Affecting Effectiveness.

Maximising advertising impact.

NZME. TellME

About this report.

We spoke to 800 New Zealanders with the goal of finding out more about how Kiwis are interacting with advertising.

With audiences continuing to fragment and consumer attention fleeting, the aim of this research was to understand what 'effective' looks like in 2024 and into 2025 and how advertisers can maximise their impact, creating memorable campaigns and driving action.

So, what is the most effective strategy to drive recall and what are the factors that drive these?

The following report is an analysis of the data and insights gathered from our research which consisted of a study run by Kantar New Zealand across a nationally representative panel, combined with global data and industry knowledge.

> *NZME's advertising effectiveness research reveals the complexities of engaging the modern consumer and driving action.*
>
> *Impactful outcomes, now more than ever, rely on decision-makers leaning into customer-centric, and omnichannel strategies with a focus on four key pillars to drive effectiveness."*
>
> Terri Patrickson,
> GM Research & Insights - NZME

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Kiwi media usage.

A snapshot of weekly consumption for advertisers

77%
Used Facebook

71%
Read online news
(e.g. nzherald.co.nz, stuff.co.nz)

64%
Watched video online (e.g. YouTube)

63%
Listened to radio AM/FM

62%
Listened to online music (e.g. Spotify, iHeartRadio)

55%
Streamed free online TV (e.g. TVNZ OnDemand)

55%
Shopped online (e.g. groceries, clothing shopping etc)

54%
Watched free-to-air (live) TV.

47%
Used Instagram

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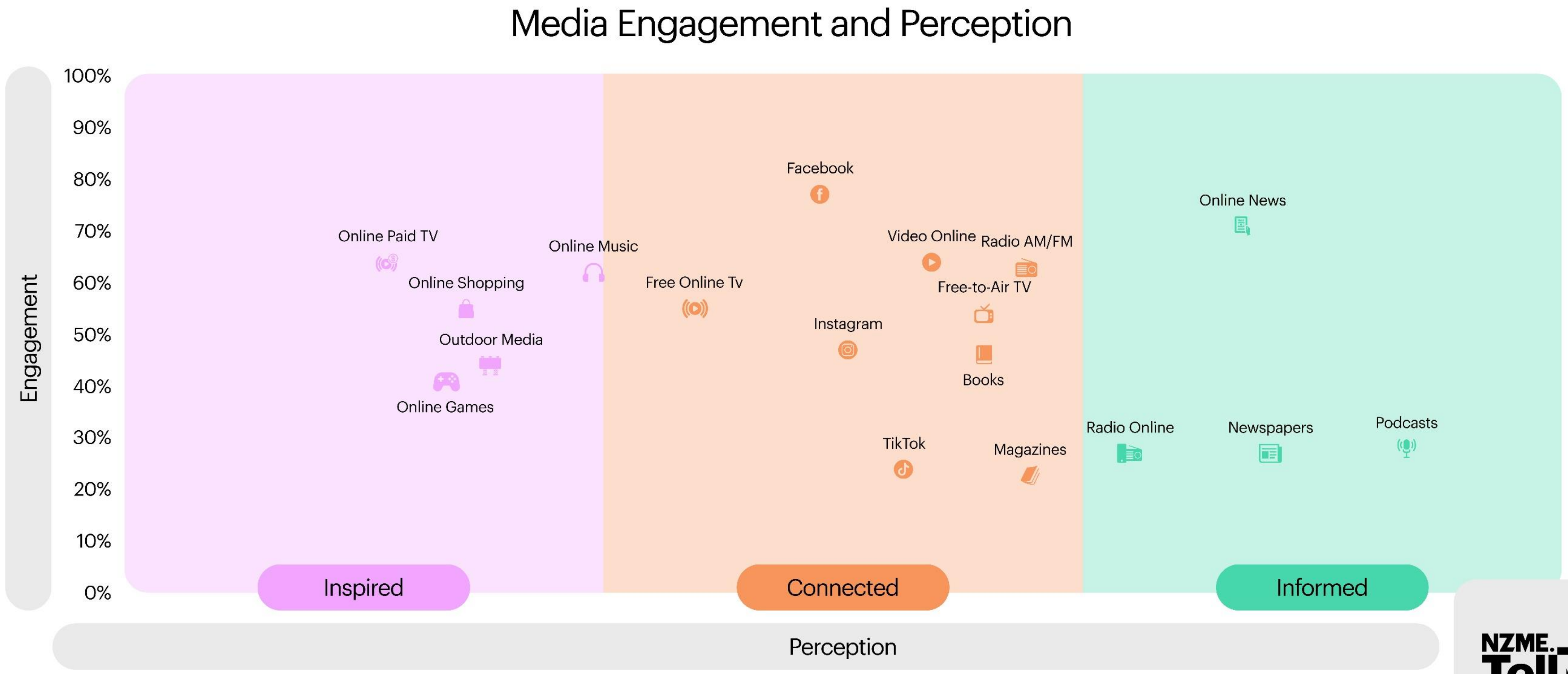
Go to chart

Source: NZME Advertising Effectiveness Study 2024

Media inspires, connects and informs.

We've identified three consumer engagement segments based on media perceptions



Go to chart

Source: NZME Advertising Effectiveness Study 2024

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The four pillars of effectiveness.

Underpinned by trust

#1 Impact

5.9x

The average Kiwi needs to be exposed to an ad 5.9 times for it to have impact and become memorable. That's not necessarily to drive action, but recall. Depending on the demographic, this can extend to 7.8 times.

What makes an ad memorable?

#2 Focus

76%

of people watching TV are engaging with other platforms making it the most distracted media. Brands are fighting for attention, and we know distracted consumers are harder to influence.

Where can you find the most focused consumers?

#3 Influence

47%

of people are paying attention to those who are experts in their field. People and their opinions matter to us. Our research shows campaigns utilising influential individuals will yield a better response from consumers.

Who's influential to your audience?

#4 Investment

+33%

Campaigns using three channels drive a 33% ROI improvement.* Research clearly shows that campaigns deliver better ROI and are more effective when investment is spread across various channels.

Are advertisers over-investing in single channel campaigns?

Trust

Without trust consumers won't participate with your brand. It's harder to create impact, it's harder to get attention, it's harder to influence and your ROI will be impacted.

Additionally, with so many sources of news and information, brands can be directly or indirectly impacted by the credibility, or lack thereof, of the environments that their ads appear in.

Recent studies show that when consumers are exposed to indirect misinformation, their mistrust in the source of misinformation spills over and activates a mistrust mindset which impairs subsequent brands and products' evaluations.^

Are you controlling where and how consumers interact with your brand?

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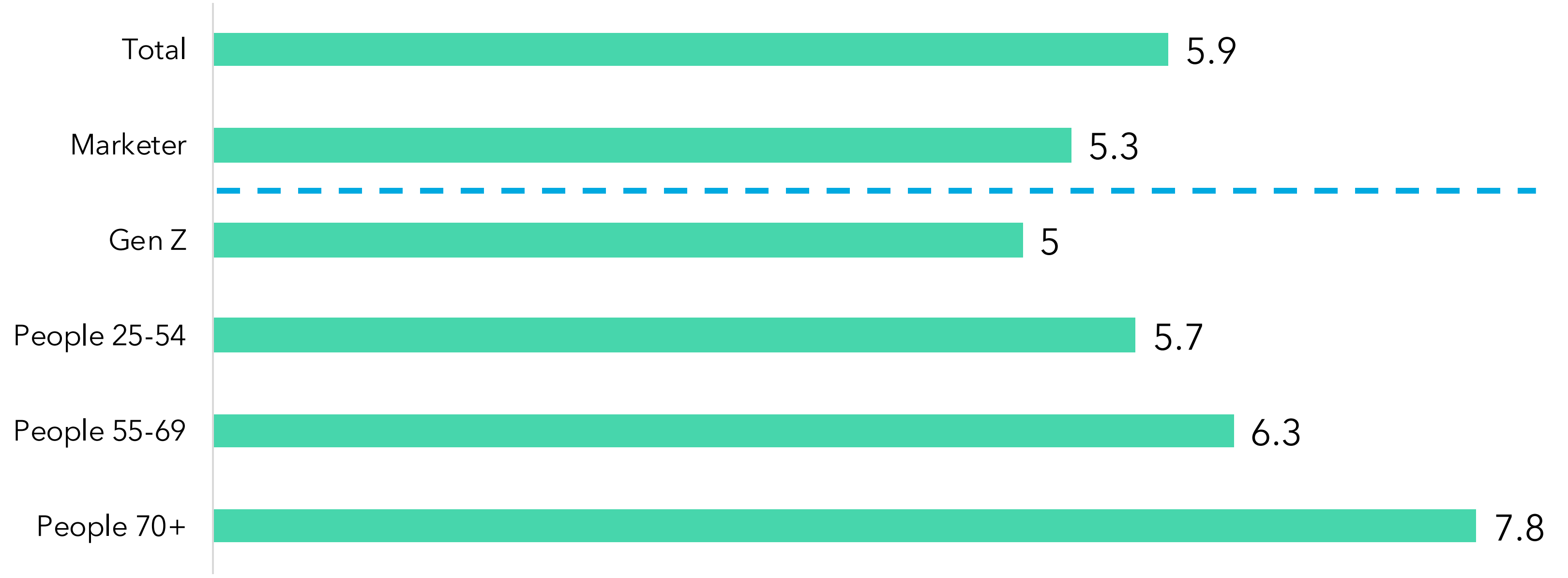
Source: NZME Advertising Effectiveness Study 2024. *Analytic Partners ROI study. ^https://www.sciencedirect.com/science/article/pii/S2352250X23001616

Leave a lasting impression.

5.9x

The number of times the average Kiwi needs to be exposed to an ad to make it memorable.

Average ad exposure by demographic



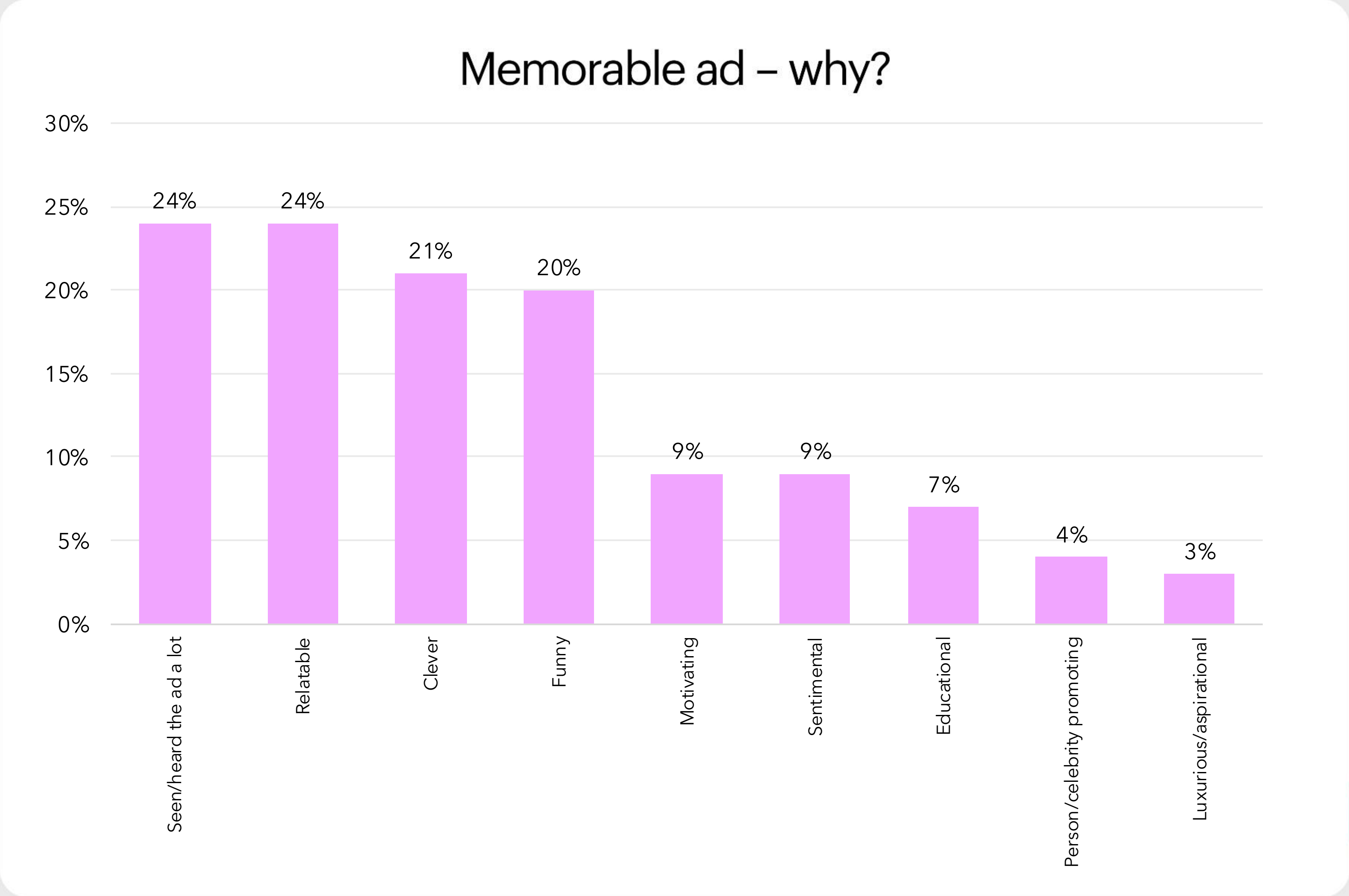
Marketers and Gen Z find ads more relevant and memorable with less exposure, possibly because of their engagement across multiple platforms.

Compared to older groups who need more frequent exposure to recall ads which could be due to their engagement on fewer platforms.

Source: NZME Advertising Effectiveness Study 2024

Frequency is the #1 driver for recall.

Consumers exposed to your ad more often are more likely to remember it



Source: NZME Advertising Effectiveness Study 2024

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Relatable, clever, funny.

Creative that is relevant creates impact

Relatable
24%

Clever
21%

Funny
20%

Motivating
9%

Sentimental
9%

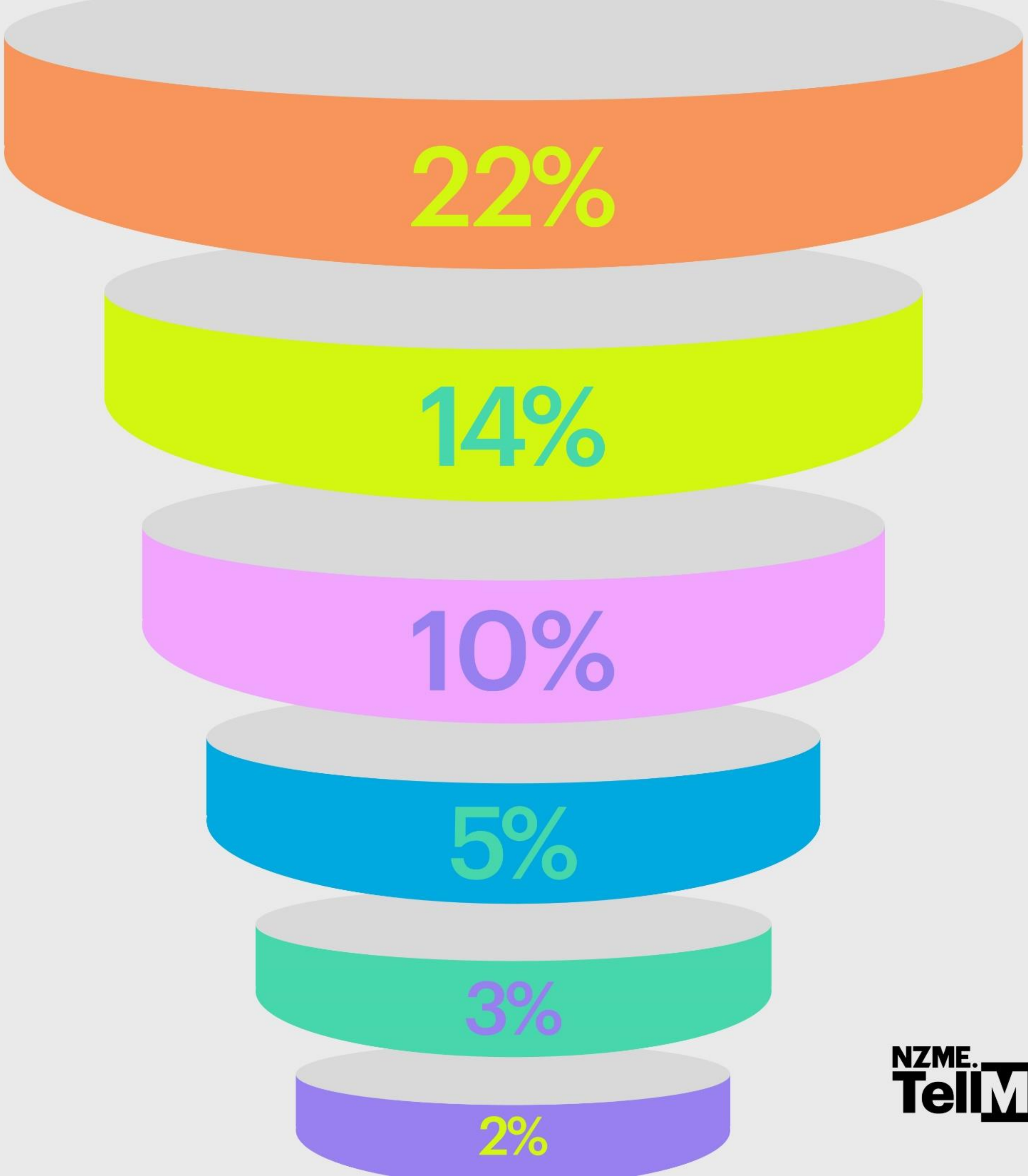
> “Emotion matters and the creative matters. So, when we talk about the medium and the message, we mustn't forget the message, it's as important as the media.”*
>
> *Jon Evans, Chief Customer Officer, System1*

Source: NZME Advertising Effectiveness Study 2024. *https://www.mi-3.com.au/05-03-2024/half-impact-comes-creative-system1-customer-chief-jon-evans-how-sell-emotional-ad

Consumer action.

