



**NZME.**  
**TellME**

**AUDIO  
STUDY 2021**  
How we're listening

# Introduction

The next installment of NZME's TellMe series is Audio Usage. We engaged kiwis to find out how they're listening.

Audio is one of the most established forms of media in the world, with the first Radio pioneered in the 1800's, more than 30 years before the Television was conceptualised. Even with the popularity of visual media saturating our focus, audio entertainment has adapted and survived centuries, continuing to create new ways to keep listeners engaged.

Considering the current audio landscape, we wanted to find out more about how our listening has evolved, particularly how, why, when and where our listening takes place.

In the wake of new forms of audio, how many hours a day do we dedicate to our ears alone and in a growing age of audio media what's leading the charge?

**NZME.**





# Methodology

We invited Kiwis to tell us about their audio consumption habits. We engaged Colmar Brunton as our research partner to seek insights into how we as a nation are engaging with audio.

Between **May 2021**, we spoke with 1,000 New Zealanders to find out how they are engaging with media.

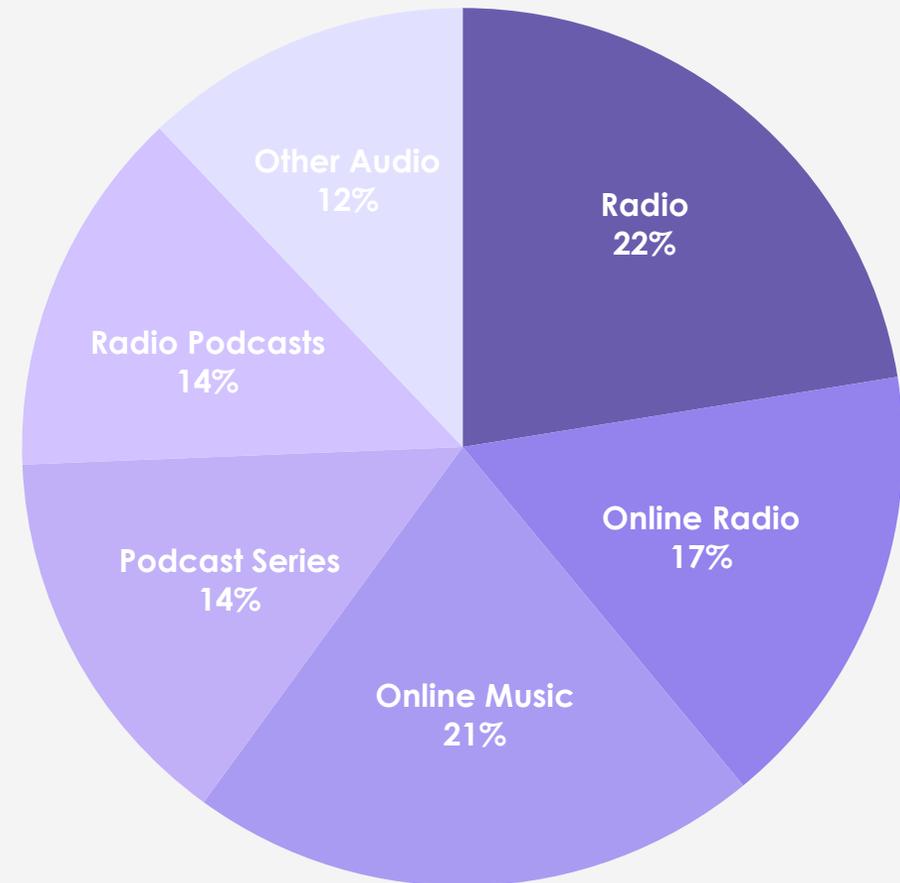
All responses are weighted to the NZ population

The survey was run online for a period of two weeks, distributed through Colmar Brunton's panel.

We asked a range of questions of respondents that were framed to reveal how they engage with media across the everyday lives.

