

FAST FACTS NZ

What you need to know
about TV Viewing in 2020



A blurred background image of a person sitting on a couch watching a television. In the foreground, a hand is holding a silver remote control, pointing it towards the TV. The TV screen shows a bright, colorful image, possibly a cartoon or a game.

ThinkTV's Fast Facts provides all the latest details about TV viewership in New Zealand, including how many and who's watching, how long they're watching for and where, number of screens and BVOD (Broadcaster Video on Demand).

Plus a special section on television viewing and TV's role during the Covid-19 Pandemic

NEW ZEALAND TV VIEWING – THE FACTS



- Every week TV reaches 3.2 million (73% of New Zealanders 5+)
- Every day TV reaches 2.4 million (55% of New Zealanders 5+)
- 96% of New Zealand homes (1,964,000) have a television
- New Zealanders spend 2 hours 23 minutes per day watching TV
- 90% of TV is watched Live
- 1.4 million New Zealanders access BVOD in a typical week

NEW ZEALAND TV VIEWING – KEY YEAR ON YEAR TRENDS

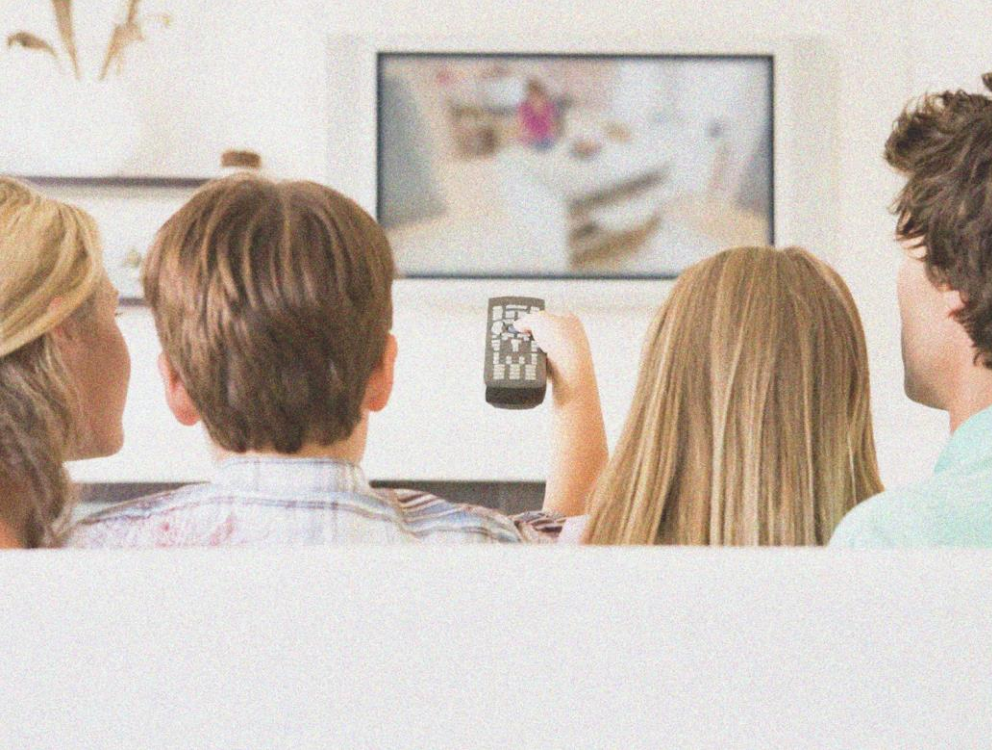


- Linear TV reaches more Household Shoppers with Kids on a typical day (average daily reach 59.1% versus 58.8%)
- Household Shoppers with Kids are spending significantly more time watching Linear TV (2 hours 40 minutes versus 2 hours 23 minutes per day)
- 20% more NZ homes have Connected TV's and the number of screens continues to be above 7 per HH (see Slide 16)
- The number of New Zealanders watching Linear TV per day remains at 2.4 million, while daily viewing of people aged 25-54 remains at over 1 million



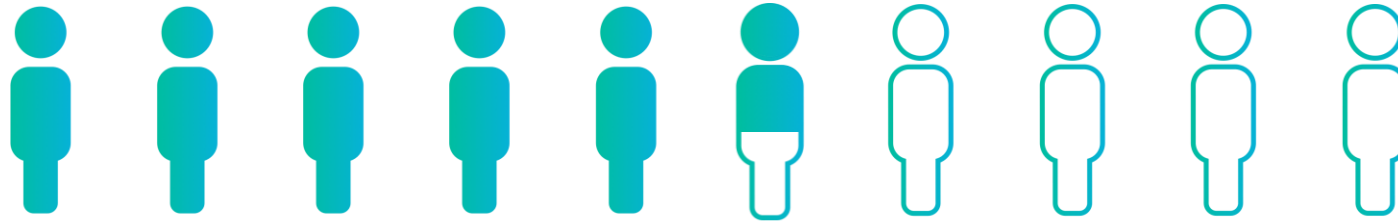
LINEAR TV

THE NEW ZEALAND LINEAR TV AUDIENCE – THE FACTS



- 25-54 year-olds make up 39% of the average audience
- Over 1 million (55%) of this core demographic are reached by TV in a typical day
- They spend 2 hours 12 minutes watching TV per day
- 8 out of 10 Household Shoppers with Children can be reached by TV in a typical week
- This group watch 2 hours and 40 minutes of TV per day
- Over half a million New Zealanders aged 18-39 watch TV every day

HOW MANY NEW ZEALANDERS WATCH LINEAR TV?



