MEDIA TRENDS 2016

HOW NEW ZEALANDERS CONSUME NEWSPAPERS, MAGAZINES, TV, RADIO & DIGITAL CONTENT
MORE CONNECTED
MORE CONTENT
MORE CONTROL
EXECUTIVE SUMMARY

New Zealanders are more mobile and connected than ever before – we’re accessing content wherever we go. This looks set to continue as mobile device ownership hasn’t yet reached saturation point. Additional devices can complement traditional media and deepen audience engagement e.g. multi-screening while watching TV. Over half of us (56%) access the internet on our phones. Photography and Camera apps are now ahead of Utilities (e.g. alarm clock, calculator) with Social Media taking out the third spot.

We are certainly in a fragmented media market. Understanding which media and what combination of media audiences are consuming is indispensable. 6 out of 10 New Zealanders read news content online and it’s growing. Audiences spend almost three hours a day watching broadcast TV, those watching only online TV content is 4%. The media mix has never been more important.

Some control is shifting to the consumer, as more people sign up for specialist digital subscription services, and consume content at a time that suits them. Nearly a quarter of New Zealanders subscribe to digital content such as Netflix and Spotify. But the key continues to be that the content is compelling – audiences will then watch it using whatever device, and this is true for advertising as well.
3.1 MILLION

NEW ZEALANDERS AGED 10+
PERSONALLY OWN A MOBILE DEVICE
MORE CONNECTED AND MOBILE

% OF HOUSEHOLDS

- USE MOBILE PHONE
- INTERNET AT HOME
- BROADBAND
- SMARTPHONE
- TABLET/iPAD
- EBOOK READER

88% 79% 70% 63% 32% 11%

Base: Main Household Shopper (used as proxy for household)
Source: Nielsen Consumer and Media Insights – 1995 to 2015

RAPID INCREASE FOR TABLET OWNERSHIP

2.6M
1.3M
1.1 MILLION

USE SMART PHONE (+15%)
OWN A TABLET (+25%)

Year on year
Base: All People 10+
Source: Nielsen Consumer and Media Insights Q1-Q4 2015
MEDIA TRENDS 2016

MORE PEOPLE ARE ACCESSING THE INTERNET WITH SMARTPHONES

- 74% in 2013, 75% in 2014, 69% in 2015
- Mobile phone access increase

64% of New Zealanders use apps regularly

OF THOSE WHO ACCESS THE INTERNET VIA A MOBILE DEVICE

TOP 10 CATEGORIES

- Photography/Camera
- Games
- Utilities
- Maps
- Social Networking
- Communication (Instant Messenger/Skype)
- Weather
- Finance/Banking
- Music/Audio
- News (Including Newspapers)

Base: All People 10+ who have used the Internet in the last 7 Days (3,423,000)
(Categories in this figure are not mutually exclusive: multiple answers)
Source: Nielsen Consumer and Media Insights Q1-Q4 2015-13

Source: Nielsen Consumer and Media Insights Q1-Q4 2015
WE ARE GIVING UP OUR LANDLINES

43% of New Zealanders homes now have no landline phone. This has increased by 24% YOY

20-29 Year olds are almost twice as likely to only have a mobile phone

Base: All People 10+
Source: Nielsen Consumer and Media Insights Q1-Q4 2015
2.8 MILLION
NEW ZEALANDERS 15+ READ A NEWSPAPER EACH WEEK
78% READ NEWSPAPERS ACROSS A WEEK

53% DAILY
58% COMMUNITY
17% SUNDAY

Source: Nielsen Consumer and Media Insights Q1-Q4 2015. Base 15+
FEWER PEOPLE ARE READING EVERY ISSUE

NUMBER OF DAILY NEWSPAPER ISSUES READ PER WEEK

<table>
<thead>
<tr>
<th>Year</th>
<th>ONE</th>
<th>TWO</th>
<th>THREE</th>
<th>FOUR</th>
<th>FIVE</th>
<th>SIX+</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>31%</td>
<td>15%</td>
<td>9%</td>
<td>3%</td>
<td>6%</td>
<td>31%</td>
</tr>
<tr>
<td>2015</td>
<td>47%</td>
<td>14%</td>
<td>7%</td>
<td>3%</td>
<td>4%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Base: All People 10+
Source: Nielsen Consumer and Media Insights Q1-Q4 2011 and 2015

