



nielsen

NEW ZEALANDERS' RELATIONSHIP WITH MUSIC

SEGMENTATION RESEARCH



s 9(2)(a)

2nd May 2017 (Version 1.3)



INTRODUCTION



- Potential for RNZ to enhance its music offering
- To better meet music needs and wants of New Zealanders
- One size does not fit all

SO

- Let's measure the motivations, attitudes, behaviours and preferences of New Zealanders in relation to music and the information and content around music
- Let's identify sub-groups with differing needs
- We will marry up our offering to better meet the range of needs and preferences (while remaining true to the charter) – or we might identify the segments that we can target with RNZ music





1

THE OVERALL PICTURE:
25 – 64 YEAR OLD MUSIC LISTENERS IN NZ

2

INTRODUCING THE MUSIC SEGMENTS

3

PROFILES OF THE DIFFERENT
SEGMENTS

An abstract graphic on the left side of the slide. It features a dark background with a grid of thin, curved lines in various colors (blue, green, yellow, red, purple) that converge towards the top left. Several colored dots (yellow, green, purple, red) are placed at various points along these lines, with thin lines extending from them across the dark space.

THE OVERALL PICTURE

WHAT WE DID

The research background



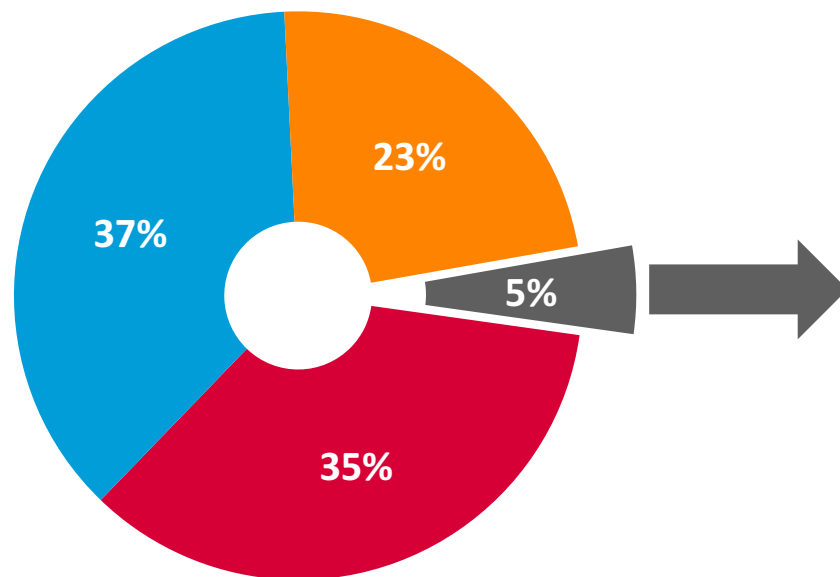
- **Questionnaire design** – based on qualitative research and consultation within RNZ
- **Robust online survey** – Over 2000 New Zealanders – representative of the population aged 25-64 years (age, gender, ethnicity and region)
- **Concert listeners** – n= 105)
- **Survey fieldwork period** – 9th November to 2nd December 2016



FREQUENCY OF LISTENING



5% HARDLY EVER OR NEVER LISTEN TO MUSIC



Non-listeners are more likely to be:

- 50-64 years of age
- Retired
- Lower incomes (combined household income of less than \$40k)
- Non-university qualified
- A couple with children living away from home

■ VERY OFTEN ■ QUITE OFTEN
■ SOMETIMES ■ HARDLY EVER OR NEVER

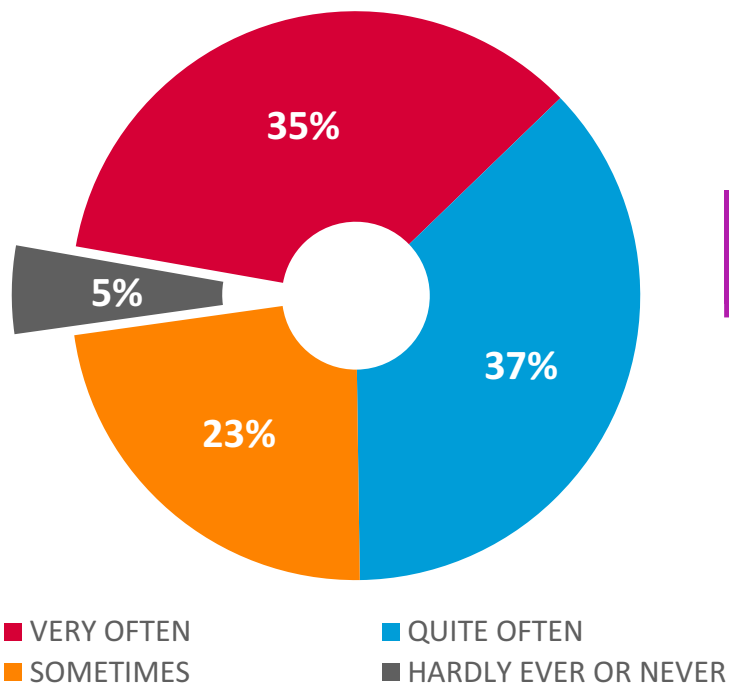
Base: All respondents
Q5: How often do you listen to music in general?