2.4 million New Zealanders in a day
55% of the population



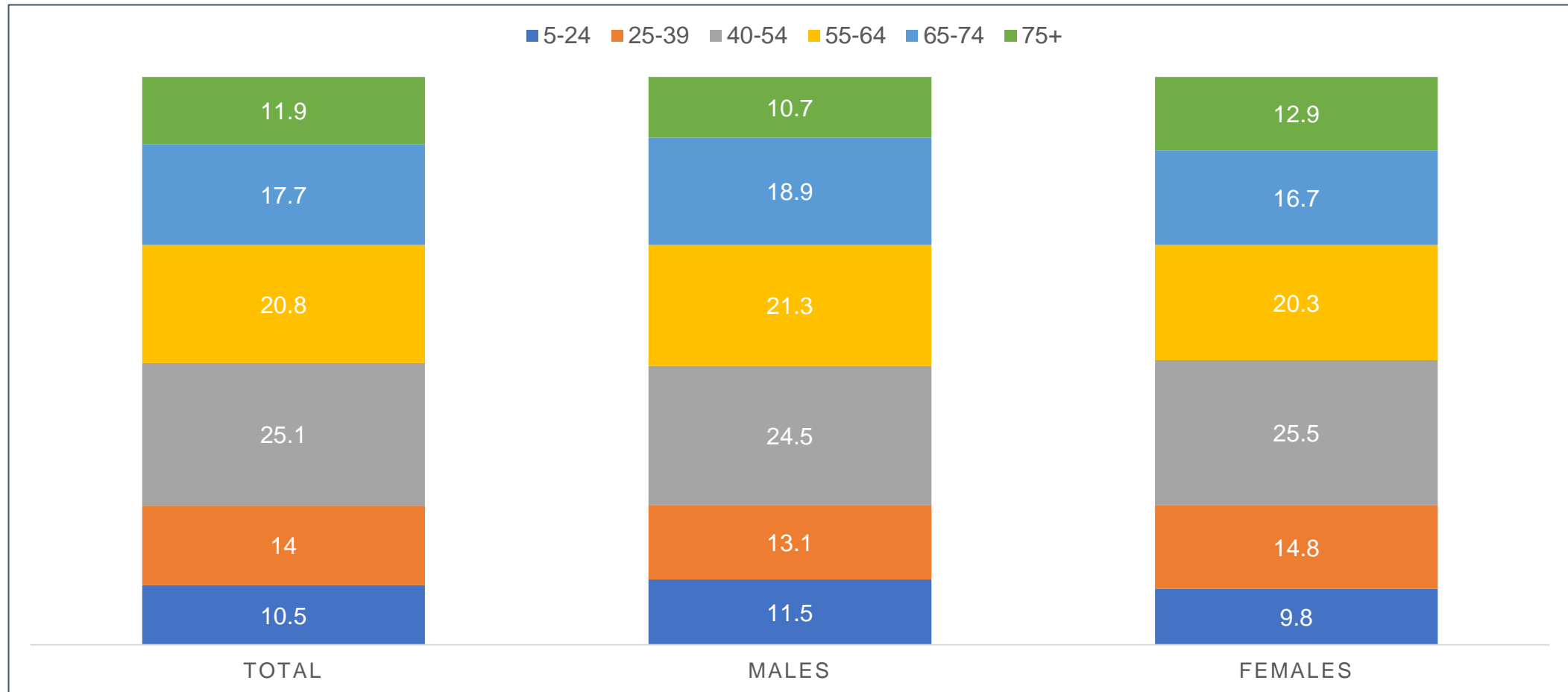
3.2 million New Zealanders in a week
73% of the population



3.7 million New Zealanders in a month
84% of the population

WHO'S WATCHING LINEAR TV?

Audience Profile (% of viewing in each age/gender demographic)



Source: Nielsen Television Audience Measurement (Base: All People 5+, Sample, Jan-Jun 2020, All Day)

HOW MANY PEOPLE DOES TV REACH IN A DAY?

AVERAGE DAILY REACH – LINEAR TV – BY KEY DEMOGRAPHICS

All Day Audience	All People 5+	All People 25-54	Main Household Shopper with Kids	All People 18-39
Average Daily Reach	2,412,700	1,012,400	309,100	530,400
Average Daily Reach (%)	55.0	54.6	59.1	38.0

Source: Nielsen Television Audience Measurement (Base: All People 5+, 25-54, Main HH with child, 18-39, Consolidated, All Day, Jan-Jun 2020, Average Daily Cume Reach)



HOW MANY PEOPLE DOES TV REACH IN A WEEK?

AVERAGE WEEKLY REACH – LINEAR TV – BY KEY DEMOGRAPHICS

All Day Audience	All People 5+	All People 25-54	Main Household Shopper with Kids	All People 18-39
Average Weekly Reach	3,203,600	1,382,500	421,100	824,000
Average Weekly Reach (%)	73.0	74.6	80.5	59.0

HOW LONG DO THEY SPEND WATCHING?