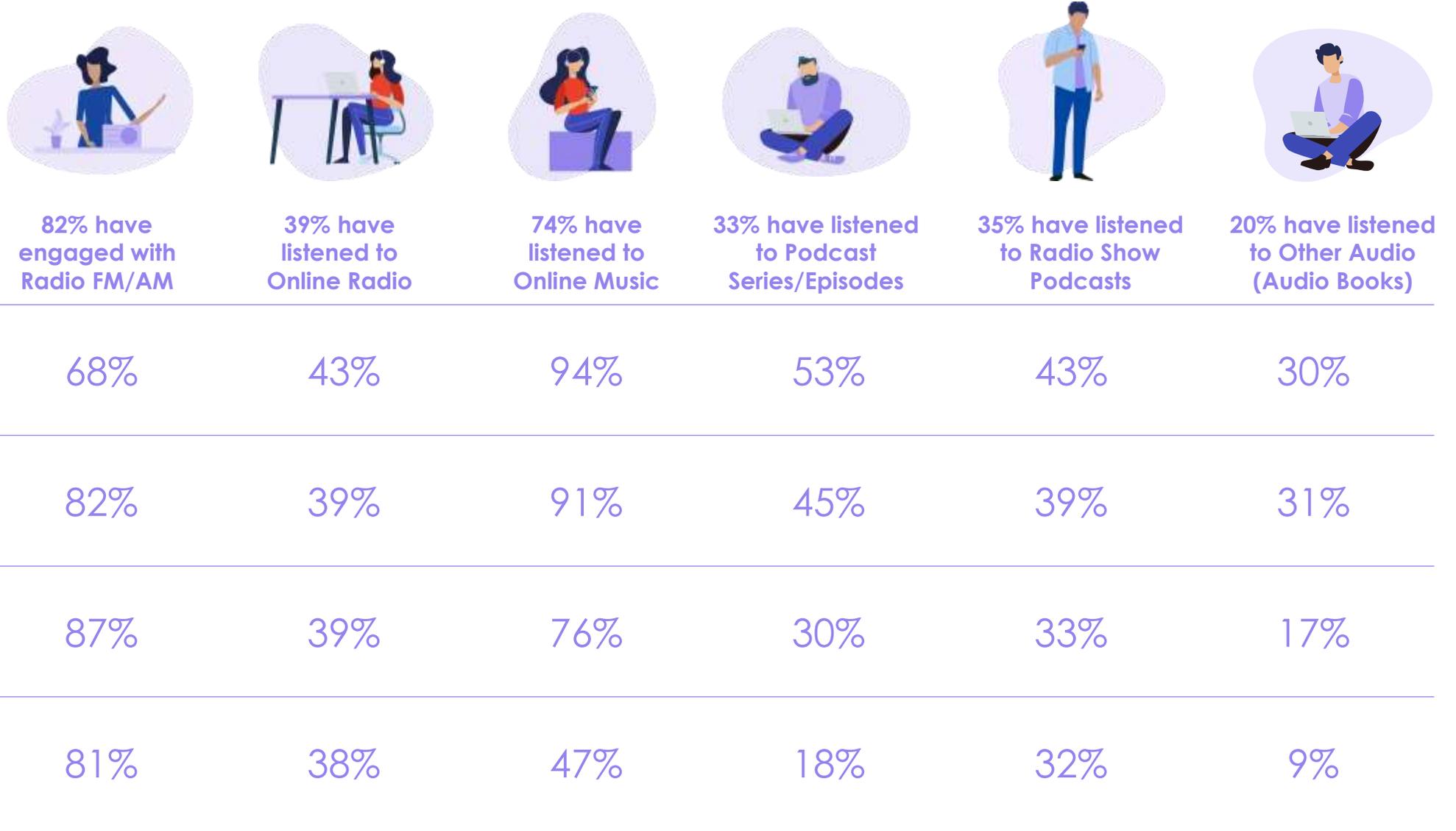
# Share of Ear

Broadcast Radio has the largest share of Audio listening, with 22%, this is closely followed by streaming online music, with 21% share.



# Audio Usage

In the last week...



SOURCE: NZME Audio Study 'How we're listening' August 2021 n=1000 nationally representative New Zealanders. For detailed charts, see the appendix

# Activities

What are we doing while we're listening...

## MORNING ROUTINE

Upon waking Kiwis want to get in the know with up-to-date information from news and entertainment, with 40% of those who utilise audio in the morning opting for radio, whether through FM/AM or online streaming.



## TRAVEL

FM/AM radio remains a staple travelling companion with 8 out of 10 kiwis tuning into their favourite radio show on their trips to and from work/study. This is the highest collective percentage of listening for any one activity, one of the few things we find ourselves doing twice a day while providing us with the perfect setting to focus.



## AT WORK/STUDY

Nearly half of Gen Z will listen to a music streaming services while at work compared to only 8% of those aged 60+. Over half of Millennials will opt for a podcast to get them through the workday.



## EXERCISING

Be it at the gym or outdoors, Online Music is the preferred audio partner to exercise to with 1/4 of kiwis opting for their own motivational playlists.



## HOUSEHOLD CHORES

Online music is the favoured overall accompaniment to chores for 36% of listeners. Half of Gen Z use online music to entertain themselves during household chores while 41% of those 60+ turn to FM/AM radio to accompany them.