FREQUENCY OF LISTENING



95% LISTEN TO MUSIC AT LEAST SOMETIMES



The results from this point on are based on the 95% who listen to music at least sometimes

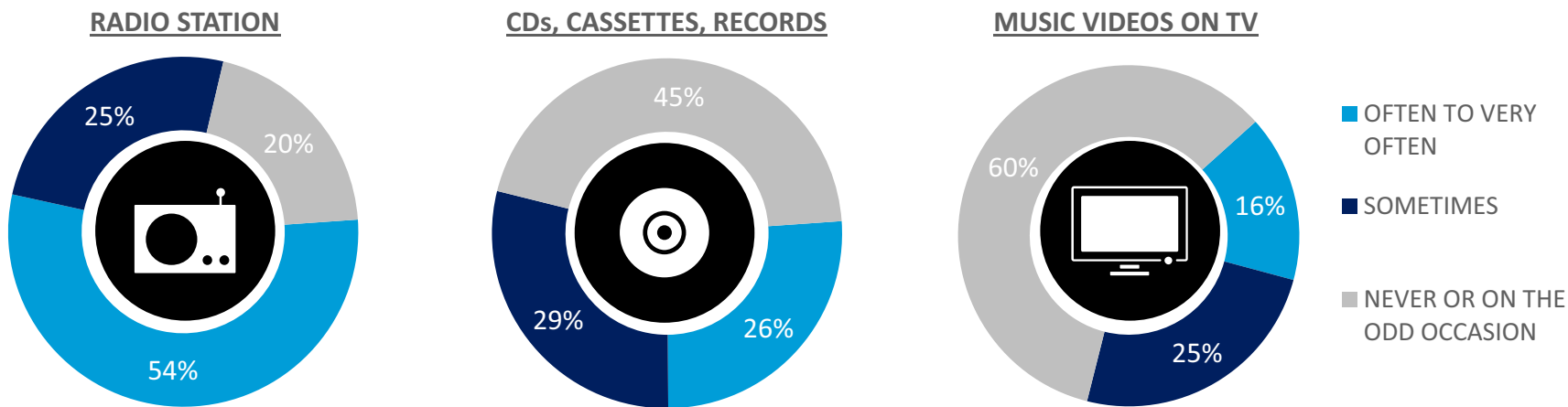
- VERY OFTEN
- QUITE OFTEN
- SOMETIMES
- HARDLY EVER OR NEVER

Base: All respondents
Q5: How often do you listen to music in general?



THE MAJORITY STILL LISTEN TO MUSIC ON THE RADIO

FREQUENCY OF LISTENING OR WATCHING MUSIC - TRADITIONAL



Base: Those who listen to music 'sometimes or more often' (Q5)
Q6: When thinking about music in general, how often do you listen / watch...

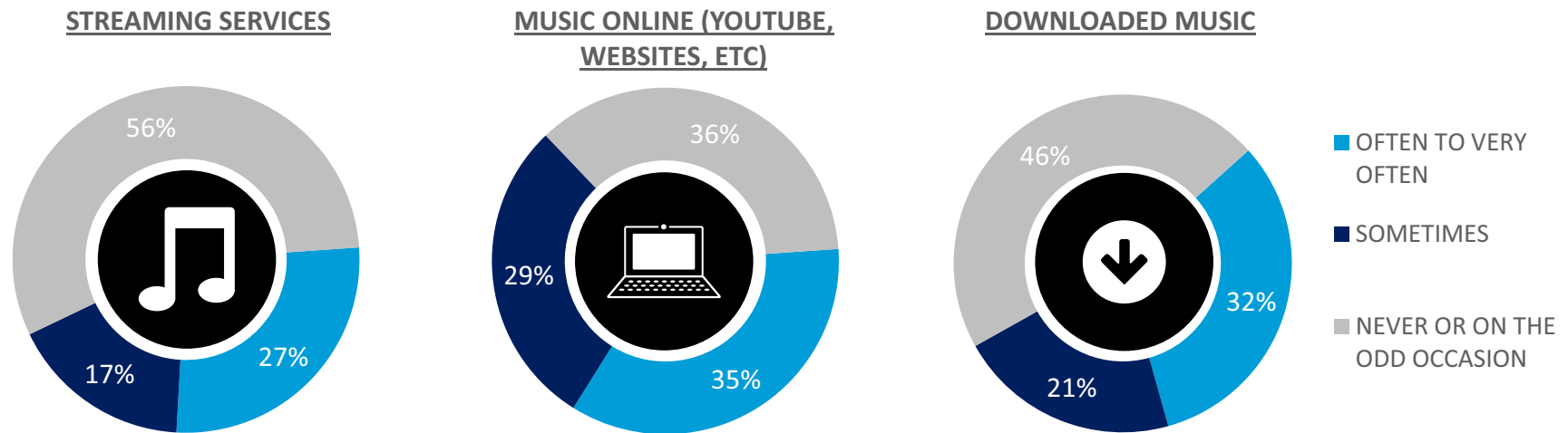
MUSIC SOURCE – DIGITAL



NEARLY TWO IN THREE ARE LISTENING TO MUSIC ONLINE – STREAMING CURRENTLY LESS PREVALENT

Sourcing music online is now more prevalent than listening to CD, cassettes, records / vinyl

FREQUENCY OF LISTENING OR WATCHING MUSIC - DIGITAL



Base: Those who listen to music 'sometimes or more often' (Q5)
Q6: When thinking about music in general, how often do you listen / watch...