TIME SPENT PER DAY – LINEAR TV – BY KEY DEMOGRAPHICS

	All People 5+	All People 25-54	Main Household Shopper with Kids	All People 18-39
Time spent viewing per day (hh:mm)	2:23	2:12	2:40	1:14

Source: Nielsen Television Audience Measurement (Base: All People 5+, 25-54, Main HH with child, 18-39, Consolidated, All Day, Jan-Jun 2020)



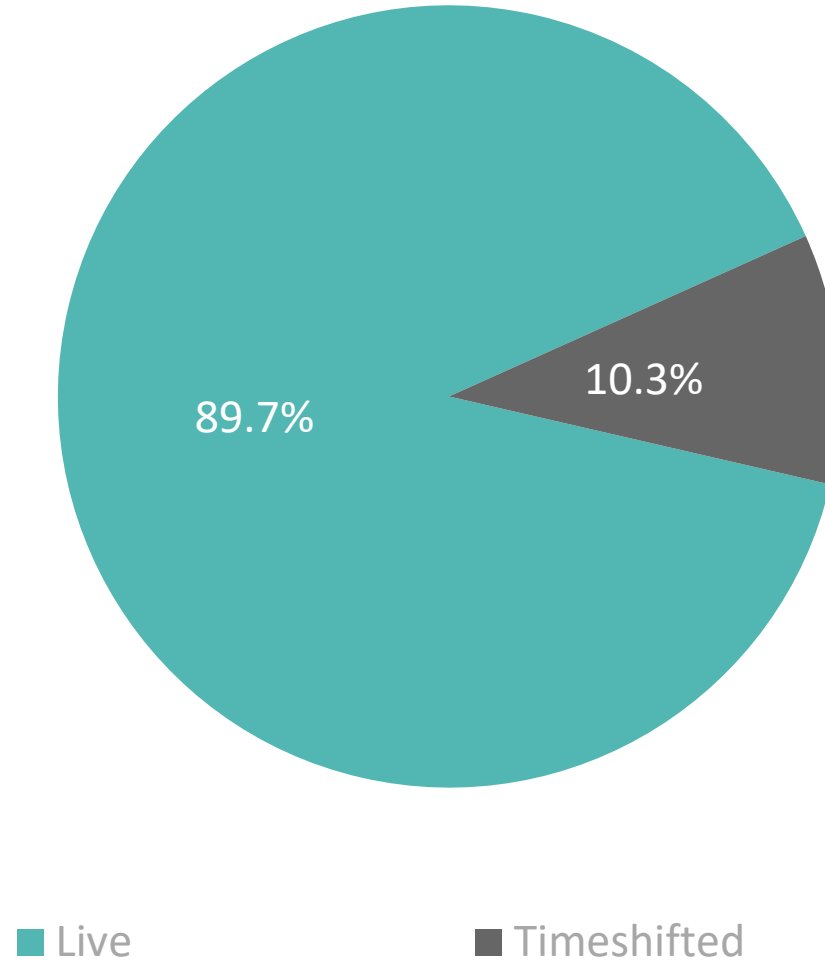
HOW WE WATCH TV

HOW WE WATCH TV – THE FACTS



- 90% of all Linear TV viewing is live
- An average New Zealand home has 7.2 screens; the number of Connected TV's has increased by 20% compared to last year
- New Zealanders spend around 17 hours per week watching Linear TV and just over 9 hours watching TV/Video content online
- Of the most popular programmes among 18-54 year-olds in H1 2020 on Linear TV, News, Current Affairs and Documentaries dominated the top 5 spots. A record number of Breaking News episodes appeared in H1 2020.
- 1.4 million New Zealanders access a NZ BVOD platform in a typical week