2.5 MILLION READ DAILIES AT LEAST ONCE A MONTH

<table>
<thead>
<tr>
<th>Year</th>
<th>MONTHLY COVERAGE</th>
<th>WEEKLY COVERAGE</th>
<th>AVERAGE ISSUE READERSHIP</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>2,816</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>2,386</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>1,598</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>1,894</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>1,166</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>2,496</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: All People 15+
Source: Nielsen Consumer and Media Insights Q1-Q4 2010-2015
6 OUT OF 10 READ NEWS CONTENT ONLINE

25% 31% 35% 40% 47% 52% 54% 60%


Base: All People 10+
Source: Nielsen Consumer and Media Insights Q1-Q4 2008-2015

WEEKLY REACH REMAINS STEADY AT 2.4M PEOPLE

DAILY NEWSPAPER BRANDS


1,471 1,425 1,332 1,212 1,008 874 818

515 580 676 763 800 759 703

189 273 366 479 650 800 870

ONLINE ONLY  BOTH PRINT & ONLINE  PRINT ONLY

Print: Weekly reading of metropolitan newspapers (The New Zealand Herald, Dominion Press, The Press, Otago Daily Times, Waikato Times); Online: Weekly visits to nzherald.co.nz, stuff.co.nz, dompost.co.nz, odt.co.nz, the press.co.nz, waikatotimes.co.nz

Base: All People 10+
Source: Nielsen Consumer and Media Insights Q1-Q4 2009-15
LOCAL NEWS IS POPULAR ONLINE

2.6 MILLION ACCESS DEDICATED NEWS AND CURRENT EVENT SITES

2.4 MILLION ACCESS LOCAL NZ NEWS*

*Combined NZ news brand URLs - based off 9 month average
Base: All People 2+
Source: Nielsen Online Ratings Feb 2015-Feb 2015
3 MILLION
NEW ZEALANDERS READ AT LEAST ONE MAGAZINE IN ITS ISSUE PERIOD

MAGAZINES
TOP TITLES REACH 2,470,000 NEW ZEALANDERS

**TOP 10 CONSUMER MAGAZINES**

<table>
<thead>
<tr>
<th>Magazine</th>
<th>Readership</th>
</tr>
</thead>
<tbody>
<tr>
<td>AA Directions</td>
<td></td>
</tr>
<tr>
<td>SKYWATCH</td>
<td></td>
</tr>
<tr>
<td>Woman’s Weekly</td>
<td></td>
</tr>
<tr>
<td>NZ HOUSE &amp; GARDEN</td>
<td></td>
</tr>
<tr>
<td>Woman’s Day</td>
<td></td>
</tr>
<tr>
<td>healthyfood</td>
<td></td>
</tr>
<tr>
<td>TV GUIDE</td>
<td></td>
</tr>
<tr>
<td>Cuisine</td>
<td></td>
</tr>
</tbody>
</table>

Average issue readership
Base: All People 10+
Source: Nielsen Consumer and Media Insights Q1-Q4 2015

**MAGAZINE READERS SHOW LOYALTY**

- 21% of magazine readers say they keep their magazines
- 34% of New Zealanders subscribe to at least one magazine

*At least six months
Base: All People 10+
Source: Nielsen Consumer and Media Insights Q1-Q4 2015
**ENGAGEMENT LEVELS REMAIN HIGH**

**53% OF NEW ZEALANDERS ARE LOYAL TO THEIR FAVOURITE MAGAZINE***

**44 MINUTES IS THE AVERAGE TIME SPENT READING A TYPICAL MAGAZINE**

**PRIMARY READERS ARE SPENDING 74 MINUTES**

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*Read four out of four issues  
Base: All People 10+  
Source: Nielsen Consumer and Media Insights Q1-Q4 2012 & 2015

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**IN THE LAST MONTH,**

**799,000 NEW ZEALANDERS READ MAGAZINE CONTENT ONLINE**

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Base: All People 10+  
Source: Nielsen Consumer and Media Insights Q1-Q4 2015
3.2 MILLION
NEW ZEALANDERS AGED 10+ LISTEN TO RADIO EACH WEEK
TOP 10 RADIO STATIONS
RANKED BY 2015 WEEKLY AUDIENCE (000s)