Impactful ads drive 1 in 4 Kiwis to consider or make a purchase

- Consider
- Chat about it
- Purchase
- Follow
- Recommend
- Share

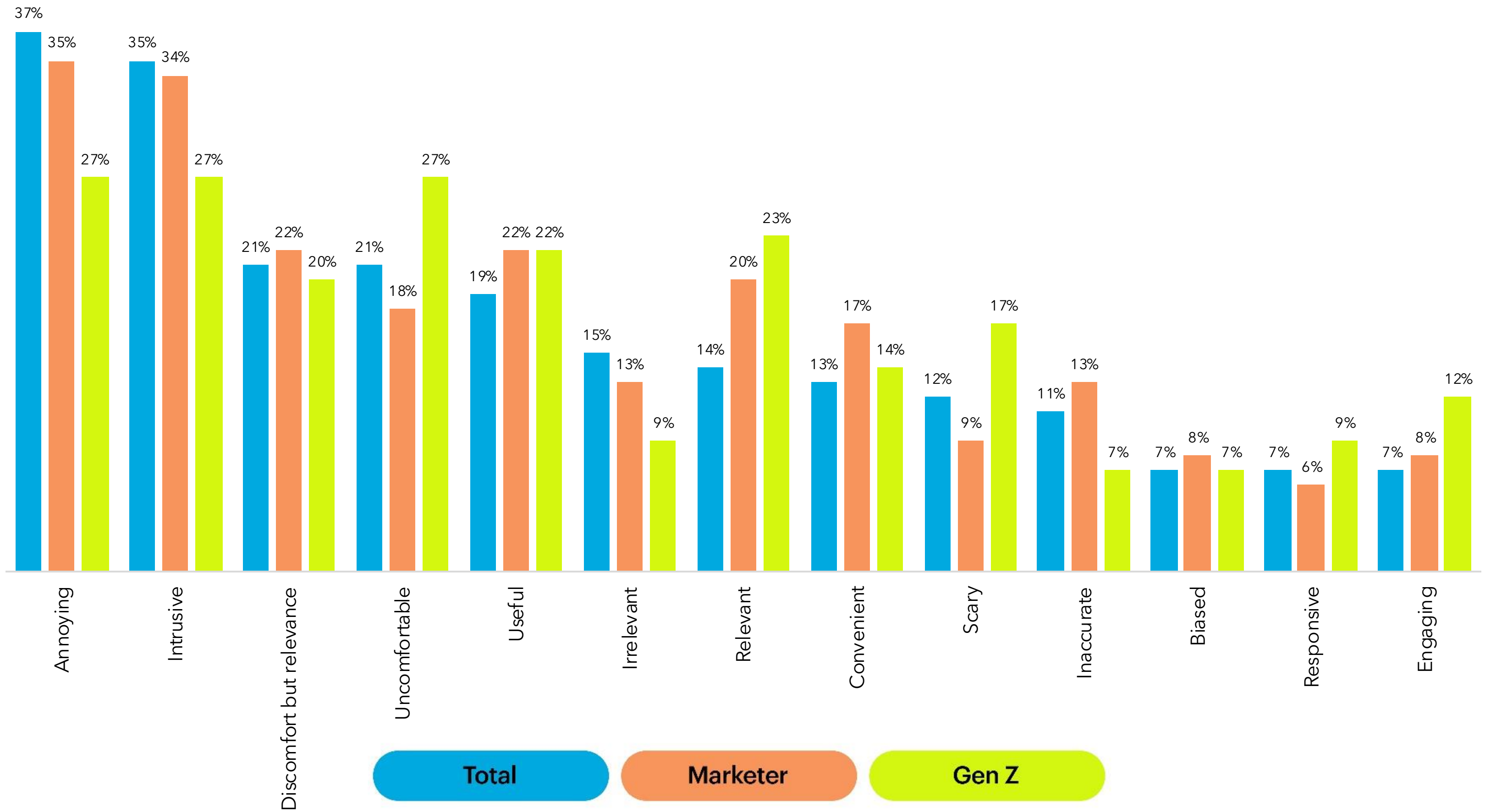


Source: NZME Advertising Effectiveness Study 2024.

The personalisation effect and its impact.

62% of Kiwis know what personalised advertising is

How you feel about personalised advertising



Our research aimed to understand views of personalised advertising and its impact on audiences, positive or otherwise. We concluded:

- Demographic and profession are key factors – younger audiences and those working in marketing are more likely to find the personalisation useful, perhaps due to frequency of exposure and understanding.
- Relevance - if the relevance of the message outweighs the initial feelings of annoyance or discomfort, the consumer can move past these feelings and onto consideration or action.

Source: NZME Advertising Effectiveness Study 2024.

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Impact.

The average Kiwi needs to be exposed to an ad

5.9x

to make it memorable.

Creative matters. Relatable, clever and funny ads are more impactful.

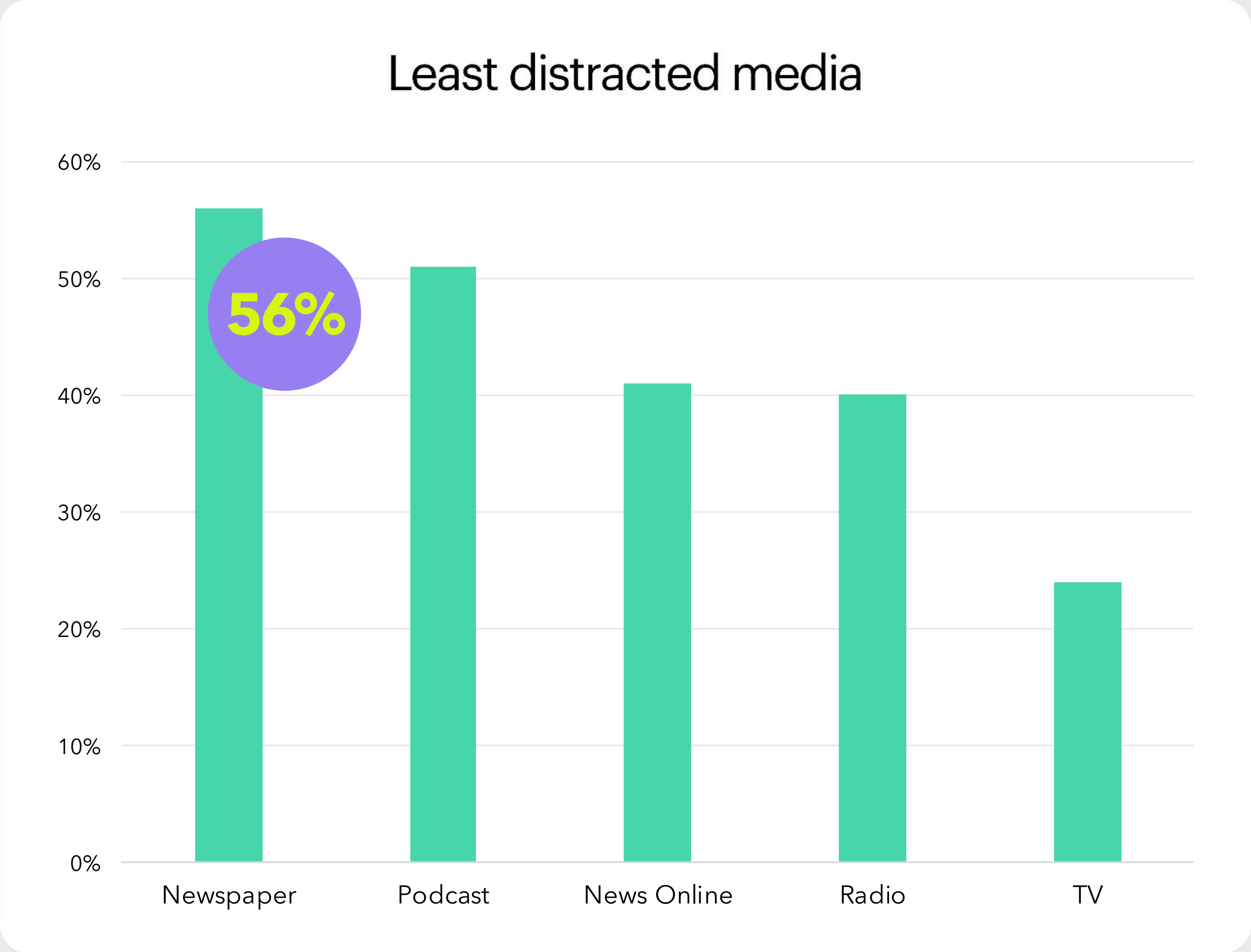
To get personalisation right and overcome consumers' initial feelings of annoyance or discomfort, relevance is key.

Source: NZME Advertising Effectiveness Study 2024. *https://www.mi-3.com.au/05-03-2024/half-impact-comes-creative-system1-customer-chief-jon-evans-how-sell-emotional-ad

May I have your ATTENTION please?

Where can you find attention?

76% of people watching TV are engaging with other platforms



56% of newspaper readers are engaging with no other media.

Informative and trusted media like news (print and online), podcasts and radio are the most focused.

TV is the most distracted media. Viewers are also:

Scrolling social	63%
Reading the news	29%
Online shopping	26%

Video and entertainment media generally peak in the evenings (post 8pm), coinciding with key online shopping times.

Source: NZME Advertising Effectiveness Study 2024

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Focus time.

What media wins attention across a typical day? The most likely media used

Time	Media
5AM - 6AM	Radio AM/FM
6AM - 9AM	Radio AM/FM
9AM - 12PM	Radio AM/FM
12PM - 2PM	Social
2PM - 5PM	Online Music
5PM - 8PM	Free-to-air TV
8PM - 11PM	SVOD/TV Streaming
11PM - 5AM	Reading

Source: NZME Advertising Effectiveness Study 2024.

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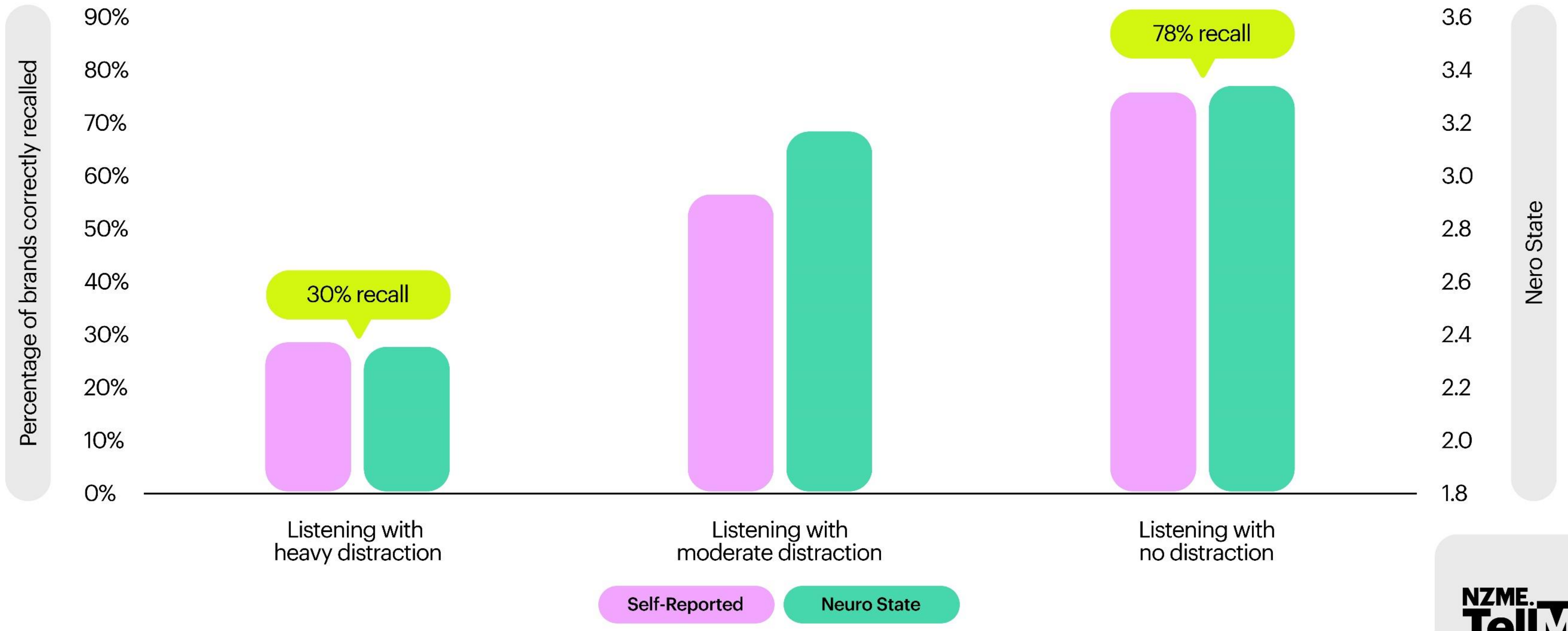
Not all attention is equal.

Audio delivers a 30% cut-through even with low consumer attention



Source: ARN Ears Wide Open Study.

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Focus.

76%

of people are distracted while watching TV.

56%

of newspaper readers are engaging with no other media, making it the most focused medium.

Audio listeners maintain

30%

recall when distracted, rising to

78%

when actively listening.^

Source: NZME Advertising Effectiveness Study 2024. ^ARN Ears Wide Open Study.

“Never mistake the power of influence.

-Jim Rohn

Who can be influential?

Friends & family

Experts in their field

Media personalities

Influencers

Celebrities

Source: NZME Advertising Effectiveness Study 2024

47% of Kiwis are paying attention to experts in their field.

Influence levels are skewed by demographic and professional factors

Influencer attention

Do you take note of things that people say or do?

	Total	Marketer	Gen Z	Millennials
#1	Experts in their field	Experts in their field	Experts in their field	Experts in their field
#2	Media personalities	Media personalities	Influencers you follow on social media	Media personalities
#3	Influencers you follow on social media	Influencers you follow on social media	Media personalities	Celebrities or sportspeople you like

- New Zealanders are most influenced by experts but also pay attention to products endorsed by local media personalities.
- Marketers in particular are more likely to take notice of experts.
- Gen Z are impressionable and more likely to take note of influencers & media personalities.
- Millennials are more likely to be paying attention to celebrities.

Source: NZME Advertising Effectiveness Study 2024.

Be influential.

Experts' knowledge, experience, and achievements position them across multiple segments of the influence funnel

Expert

Expert as a Sexologist

Media personality

Media personality through radio and TV interviews, and award-winning podcast

Influencer

Influencer on social media with more than 32K Instagram followers

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Consumers are most influenced by quality and price.

Appeal to the top factors driving purchasing decisions in the current economic climate

Quality 1	Price (cheapest/best value for money) 2	Brand (I know and trust) 3	Reviews 4
Ease of purchase (time & effort for you) 5	What friends/family/peers think 6	Sustainability credentials 7	How fashionable/popular it is 8

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Source: NZME Advertising Effectiveness Study 2024.

Influencing category audiences.

Leveraging demographics, location, and media habits to influence audiences with a higher conversion potential.

Newspaper readers are more likely to be influenced by
Food

Gen Z are more likely to be influenced by
Personal

Aucklanders are more likely to be influenced by
Alcohol

Gen Z are more likely to be influenced by
Travel

Males are more likely to be influenced by
Technology

Newspaper readers are more likely to be influenced by
Home

Aucklanders more likely to be influenced by
Utilities

Millennials are more likely to be influenced by
Kids

Males are more likely to be influenced by
Auto

HH with kids are more likely to be influenced by
Finance

HH with kids are more likely to be influenced by
Services

Source: NZME Advertising Effectiveness Study 2024

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Influence.

47%

are paying attention to people who are experts in their field.

Consumers are most influenced by quality, price and brand when making a purchase.

Consideration and conversion rates for your category are influenced by demographics, location and media habits.

Source: NZME Advertising Effectiveness Study 2024

Make your

work harder.