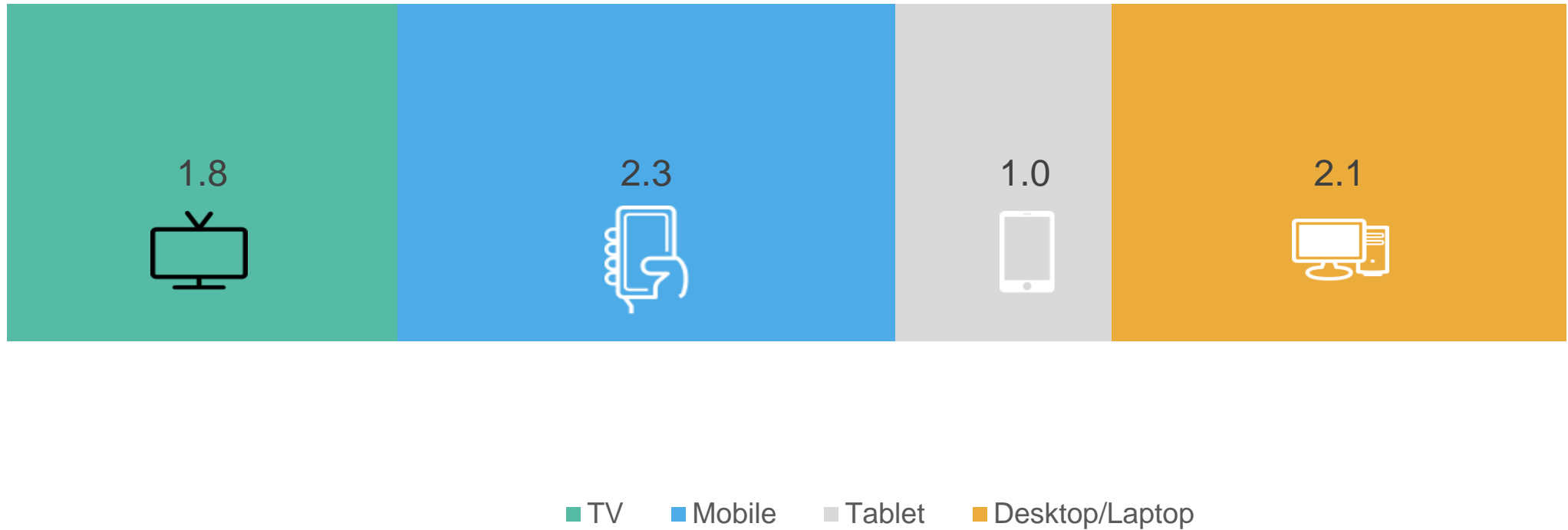
TELEVISION IS PREDOMINANTLY VIEWED LIVE



Source: Nielsen Television Audience Measurement (Base: All People 5+, Consolidated, Jan-Jun 2020, All Day, % of Playback viewing)

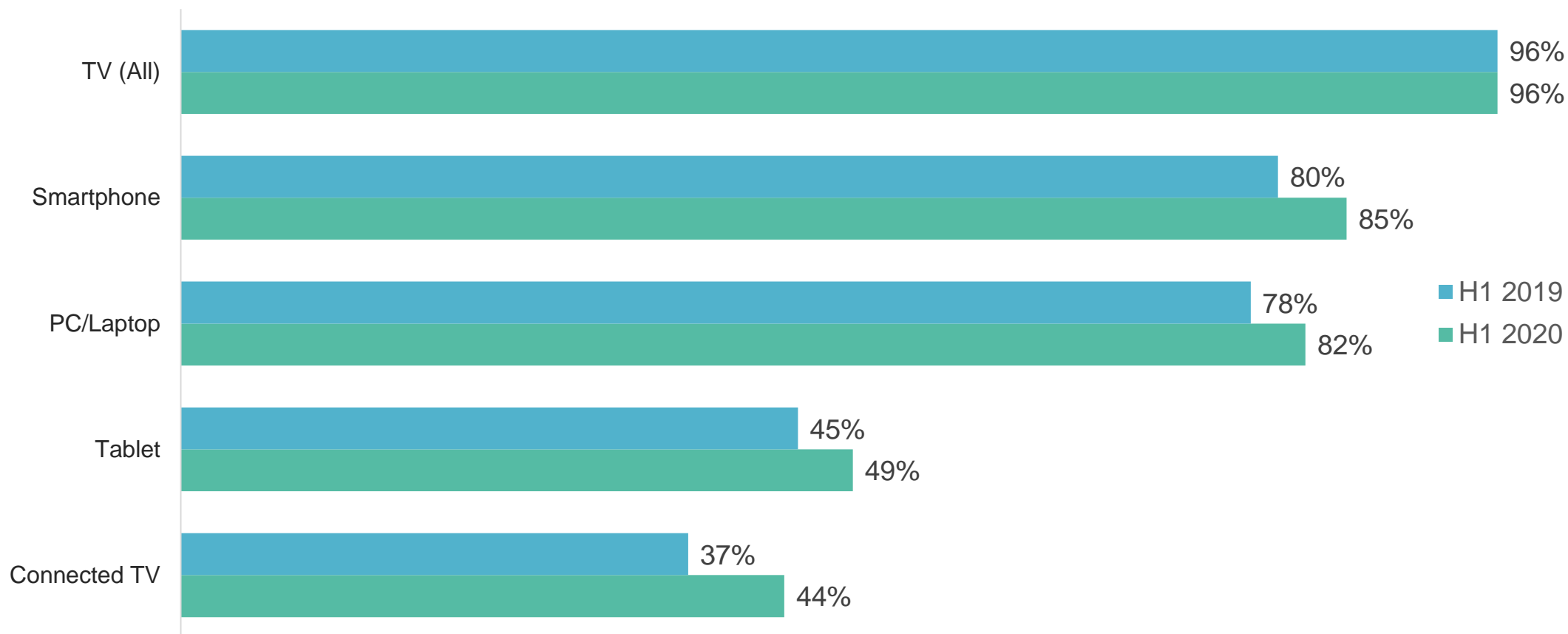
MANY OPTIONS TO CONSUME TV

An average New Zealand home has more than 7 screens



96% OF NZ HOMES HAVE A TV (ANY TYPE)