YoY % CHANGE
+10% -5% -2% -3% -16% -6% -25% -4% +16% -1%

THE EDGE
RADIO NEW ZEALAND NATIONAL
MORE FM
THE ROCK
ZM
NEUStalk ZB
THE HITS
THE BREEZE
MAI FM
THE SOUND

Base: All people 10+
Source: Nielsen Consumer and Media Insights Q1 2014-Q4 2015
RADIO ONLINE
CAPTURES A GROWING AUDIENCE

TOP SITES

<table>
<thead>
<tr>
<th>Site</th>
<th>Average Unique Audience</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>RADIO NEW ZEALAND</td>
<td>245,000</td>
<td>55%</td>
</tr>
<tr>
<td>THE EDGE</td>
<td>191,000</td>
<td>35%</td>
</tr>
<tr>
<td>ZM ONLINE</td>
<td>175,000</td>
<td>23%</td>
</tr>
</tbody>
</table>

Source: Nielsen Online Ratings – Average Monthly Unique Audience 2014-2015
Ranked by 2015
Includes websites visitation; exclude mobile apps
3.5 MILLION
NEW ZEALANDERS AGED 5+ WATCH TELEVISION EACH WEEK

TELEVISION
AUDIENCES SPEND ALMOST 3 HOURS A DAY WATCHING BROADCAST TV

Broadcast TV-Average Time Spent Viewing per Day (Mins)
All People 5+
Period: 1 January to 31 December 2015 (2am-2am)

PEAK (18:00-22:29)  OFF PEAK (22:30-17:59)
PEAK CHANNEL SHARE

2015

TV1* | TV2* | TV3* | FOUR* | PRIME | MAORI TV | CHOICE TV | SKY MOVIES** | SKY SPORT 1, 2, 3, 4 | VIBE, JONES!, CRIME & INVESTIGATION | OTHER SKY CHANNELS
---|---|---|---|---|---|---|---|---|---|---
31.2 | 16.1 | 15.5 | 3.4 | 5 | 2.3 | 4.1 | 2.5 | 13.2 | 3.3

2014

28.7 | 18.0 | 16.1 | 3.9 | 5.2 | 2.1 | 4.1 | 2.6 | 12.5 | 2.6

2013

28.8 | 17.7 | 17.8 | 4.6 | 5.8 | 2 | 4.1 | 1.3 | 13.6 | 1.7

2005

35.8 | 22 | 20.4 | 1.5 | 2.1 | 4 | 1.3 | 1.5 | 7.1

All People 5+, 1 January to 31 December 2015, Peak (6pm to 10:30pm)
TVOne*, TV2*, TV3*, FOUR* = Parent channel + Plus 1 Channel
Sky Movies** = Includes Sky Movies Premiere, Extra and Greats
## TOP 10 PROGRAMMES IN 2015

<table>
<thead>
<tr>
<th>RANK</th>
<th>PROGRAMME</th>
<th>CHANNEL</th>
<th>AUD%</th>
<th>EPISODES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ONE NEWS</td>
<td>TVONE*</td>
<td>16.1</td>
<td>365</td>
</tr>
<tr>
<td>2</td>
<td>RUGBY WORLD CUP 2015 FINAL LIVE</td>
<td>PRIME</td>
<td>16.0</td>
<td>1</td>
</tr>
<tr>
<td>3</td>
<td>BORDER PATROL</td>
<td>TVONE*</td>
<td>15.3</td>
<td>9</td>
</tr>
<tr>
<td>4</td>
<td>FAIR GO AD AWARDS 2015</td>
<td>TVONE*</td>
<td>14.9</td>
<td>1</td>
</tr>
<tr>
<td>5</td>
<td>FAIR GO</td>
<td>TVONE*</td>
<td>14.8</td>
<td>38</td>
</tr>
<tr>
<td>6</td>
<td>MRS. BROWN’S BOYS</td>
<td>TVONE*</td>
<td>14.6</td>
<td>2</td>
</tr>
<tr>
<td>7</td>
<td>SECRET LIFE OF CATS</td>
<td>TVONE*</td>
<td>14.0</td>
<td>1</td>
</tr>
<tr>
<td>8</td>
<td>HYUNDAI COUNTRY CALENDAR</td>
<td>TVONE*</td>
<td>13.9</td>
<td>30</td>
</tr>
<tr>
<td>9</td>
<td>INTL RUGBY BLEDISLOE CUP</td>
<td>SKY SPORT 1</td>
<td>13.8</td>
<td>1</td>
</tr>
<tr>
<td>10</td>
<td>THE FORCE</td>
<td>TVONE*</td>
<td>13.7</td>
<td>20</td>
</tr>
</tbody>
</table>

