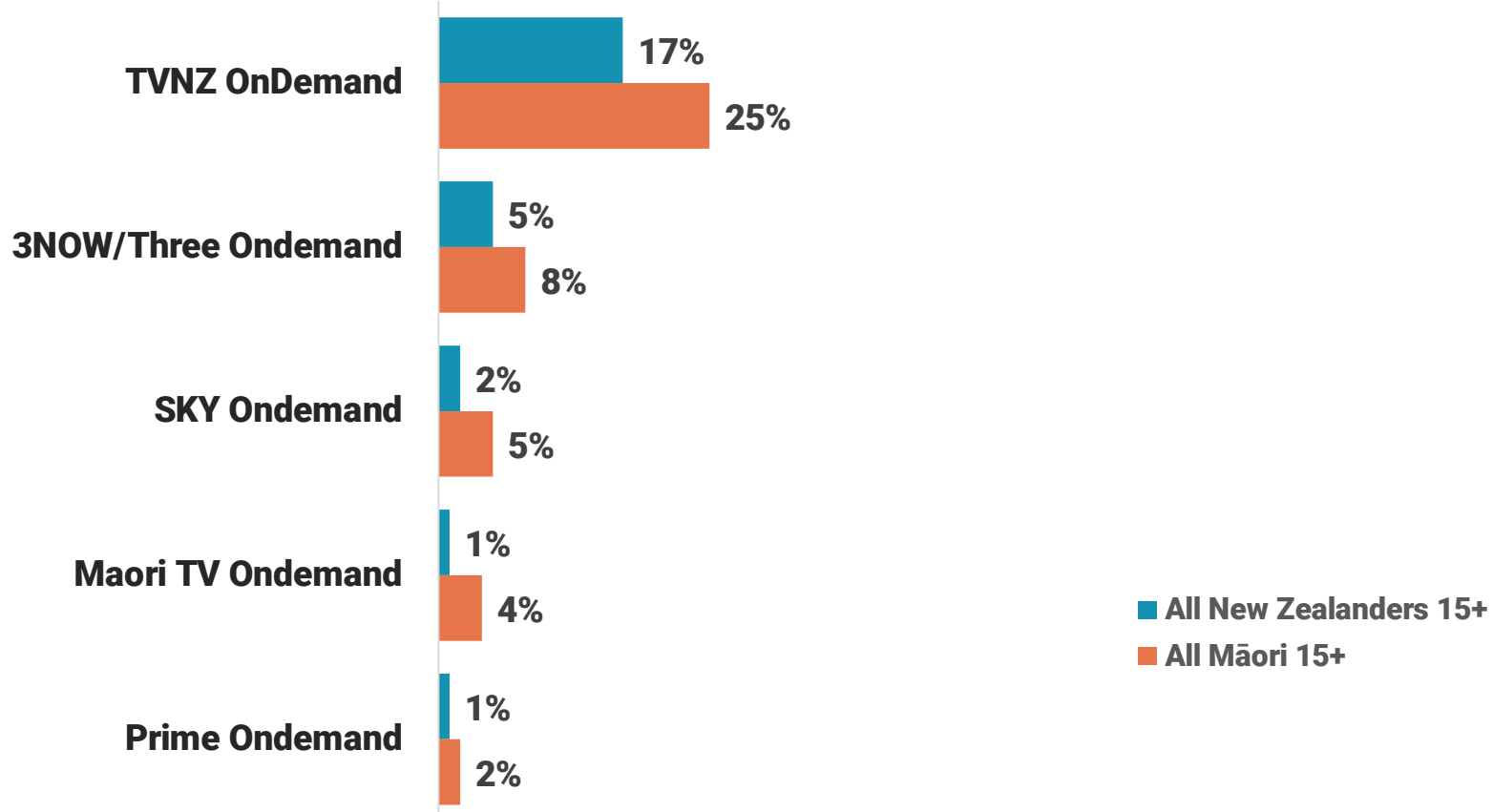


# All on demand sites are more widely used by Māori than New Zealanders 15+, and especially TVNZ OnDemand which is viewed by one in four Māori each day.



## Daily reach of on demand sites 2021 – All New Zealanders 15+ & all Māori 15+

Q: Thinking about yesterday overall, which of the following websites did you watch?

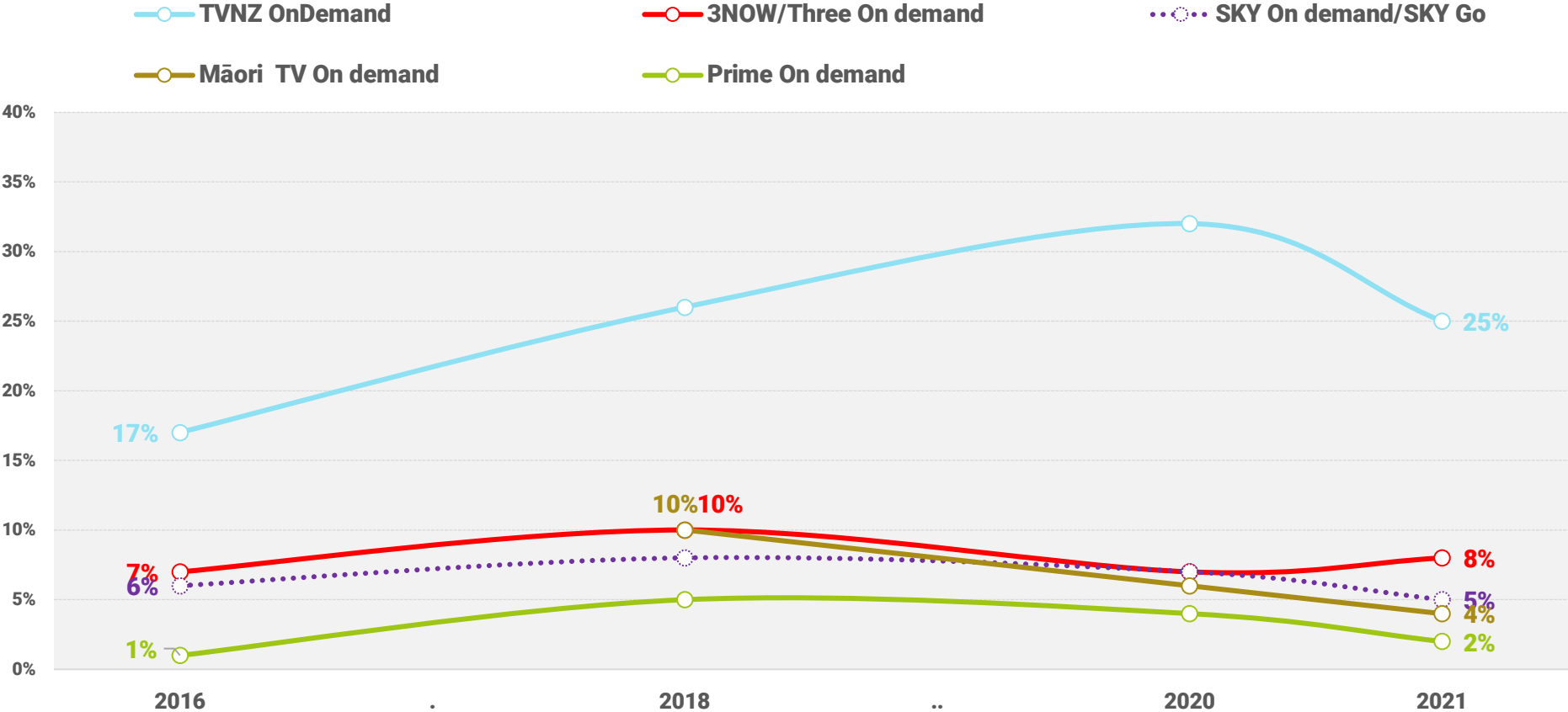




**TVNZ OnDemand continues to attract the biggest audience to an on demand site among Māori by a significant margin, but its daily audience has declined to 2018 levels since 2020. SKY OnDemand, Māori TV OnDemand and Prime OnDemand have also declined since 2020, suggesting a peak in on demand viewing in 2020 driven by Covid 19 levels 1 and 2.**

**Daily reach of on demand sites – all Māori 15+**

Q: Thinking about yesterday overall, which of the following websites did you watch?