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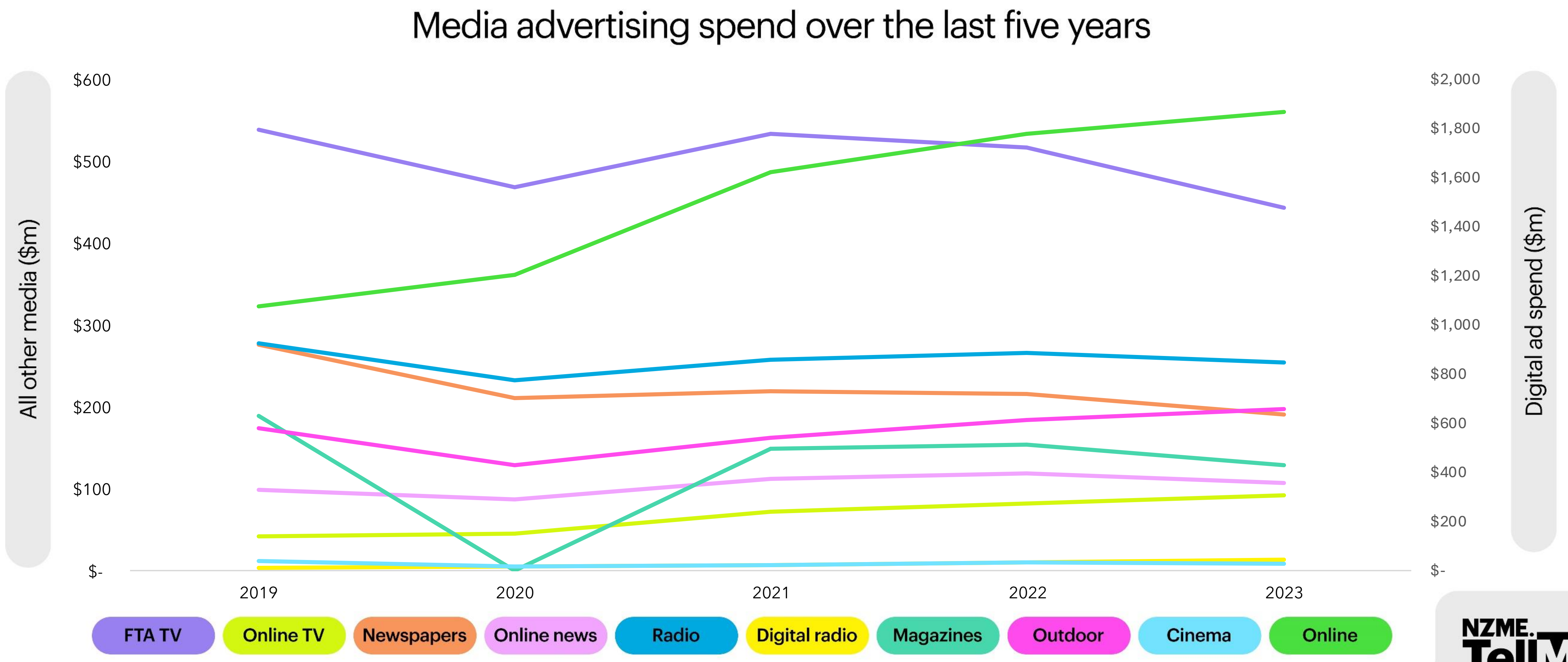
Media investment trend snapshot.

Digital media spend has increased by 68% since 2019



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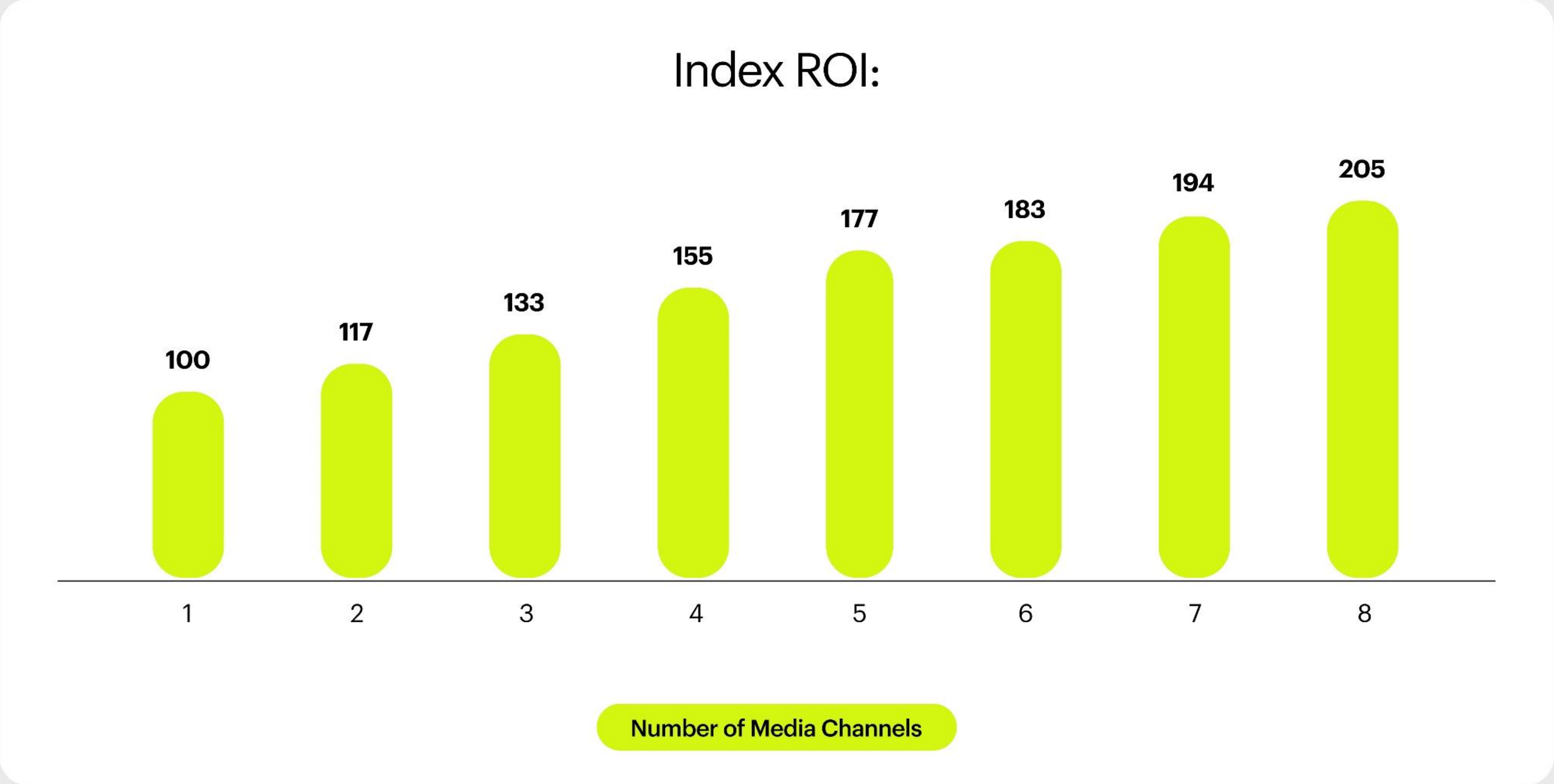
Source: ASA FY 2019 - 2023

“ Provided you can afford them and you’ve got scale, the more channels the better.”

- Mark Ritson



One of the reasons marketing performance should not be analysed in isolation is that media channels work together and complement one another.

As we increase the number of media channels, ROI increases with three channels driving a 33% ROI improvement.

Source: Analytic Partners’ ROI Genome.

Omnichannel powers ROI.

Exposure to both visual and audio messages from the same brand aids consumer processing and recall

33%

A third of respondents recall seeing a memorable visual ad on free-to-air TV.

Add in online TV, social media and online video this increases to 47%.

+37%

Adding an audio component to the campaign creates a +37% uplift across engagement, attention and recall metrics demonstrating audio's ability to increase ROI.^

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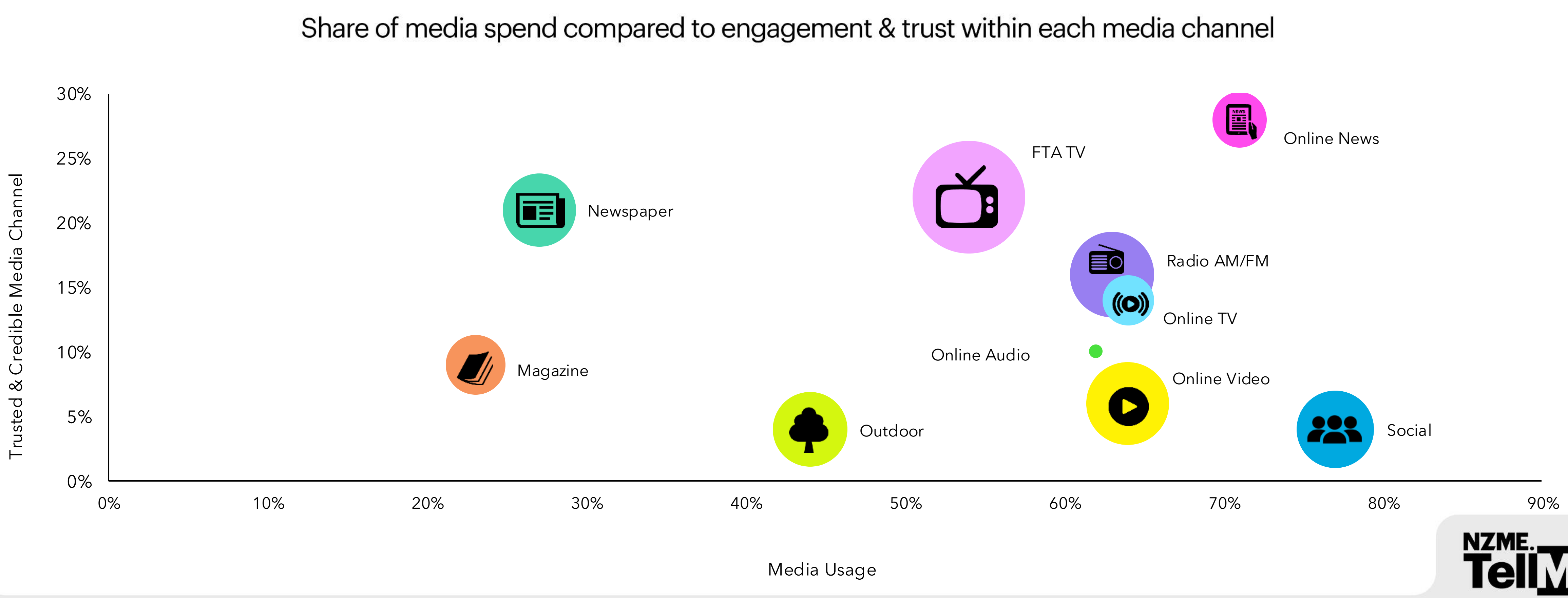
Source: NZME Advertising Effectiveness Study 2024. ^ARN Ears Wide Open Study.

Underinvested channels present an opportunity for advertisers.

Share of voice and ROI potential



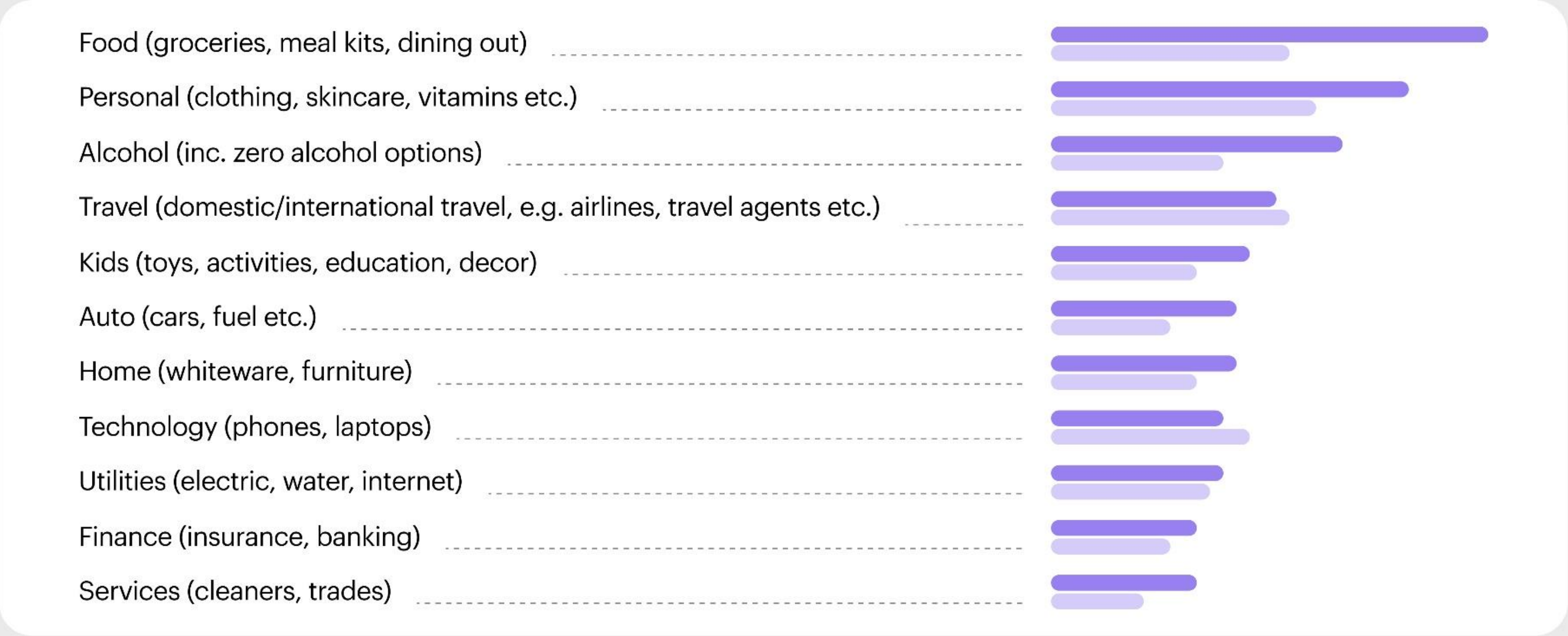
Source: NZME Advertising Effectiveness Study 2024, Nielsen CMI Q2 23- Q1 24 AP15+, ASA & IAB FY 2023 report

Consumers are spending and considering future purchases.

Continued investment in your brand will drive short and long-term consideration and conversion

Purchase ← → **Consideration**

Food | Alcohol | Personal | Auto | Services | Kids | Home | Finance | Utilities | Travel | Technology



Be the brand they remember. Action and consideration is driven by seeing or hearing your brand.

Actually purchased

Seriously considered

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Source: NZME Advertising Effectiveness Study 2024.

Invest.

Share of digital media spend has increased by **68%** since 2019.

Online audio, including both digital radio and podcast, is the most underinvested media channel.

Campaigns using three channels drive a **33%** ROI improvement.

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SOURCE: NZME Advertising Effectiveness Study 2024, Nielsen CMI Q2 23- Q1 24 AP15+, ASA & IAB FY 2023 report, Analytic Partners ROI Study.

You are the COMPANY you keep.

Consumers will protect the brands they trust.

Consumers who fully trust a brand are more likely to purchase that brand, stay loyal to it, and advocate for it. Loyalty not only earns brands their customers' business, but it will also grant them forgiveness when it makes a mistake.

Percentage who say **I'm more likely to do this on behalf of a brand I fully trust** vs one I do not.

Purchase (net)

Buy new products
Buy it even if it's more expensive

63%

Stay loyal (net)

Do not shop around for the other brands
Even if it makes a mistake
Even if others accuse it of wrongdoing

55%

Advocate (net)

Recommend the fully trusted brand to other people

53%

Source:2024 Edelman Trust Barometer

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"Even when exposed to indirect misinformation, when it is not related to brands, but linked to other issues or events, researchers say consumers may experience confusion, doubt, and a general sense of vulnerability to the external world which could affect their spending habits."

Source: https://www.sciencedirect.com/science/article/pii/S2352250X23001616

Proven and informative media channels stack up for trust.

Online news is the most trusted media for Kiwis

Most trusted

NZ news on app or website	Broadcast TV - Free to air or paid	Daily newspaper (printed) weekly/ local

Least trusted

Social media	Outdoor advertising	Cinema

Scroll speeds are **3x** slower on premium journalism.*

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Source: Nielsen CMI Q2 23 – Q1 24 fused 'Jun24 *Amplified Intelligence.

Trust like no other.

Trust us to
entertain

Trust us to
inform

Trust us to
influence

Trust our
experts

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Source: NZME Advertising Effectiveness Study 2024

Summary.

Your audiences are found across multiple channels which are continuing to fragment, these have differing reach and engagement potentials. Add incremental channels as and when you can rather than trying to split existing spend.

With a wide net, you need to know your audience better than ever, find them where they are and show up frequently.

Focus on channels where consumers are most focused when engaging with that platform.

Capture their attention by ensuring your content is relevant and relatable.

Choose an omnichannel campaign for better results.

You want to make sure your message is not only seen but remembered, include a trusted media in your campaign.

Choosing high-reach channels alone may not be the best choice, Facebook is the highest reaching channel, but is the first media consumers would be most willing to give up.

Source: NZME Advertising Effectiveness Study 2024

Appendix.

Demographic profiles.

Not all consumers consume media in the same way

A deep dive into...