**Target: All People 5+**
Average combined episodes - 1 January to 31 December; 2am-2am
TVOne* = TVOne and TVOne Plus 1
## Top 10 Time-Shifted Programmes

<table>
<thead>
<tr>
<th>Rank</th>
<th>Programme</th>
<th>Channel</th>
<th>AUD%</th>
<th>Episodes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Broadchurch</td>
<td>TVONE*</td>
<td>2.0</td>
<td>8</td>
</tr>
<tr>
<td>2</td>
<td>Despicable Me 2</td>
<td>TV3*</td>
<td>2.0</td>
<td>1</td>
</tr>
<tr>
<td>3</td>
<td>Dr Seuss' The Lorax</td>
<td>TV3*</td>
<td>1.8</td>
<td>1</td>
</tr>
<tr>
<td>4</td>
<td>Mrs. Brown's Boys</td>
<td>TVONE*</td>
<td>1.7</td>
<td>2</td>
</tr>
<tr>
<td>5</td>
<td>Our Girl</td>
<td>TVONE*</td>
<td>1.7</td>
<td>7</td>
</tr>
<tr>
<td>6</td>
<td>Adele Live in London</td>
<td>TV3*</td>
<td>1.6</td>
<td>1</td>
</tr>
<tr>
<td>7</td>
<td>800 Words</td>
<td>TVONE*</td>
<td>1.6</td>
<td>7</td>
</tr>
<tr>
<td>8</td>
<td>Winter</td>
<td>TVONE*</td>
<td>1.6</td>
<td>6</td>
</tr>
<tr>
<td>9</td>
<td>How to Murder Your Wife</td>
<td>TVONE*</td>
<td>1.5</td>
<td>1</td>
</tr>
<tr>
<td>10</td>
<td>Downton Abbey</td>
<td>PRIME</td>
<td>1.4</td>
<td>10</td>
</tr>
</tbody>
</table>

Target: All People 5+
Average combined episodes - 1 January to 31 December 2015; 2am-2am
TVOne* , TV2* and TV3* = Parent channel + Plus 1 Channel

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SLIGHT INCREASE IN ALL DAY TIME-SHIFTED VIEWING

DRIVEN BY BOTH THE NUMBER OF PEOPLE AND THE TIME SPENT VIEWING CONTENT

HHS Penetration of PVR 48%
HHS Penetration of PVR 51%

Total Television, AP5+
Period: 1 January to 31 December 2014
TV SCREEN USE IS BECOMING MORE DIVERSE

Base: New Zealanders 5+ that watch TV in an average day
Source: Multi Screen Report 2015; Nielsen Television Audience Measurement, All day audience rating – total people

3.7M NEW ZEALANDERS WATCH TV CONTENT ON ANY DEVICE

Base: All People 10+
TV Content: Includes broadcast TV, shows or movies downloaded or streamed from the Internet
Source: Multi Screen Report 2015; Nielsen Consumer Media Insights Q2-Q3 2014,
2.5 MILLION
NEW ZEALANDERS HAVE SEEN OUT OF HOME ADVERTISING IN THE LAST 7 DAYS

OUT OF HOME ADVERTISING
NON METRO VIEWING HAS INCREASED

60% METRO

40% NON-METRO

AUCKLAND, WELLINGTON, CHRISTCHURCH, DUNEDIN AND HAMILTON

Base: All people 15+
Source: Nielsen Media CMI Q1 2015-Q4 2015

BUSES & BUS SHELTERS ARE UP

OUTDOOR ADVERTISING SEEN LAST 7 DAYS

ON BUSES
ON BUS SHELTER/ BUS STOP
OUTDOOR BILLBOARD
ON A BILLBOARD INSIDE A SHOPPING CENTRE
IN/AROUND THE AIRPORT

82% 83% 87%
72% 73% 76%
79% 82% 78%
68% 64% 69%
50% 47% 49%

2011 2013 2015

Base: Seen outdoor advertising L7D 15+
Source: Nielsen Media CMI Q1 2015-Q4 2015

NEW ZEALANDERS SEE OUTDOOR ADVERTISING AT LEAST ONCE A DAY OR EVERY FEW DAYS

48%

UP BY +7% FROM 2011

Base: All people 15+
Source: Nielsen Media CMI Q1 2015-Q4 2015
3.4 MILLION NEW ZEALANDERS USE THE INTERNET ACROSS A WEEK
**TOP 10 VISITED ONLINE BRANDS**