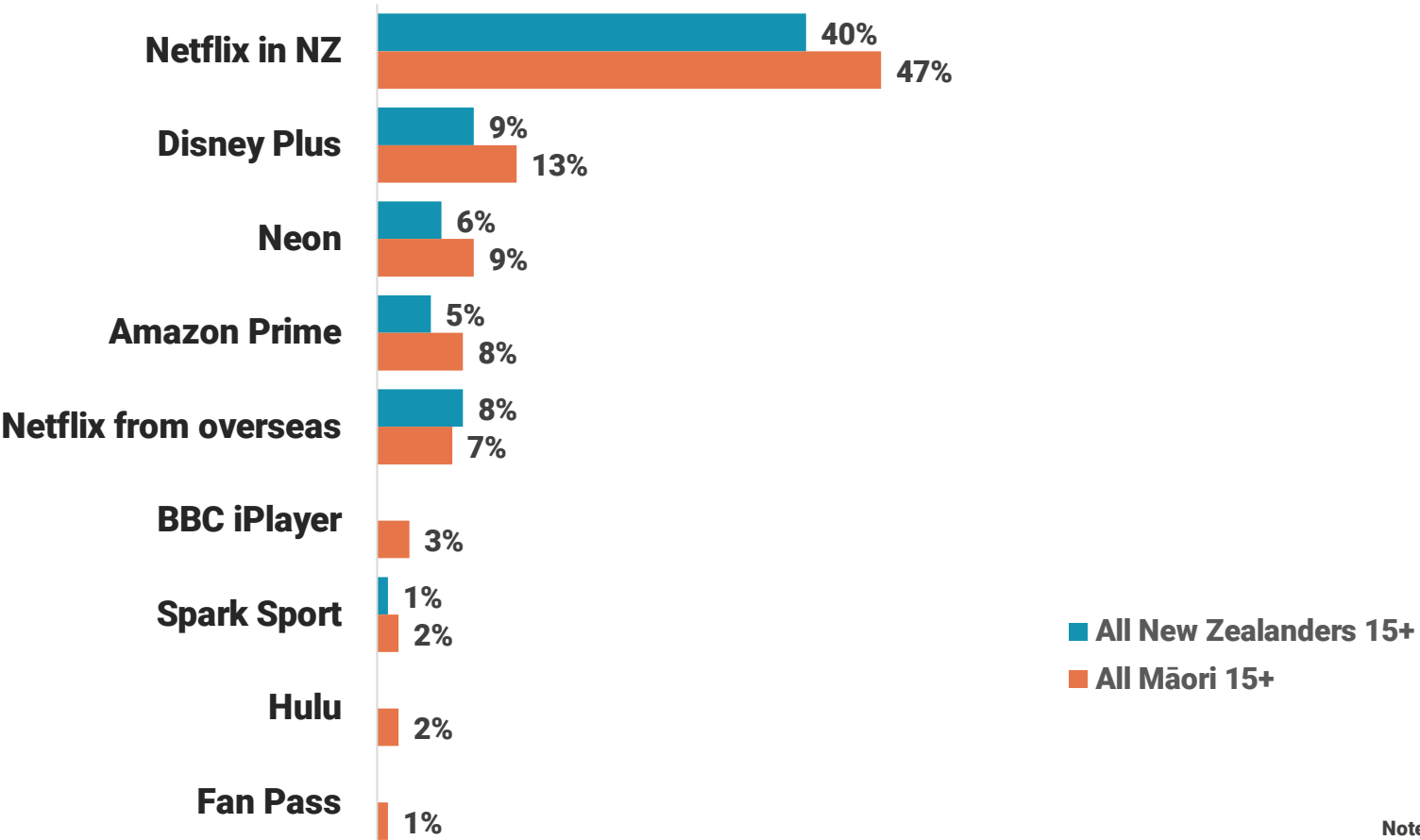


**As with other media, a larger proportion of Māori use SVOD sites than overall New Zealanders 15+. Netflix attracts the biggest audience, reaching nearly one in two Māori each day, followed by Disney Plus (13%).**



**Daily reach of SVOD sites 2021 – All New Zealanders 15+ & all Māori 15+**

Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?

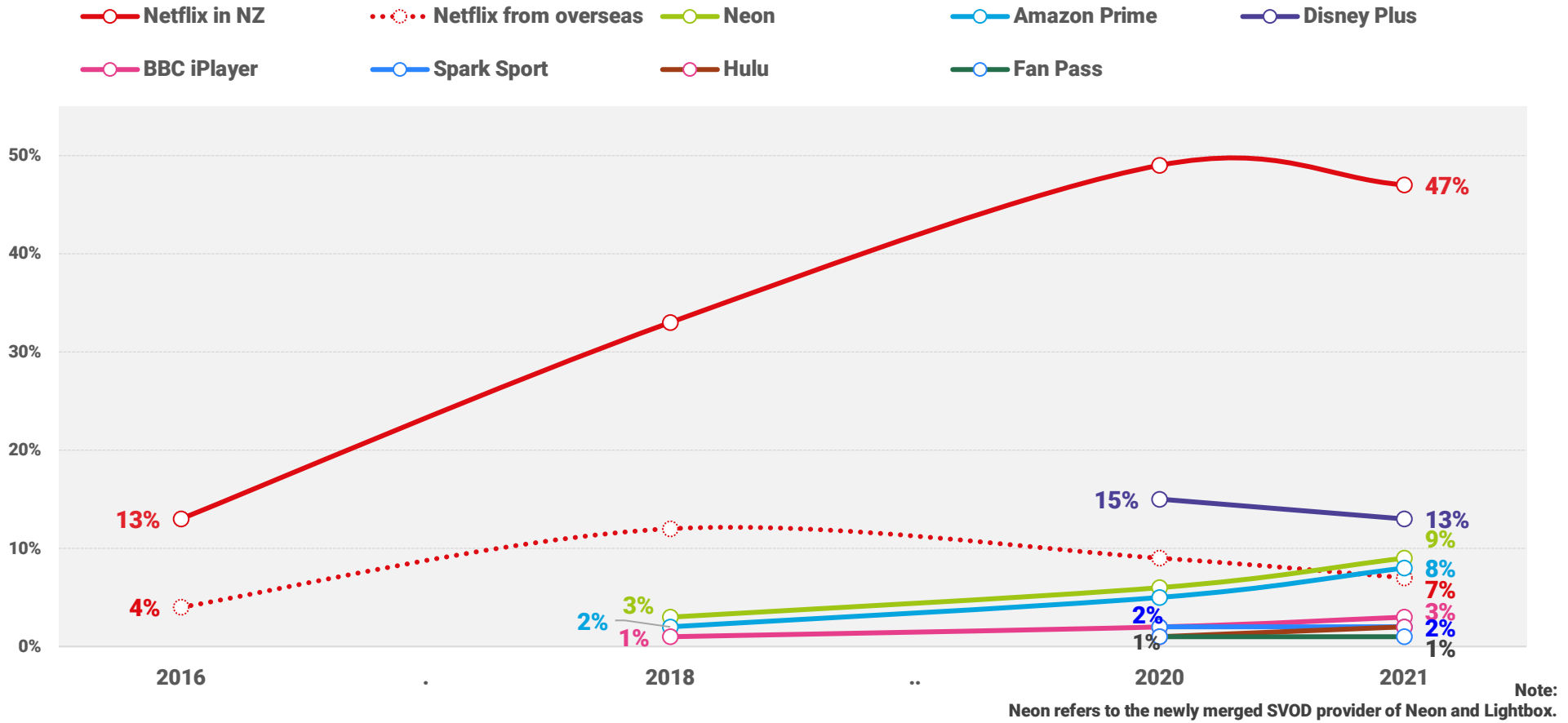


Note: Neon refers to the newly merged SVOD provider of Neon and Lightbox.

# Netflix has maintained its position as the most popular SVOD provider among Māori, with Disney Plus significantly below this provider. Amazon Prime and the newly merged Neon show significant audience growth since 2020.

## Daily reach of SVOD sites – all Māori 15+

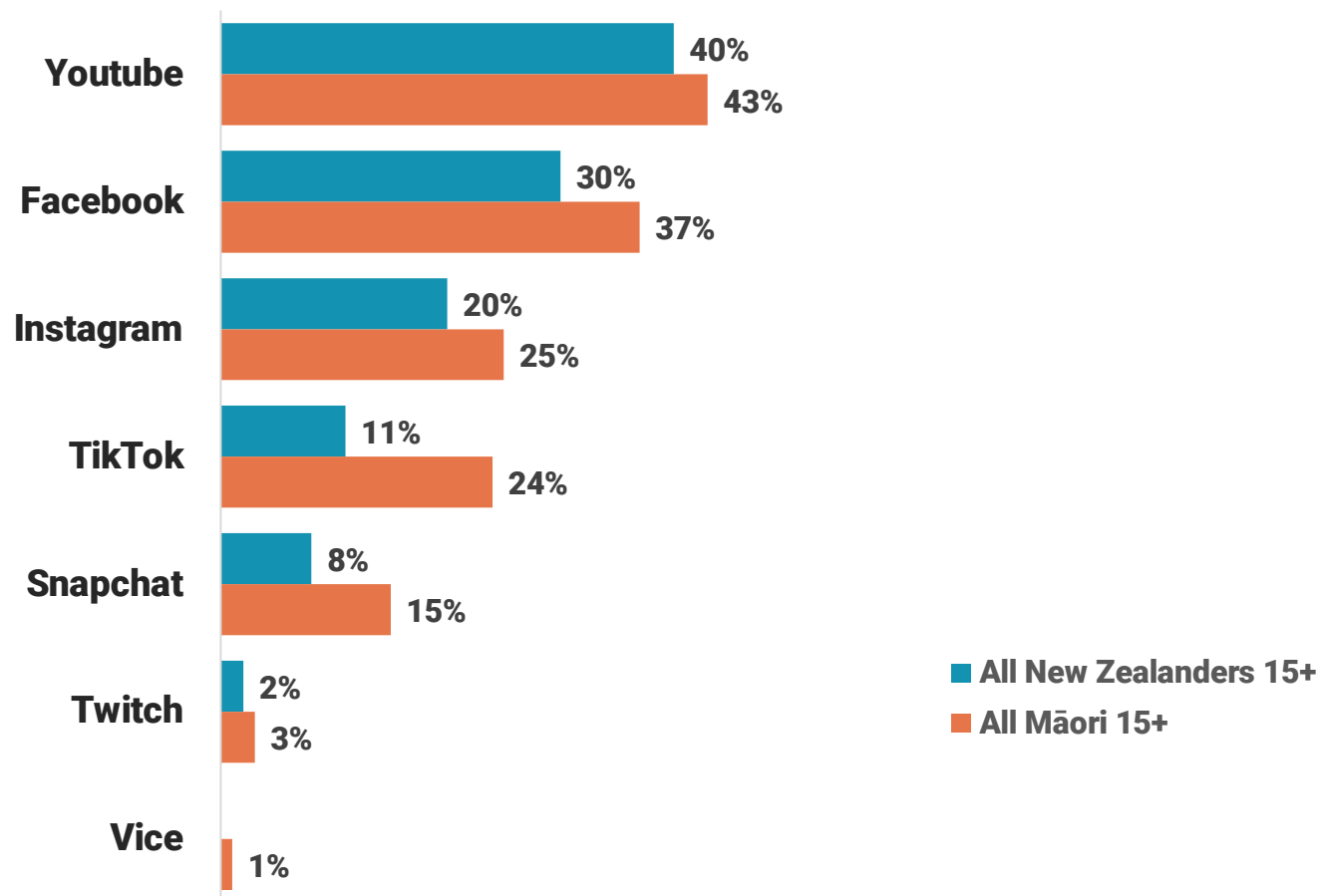
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