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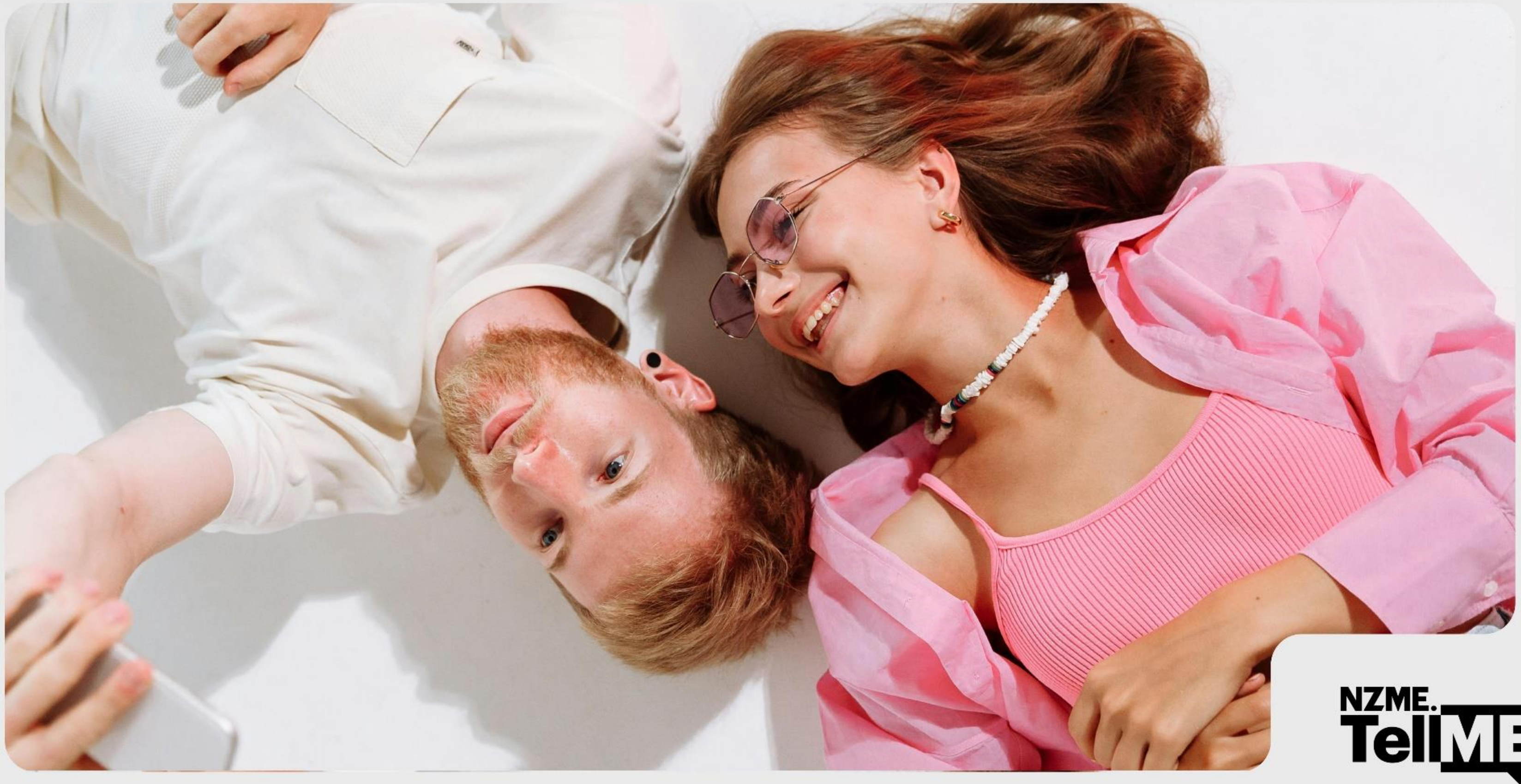
Gen Z.

Connected Open Impressionable

> "Sometimes when I'm considering purchasing or engaging with something it feels relevant that it shows up"

Gen Z respondent on personalised advertising



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Source: NZME Advertising Effectiveness Study 2024 AP18-29.

Gen Z.

Connected

- Gen Z are heavy digital consumers who are more likely to be found engaging with:
  - TV/ Video online, online music, podcasts & social media.
- Instagram is their primary media across most of the day.
- 8 in 10 have a music streaming subscription.
- They're always connected and are significantly more likely to be engaging with more than one media at a time.
- The secondary media always includes socials such as Instagram & TikTok and in some cases gaming or online music.

Open

- Gen Z tend to embrace personalised advertising and are more likely to find it relevant & engaging.
- They are also more likely to take action, considering or purchasing a product/ service after seeing an ad.
- New products are discovered via Instagram, TikTok, other socials or podcasts.
- They tend to place less importance on quality & more importance on how popular or fashionable a product is when making purchasing decisions.

Impressionable

- Gen Z are the most impressionable audience.
- They take more notice of what influencers & media personalities have to say.
- **5x**
  - The number of times Gen Z needs to be exposed to an ad for it to become memorable is significantly less than the average of 5.9x.
- Frequency and relatability are key for Gen Z to find an ad memorable.
- Over a third are spending over two hours on social media each day, 24% more than Millennials. They are also more likely to report that social is having a negative effect on their mental health^.

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Source: NZME Advertising Effectiveness Study 2024 AP18-29 ^McKinsey Health Institute Global Gen Z Survey (2022) (n = 41,960).

Millennials.

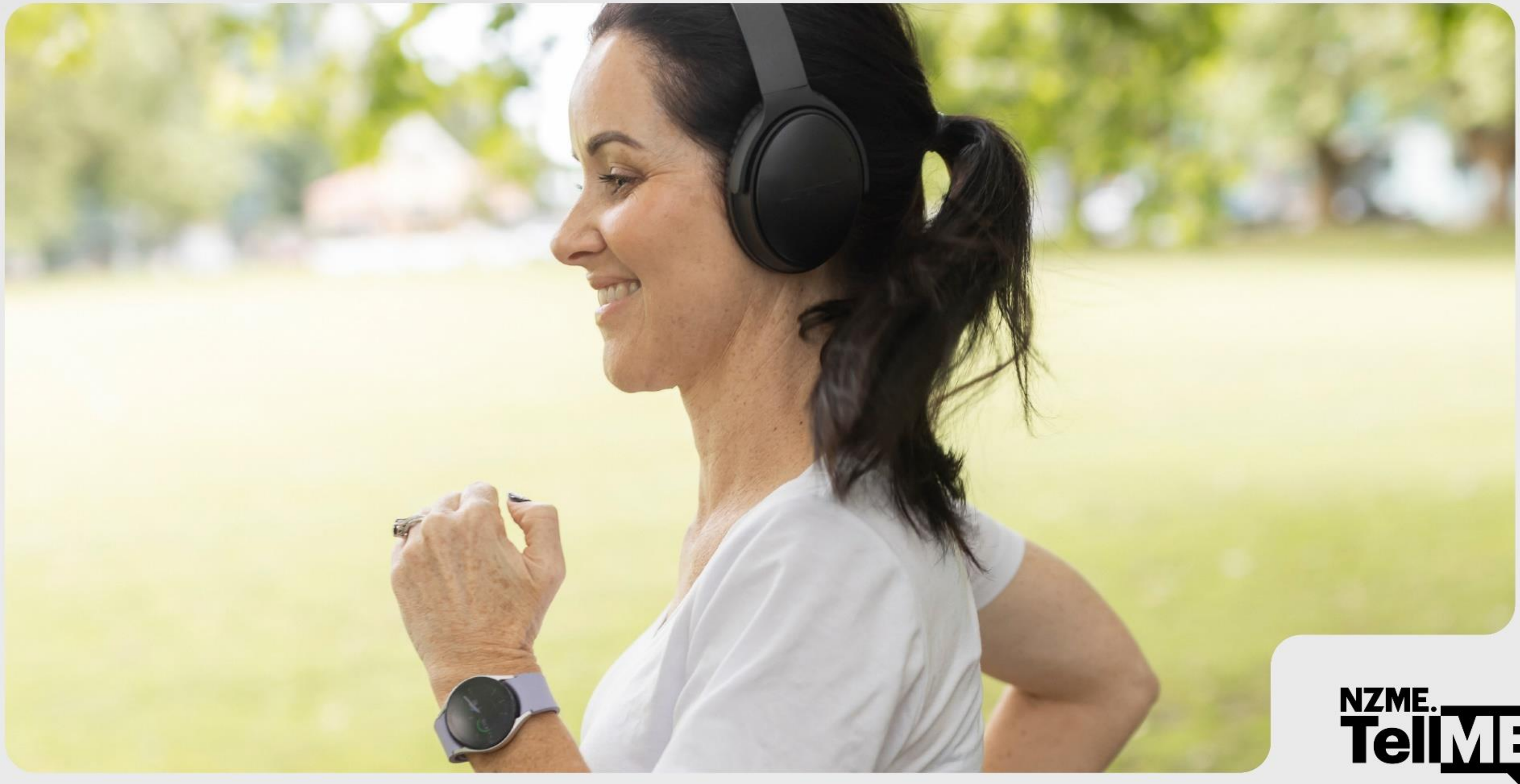
Trend-conscious

Convenience

Adaptable

“It was funny - had Stephen Adams in it”

Millennial respondent on their most memorable ad and why



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Source: NZME Advertising Effectiveness Study 2024 AP30-39.

Millennials.

Trend-conscious

- Millennials are heavy digital consumers (but to a lesser extent than Gen Z), they are more likely to be engaging with:
  - Video online
  - Online music (63% have a music streaming subscription)
  - Podcasts
  - Social media – particularly Instagram & TikTok.
- They are trend-conscious, placing significantly more importance on popularity when making purchasing decisions.
- They are more likely to find out about new products from Facebook, Instagram or online video.
- Millennials tend to be focused when listening to the radio and love a good jingle.

Convenience

- Millennials are more likely to have music & TV streaming subscriptions.
- They are more likely to be doing their grocery shopping online, shopping from the specials list for convenience.
- Millennials are dual-screeners and are more likely to be distracted when watching TV.
  - Online with socials
  - Online shopping
- Kids are top of mind. Millennials are more likely to be considering or purchasing from the kids' category after seeing an ad.

Adaptable

- Millennials are open to personalised advertising as they tend to find it relevant, yet they are still suspicious.
- They take more notice of celebrities they like and are more likely to be influenced in their purchase considerations by friends, family and influencers.

Source: NZME Advertising Effectiveness Study 2024 AP30-39.

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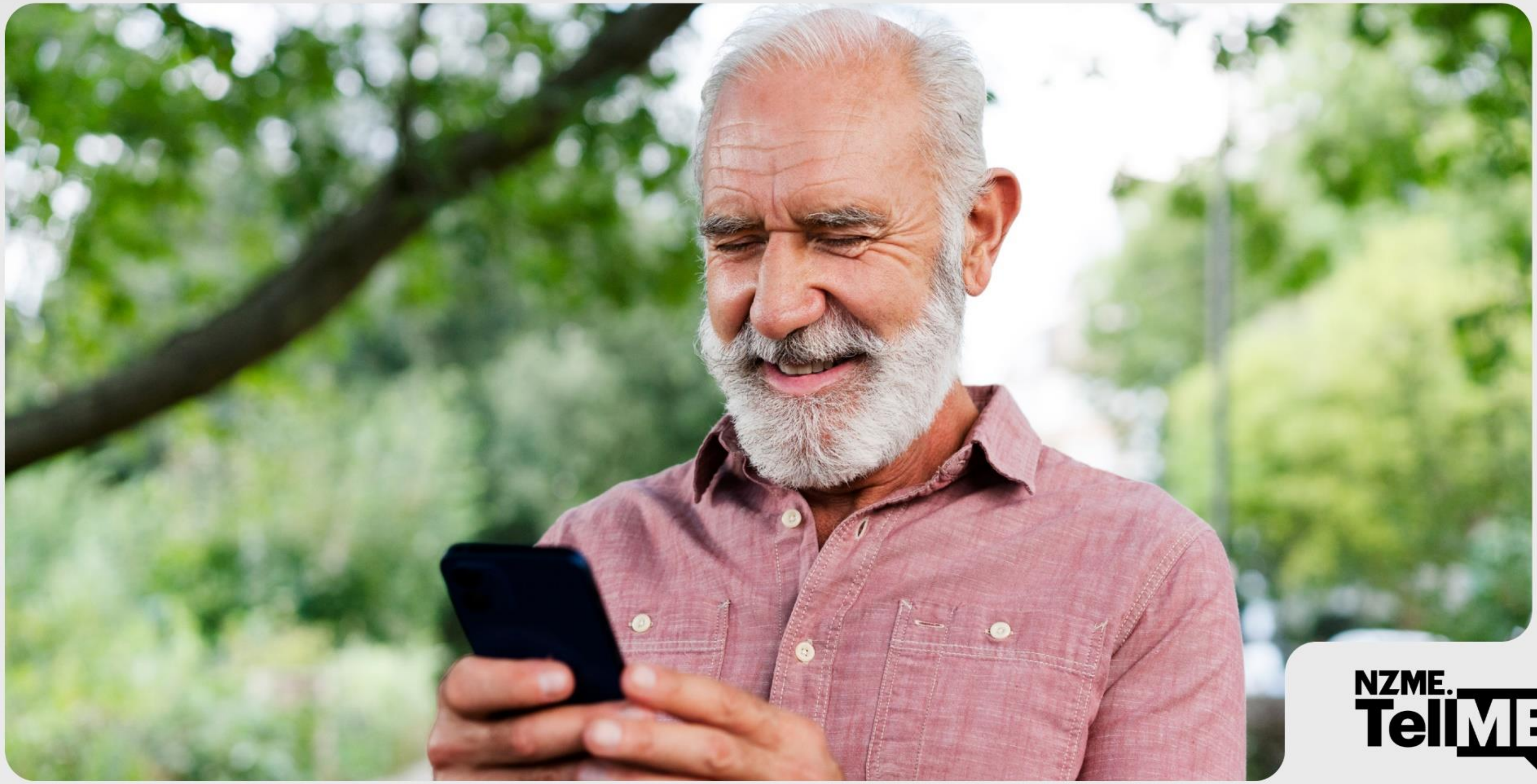
Boomers.

Traditional | Information-led | Impervious

> “Funny and enjoyable."
>
> "Warmed my heart"
>
> "It was easy to listen to and understand"
>
> "Because it related to a concern I have about my pets"
>
> "I’ve seen it so many times!"

Boomer respondents on what made a memorable ad



Source: NZME Advertising Effectiveness Study 2024 AP60+.

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Boomers.

Traditional

- Boomers are more traditional media consumers who are most heavily engaging with:
  - FTA TV
  - Print (newspaper & magazine)
  - Online news
- For Boomers, it's all about keeping up to date with the news and they do this both in print & online.
  - They are more likely to have a news site subscription, with over 1 in 3 of those aged 70+ having one.
- While frequency & relatability are still important to Boomers when making an ad memorable, 'clever' ads are more likely to stick in their minds too.
- Boomers need to be exposed to an ad significantly more times for it to become memorable – an average of 7.8 times for those aged 70+.

Information-led

- Boomers are the group most likely to be reading news online.
  - More than 80% of 60-69 year olds are reading online news.
- They are more likely to be finding out about new products from advertising they see or hear on the radio as well as in print, and on FTA TV.
- When making purchasing decisions, they place significantly more importance on quality and sticking to brands they know & trust.

Impervious

- This group are the hardest to influence, or at least they say they are. They are less likely to be influenced by advertising when considering or purchasing across categories.
- Boomers take less notice of what influencers & celebrities have to say and overall are less likely to be influenced by anyone when considering and purchasing products/ services.
- They are less likely to understand what is meant by personalised advertising and tend to find it annoying, intrusive & irrelevant.

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Source: NZME Advertising Effectiveness Study 2024 AP60+.

Marketers.

Engaged | Aware | Forward focused

"Feels like big brother watching what you do. However less annoying than random advertising"

Marketer respondent on personalised advertising

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Marketers.

Engaged

- Marketers are engaging more with streamed online paid TV, social media, online music & outdoor media.
  - Online music & podcasts accompany them across the day
  - They are mostly listening to podcasts and online music during breakfast and early evening zones.
- They are more likely (than general consumers) to say that memorable ads are being seen on Facebook and Instagram.
- And they are more likely to be finding out about new products or brands on socials, especially Instagram.
- Marketers are more likely to have music & TV streaming subscriptions.

Aware

- Marketers are taking action after being exposed to ads. Including:
  - Considering the product or brand
  - Speaking to someone about the product or brand
  - Following the brand
  - Recommending the product or brand
- They are significantly more likely to be noticing outdoor media in the mornings & early evenings.
- Marketers are more influenced by experts in their field.

Forward focused

- Marketers are much more aware of personalised advertising (75%) and are more likely to find it relevant and useful.
- A memorable ad for Marketers is relatable and clever and is seen an average of 5.3x to be recalled.

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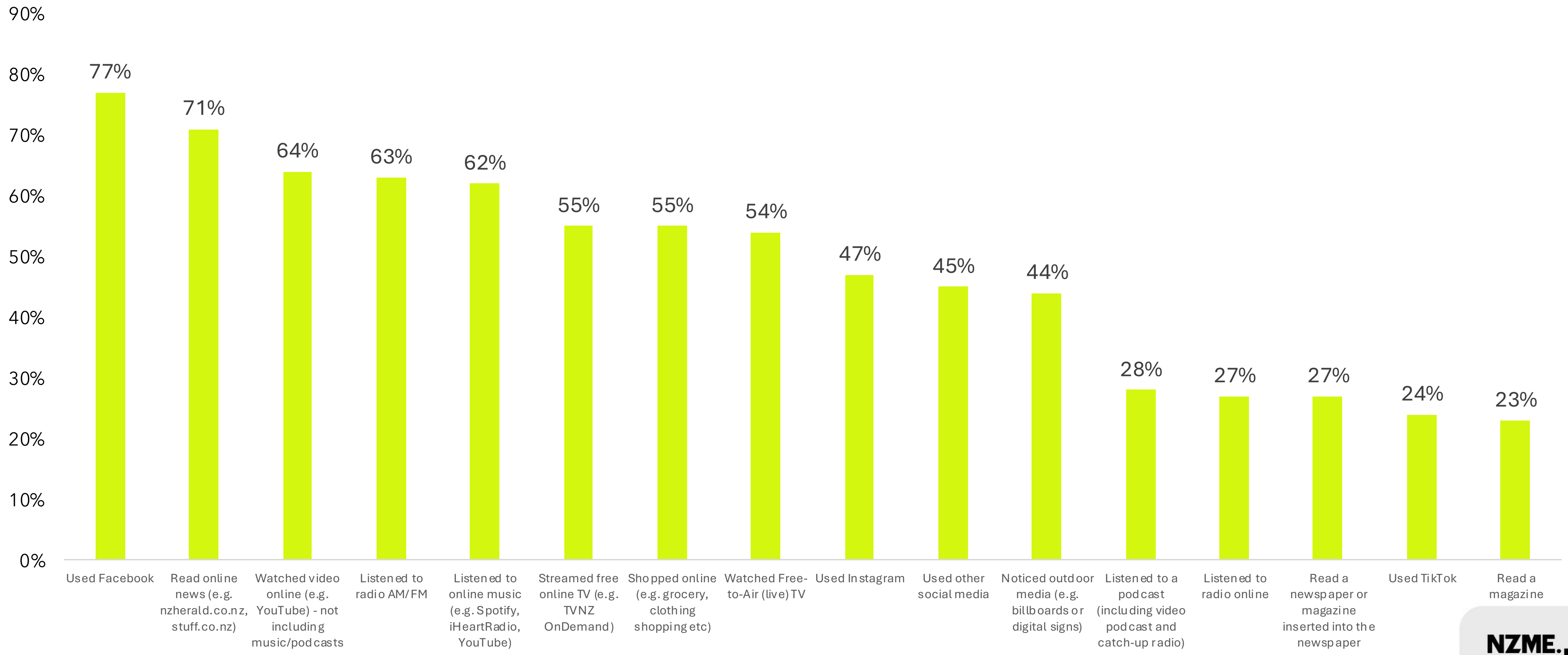
Source: NZME Advertising Effectiveness Study 2024.