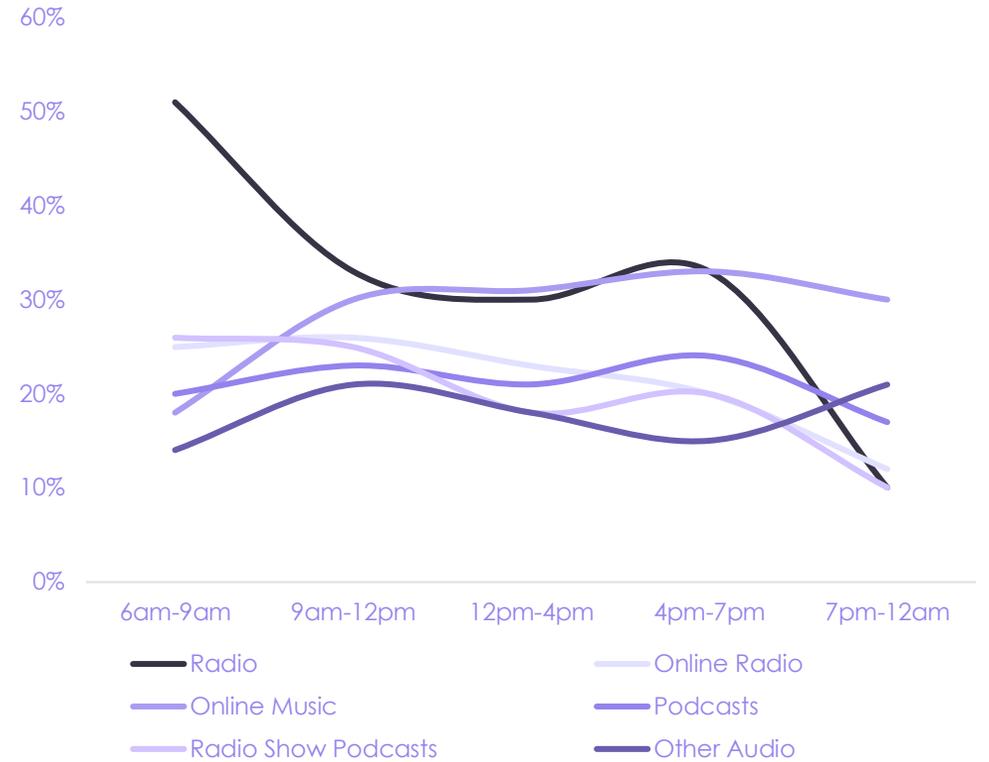
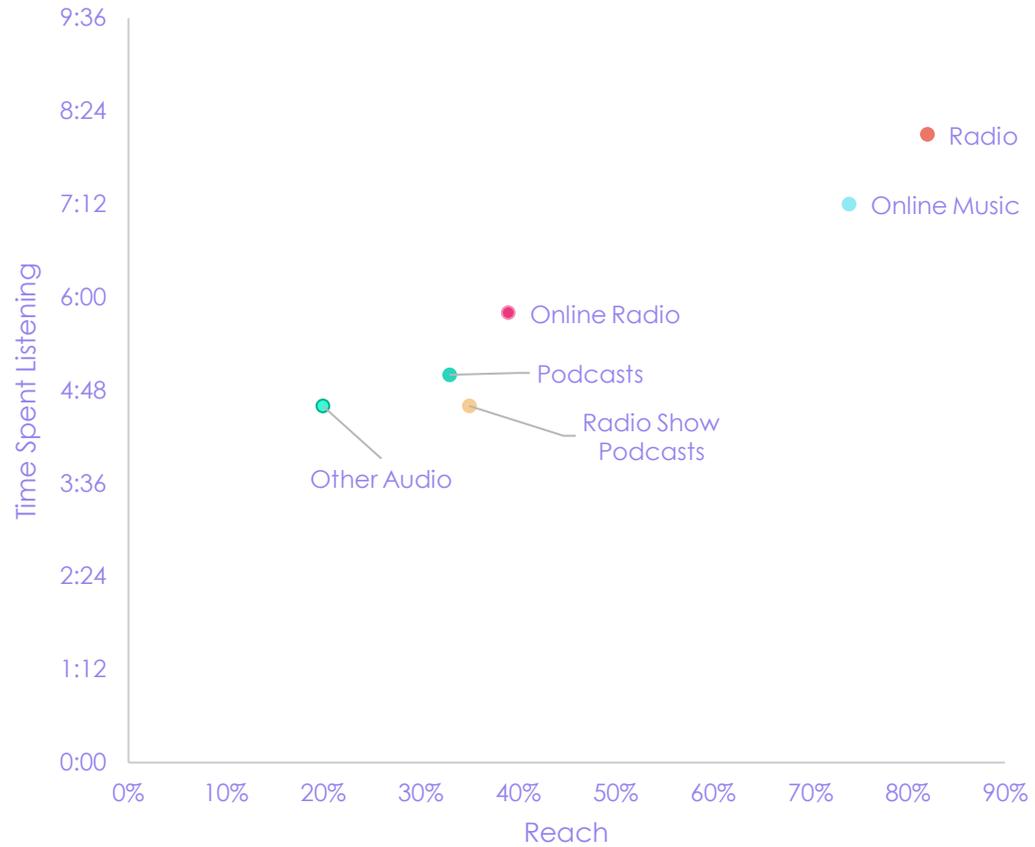


## RELAXING

Around 3 out of 5 kiwis use online music to relax, while half of us will turn to podcasts. This is the preferred activity for most kiwis aged 60+ who report the highest rate of listening to all audio while relaxing. On average Millennials show the lowest interest in using audio while relaxing, rather adopting it as a supplement to less passive activities.