MUSIC WEEKDAY LISTENING – SOURCE AND DAYPARTS



TYPICAL WEEKDAY LISTENING IS RADIO DURING THE DAY,
ONLINE IN THE EVENINGS

	MUSIC FROM A RADIO STATION	MUSIC ON CDS, CASSETTES, RECORDS / VINYL	DOWNLOADED MUSIC	STREAMING SERVICES	MUSIC ONLINE (E.G. YOUTUBE, ONLINE RADIO)	MUSIC VIDEOS ON TV
EARLY MORNING (6AM - 9AM)	48%	8%	9%	5%	4%	2%
MID MORNING (9AM - 12PM)	32%	12%	13%	11%	8%	4%
LUNCH TIME (12PM - 1PM)	20%	9%	12%	10%	9%	4%
EARLY AFTERNOON (1PM - 3PM)	25%	13%	13%	12%	11%	5%
LATER AFTERNOON (3-6PM)	35%	17%	17%	15%	17%	9%
EARLY EVENING / DINNER TIME (6-9PM)	12%	18%	21%	18%	33%	21%
LATE EVENING (9-MIDNIGHT)	7%	10%	14%	12%	27%	17%
THROUGH THE NIGHT (MIDNIGHT TO 6AM)	3%	2%	4%	3%	5%	3%
DON'T TYPICALLY DO THIS	13%	32%	23%	19%	21%	30%
NEVER	5%	15%	26%	38%	13%	25%

Base: All

Q13: Please indicate below the times you typically do the following during the week (Mon-Fri)

MUSIC WEEKEND LISTENING – SOURCE AND DAYPARTS



WEEKEND THERE IS LESS RADIO LISTENING AND EARLIER ONLINE LISTENING

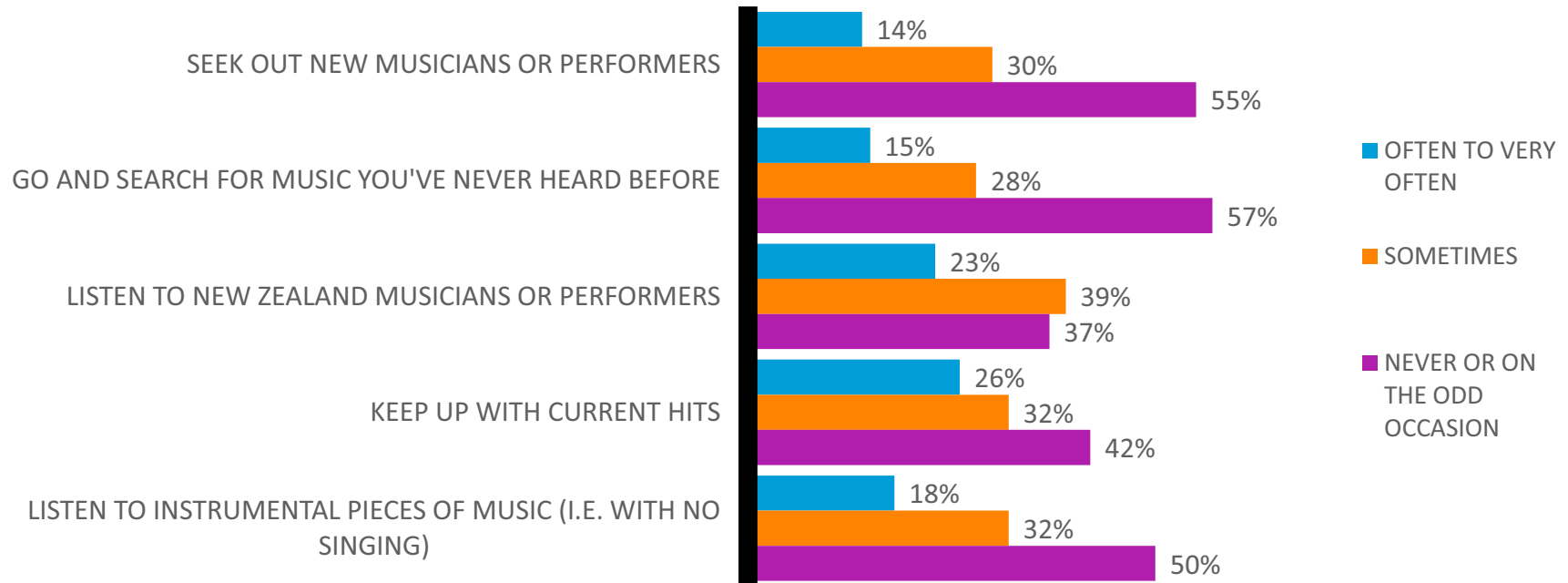
	MUSIC FROM A RADIO STATION	MUSIC ON CDS, CASSETTES, RECORDS / VINYL	DOWNLOADED MUSIC	STREAMING SERVICES	MUSIC ONLINE (E.G. YOUTUBE, ONLINE RADIO)	MUSIC VIDEOS ON TV
EARLY MORNING (6AM - 9AM)	21%	4%	5%	4%	4%	2%
MID MORNING (9AM - 12PM)	33%	15%	12%	10%	11%	7%
LUNCH TIME (12PM - 1PM)	22%	13%	13%	13%	11%	6%
EARLY AFTERNOON (1PM - 3PM)	21%	18%	16%	16%	14%	8%
LATER AFTERNOON (3-6PM)	19%	20%	21%	19%	21%	13%
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DON'T TYPICALLY DO THIS	33%	35%	29%	23%	27%	32%
NEVER	5%	15%	26%	38%	13%	25%