Kiwi media usage.

A snapshot of weekly consumption for advertisers

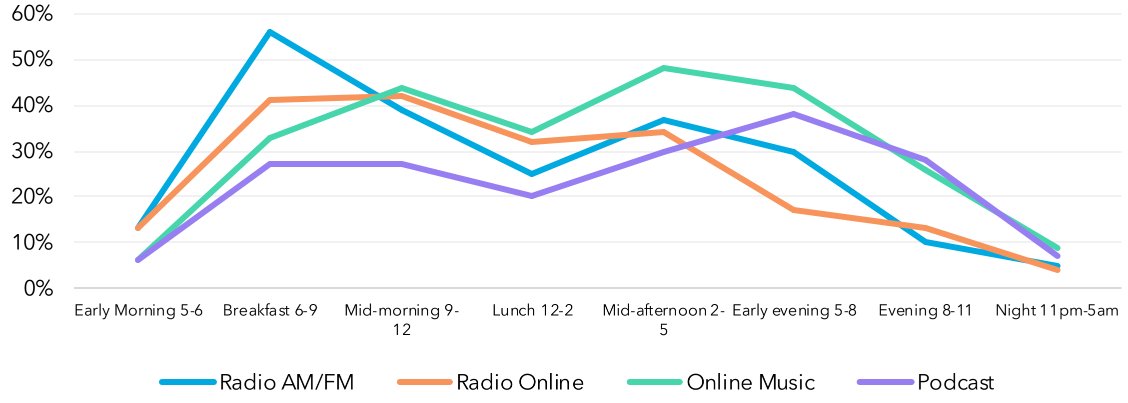


Source: NZME Advertising Effectiveness Study 2024.

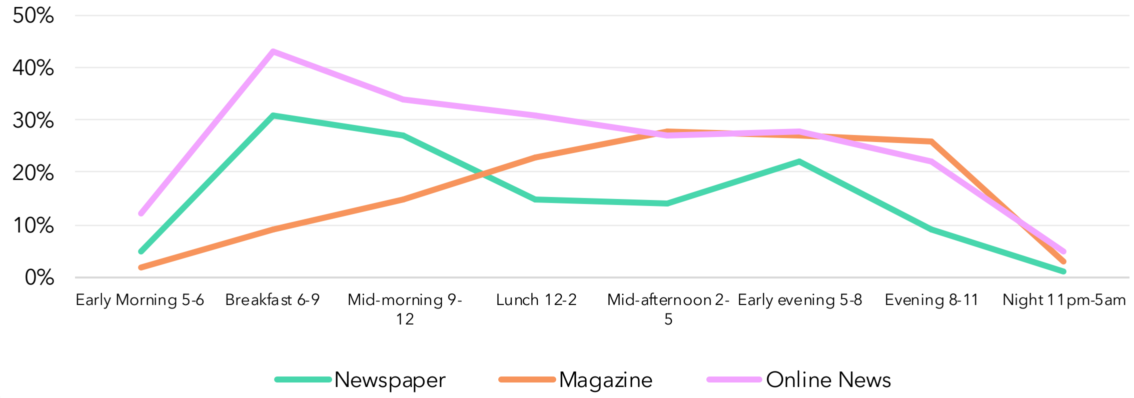
Time of day engagement.

Morning/Lunch

Audio

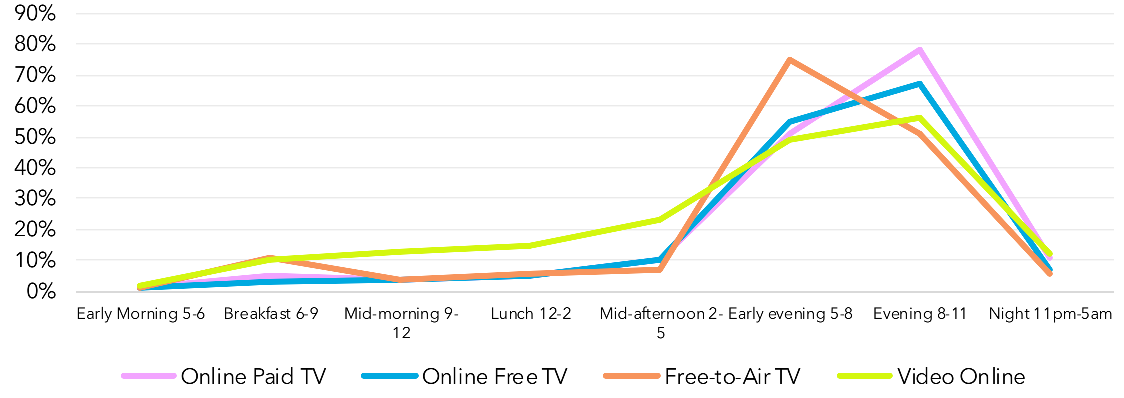


Informative

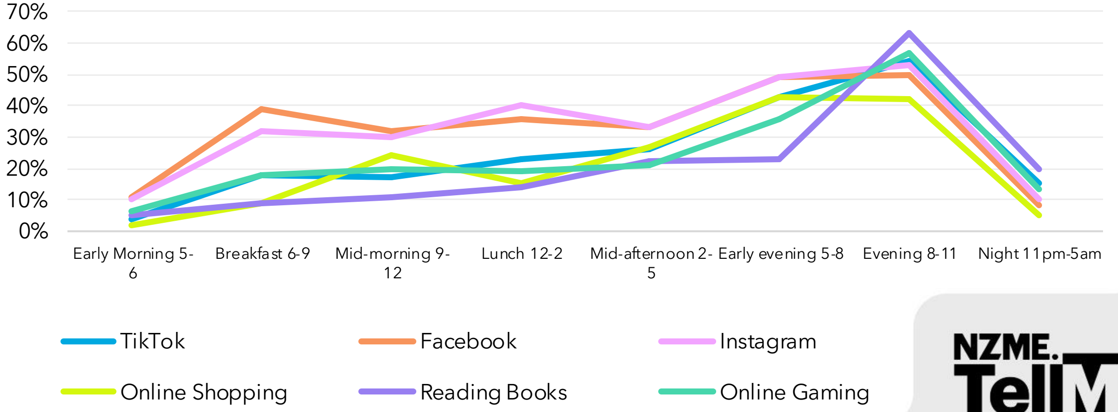


Afternoon/Evening

TV/Video



Entertainment



Source: NZME Advertising Effectiveness Study 2024

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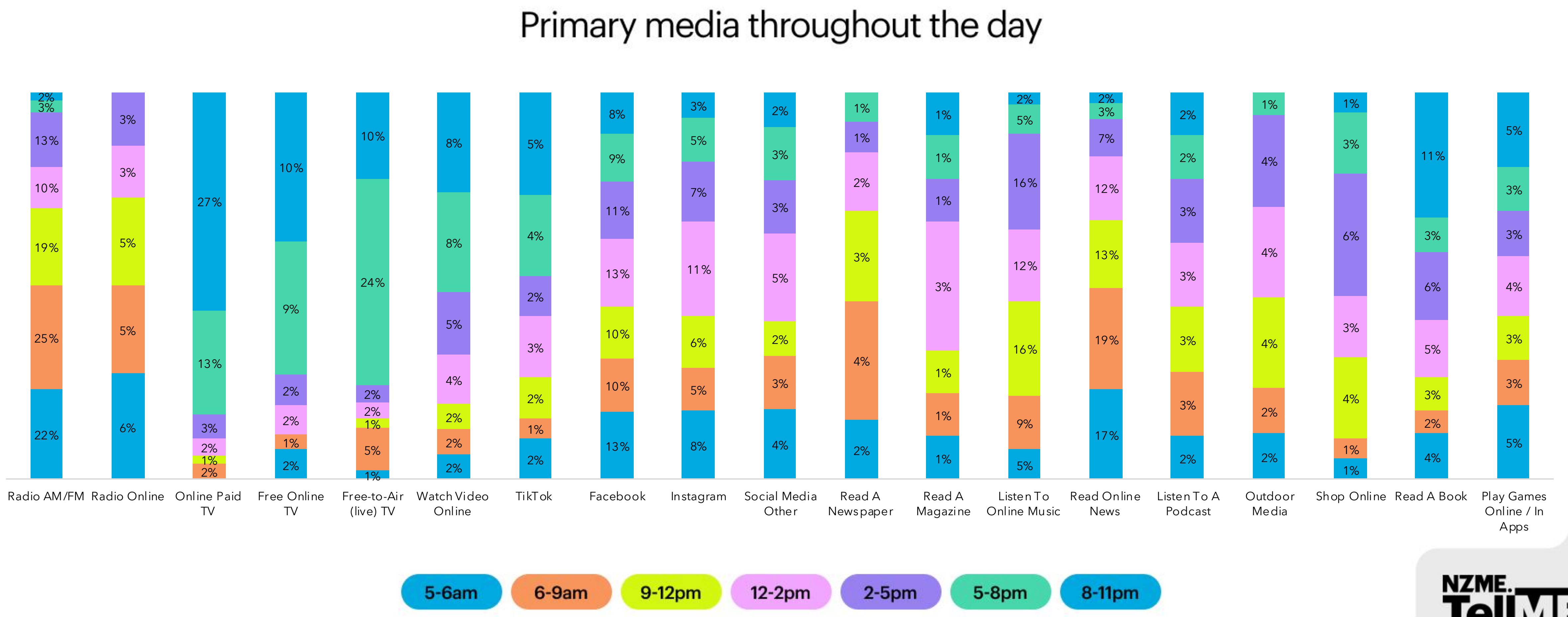
A look at the most likely media used across the day.



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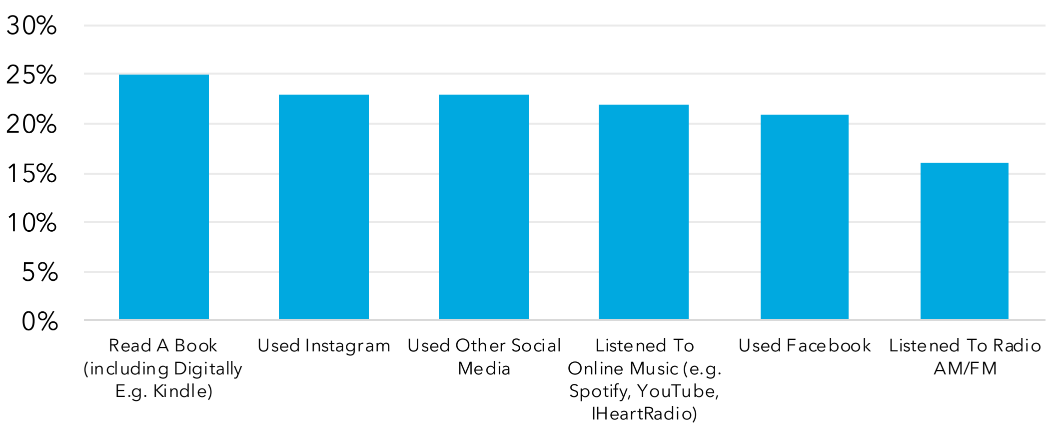
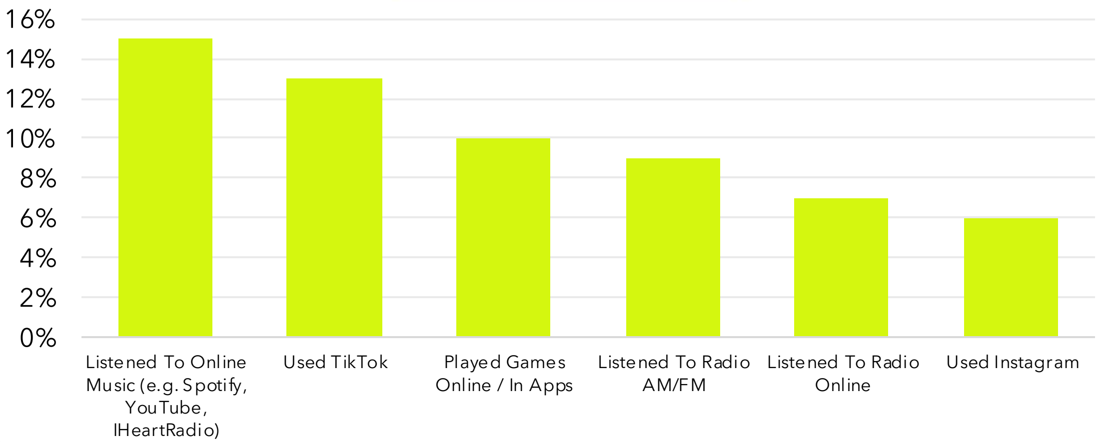
Media attitudinals.