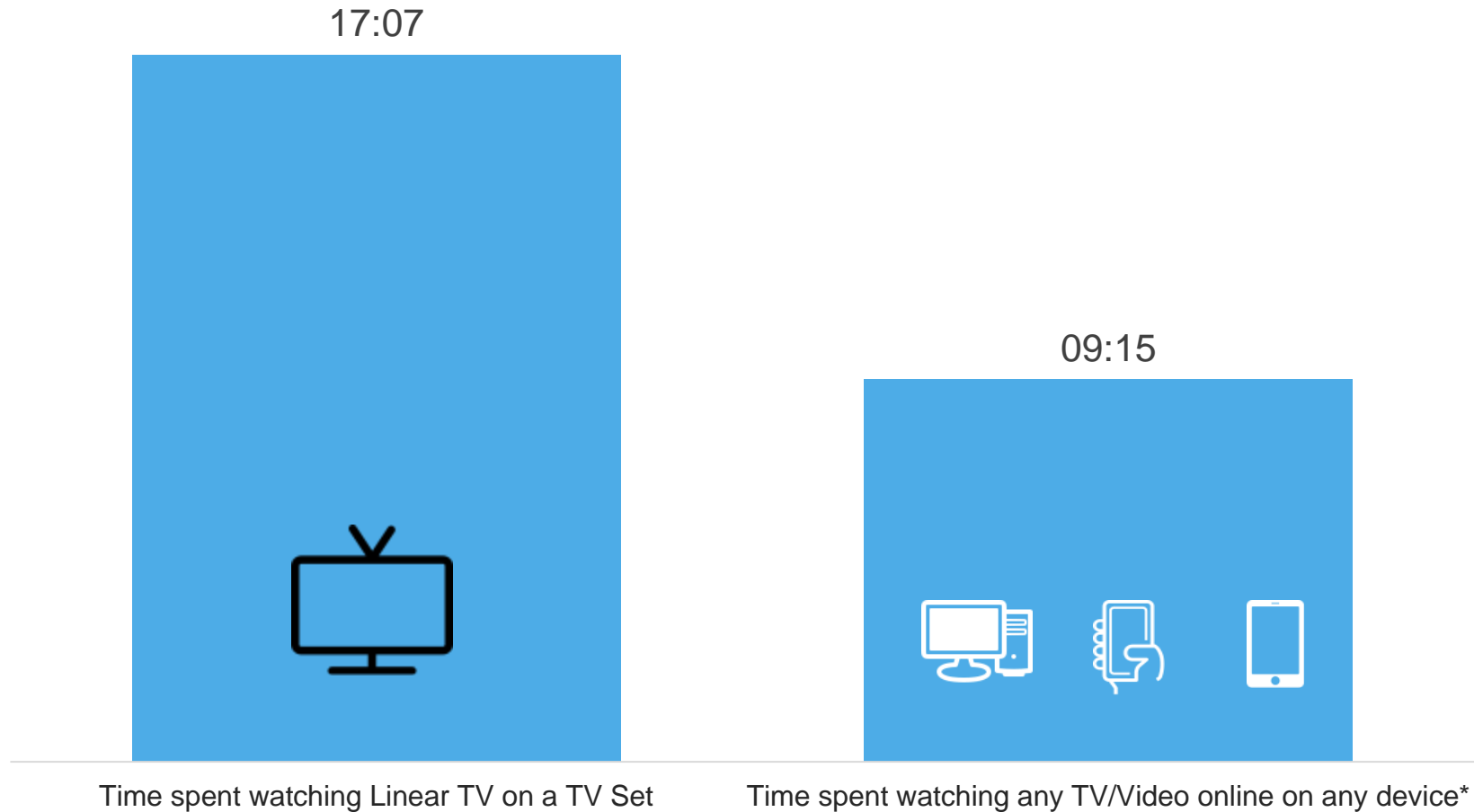
And more than 4 out of 10 have a Connected TV (20% increase YOY)



Source: Nielsen Consumer and Media Insights, 10+, Q1 – Q2 2019, Q1 – Q2 2020. Base = Main Household Shopper

MOST TIME SPENT WATCHING LINEAR TV

More time is spent watching Linear TV in a typical week (hh:mm)