Base: All

Q14: Please also indicate below the times you typically do the following **during the weekend (Sat-Sun)**.

14% OF MUSIC LISTENERS OFTEN SEEK OUT NEW ARTISTS OR MUSIC

FREQUENCY WITH KEEPING UP TO DATE



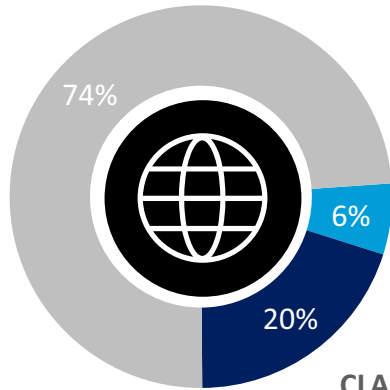
Base: Those who listen to music 'sometimes or more often' (Q5)
Q26: And how often do you...

LIVE MUSIC ATTENDANCE

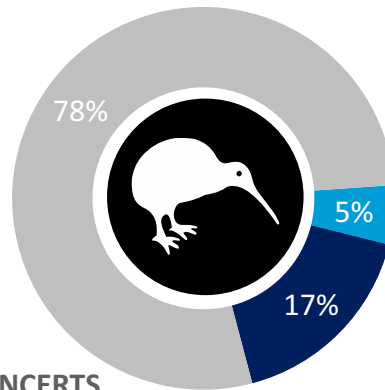


JUST 22% ATTEND LOCAL CONCERTS WITH SOME REGULARITY

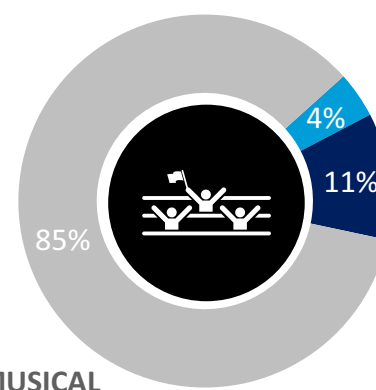
INTERNATIONAL CONCERTS



LOCAL CONCERTS

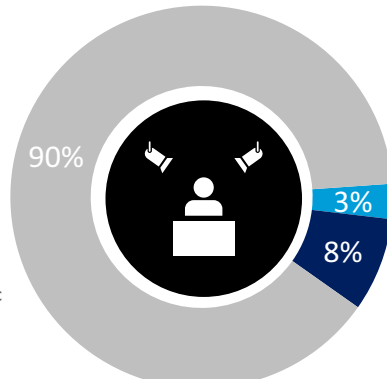


MUSICAL FESTIVAL

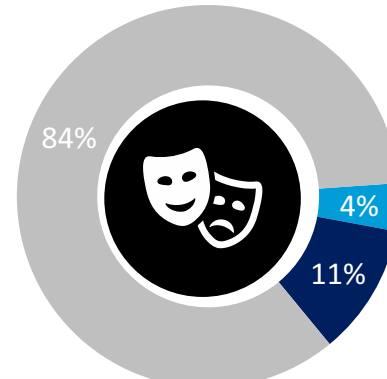


- OFTEN / VERY OFTEN
- SOMETIMES
- NEVER / ODD OCCASION

CLASSICAL CONCERTS



STAGE MUSICAL



Base: Those who listen to music 'sometimes or more often' (Q5)
Q10: And how often do you...