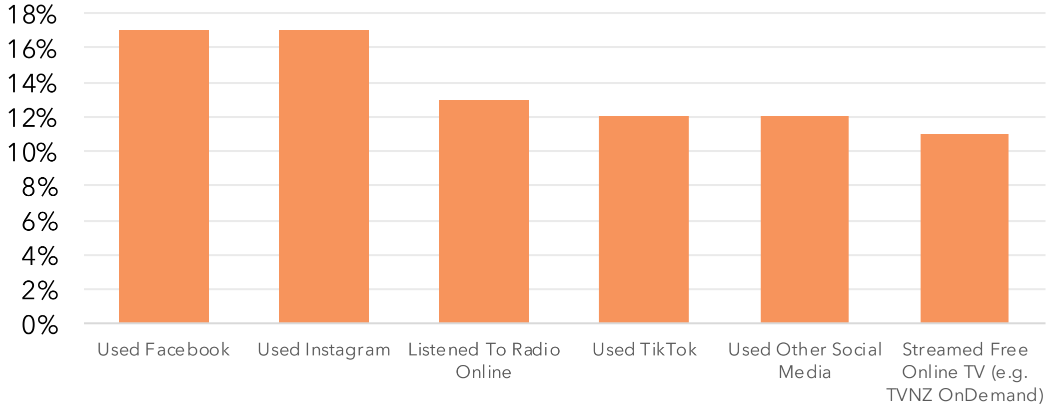
I feel a personal connection



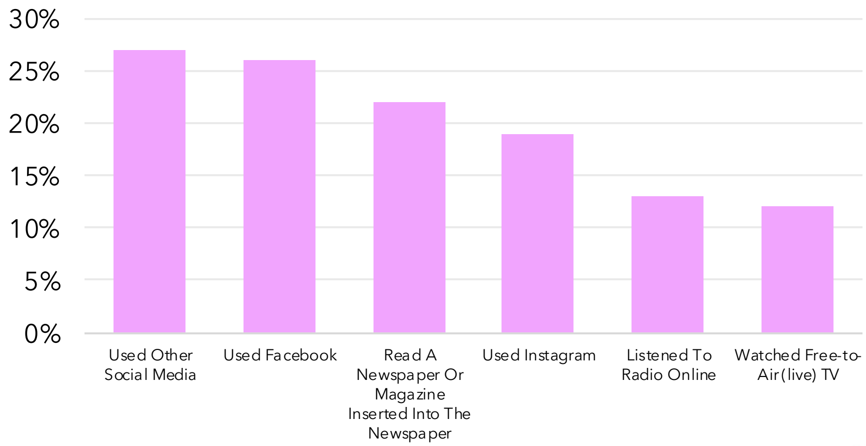
It makes me feel young



I feel included



It makes me feel closer to my community



Source: NZME Advertising Effectiveness Study 2024

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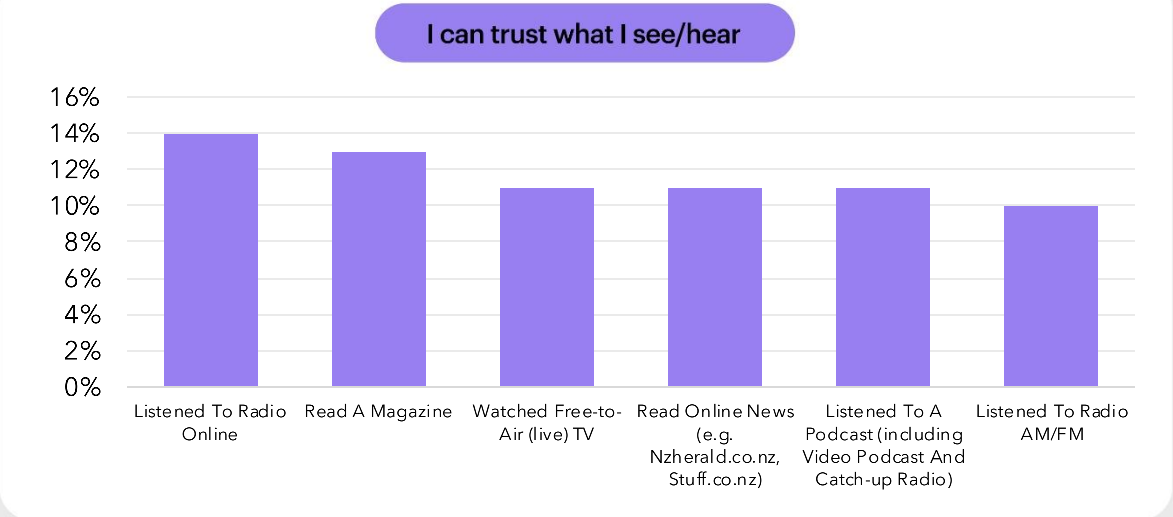
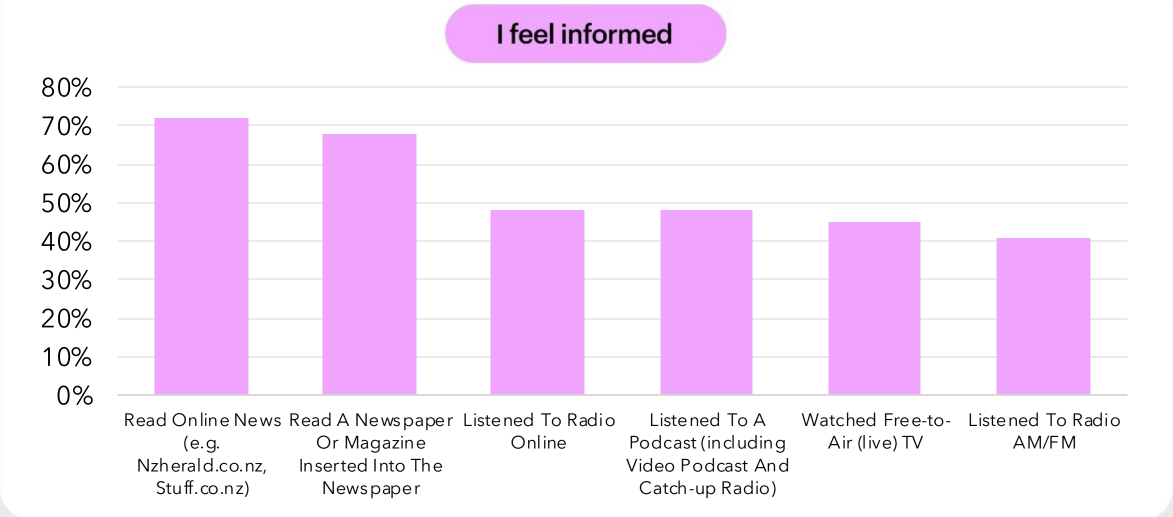
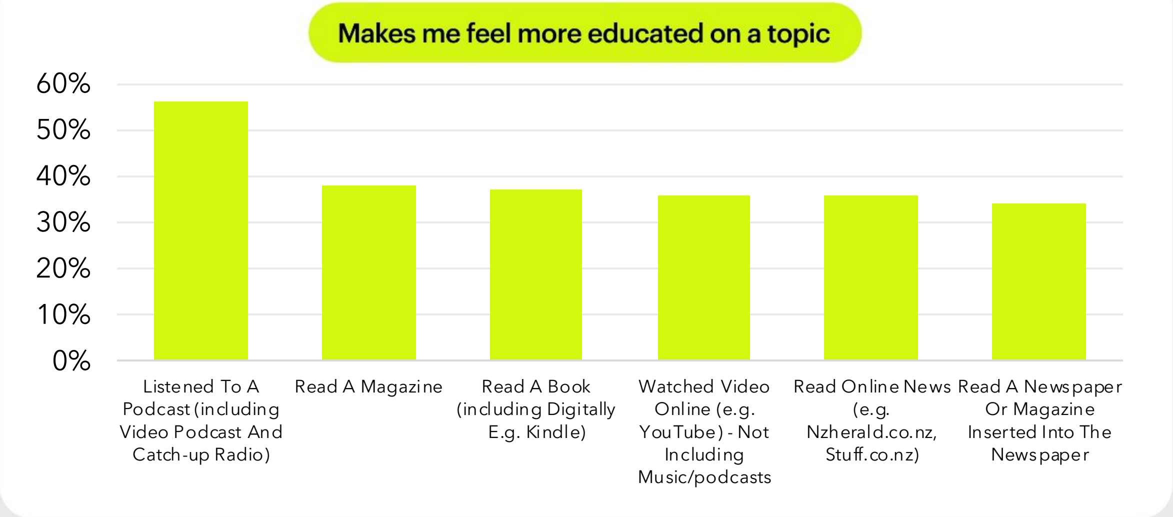
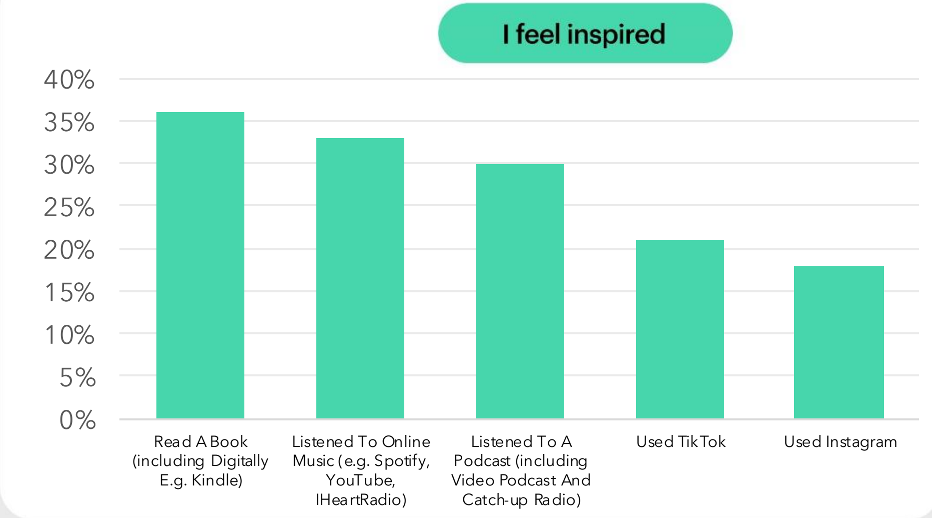
Media attitudinals.









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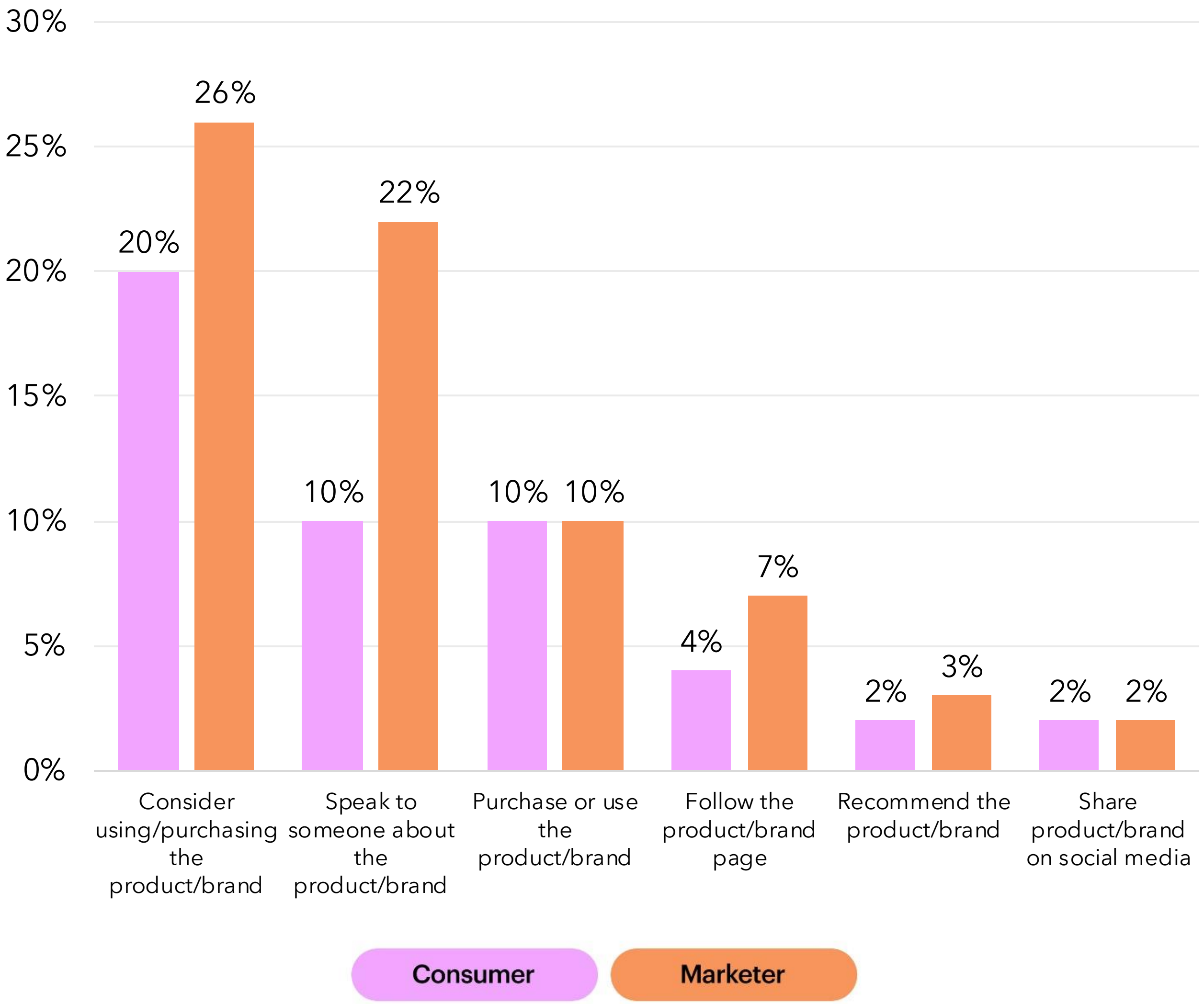
Source: NZME Advertising Effectiveness Study 2024

Marketers are more likely to take action.



Marketers more likely to consider and chat to someone about the product/brand after being exposed to an impactful ad.

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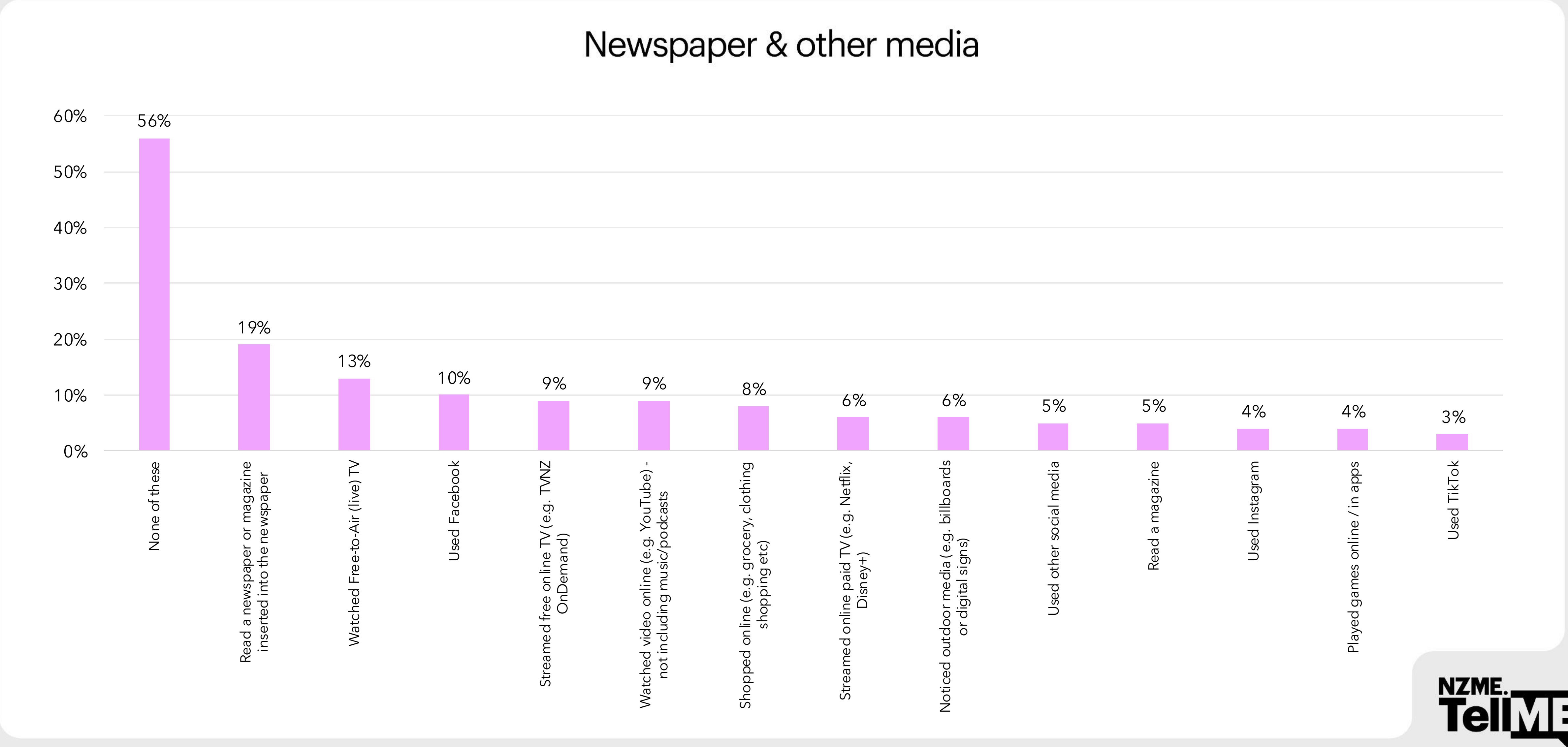
Source: NZME Advertising Effectiveness Study 2024

Informative media is the most focused.



Source: NZME Advertising Effectiveness Study 2024

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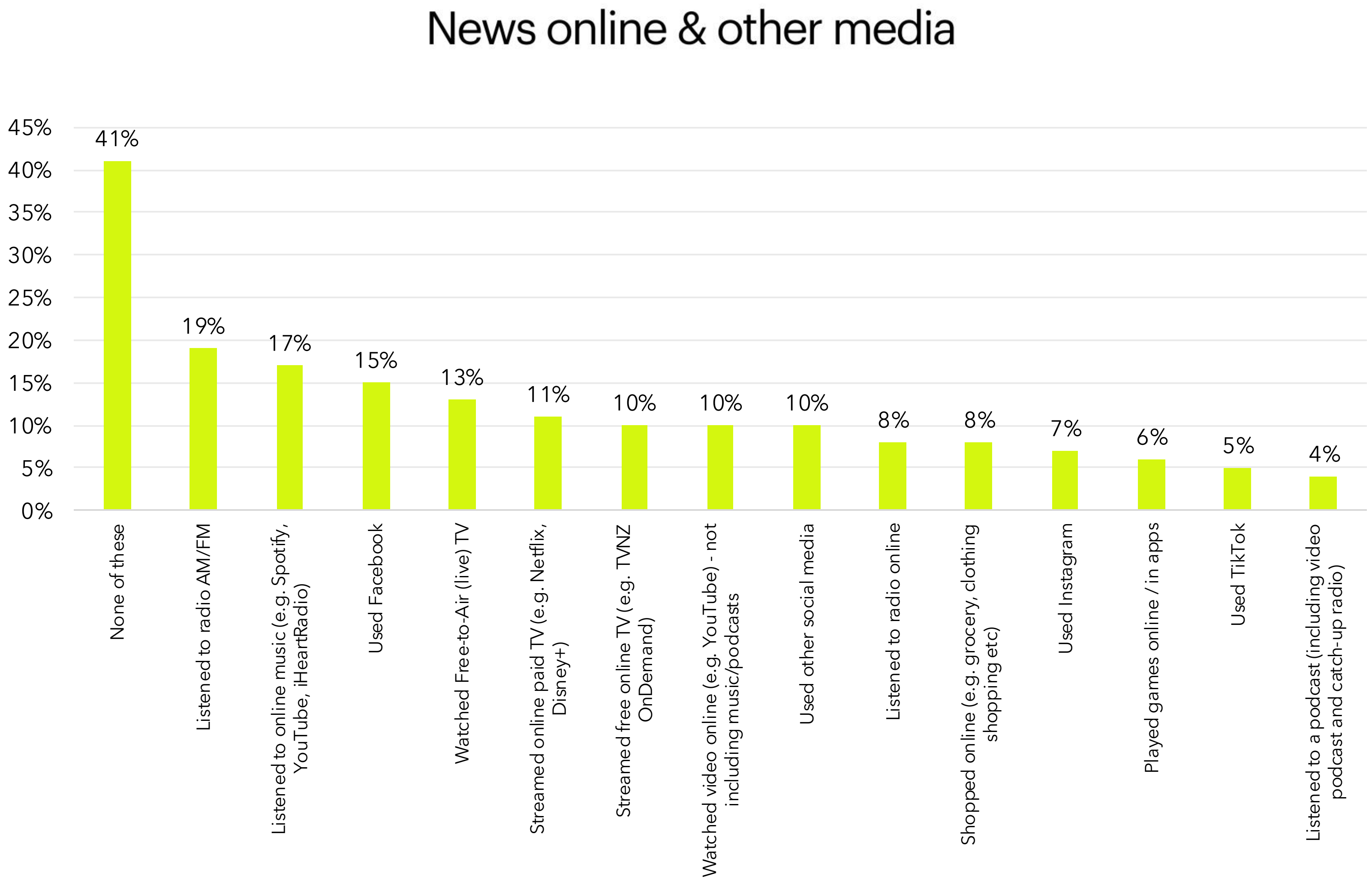
Informative media is the most focused.