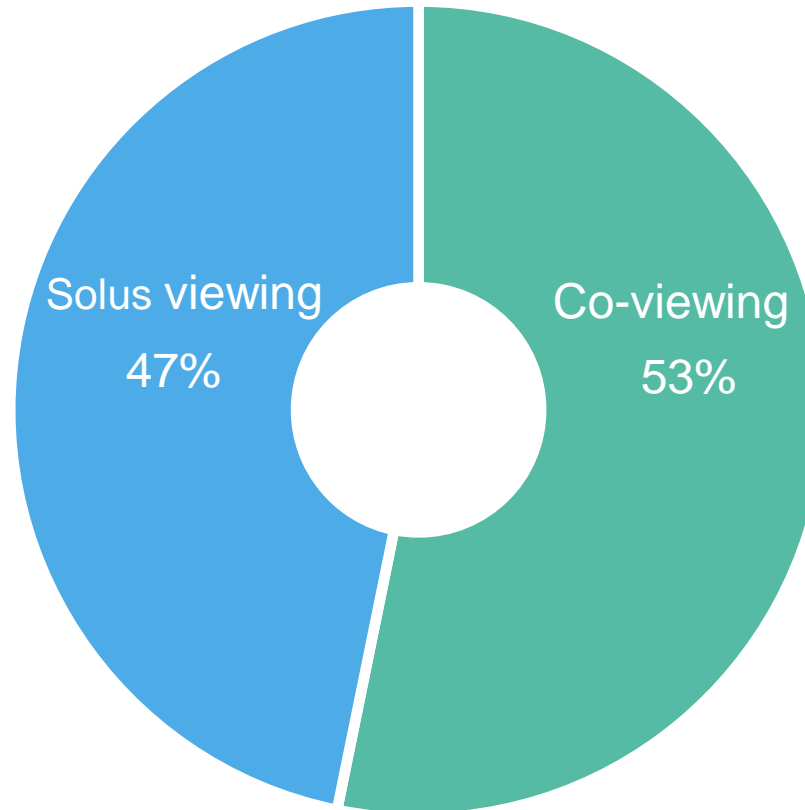




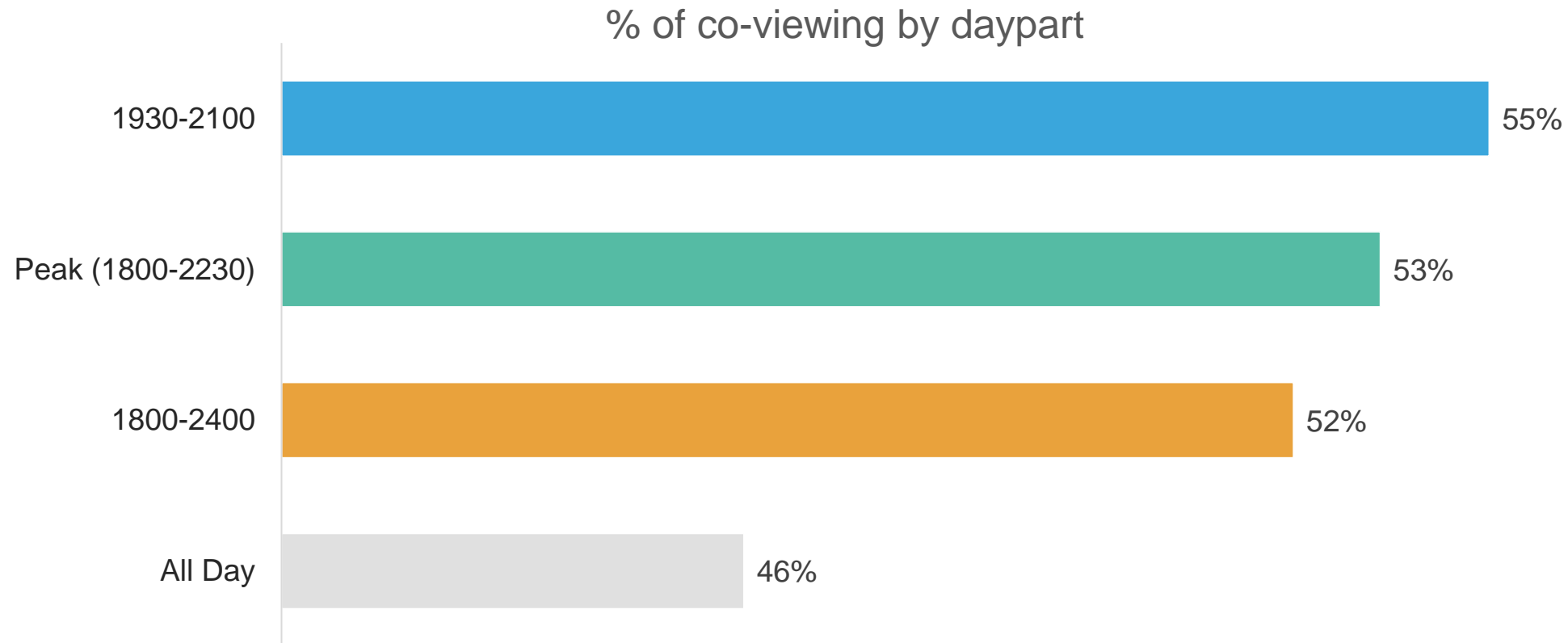
CO-VIEWING

JUST OVER HALF OF PEAK TIME VIEWING IS CO-VIEWING

(Viewing with others)



CO-VIEWING IS HIGHEST DURING THE CORE EVENING FAMILY VIEWING TIME (1930-2100)





TOP PROGRAMMES

MOST POPULAR PROGRAMMES IN H1 2020 – INCLUDING ONE-OFF EVENTS

Top 20 Programmes including sport and one-off shows – Linear TV – All People 18-54

RANK	PROGRAMME	CHANNEL	AUD%	NO. OF EPISODES
1	1 News	TVNZ 1*	9.8	182
2	Eat Well For Less? New Zealand	TVNZ 1*	9.4	8
3	Hyundai Country Calendar	TVNZ 1*	9.2	16
4	Beat The Chasers	TVNZ 1*	8.3	1
5	Best of Good Sorts	TVNZ 1*	8.1	1
6	The Chase The Bloopers	TVNZ 1*	8.1	1
7	Bradley Walsh & Son Breaking Dad	TVNZ 1*	7.9	10
8	Crocodile Dundee	Three*	7.6	1
9	Despicable Me	Three*	7.4	1
10	Seven Sharp	TVNZ 1*	7.1	105
11	Lego Masters (USA)	Three*	7.0	10
12	Minions	Three*	6.9	1
13	Dog Squad	TVNZ 1*	6.8	6
14	Lego Masters	Three*	6.8	11
15	Sunday(PM)	TVNZ 1*	6.8	17
16	Fair Go	TVNZ 1*	6.7	10
17	1 Breaking News	TVNZ 1*	6.6	65
18	Despicable Me 3	Three*	6.6	1
19	Married At First Sight	Three*	6.4	36
20	Shortland Street	TVNZ 2*	6.4	94

Target: All People 18-54 Average combined episodes - 1 January to 30 June 2020; All Day (2am – 2am)

TVNZ 1* = TVNZ 1 and TVNZ 1 +1; TVNZ 2* = TVNZ 2 and TVNZ 2 + 1; Three* = Three and Three Plus 1