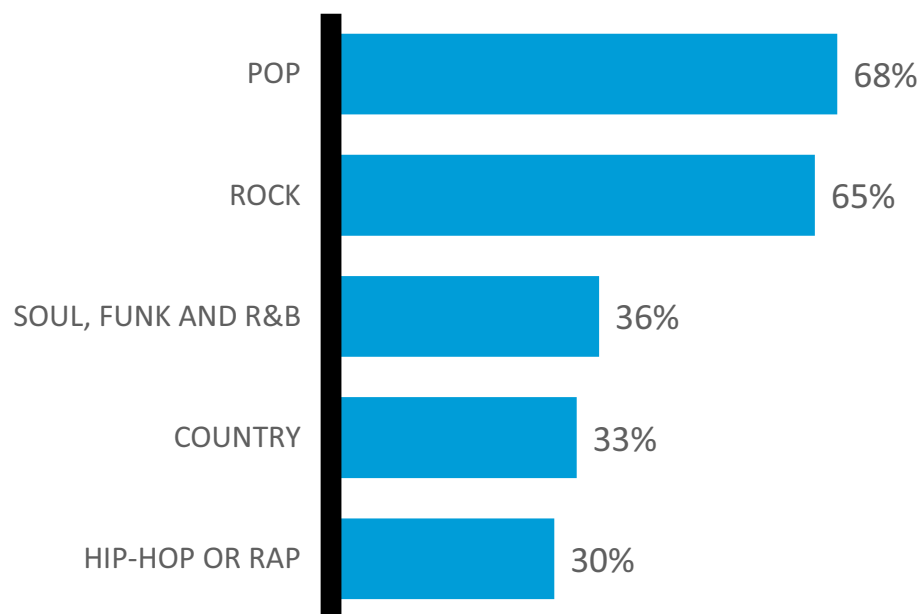


GENRES LISTENED TO



POP & ROCK ARE THE MOST POPULAR GENRES, FOLLOWED BY SOUL/FUNK, COUNTRY & HIP-HOP

TOP 5 GENRES LIKE TO LISTEN TO



Other notable genres liked:

- Classical music: 25%
- Music from stage shows: 20%
- World music: 19%
- Religious & spiritual music: 17%
- Folk, Maori, Pacific music: 13%

Base: Those who listen to music 'sometimes or more often' (Q5)
Q17: Please tell us which of the following genres or types of music you like to listen to?