# Engagement



# Streaming

	NZ Awareness	NZ Listeners	➤ Gen Z Listeners	➤ Millennials Listeners	➤ Gen X Listeners	➤ Boomers Listeners
 Spotify	85%	53%	89%	71%	51%	23%
 YouTube Music	76%	51%	55%	57%	50%	45%
 iHeartRadio	69%	22%	19%	23%	24%	20%
 Apple Music	65%	14%	12%	18%	16%	9%
 Rova	42%	16%	15%	22%	15%	12%
 Amazon Music	41%	10%	20%	12%	7%	7%
 SoundCloud	26%	11%	12%	16%	8%	3%

# Appendix

# Media Focus



RADIO AM / FM



ONLINE RADIO



RADIO PODCASTS



ONLINE MUSIC



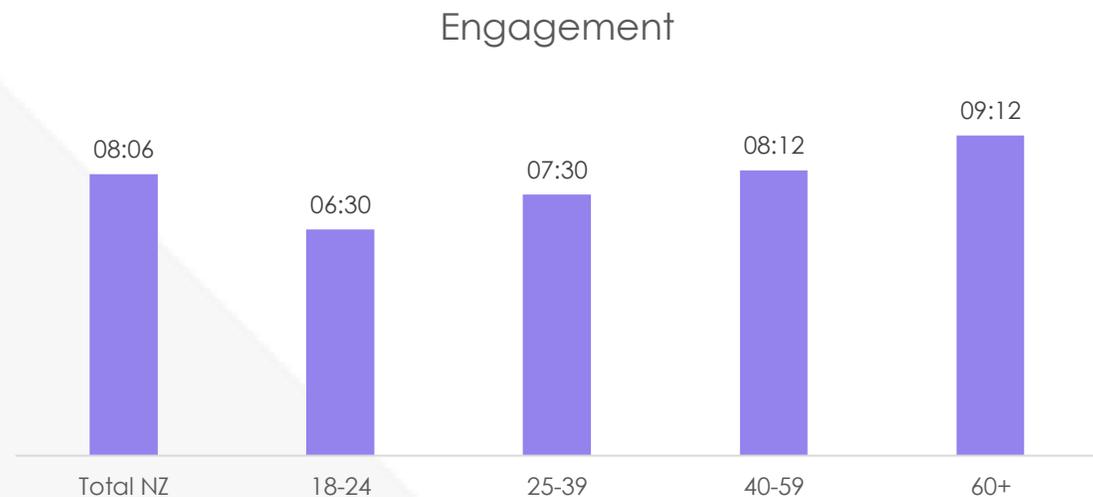
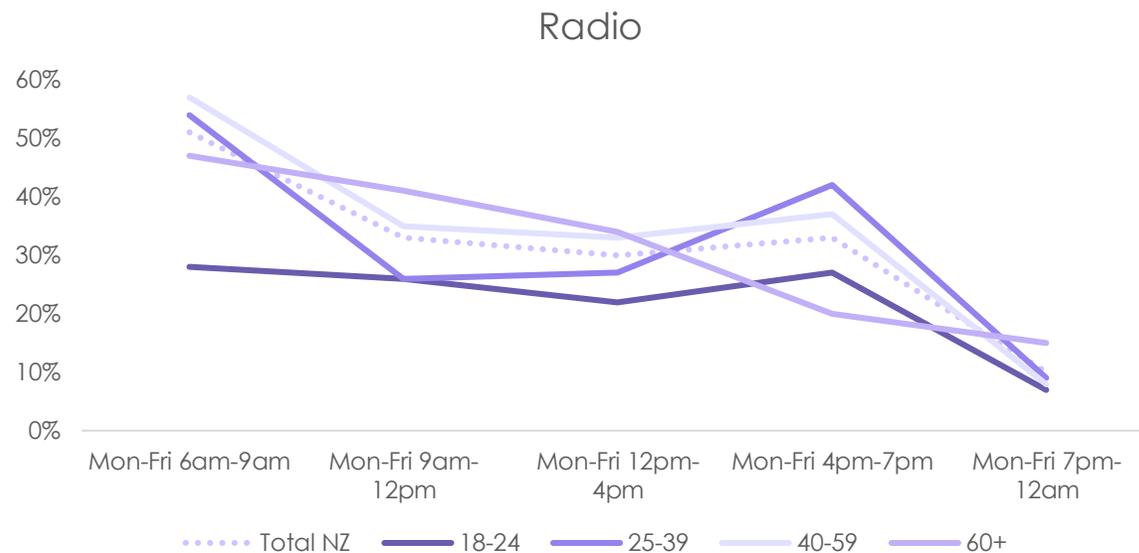
PODCAST SERIES