**YouTube continues to attract the biggest daily audience to overseas online video among Māori, reaching more than four in ten each day. Facebook is second most popular for online video followed by Instagram. Māori are more likely to watch online video on nearly all sites than overall New Zealanders 15+.**

### Daily reach of overseas online video sites 2021 – All New Zealanders 15+ & all Māori 15+

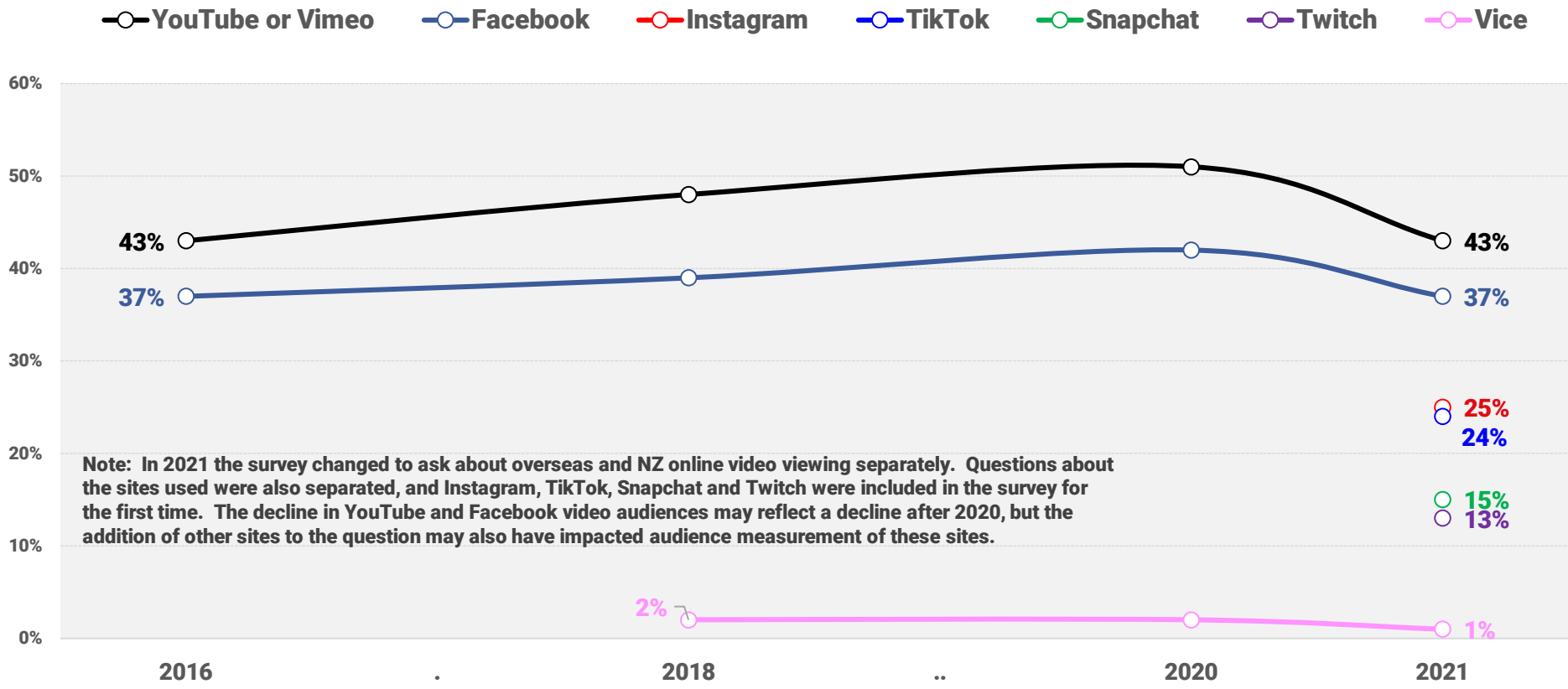
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



# Both YouTube and Facebook demonstrate declines in audience size since 2020.

## Daily reach of overseas online video sites – all Māori 15+

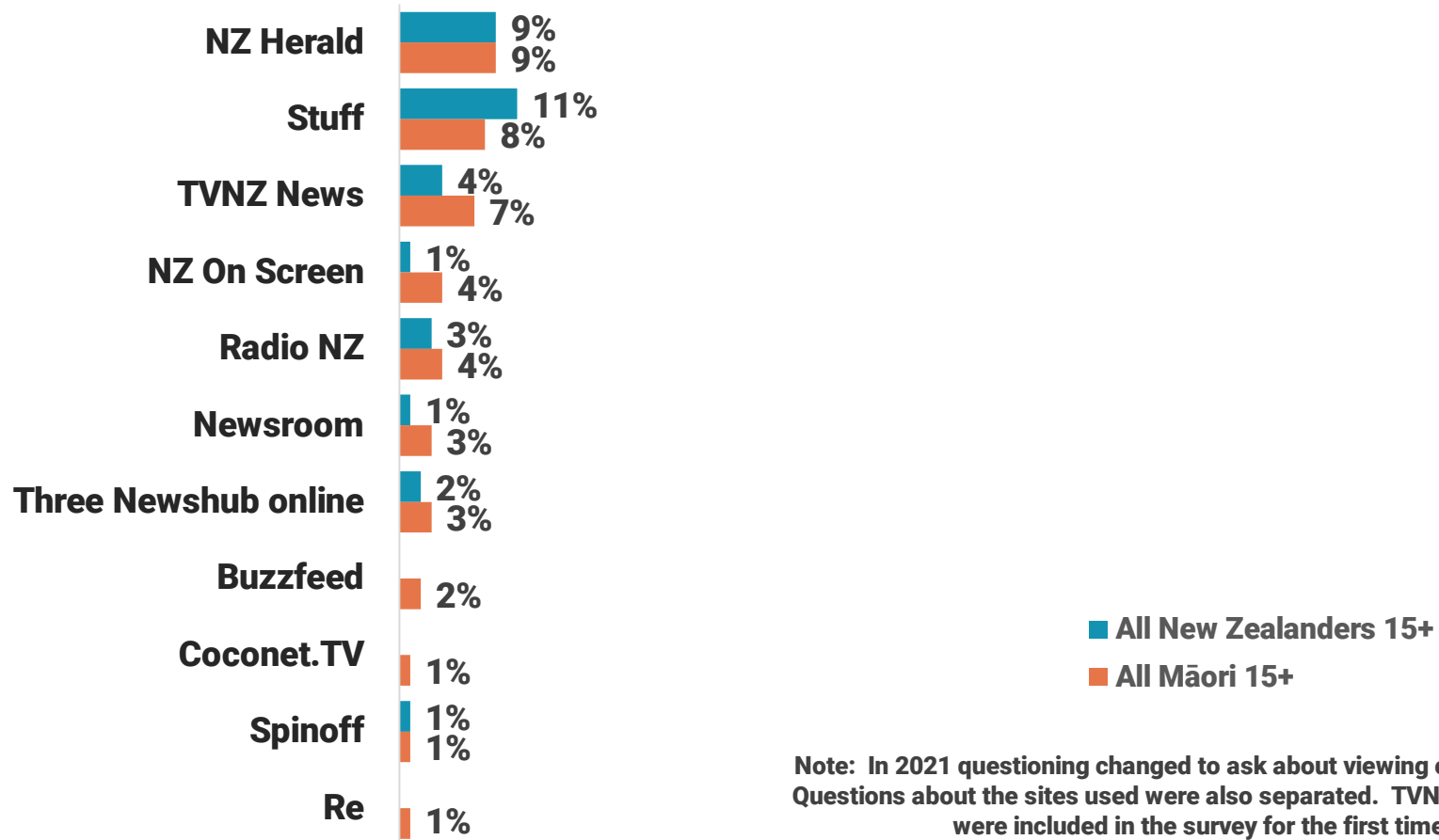
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



# NZ Herald, Stuff and TVNZ News attract the biggest audiences to NZ based online video sites, reaching slightly fewer than one in ten Māori each day.

## Daily reach of NZ online video sites 2021 – All New Zealanders 15+ & all Māori 15+

Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?