MOST POPULAR PROGRAMMES IN H1 2020 – EXCLUDING ONE-OFF EVENTS

Top 20 Programmes – excluding sport and one-off shows – Linear TV – All People 18-54

RANK	PROGRAMME	CHANNEL	AUD%	NO. OF EPISODES
1	1 News	TVNZ 1*	9.8	182
2	Eat Well For Less? New Zealand	TVNZ 1*	9.4	8
3	Hyundai Country Calendar	TVNZ 1*	9.2	16
4	Bradley Walsh & Son Breaking Dad	TVNZ 1*	7.9	10
5	Seven Sharp	TVNZ 1*	7.1	105
6	Lego Masters (USA)	Three*	7	10
7	Dog Squad	TVNZ 1*	6.8	6
8	Lego Masters	Three*	6.8	11
9	Sunday(PM)	TVNZ 1*	6.8	17
10	Fair Go	TVNZ 1*	6.7	10
11	1 Breaking News	TVNZ 1*	6.6	65
12	Married At First Sight	Three*	6.4	36
13	Shortland Street	TVNZ 2*	6.4	94
14	Jamie Keep Cooking And Carry On	TVNZ 1*	6.3	13
15	George Clarke's Amazing Spaces	TVNZ 1*	6.3	2
16	Eat Well For Less?	TVNZ 1*	6.2	8
17	David Lomas Investigates	Three*	6	10
18	Your Home Made Perfect	TVNZ 1*	6	6
19	Easy Ways To Live Well	TVNZ 1*	5.8	3
20	Bondi Rescue	Three*	5.7	30

Target: All People 18-54 Average combined episodes - 1 January to 30 June 2020; All Day (2am – 2am)

TVNZ 1* = TVNZ 1 and TVNZ 1 +1; TVNZ 2* = TVNZ 2 and TVNZ 2 + 1; Three* = Three and Three Plus 1



NZ BROADCASTER VIDEO ON DEMAND

**1.4 million
New Zealanders access
a NZ BVOD* platform
every week**

Source: Nielsen Consumer and Media Insights, Q1 – Q2 2020. *NZ BVOD = TVNZ On Demand; ThreeNow; Bravo TV; Freeview; SkyGO; Sky Fan Pass; Choice TV On Demand; Maori Television On Demand



NZ BVOD PLATFORMS* REACH HIGH VALUE AUDIENCES

ACCESSED NZ BVOD IN LAST 7 DAYS – AUDIENCE DEMOGRAPHICS

	All People 25-54	Household Shopper with Kids	Homeowners
Accessed last 7 days	689,000	263,000	931,000
Accessed last 7 days (%)	47%	51%	48%

Source: Nielsen CMI Q1 – Q2 2020, Base: Used Online/TV Video service in last 7 days

*NZ BVOD: TVNZ On Demand; ThreeNow; Bravo TV; Freeview; SkyGO; Sky Fan Pass; Choice TV On Demand; Maori Television On Demand





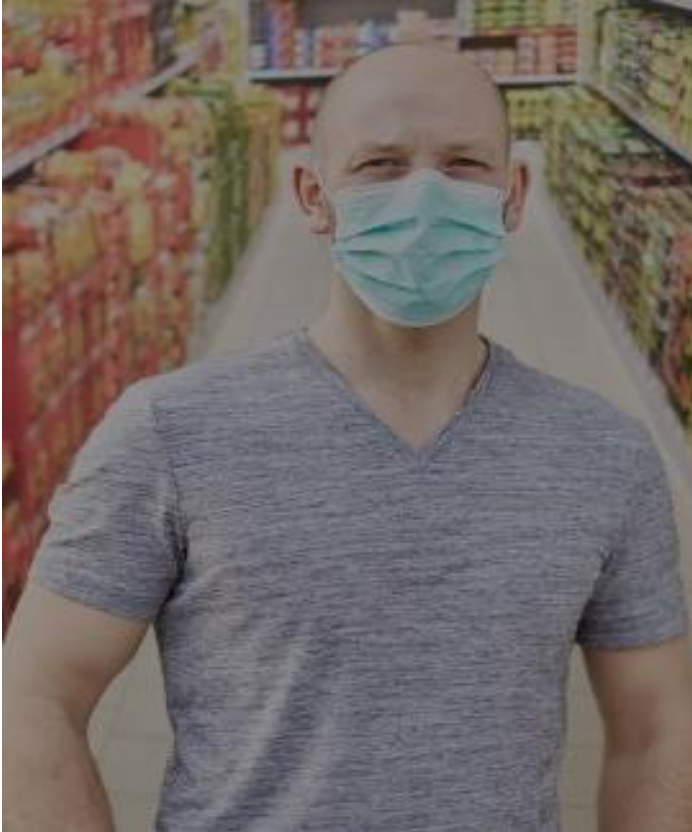
**TV VIEWING
DURING COVID-19**

NEW ZEALANDERS TURNED TO TV IN LARGE NUMBERS DURING THE PANDEMIC



- During the 8-week lockdown period, viewership to news and current affairs programming increased **markedly**, while time spent viewing and all-day audiences were up too, and growth was across a range of demographics.
- When comparing the same time period (Weeks 13-20*) to 2019, viewing audiences and time spent viewing was higher across all key demographics. For the News Hour, the increase in ratings was 27% for All People 25-54 and All People 18-39, and 30% for Household Shoppers with Kids.
- Time spent viewing was on average 17% higher than the same period in 2019.
- Co-viewing (viewing with others) was significantly higher during the Lockdown period. In peak time for the entire 2019 year co-viewing was 51% (with solus viewing 49%). During Lockdown 57% of peak time viewing was co-viewing.