OTHER AUDIO

# Radio

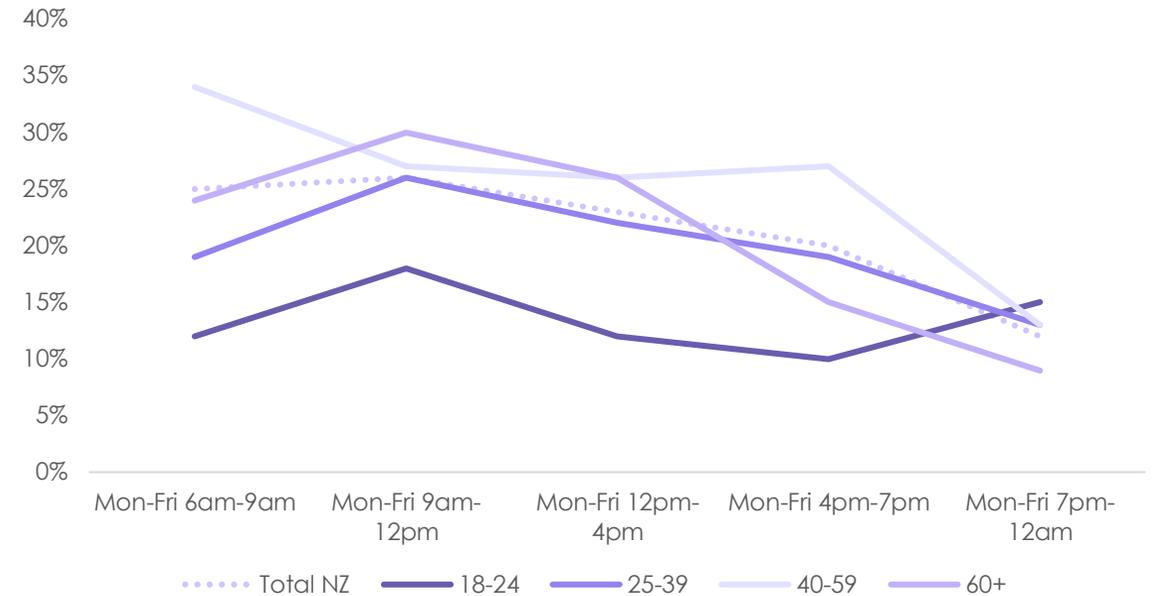
- Over 80% of New Zealanders listen to the radio within the last week. Around half will listen to the radio at breakfast time and will spend over eight hours per week listening.
- Whilst the car radio is the most popular device, used by 72% of us in a month, 24% will listen via a Smartphone, followed by desktop device (13%) and then smartphone connecting to car speakers (10%).
- For over 25s, radio is part of the morning routine, getting ready for work, commuting and doing the school run. Those aged 18-24 are yet to develop this habit, with 11% of 18-24s listening to the radio as part of their morning routine, compared to 21% for those 40-59 and 41% of over 60s.
- Waking up and getting ready for the day with the radio is very much a part of life for 60+, and it accompanies them around the house when they are doing chores and relaxing. Younger age groups tend to listen when they are multi-tasking, at work or study or driving around.
- Radio as a shared experience trends younger, with around 35% of under 40s frequently listening with other people. Overall, nearly 9 in 10 of us will be listening with other people and sharing in the radio listening experience.
- Recall of advertising is higher among older age groups, with 42% of 40-59s saying they are likely to recall the ads they hear on the radio.



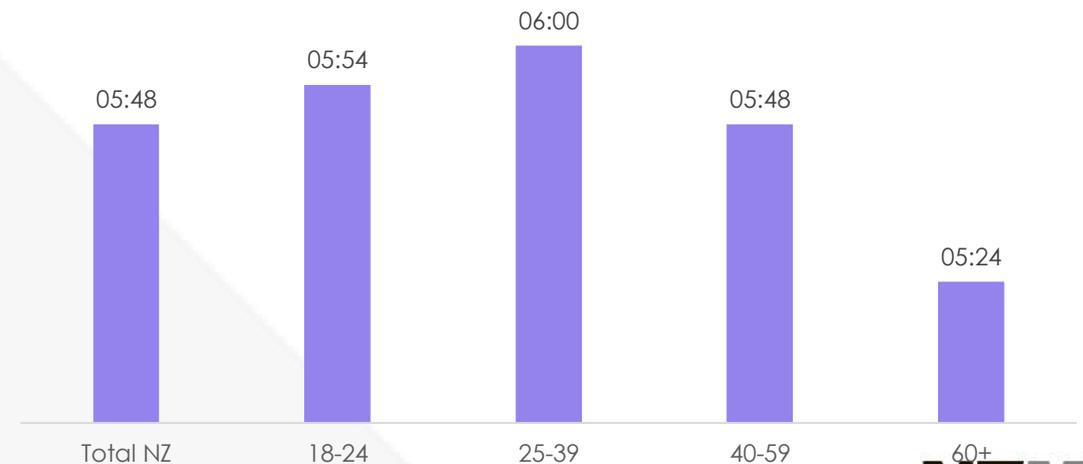
# Online Radio

- Over 39% of New Zealanders listen to the radio within the last week and will spend nearly six hours per week listening.
- At a weekly level, around 40% of all age groups will listen to radio via an online portal. Across the day the peak is the 9am-midday timeslot, apart from for the 40-59 age group who are listening the most at breakfast time.
- We spend an average of around 6 hours per week with online radio, with smartphones being the preferred device across all age groups. A quarter of us are regularly listening to online radio with other people, on average a listener will be listening with 2 other people.
- The most popular way of accessing Online Radio remains through extensions of the radio stations themselves, with 9 out of 10 kiwis who listen to their radio online utilizing a station's app or website.
- Online Radio accompanies us during our work/study day when we're taking breaks, when we relax at home, exercise and are out and about on public transport; it's not something we schedule, instead we're tapping into it when we can with micro-breaks
- Aucklanders are on average 11% more likely to use Online Radio than other regions around New Zealand
- One in five are likely to recall of advertising heard through online radio, it increased to a quarter for those aged 25-39 years.