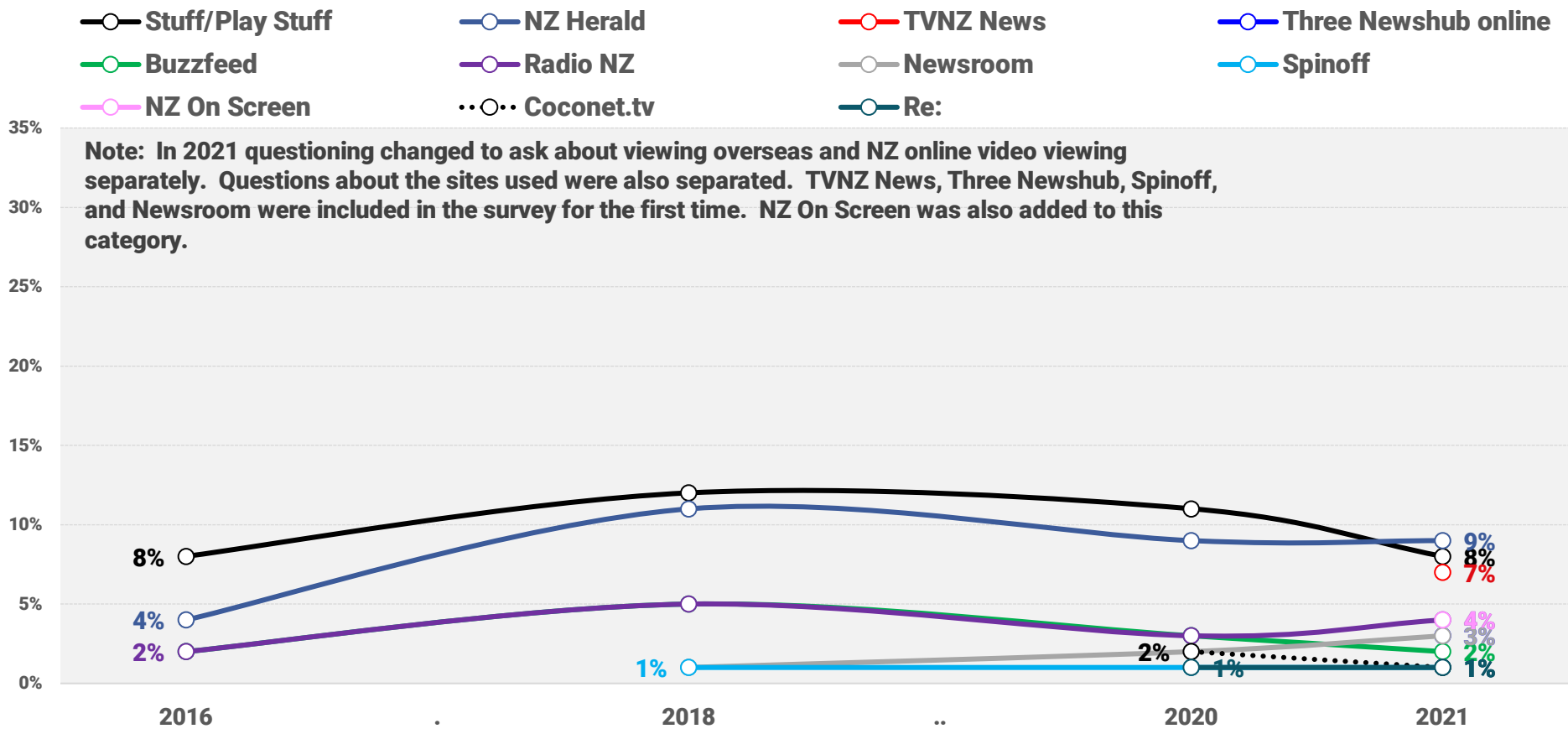


Note: In 2021 questioning changed to ask about viewing overseas and NZ online video viewing separately. Questions about the sites used were also separated. TVNZ News, Three Newshub, Spinoff, and Newsroom were included in the survey for the first time. NZ On Screen was also added to this category.

# The audiences using Stuff and NZ Herald are stable over time, with TVNZ News attracting a similar sized daily audience among Māori.

## Daily reach of NZ online video sites – all Māori 15+

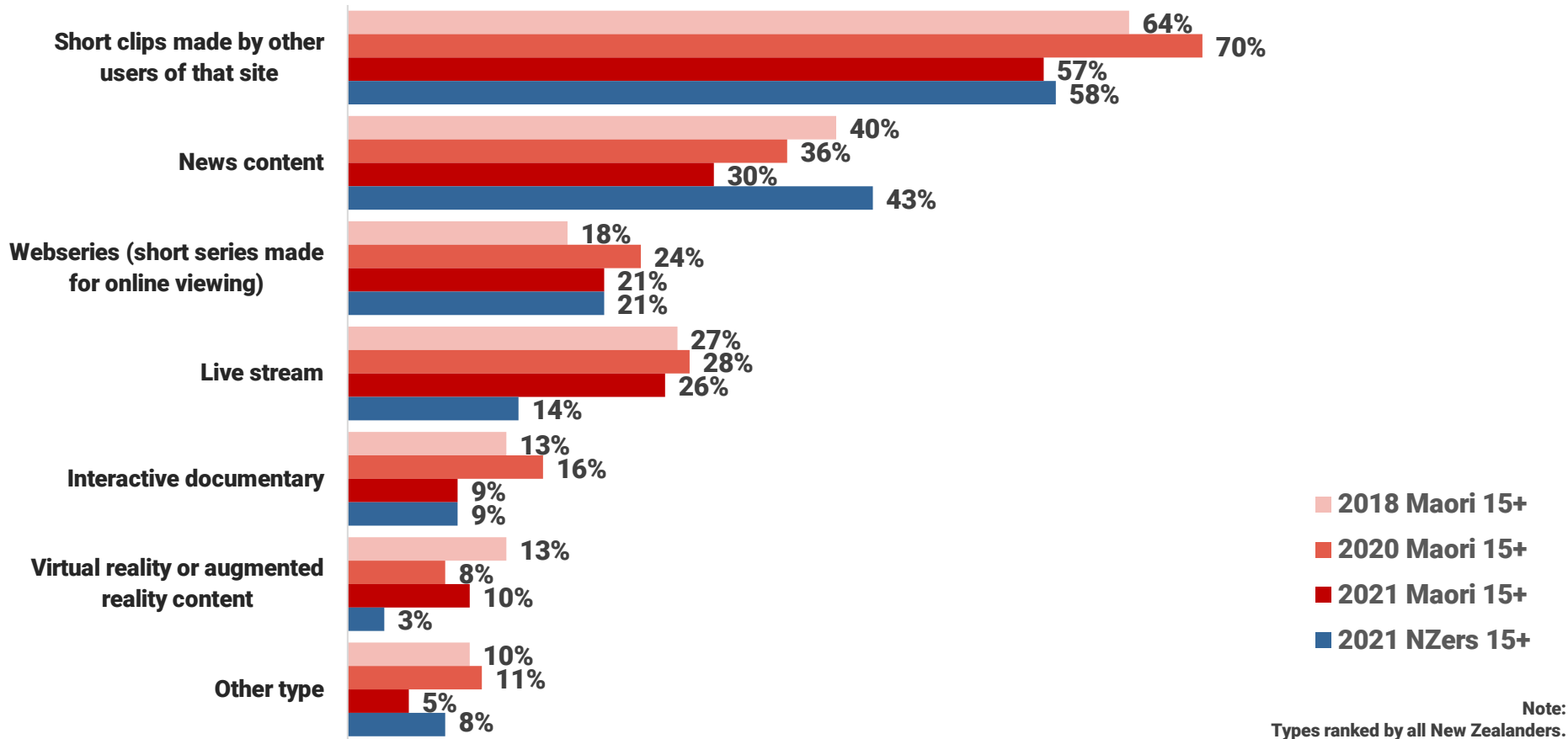
Q: Thinking about yesterday overall, which of the following websites / services did you use to watch TV shows?



**Short user generated clips are the most commonly used type of online video among Māori, although the proportion who view these has declined. Māori are significantly less likely to watch news video online than overall New Zealanders 15+ and this has declined again in 2021.**

**Types of online video watched – all Māori who watched online video yesterday**

Q: Which of the following types of video did you watch on these sites?