Audience insights

- Gen Z are more likely to be scrolling TikTok, Instagram, other socials or listening to music online while reading news online.
- 1 in 5 are listening to radio AM/ FM while engaging with their news online.

Source: NZME Advertising Effectiveness Study 2024

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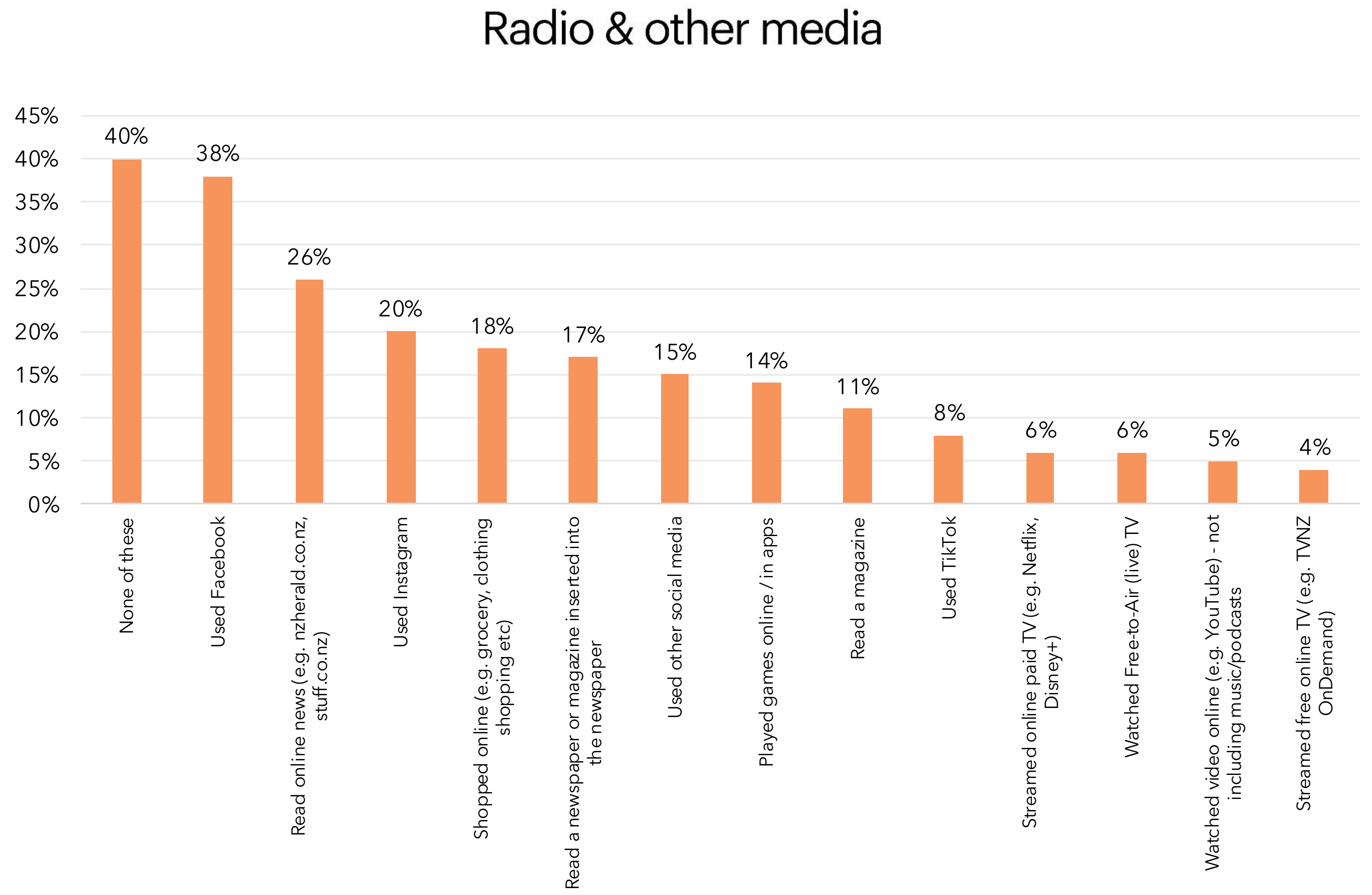
Audio is a focused medium.



Audience insights

- Gen Z are more likely to be on TikTok, Instagram or other socials while listening to radio.
- While the older generations are more likely to be reading news (print, NIMs or online) while listening to radio.
- 45% of 25–54-year-olds are engaging with no other media while listening to the radio.

Source: NZME Advertising Effectiveness Study 2024

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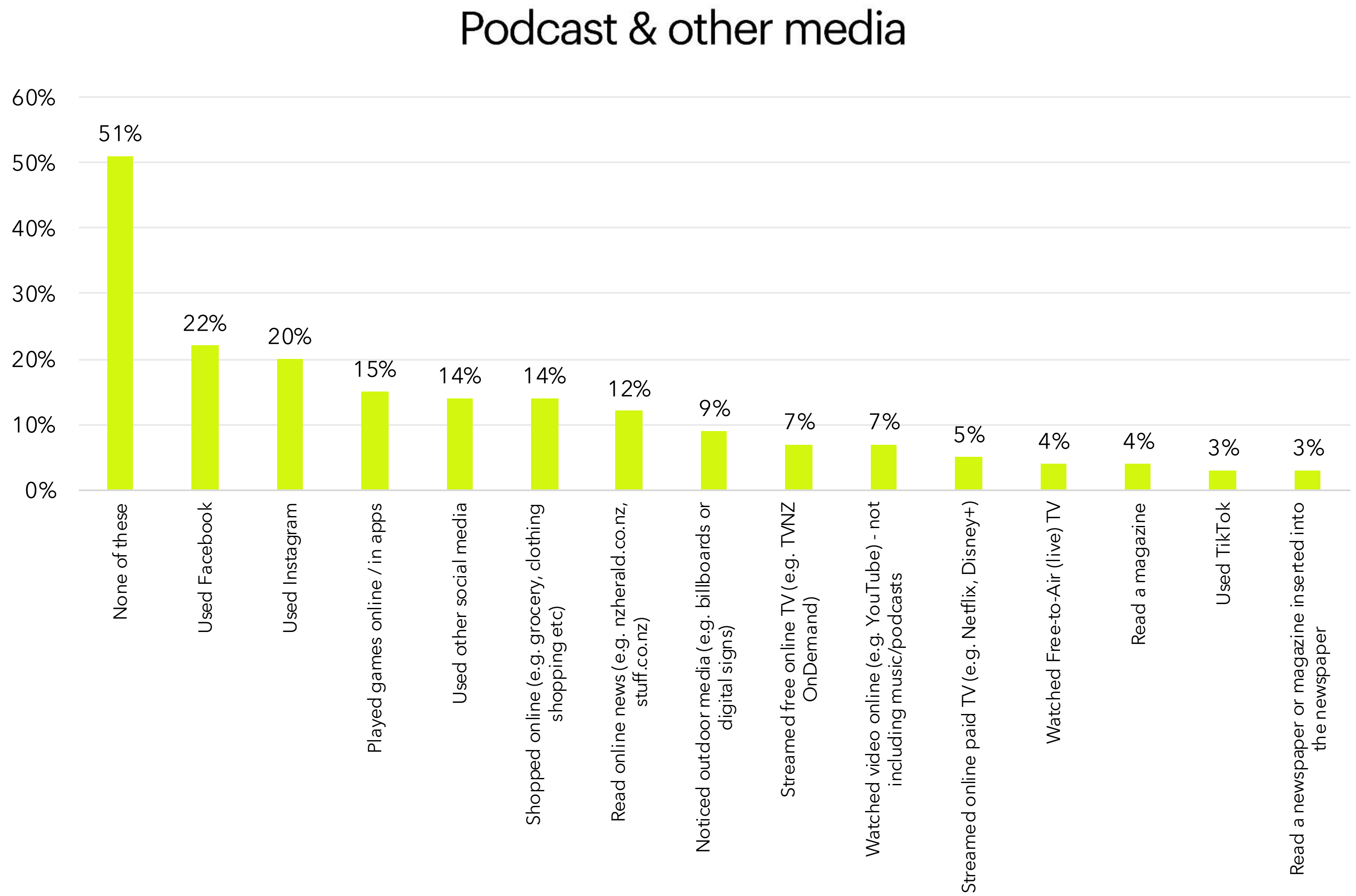
Audio is a focused medium.



Audience insights

- Gen Z are more likely to be on other socials or gaming while listening to podcasts.
- 50–59 year olds are most likely to be engaging with no other media when listening to podcasts.

Source: NZME Advertising Effectiveness Study 2024

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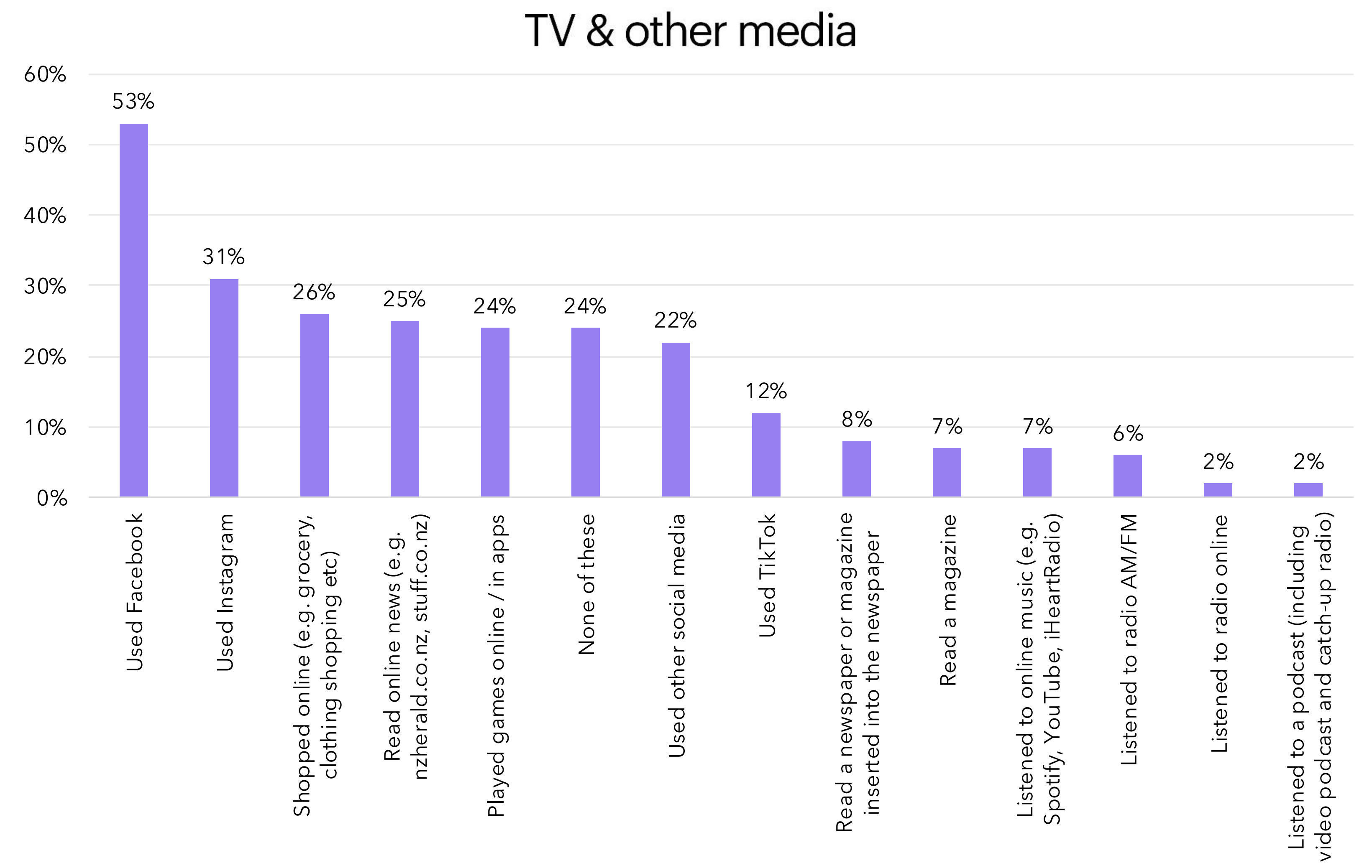
TV is the most distracted form of media.



Audience insights

- Females are more likely to be on Social Media or shopping online while watching TV.

- Younger age groups (Gen Z, Millennials) are also more likely to be on social media while watching TV.

Source: NZME Advertising Effectiveness Study 2024.

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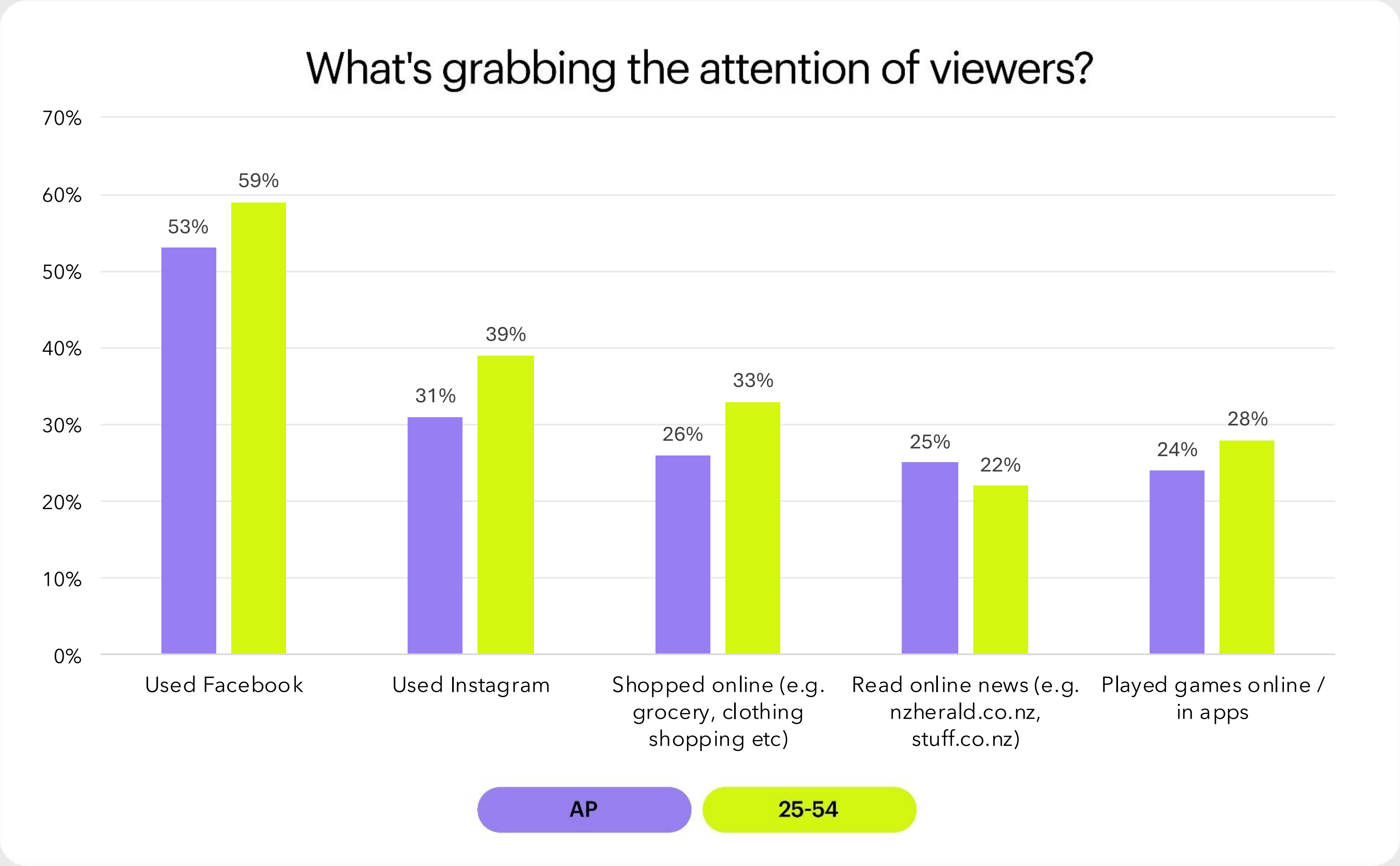
TV is the most distracted media.

And 25-54 year olds are more affected



The most likely activities

Demographic analysis:

-
-
-

Gen Z & Millennials -

70+ -

Source: NZME Advertising Effectiveness Study 2024.