DURING THE PANDEMIC, TELEVISION PROVED ITS IMPORTANCE AS A SOURCE OF INFORMATION, AND WAS HIGHLY TRUSTED, AS MEASURED BY A RANGE OF STUDIES.



- The **Ipsos Covid19 tracker** in April 2020* showed:
 - 7 out of 10 New Zealanders turn to the News on TV for information on Covid-19 with half of the population saying that they get information from advertising and announcements on TV.
 - For young New Zealanders, aged 18-35, News on TV is equal highest with online news sites at 57%, and over 4 out of 10 say they have been getting information from advertising and announcements on TV.
 - When asked to what degree respondents *trust* a range of sources, 7 out of 10 say they trust TV News.
 - The level of trust is high across all age groups including People aged 18-35 where it is also trusted by 70%.
 - And no matter what the generation, the trust in TV News is double to social media sources.
- **Nielsen Consumer Media and Insights**, Quarter 2 2020** reported that **half** of New Zealanders depend on their local television news to be their trusted media source of information for COVID-19
- The **NZ on Air, Where are the Audiences Report 2020**** showed:
 - TVNZ news and updates (online and broadcast) were the most widely used source of information during the Covid 19 outbreak (47% used this source). This source was also the most trusted (28%)
 - The second most trusted source was the official Covid 19 website (8%).

GLOSSARY

KEY TERMS AND DEFINITIONS

TERM	DEFINITION	NOTES
As Live	Viewing of recorded television broadcast content that occurs within the same research day (2am-2am) but viewed at a later time than the original broadcast time; for example, pausing a program and then continuing to watch it as a recording	
Average Daily Reach (000's or %)	The sum of the number of unique viewers who have seen at least one minute of an event or time band across the day, averaged across a period of time (days).	An individual or household is only counted once per day if they have viewed at least one minute of the event or time band
AUD%	The average viewing audience for a demographic expressed as a percentage of the relevant Universe Estimate Also known as TARP (Target Audience Rating Point)	= Audience / Universe Estimate
Audience or AUD (000s)	The average number of people (or homes) in a target market who were watching a specific event or time band each minute, expressed in absolute figures for that demographic	= sum of people watching each minute of the show or time band / sum of minutes
Connected TV	A TV set that is connected to the internet, allowing viewers to not only watch Linear or Broadcast TV but also watch Video on Demand etc	
Consolidated Data: Consolidated 7	Nielsen's final ratings incorporating 'Live' viewing and viewing of broadcast content that is played back through the television set at normal speed either within seven days of original broadcast ('Consolidated 7')	Consolidated 7 = 'Live' + 'As Live' + 'Time Shift to 7'
Demographic (group) or Target	Basic descriptor of individuals or households using classifications such as age, sex, occupation group, education level, household size, etc	
Linear TV	TV received via aerial, satellite or cable is Linear TV i.e. any TV that is not viewed over the internet. Sometimes referred to as Broadcast TV, it can be watched as Live TV or time-shifted as Playback TV	
Live	Viewing of a television program as it is actually broadcast	
Main HH Shopper	Person aged 18 or older who has primary household shopping responsibilities	

KEY TERMS AND DEFINITIONS

Term	Definition	Notes
Overnight Data	Nielsen ratings delivered each morning for the previous research day, incorporating 'Live' viewing and viewing of content that was broadcast yesterday, recorded and played back by 2am ('As Live' viewing)	'Live' + 'As Live' viewing
Profile%	Shows the audience composition of an event or time band by calculating the proportion of viewers in the target demographic to the number of viewers in the base target (usually Total People)	= Audience of target group of interest / Total People Audience
Reach OR Reach (1 min) OR Cumulative (Cume) Reach	The sum of the number of unique viewers who have seen at least one minute of an event or time band across its total duration	An individual or household is only counted once if they have viewed at least one minute of the event or time band
Reach%	The sum of unique viewers expressed as a percentage of the universe for the target demographic	= Reach / Universe Estimate
Research Day	2am – 2am on any calendar day	
Sample Size	The panel size for any specific demographic	
TARP (Target Audience Rating Point)	The average viewing audience for a demographic expressed as a percentage of the relevant Universe Estimate	= Audience / Universe Estimate
Timeshifted	Linear TV recorded on a Personal Video Recorder (PVR), VCR or other form of time-shifting technology and watched after the live broadcast. Also referred to as Playback TV. Can be viewed up to 7 days from broadcast	
Time Spent Viewing / Demo	Of the total number of people in the target market (potential audience), the number of minutes each person viewed of a specific event. This variable considers the potential of the target, even if many individuals in the target audience did not watch the event being analysed	= (Audience / Universe Estimate) x Event Duration
Time Spent Viewing / Viewer	The average number of hours or minutes each individual has seen of the program or time band being analysed compared to the total number of people in the target audience. Each individual must have watched at least 1 minute of the event to be counted	= (Audience / Reach) x Event Duration
Total TV	The Total Audience viewing across all of the TV channels that are broadcasted and measured by Nielsen – includes Live and Consolidated	