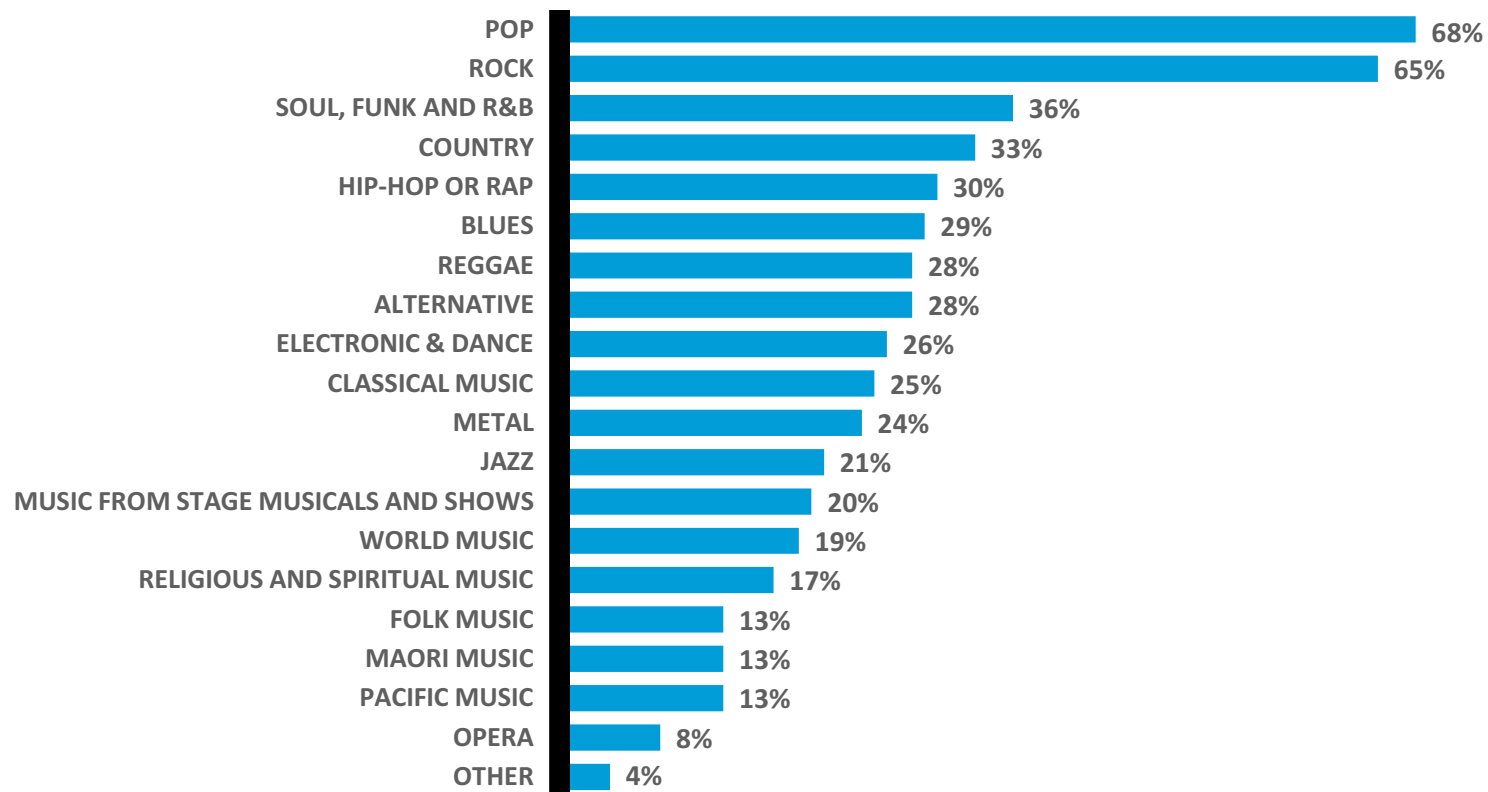


GENRES LISTENED TO



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GENRES LIKE TO LISTEN TO



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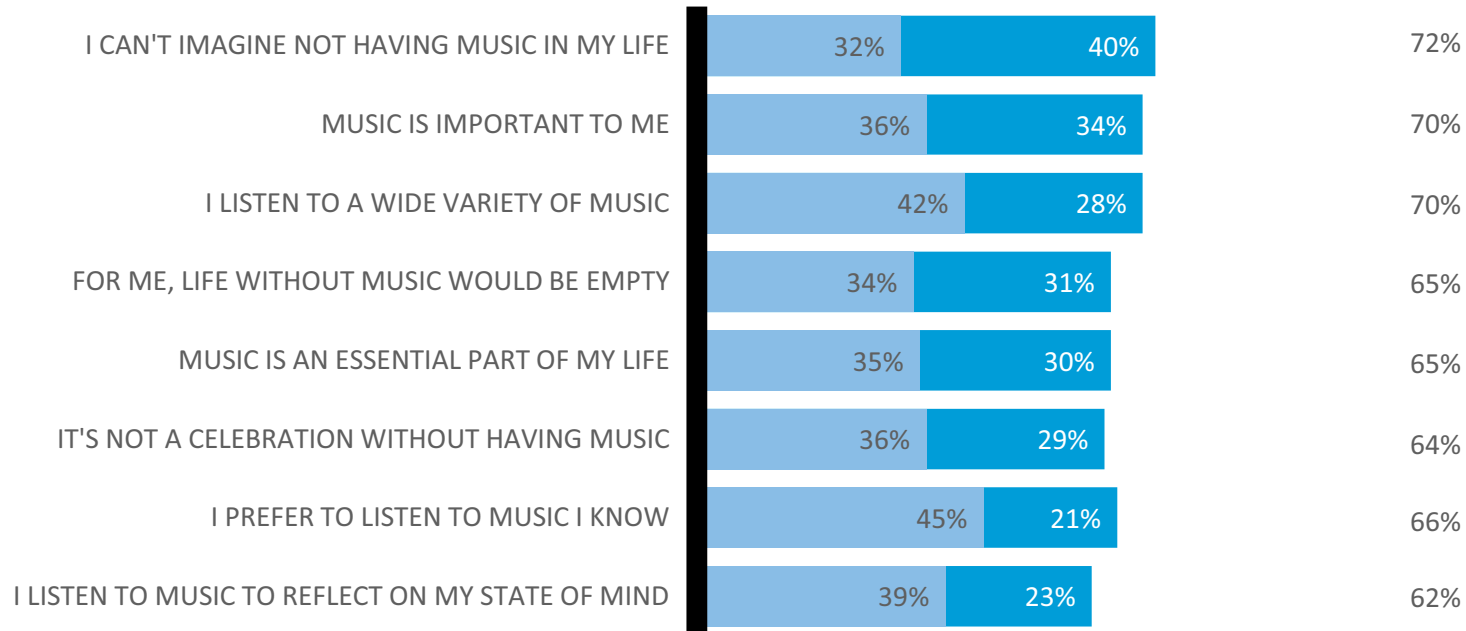
ATTITUDES TO MUSIC



MOST WHO LISTEN TO MUSIC HAVE A STRONG EMOTIONAL CONNECTION

MOST PREVALENT ATTITUDES TO MUSIC

% STRONGLY AGREE/AGREE



Base: Those who listen to music 'sometimes or more often' (Q5)
Q24: How much you agree or disagree with the following statements