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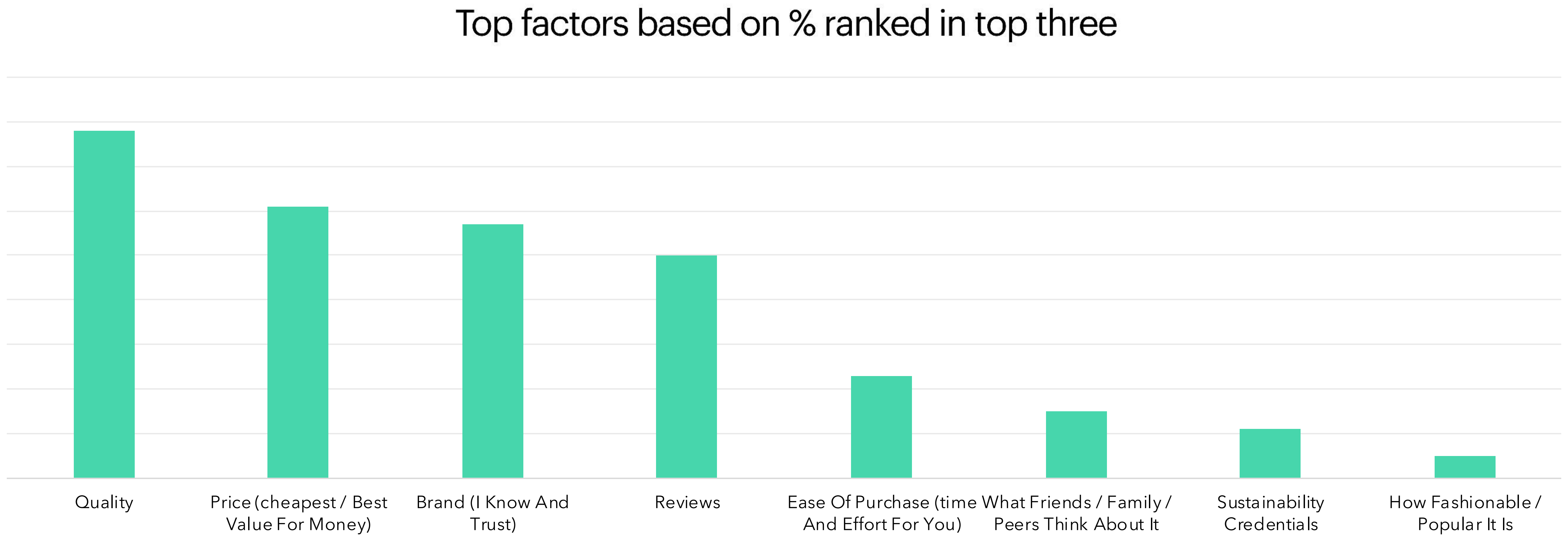
Consumers are most influenced by quality and price when making a purchase.



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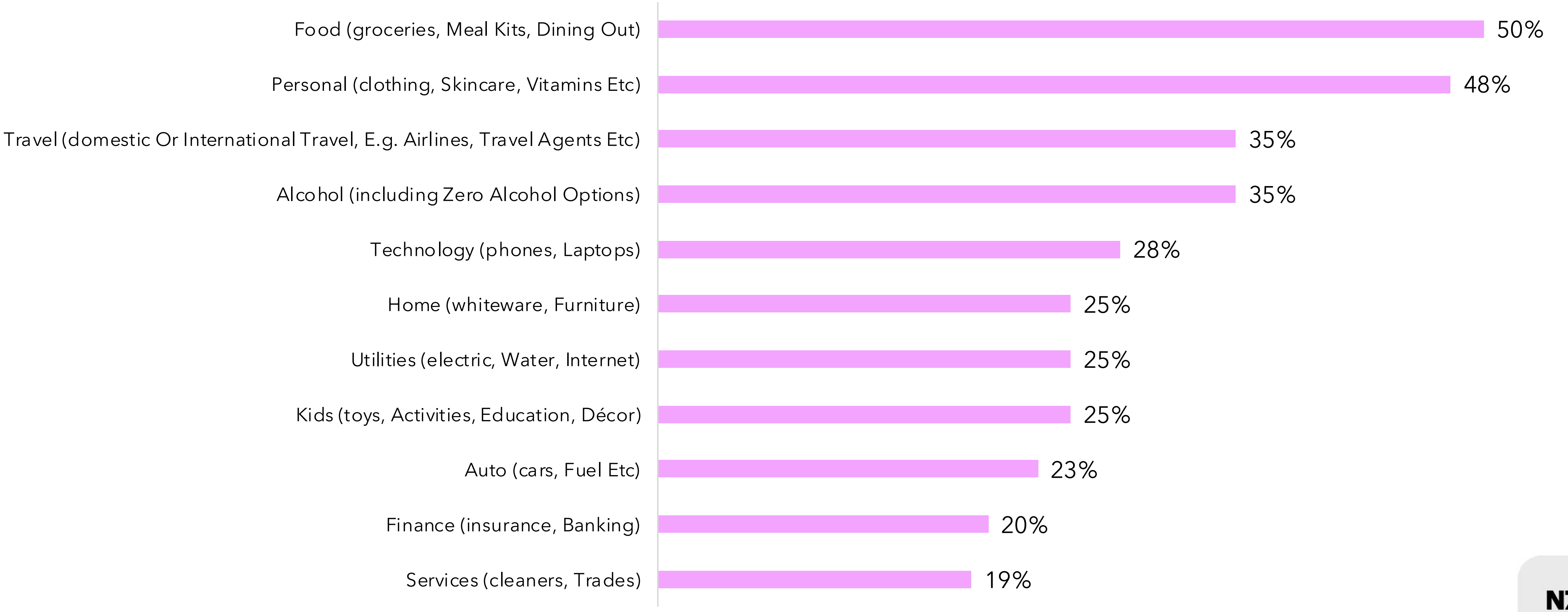
Source: NZME Advertising Effectiveness Study 2024

Consumer action by category.

Seen or heard an ad that made you purchase or seriously consider purchasing something in any of these categories?



Source: NZME Advertising Effectiveness Study 2024

Top spending categories by media channel.

Could an alternate channel mix increase your brand's cut-through?

Top spending category within Cinema:	Food & Beverage	Makes up 20% of Cinema spend
Top spending category within Newspaper:	Travel	Makes up 16% of Newspaper spend
Top spending category within Magazine:	Home	Makes up 10% of Magazine spend
Top spending category within Online:	Food & Beverage	Makes up 13% of Online spend
Top spending category within Outdoor:	Food & Beverage	Makes up 19% of Outdoor spend
Top spending category within Radio:	Building & Home Improvement	Makes up 13% of Radio spend
Top spending category within Social:	Clothing	Makes up 14% of Social spend
Top spending category within TV:	Food & Beverage	Makes up 18% of TV spend

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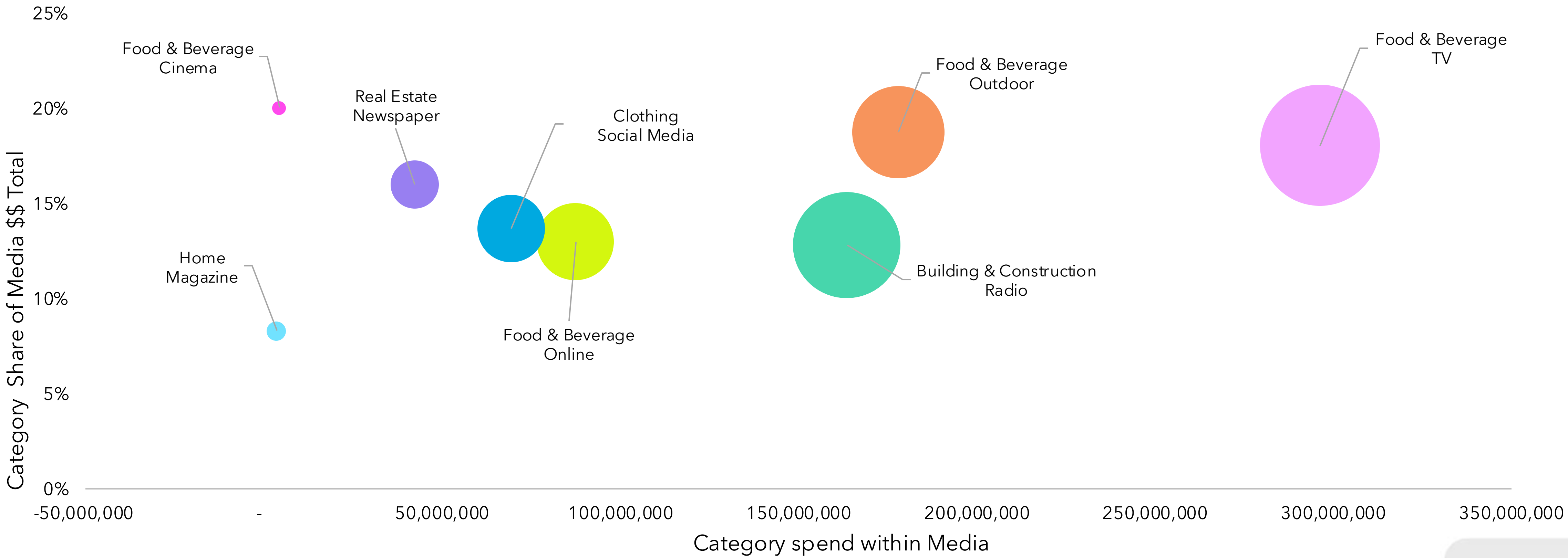
Source: Nielsen Ad Spend FY 2023

Top spending categories by media channel.

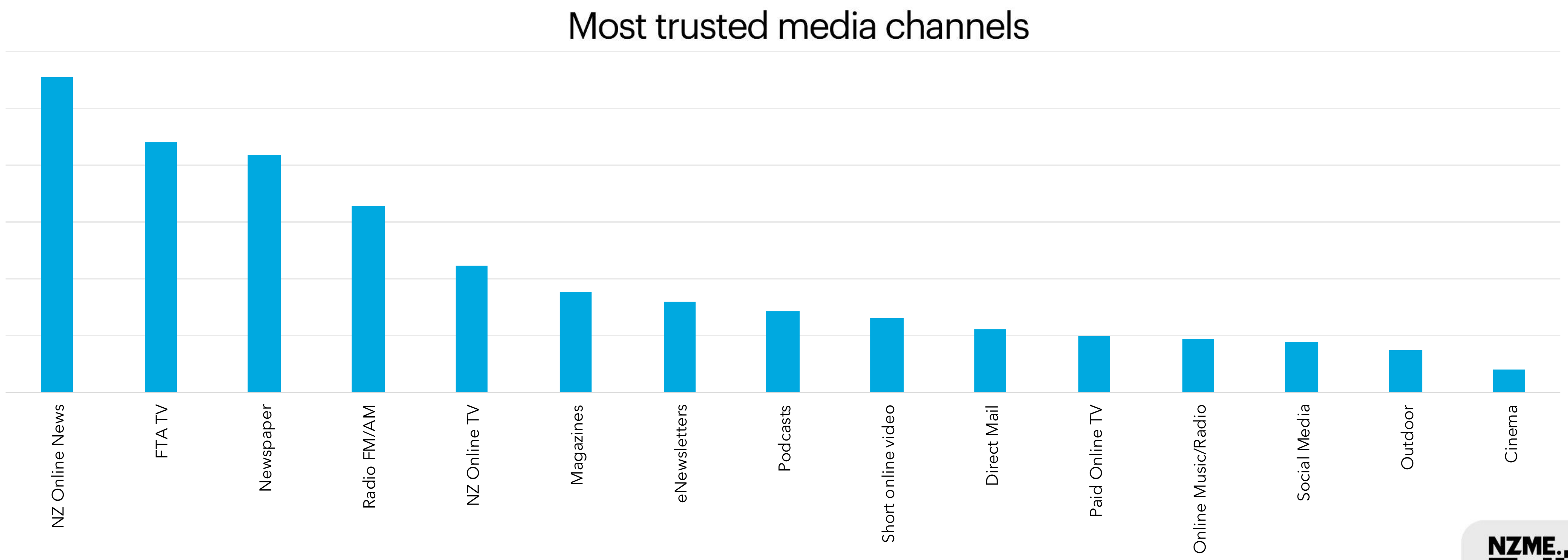
Example: Building & construction is top category spending within Radio, making up 13% of spend within Radio



SOURCE: Nielsen Ad Spend FY 2023 (y axis = category spend within media, x axis = share of spend within media and bubble = total spend within media).

Proven and informative media channels stack up for trust.

Online news is the most trusted media for Kiwis



Source: Nielsen CMI Q2 23 – Q1 24 AP15+

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The audio advantage.

80% of people think the human voice can establish trust like nothing else.*

It's a fun and exciting environment, but also informative with 36% tuning in to get the latest news and updates.

Radio advertisements get stuck in people's heads, playing a large part in the unconscious ad recall.

Even when an audio consumer is highly distracted, listeners still generate 30% recall, which increases to 78% recall when actively listening.^

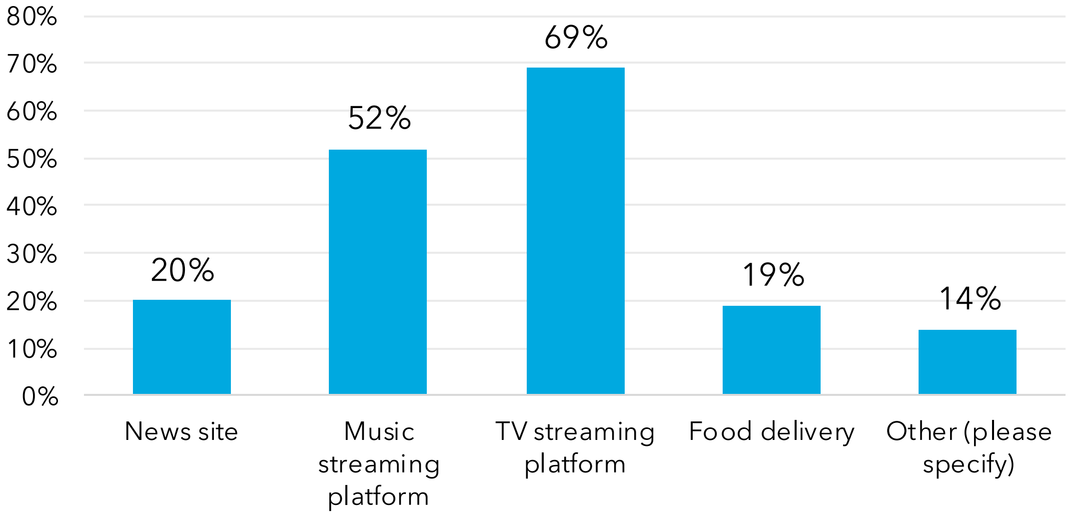
Radio is one of the most trusted media platforms in New Zealand.**

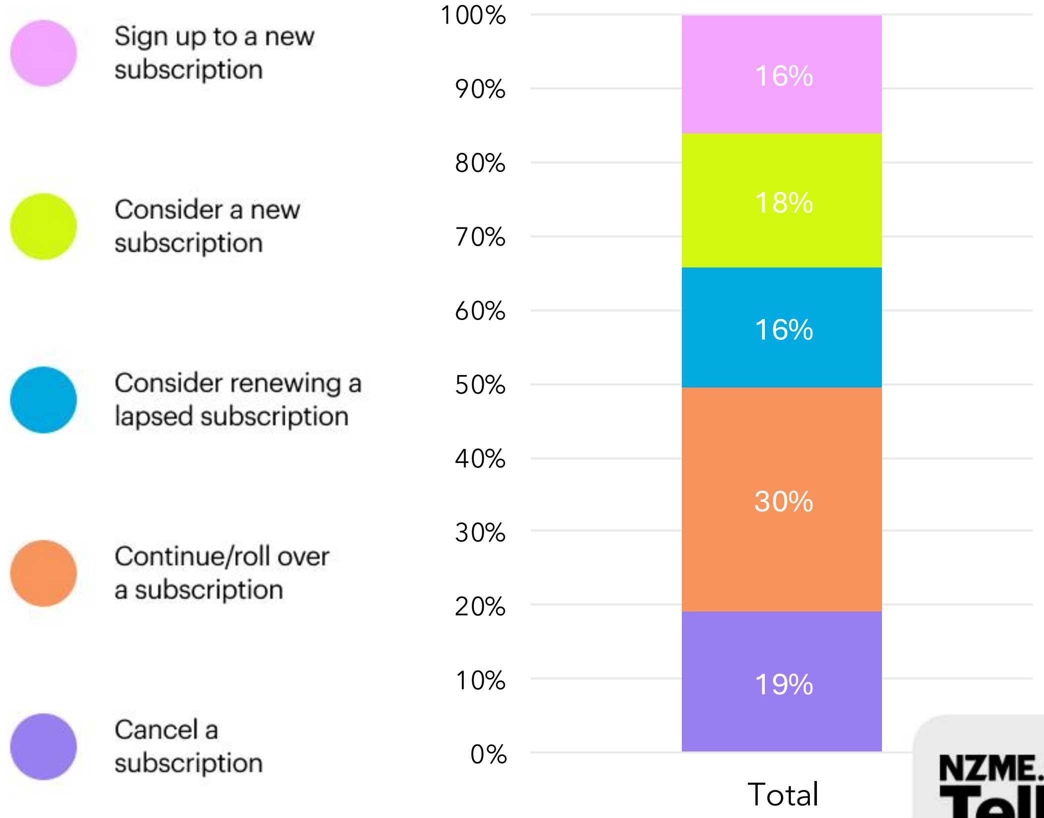
With podcast engagement continually increasing, we are now seeing usage shifting into the evening routine, peaking after 5pm.

Online audio, including both digital radio and podcast, is the most underinvested media channel.

Source: NZME Advertising Effectiveness Study 2024*ARN Neurolab research ^ARN ears wide open research **Nielsen CMI Q2 23 - Q1 24 AP15+.

Kiwis are in the market for subscriptions.





Audience insights

- TV streaming subscriptions are the most popular among Kiwis.
- Gen Z are more likely to be considering a new subscription or be continuing with a current subscription.
- HH with kids are more likely to have a TV streaming platform subscription.

Source: NZME Advertising Effectiveness Study 2024

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Grocery shopping preferences and retail media impact.

Audience insights

- Kiwis who subscribe to a food grocery site/app, only one in ten will add products to their cart that they have seen advertised.
- Older generations (60+) are more likely to never shop online.
- Males are less likely to shop from a list.
- 40-49 year olds more likely to add products advertised online to their cart.
- HH with kids are more likely to shop from the specials list or promotional mailer.

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Source: NZME Advertising Effectiveness Study 2024.

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Thank you.

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