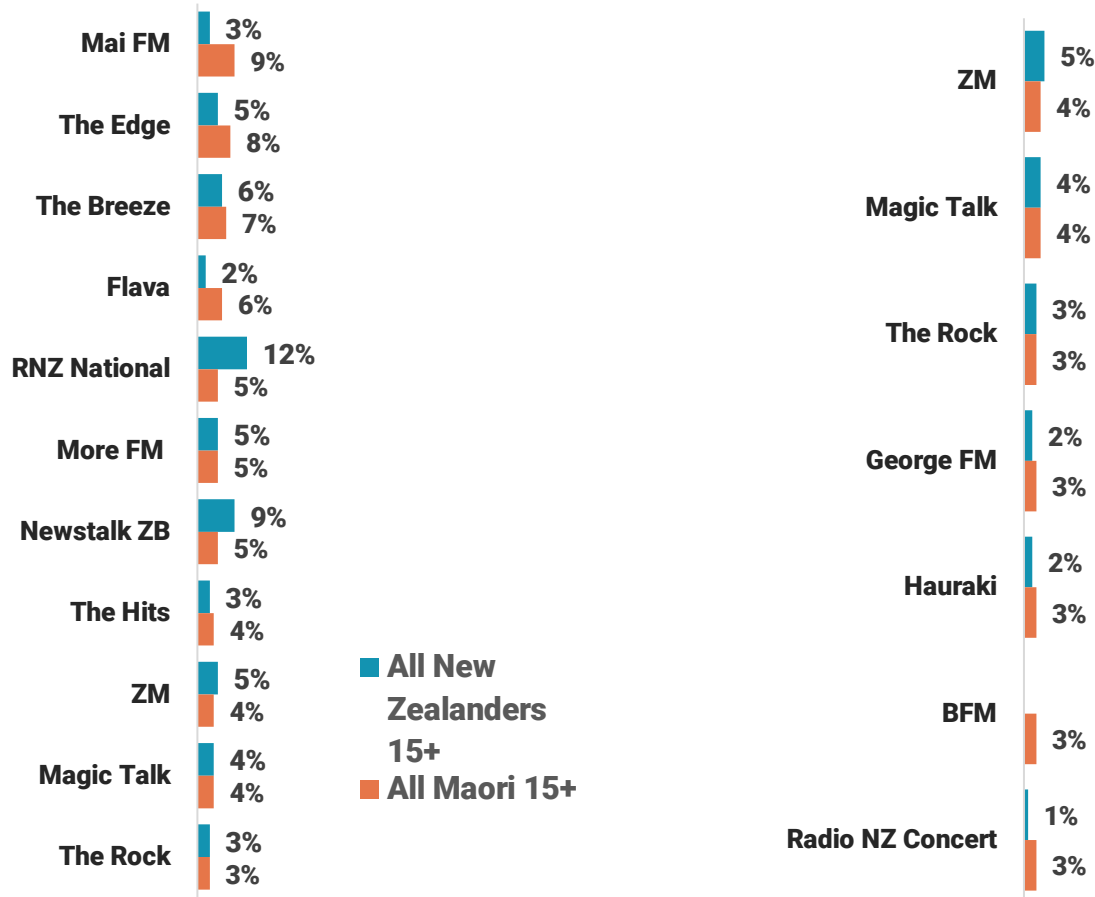
Note: Types ranked by all New Zealanders.



**Mai FM attracts the biggest audience among Māori each day, followed by The Edge, The Breeze and Flava - each reaching nearly one in ten Māori each day. These stations are significantly more popular than among overall New Zealanders 15+. Māori are more likely to listen to most radio stations except for news based stations such as RNZ National and Newstalk ZB.**

**Daily reach of radio stations 2021 (stations 3% and above) – all New Zealanders 15+ and all Māori 15+**

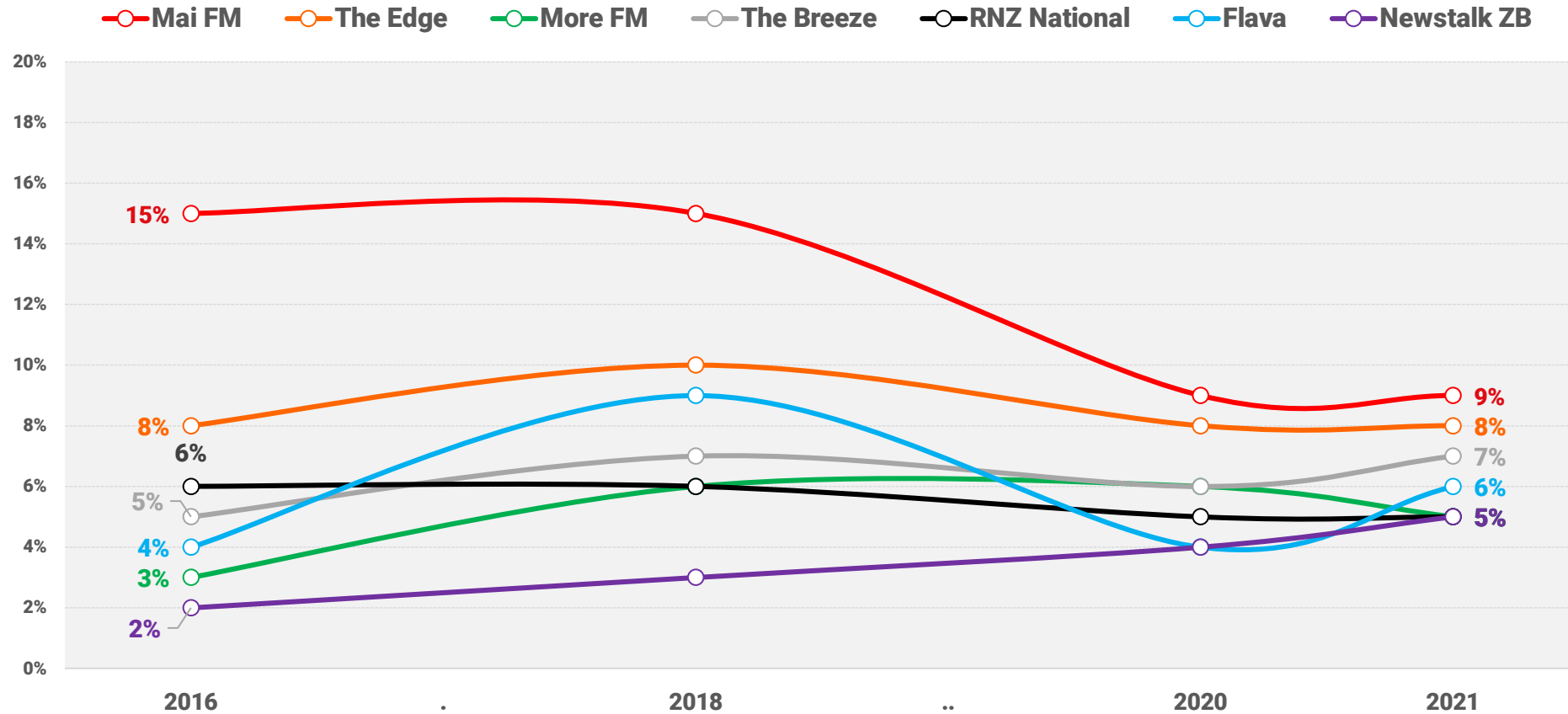
Q: Thinking about yesterday overall, what New Zealand radio stations did you listen to either on radio or online?



# Following declines in audience in 2020, the audiences on most of the biggest radio stations among Māori are stable in 2021. Two stations (Flava, Newstalk) show some audience growth.

## Daily reach of radio stations over time (5% reach and above) – all Māori 15+

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

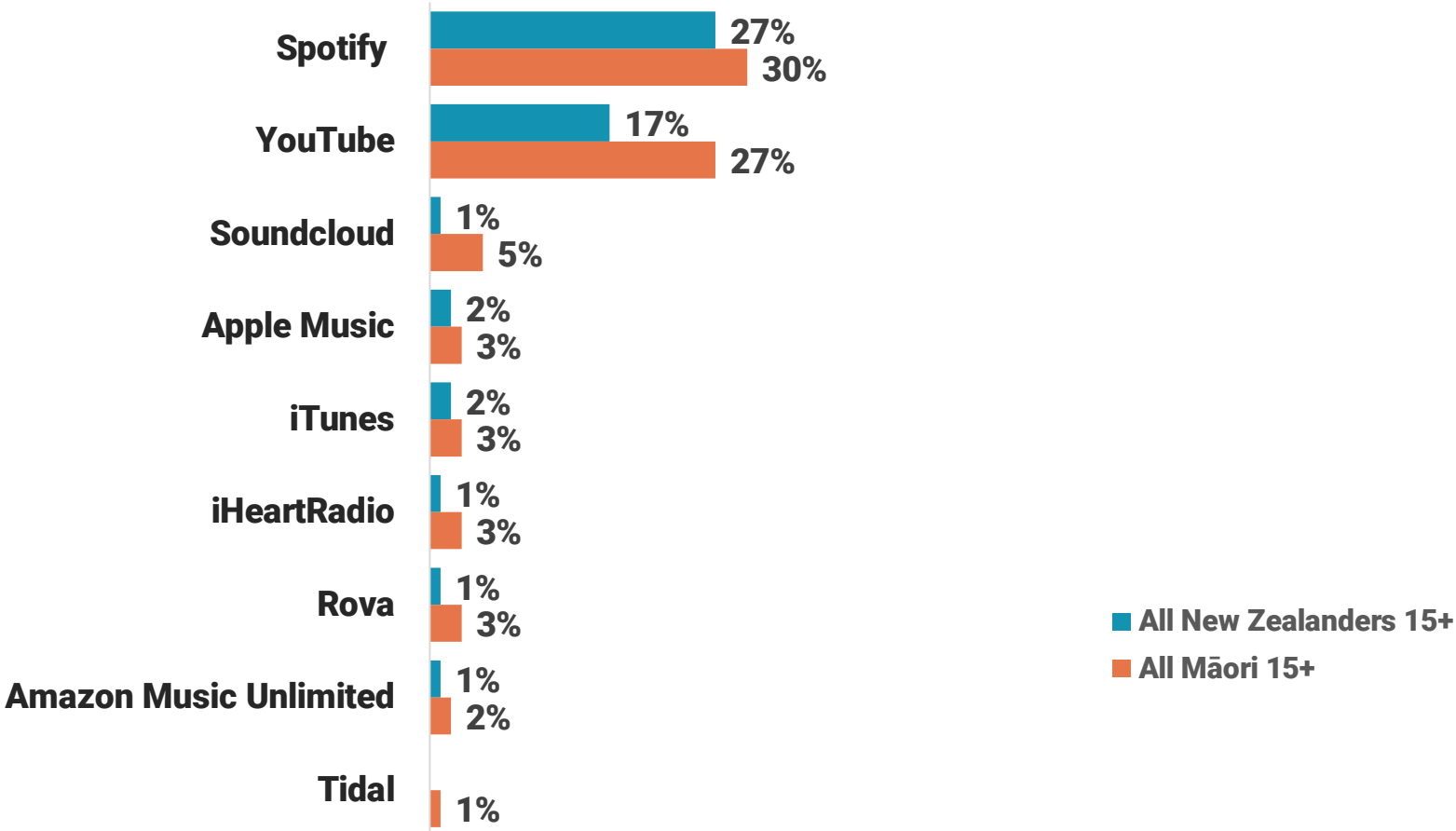


Several stations (ZM, iHeartRadio, The Rock, Sound) have dropped below the 5% threshold since 2020, while Flava and Newstalk have increased their audience among Māori to above 5%.