● STRONGLY AGREE
● SLIGHTLY AGREE

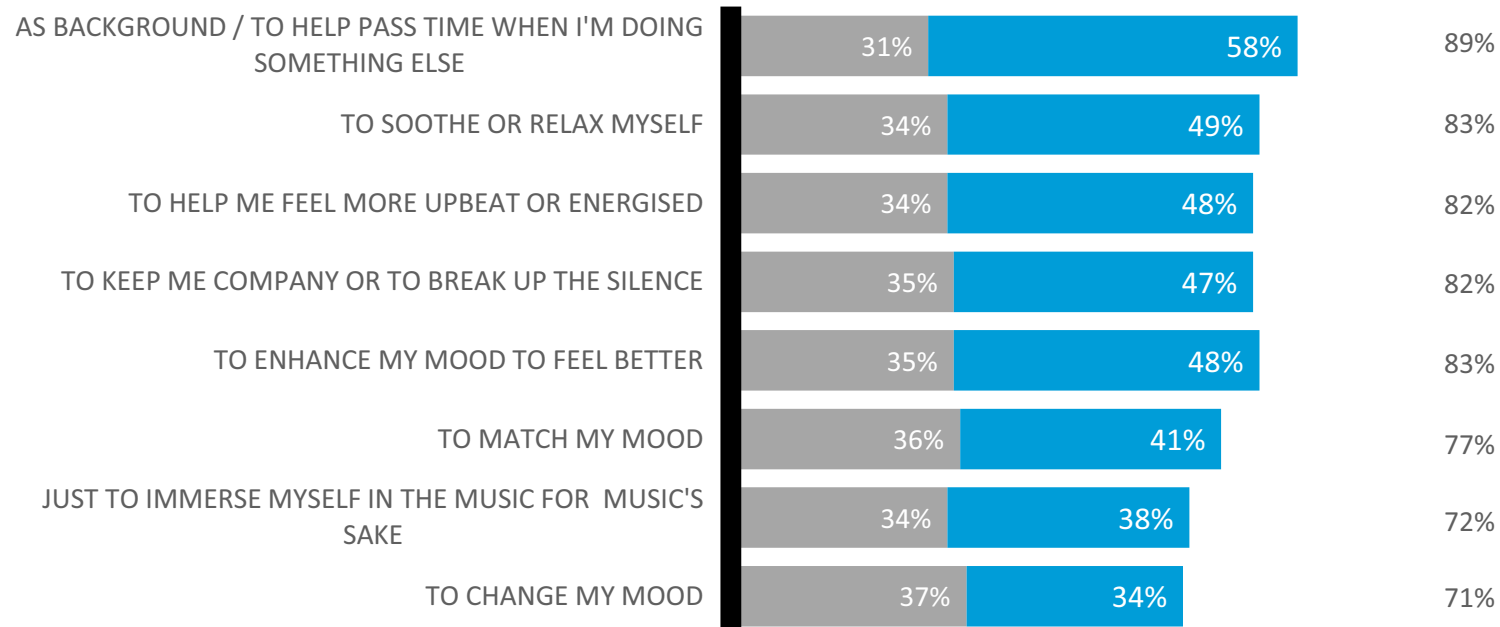
MOTIVATIONS FOR LISTENING



MUSIC IS A COMPANION AND MOOD INFLUENCER

MOST PREVALENT MOTIVATIONS FOR LISTENING TO MUSIC

% OFTEN/VERY OFTEN & SOMETIMES



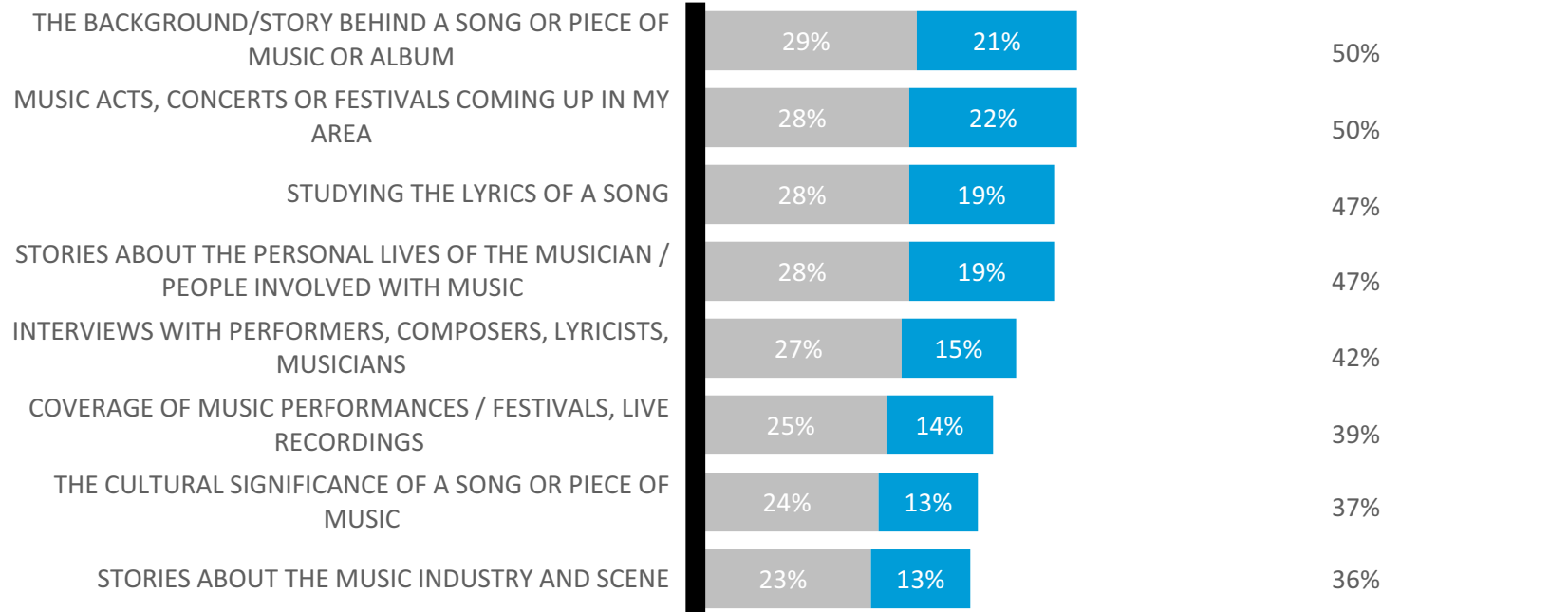
Base: Those who listen to music 'sometimes or more often' (Q5)
Q25: How often, if at all, do you listen to music for each of the following reasons...