Online Radio



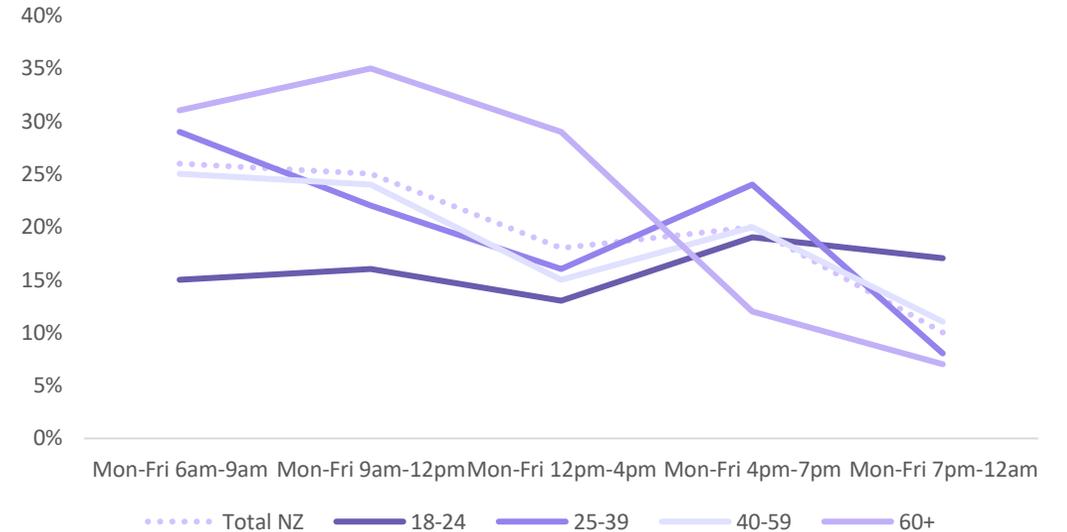
Online Radio



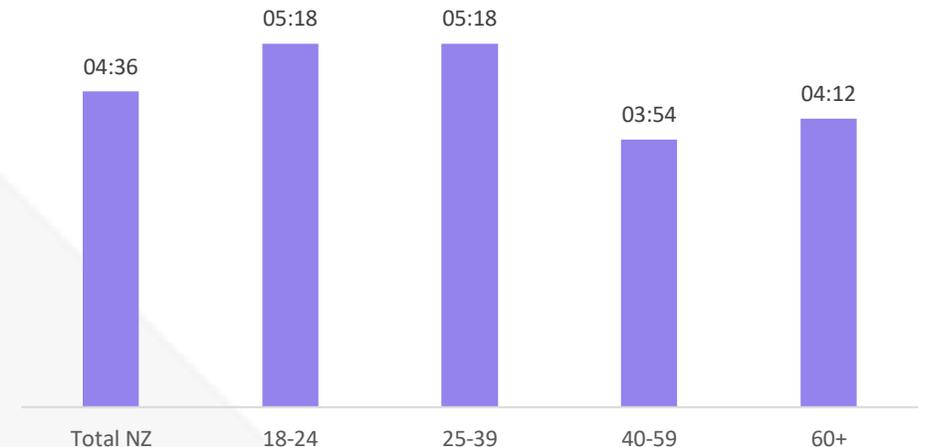
# Radio Podcasts

- 35% of us are listening to radio shows and programmes via podcasts in a typical week. Whereas traditional radio's biggest spot is the breakfast time, radio podcast listening is associated more with our relaxing occasions, and peaks in the evenings for the under 40 age groups.
- Favoured device is the smartphone, with 47% of the nation's radio podcast listeners using them. Although smartphones are the preferred device for 40-59s, they are demonstrating a faster uptake for listening via smart speakers.
- They're listened to whilst people are driving and this is highlighted with over 20% listening via smartphone in the car.
- One in five will often be listening to a radio podcast with other people.
- It's interesting with radio podcasts that there isn't a linear trend for age, either in terms of time spent, or recency of usage. During the mornings Mon-Fri, those aged 60+ are twice as likely as those aged 18-24 to be listening to radio podcasts, with Leighton Smith mentioned several times as a favourite podcaster. ZM featured amongst the 18-24s, with callouts for Bree and Clint, Jono and Ben and Fletch Vaughan and Megan.
- There is a lower overall average of episodes consumed weekly than other podcasts, because there are other ways to consume radio shows the focus is split further than say a podcast that can only be consumed via a podcast platform.
- 27% of listeners are likely to remember the advertising they hear on radio podcasts, with 30% of 18-24s recalling the ads.