# Both Spotify and YouTube reach about three in ten Māori each day with Spotify slightly more popular than YouTube for listening to music.

## Daily reach of music streaming sites 2021 – All New Zealanders 15+ & all Māori 15+

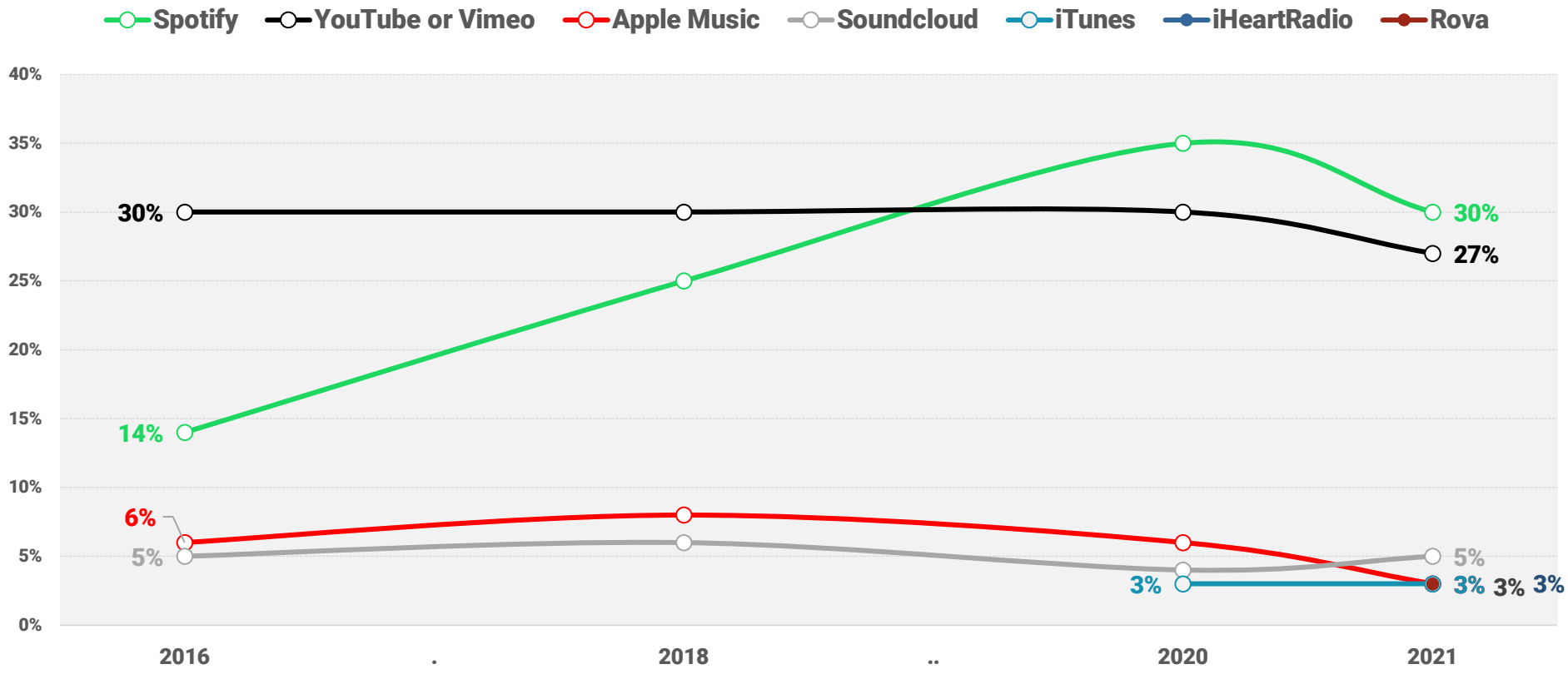
Q: Thinking about yesterday overall, which of the following websites did you use listen to music?



# The audiences listening to Spotify, YouTube and Apple Music have declined among Māori since 2020, with SoundCloud overtaking Apple Music as the third most popular music streaming site.

## Daily reach of music streaming sites – all Māori 15+

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



Note: iHeartRadio and Rova included for the first time in 2021



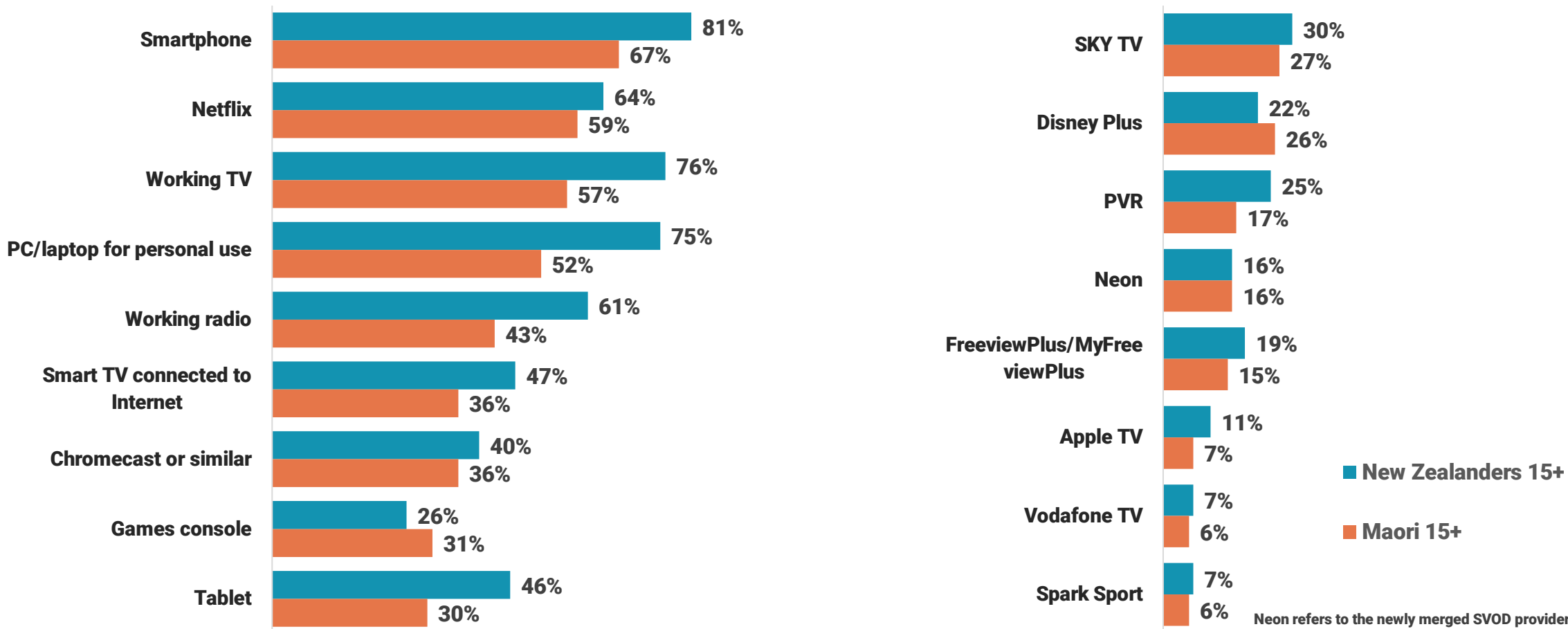
# Devices Personally Own Or Have Daily Access To



**Despite higher levels of media consumption overall, Māori audiences are typically less likely to be able to access most devices and platforms. The exceptions are higher incidence of access to a gaming console, Neon and Disney Plus. There is also less difference between overall New Zealanders 15+ and Māori in terms of access to Netflix.**