1. Google (1)
2. Facebook (2)
3. MSN (4)
4. Stuff.co.nz (8)
5. Trade Me (5)
6. YouTube (3)
7. Microsoft (7)
8. NZ Government (9)
9. NZ Herald (NEW)
10. Yahoo! (6)

Base: All people 5+
Source: Nielsen Online Ratings – Average Monthly Unique Audience 2015
Previous year ranking shown in brackets

**TOP 20 GROWTH BRANDS (EXCLUDING APPS)**

For sites with a monthly unique audience greater than 300,000

1. AliExpress (102%)
2. Spotify
3. Mode Media
4. 3 News
5. Farmers
6. The Guardian
7. Harvey Norman
8. TripAdvisor
9. Stuff.co.nz
10. NZ Transport Agency
11. Inland Revenue
12. TVNZ
13. PayPal
14. Ziff Davis Tech
15. Mitre 10
16. Web MD
17. Priceline
18. New Zealand Herald
19. Buzzfeed
20. Kiwibank (8%)
88% of online New Zealanders visit social media across a month.
Facebook and YouTube continue to dominate the social media landscape.

- 75% Facebook
- 61% YouTube
- 23% Google+
- 20% LinkedIn
- 20% Instagram
- 17% Pinteres
- 17% Twitter
- 17% Snapchat
- 12% WhatsApp
- 11% Neighbourly

Base: Online New Zealanders 15+
Source: Nielsen Connected Consumer Survey 2015
*In a month, including apps.
1 IN 4
ONLINE NEW ZEALANDERS SUBSCRIBE TO DIGITAL CONTENT

DIGITAL CONTENT
Which types of television content watched online in a 4 week period

- **33%**: Official free TV on-demand, ‘catch up TV’ services or streamed TV
- **19%**: TV snippets or entire shows streamed on YouTube, Vimeo, Vine, etc
- **17%**: TV shows/movies downloaded or streamed from unofficial sources, excluding YouTube
- **14%**: Subscription based on-demand TV services (e.g. Netflix, Lightbox)

Base: Online New Zealanders 15+
Source: Nielsen Connected Consumer Survey 2015
TYPES OF PROGRAMMES WATCHED VIA INTERNET TV

- **MOVIES:** 54%
- **ENTERTAINMENT (COMEDY, REALITY, GAME SHOWS, ETC.):** 42%
- **DRAMA/SOAPS (OVERSEAS):** 38%
- **DOCUMENTARIES:** 31%
- **NZ NEWS/CURRENT AFFAIRS:** 28%
- **NZ DRAMA/SOAPS:** 21%

Base: Online New Zealanders 15+
Source: Nielsen Connected Consumer Survey 2015

YOUTUBE & TVNZ ON DEMAND VIE FOR TOP SPOT IN INTERNET TV VIEWING

- **YOUTUBE:** 29%
- **TVNZ ONDEMAND:** 29%
- **3NOW:** 13%
- **NETFLIX:** 13%
- **SKY GO:** 7%
- **PUTLOCKER:** 6%
- **LIGHTBOX:** 5%
- **VIMEO:** 4%

Internet TV services used last 4 weeks AP 15+
Base: Online New Zealanders 15+
Source: Nielsen Connected Consumer Survey 2015
SPOTIFY IS THE TOP CHOICE OF AUDIO CONTENT

- **SPOTIFY**: 21%
- **iHEART RADIO**: 11%
- **ONLINE RADIO (THEHITS.CO.NZ, MOREFM.CO.NZ ETC.)**: 10%
- **APPLE MUSIC**: 7%
- **SOUNDCLOUD**: 6%
- **GOOGLE PLAY MUSIC**: 5%
- **iTUNES RADIO**: 5%
- **PANDORA**: 5%

Online Radio And/or Music Services Listened To In Last 4 Weeks
Base: Online New Zealanders 15+
Source: Nielsen Connected Consumer Survey 2015
ABOUT NIYLEN

Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy. Nielsen’s Watch segment provides media and advertising clients with Total Audience measurement services for all devices on which content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry’s only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen also provides its clients with analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries, covering more than 90% of the world’s population.

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