Radio Podcasts



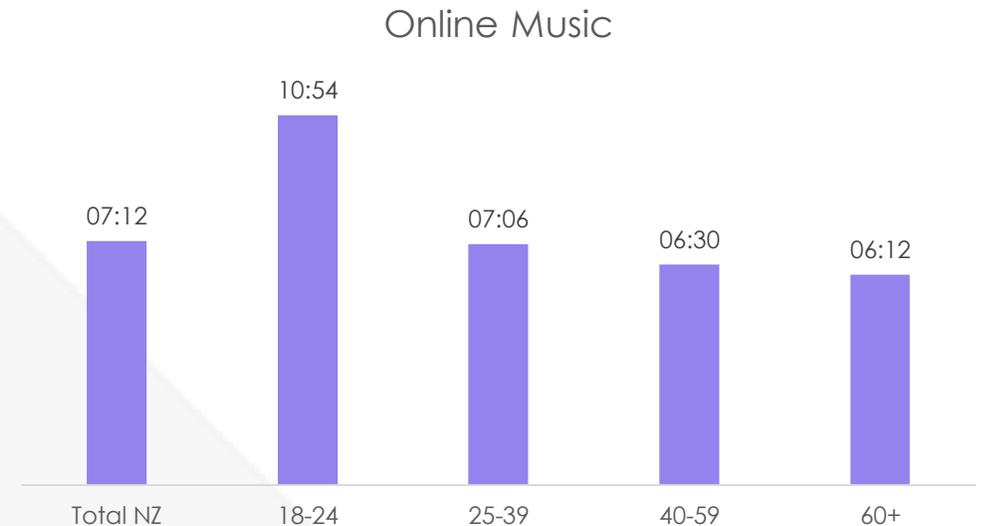
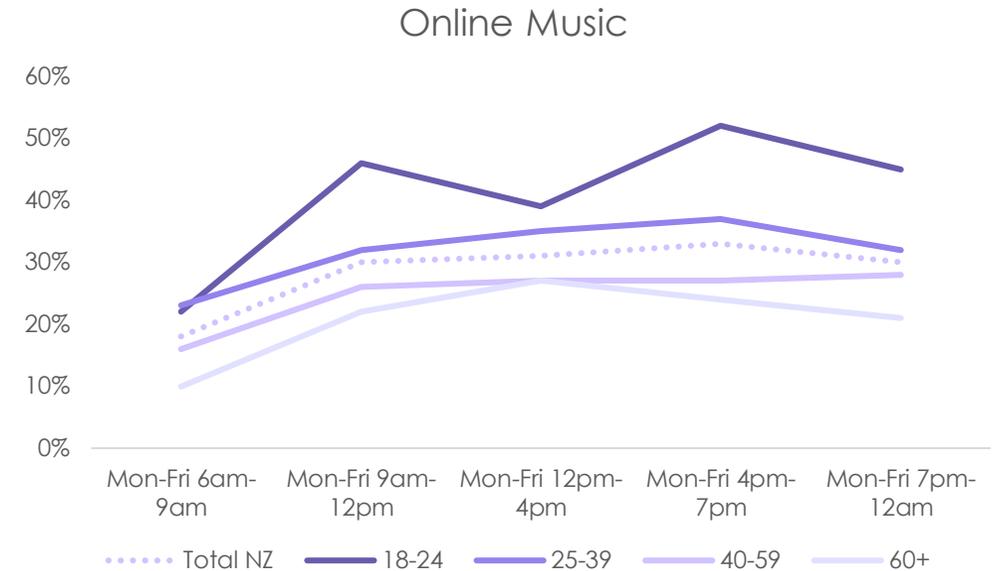
Radio Podcasts



# Online Music

- Three quarters of us listen to online music via a streaming platform in a typical week, rising to a huge 94% of 18-24s.
- Usage is generally steady across the day, and we're spending around an hour a day with online music, putting it up there with FM/AM radio which has 8 hours per week of listening per New Zealander
- Gen Z proving the outliers who prefer to listen only during the first half of their day, and then again in the evening.
- Favoured device is the smartphone, followed by laptops and computers and then tablets. Tablets skew older whilst smartphones are preferred by younger age groups, along with smartwatches and car-enabled options such as apple car play.
- The strongest theme that came through with activities is how regularly connected 18-24s are with their online music. Half will listen when relaxing at home or doing tasks; 46% whilst at work and 42% whilst exercising. It features for over a third on public transport. In contrast, at the opposite end of the age scale, those aged 60+ tend to engage whilst relaxing at home (70%)
- Three in ten of us will often be listening to online music alongside other people. It's second only to FM/AM radio as a shared audio experience for New Zealanders
- Amongst all the audio categories in the survey, likelihood to recall ads heard through online music was low at 20%