**Devices & platforms personally own or have daily access to – all New Zealanders 15+ & all Māori 15+**

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

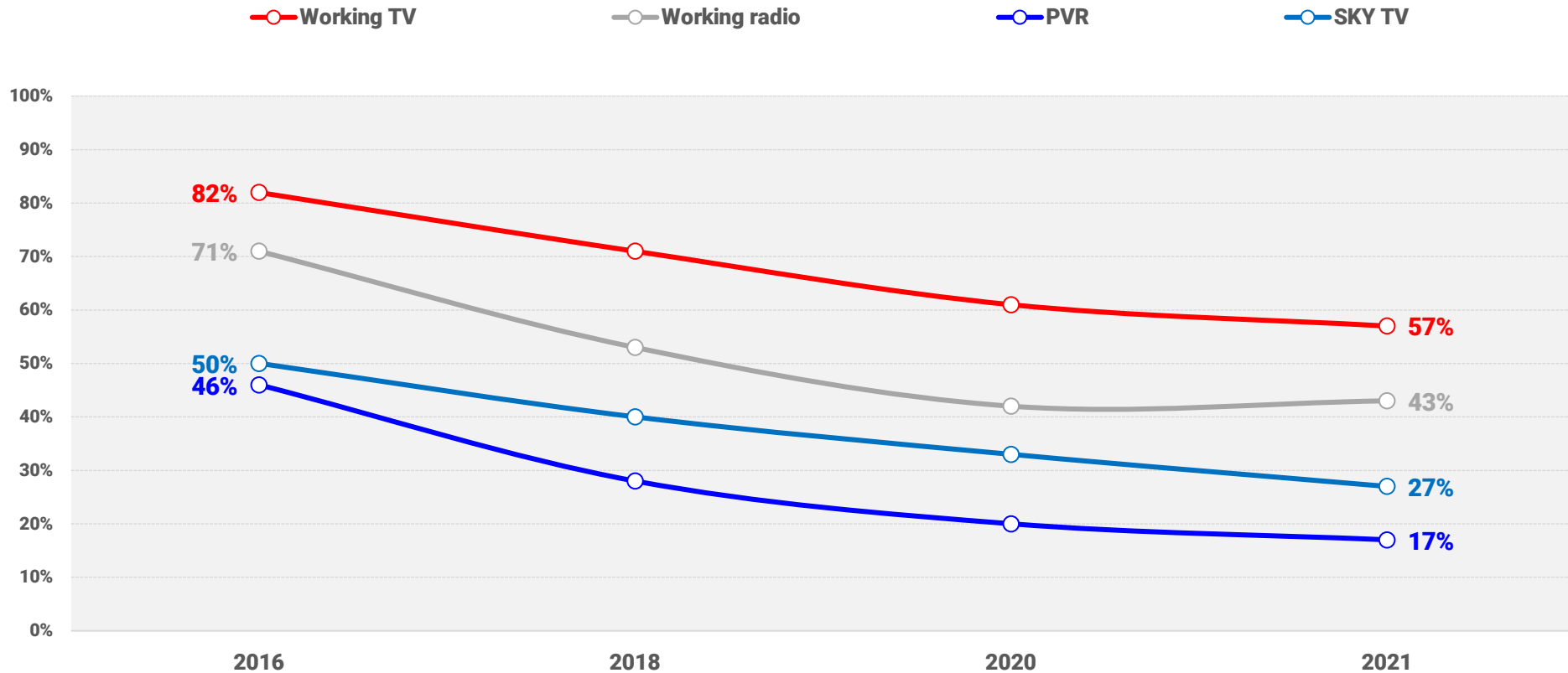


Note: Neon refers to the newly merged SVOD provider of Neon and Lightbox.

# The incidence of all devices and platforms through which Māori audiences access traditional media has declined since 2020, except for access to a radio.

## Devices & platforms personally own or have daily access to – all Māori 15+

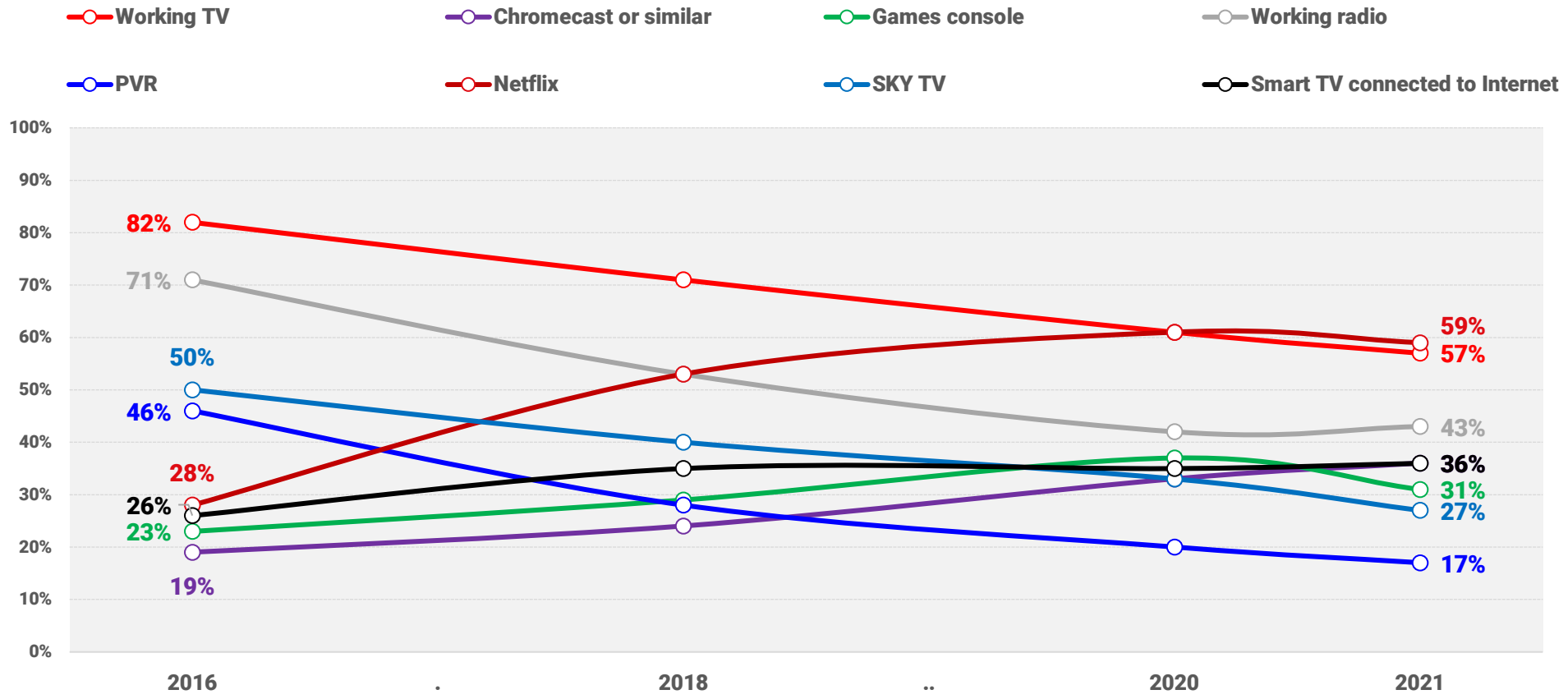
Q: Which of the following, if any, do you personally own or have daily access to?



**Access to the most common devices and platforms that enable access to digital media is largely stable among Māori audiences since 2020, although Chromecast has grown a little in the last 12 months. Access to a gaming console has declined in 2021.**

**Devices & platforms personally own or have daily access to – all Māori 15+**

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



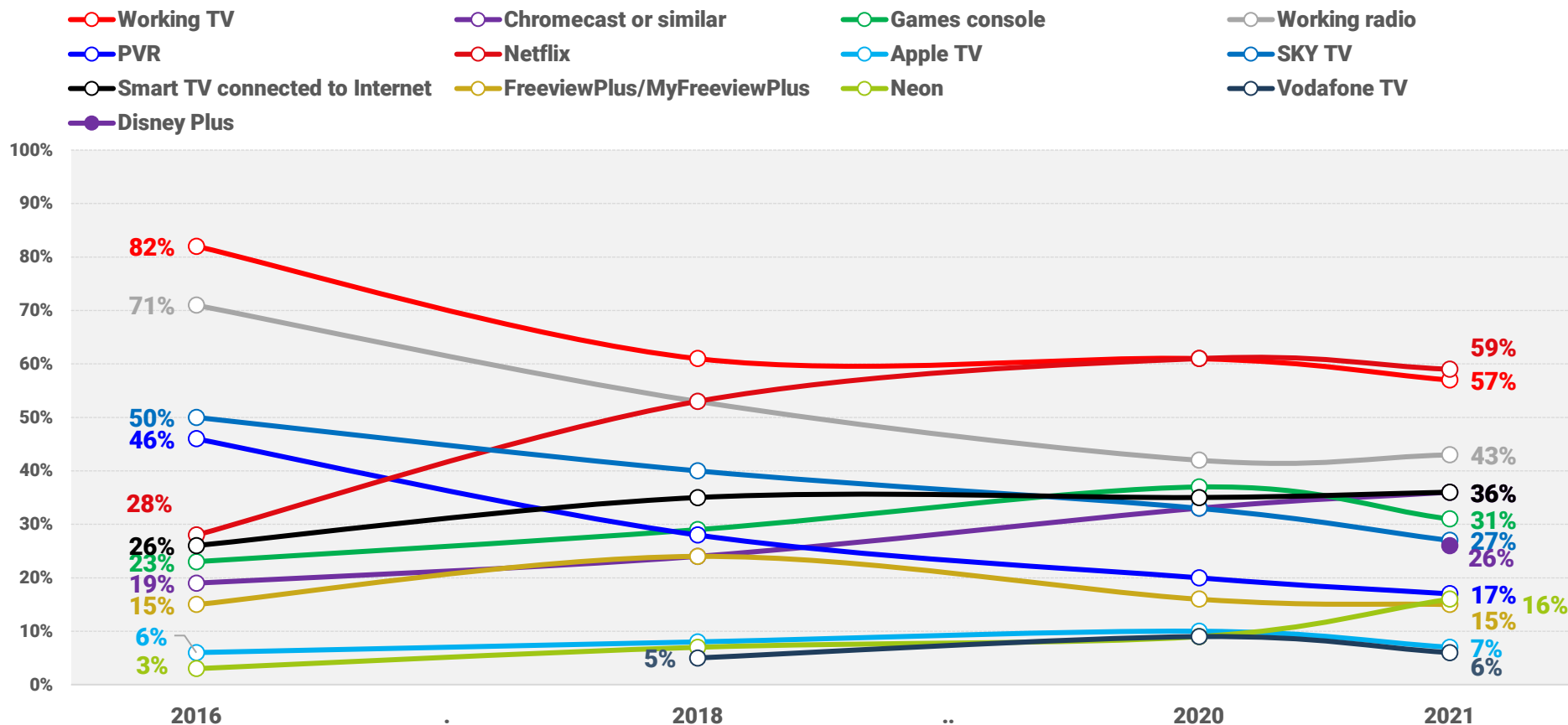
Base: All Māori: (2016 n=195; 2018 n=451; 2020 n=521; 2021 n=446).