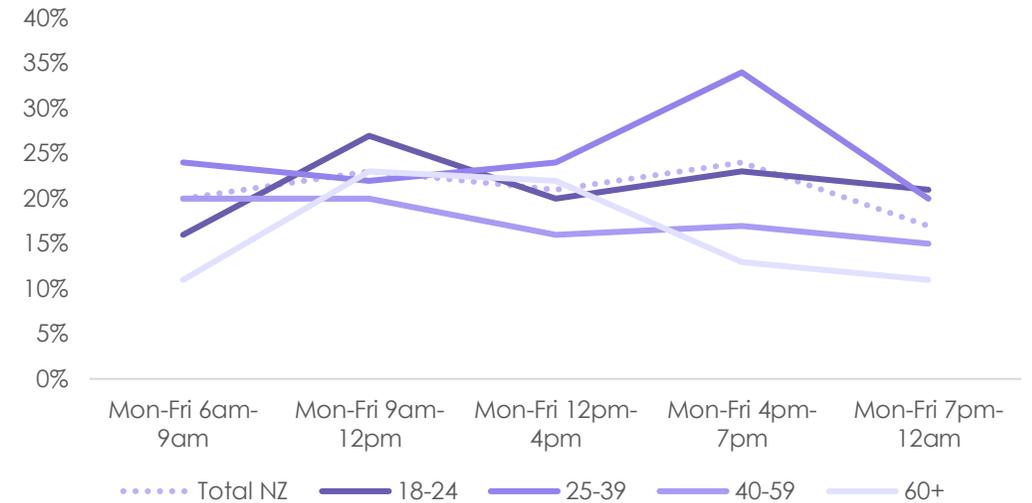
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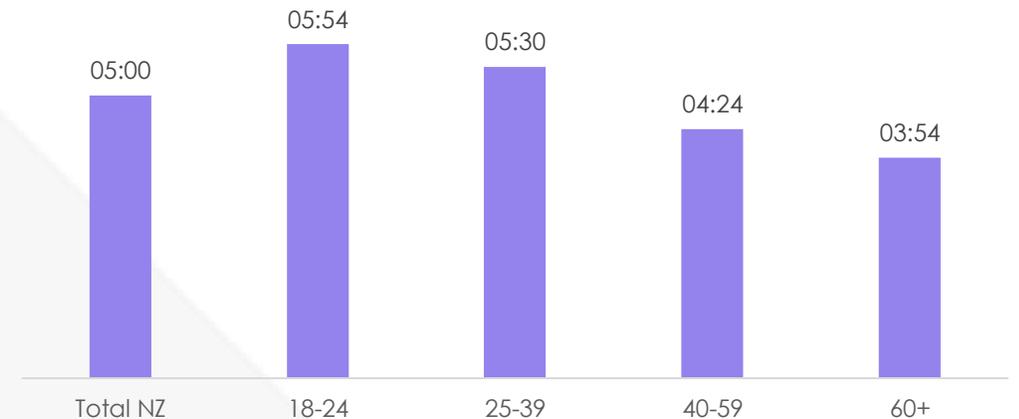
# Podcast Series

- 33% of us listen to podcast series/episodes in a typical week, with 43% listening over a month
- We spend around five hours per week with podcasts, and the trend across the day differs dramatically by age group. Whereas 18-24s are relatively steady with a morning peak, 40-59s are quite flat across the day with 25-39s listening most in the evenings, during what was previously the traditional peak TV viewing daypart
- At a total level, key listening trigger points are daily travel and relaxation.
- 67% listen via our smartphones, with older Kiwis preferring laptops and tablets, and younger Kiwis using newer technologies such as smartwatches and vehicle-connected technologies.
- Those in the 40-59 age group are 55% more likely to be listening via smart speakers (Amazon Echo, Google Nest); they're a popular family household option, and much of this group's listening tends to be based around the home
- Only 14% of us are frequently or always listening with others to podcasts. They're a highly personal experience and are one of the least shared audio categories we surveyed
- 33% of podcast listeners will search for brands the hear mentioned (higher than any other individual audio category we surveyed). It's a highly targeted and personalised category and the relevance of sponsors to the listener means that there is little wastage.

Podcast Series



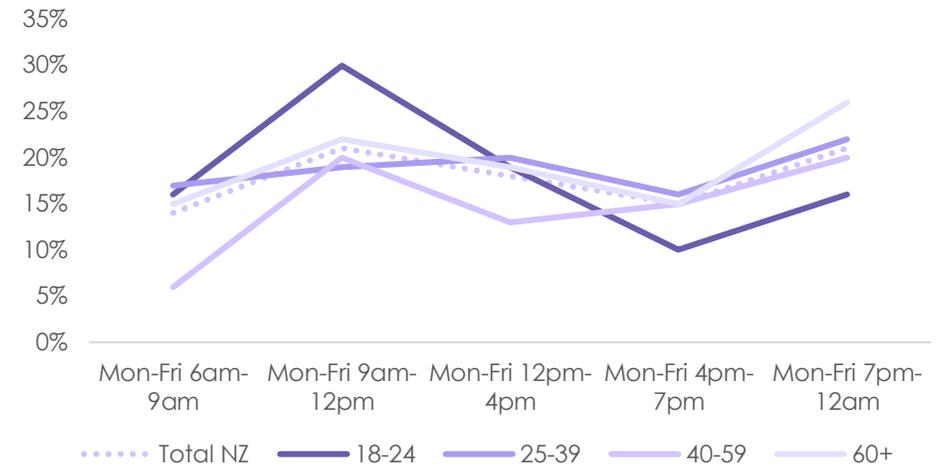
Podcast Series



# Other Audio

- One in five of us are engaging at least weekly with other forms of audio (primarily audio books such as Audible), with an average time spent of 4 hours 36 minutes per week.
- Similar to the other digital media listening – podcasts and online music – there is a morning 9am-noon peak. However what's different here is the notable 7pm-midnight spike that we don't see with any other category. It's very much an end-of-day wind down media, and is the highest rated for falling asleep, especially for 40-59s where 29% are listening.
- 31% of us say we already listen to audio books, with listening highest amongst 25-39s (35%).
- 4% are already using social audio (i.e. Clubhouse). Listening is highest amongst 18-24s (6%)
- 9% are using live interactive podcasts (like Facebook Live but audio, or an interactive audio book). Listening is highest amongst 18-24s (19%)

Chart Title



Other Audio E.g. Audio Books