# Access to the remaining devices and platforms is also stable among Māori, with the exception of significant growth in the newly merged Neon/Lightbox (16%).

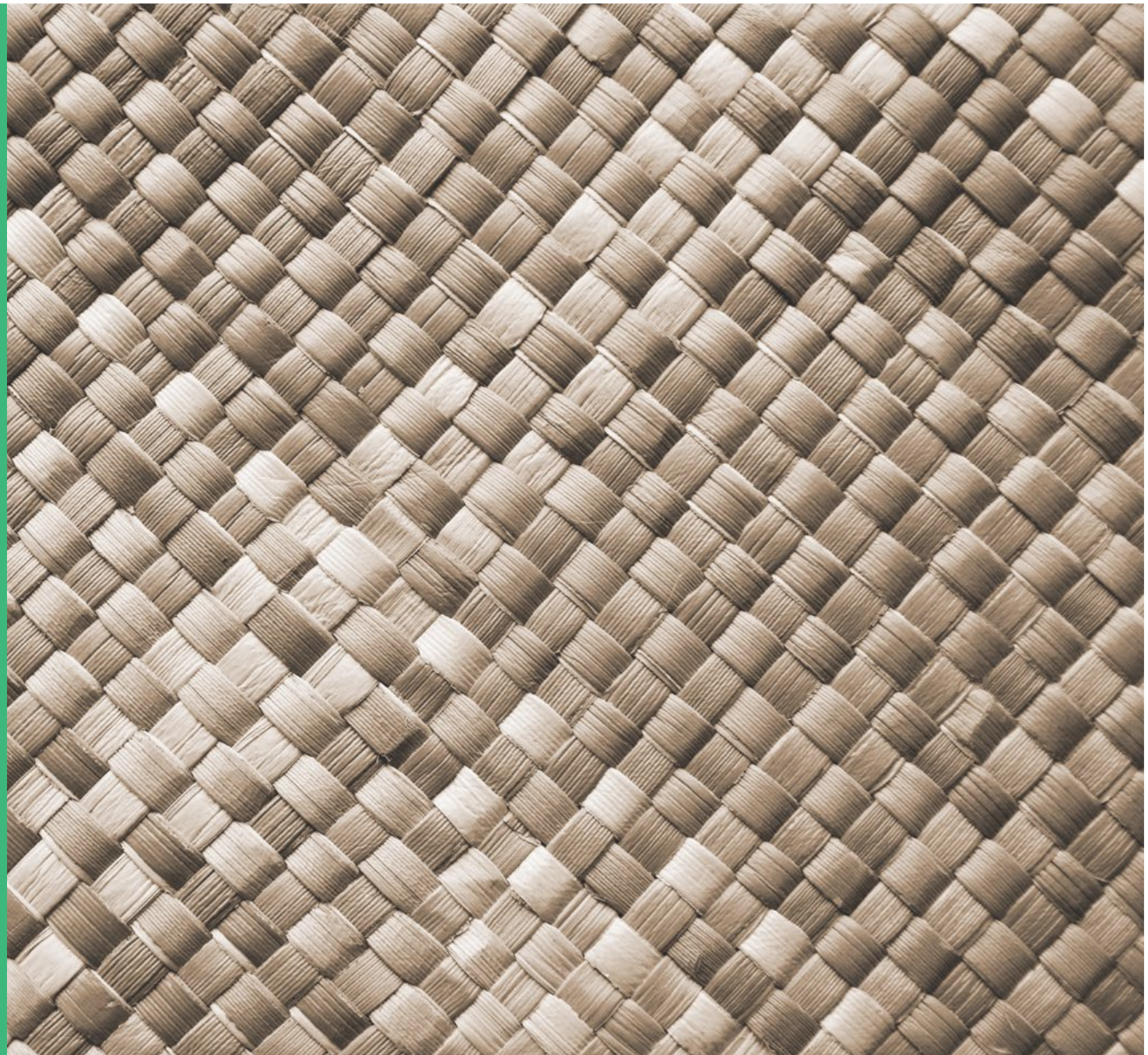
## Devices & platforms personally own or have daily access to – all Māori 15+

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





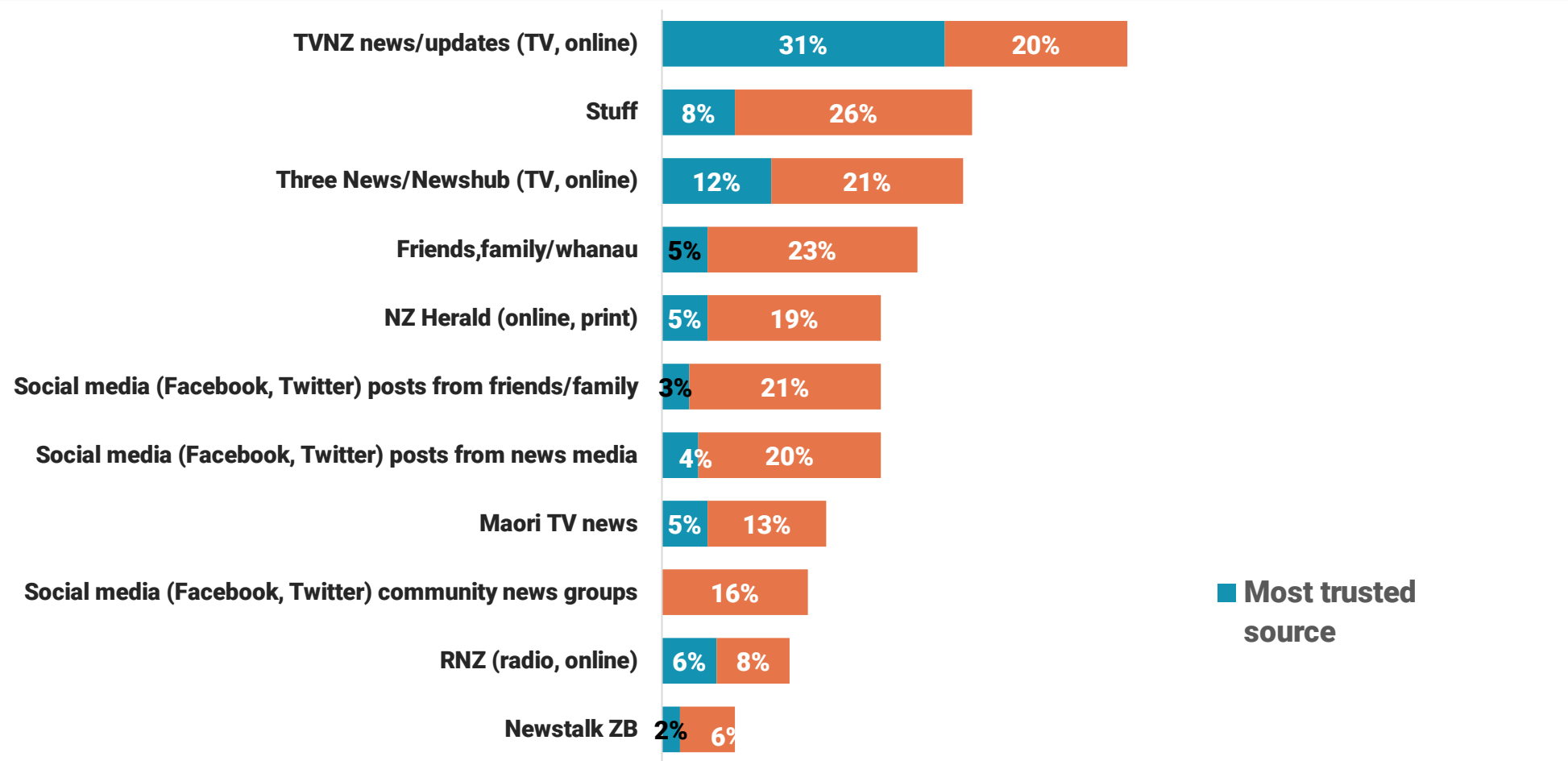
# Sources of news



# TVNZ News, both online and on air, is the most widely used and trusted source of news among Māori audiences. Stuff and Newshub are second most widely used with Three Newshub trusted by slightly more Māori.

## Sources of news and information (sources used by 5% or more) – all Māori 15+

Q: Which of the following sources of news and information do you regularly use to keep up to date?  
And which one of these is your most trusted source of news?





# WHERE ARE THE **AUDIENCES?**

**Māori report**

**AUGUST 2021**