● OFTEN/VERY OFTEN
● SOMETIMES

INTEREST IN INFORMATION ABOUT MUSIC



PASSION FOR INFORMATION ABOUT MUSIC IS MUCH WEAKER THAN PASSION FOR LISTENING



% VERY INTERESTED/PASSIONATE & MODERATELY INTERESTED IN THIS

Base: Those who listen to music 'sometimes or more often' (Q5)

Q27: Please indicate your **level of interest** in finding out information about or discussing the following things related to music

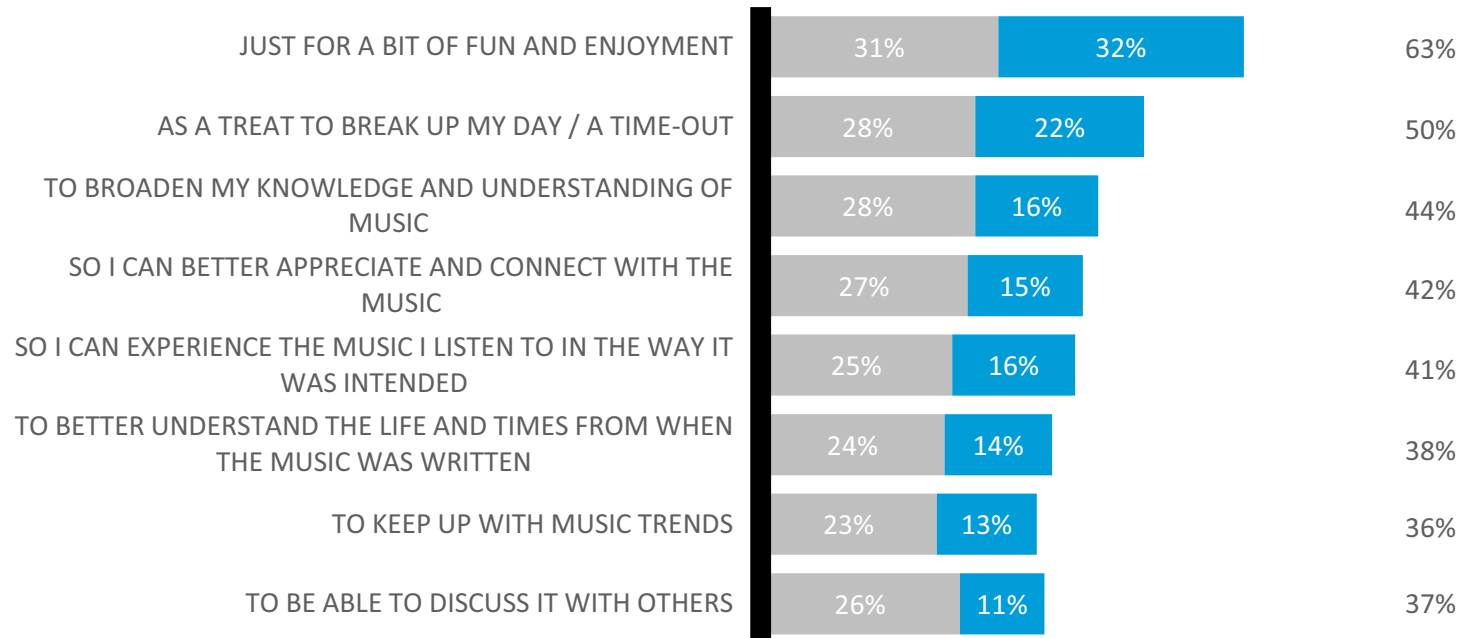
● VERY INTERESTED/PASSIONATE ABOUT THIS
 ● MODERATELY INTERESTED IN THIS

MOTIVATIONS FOR INTEREST IN INFORMATION ABOUT MUSIC



FINDING OUT ABOUT MUSIC IS MORE OFTEN DRIVEN BY FUN AND ENJOYMENT VS. KNOWLEDGE

% OFTEN/VERY OFTEN & SOMETIMES



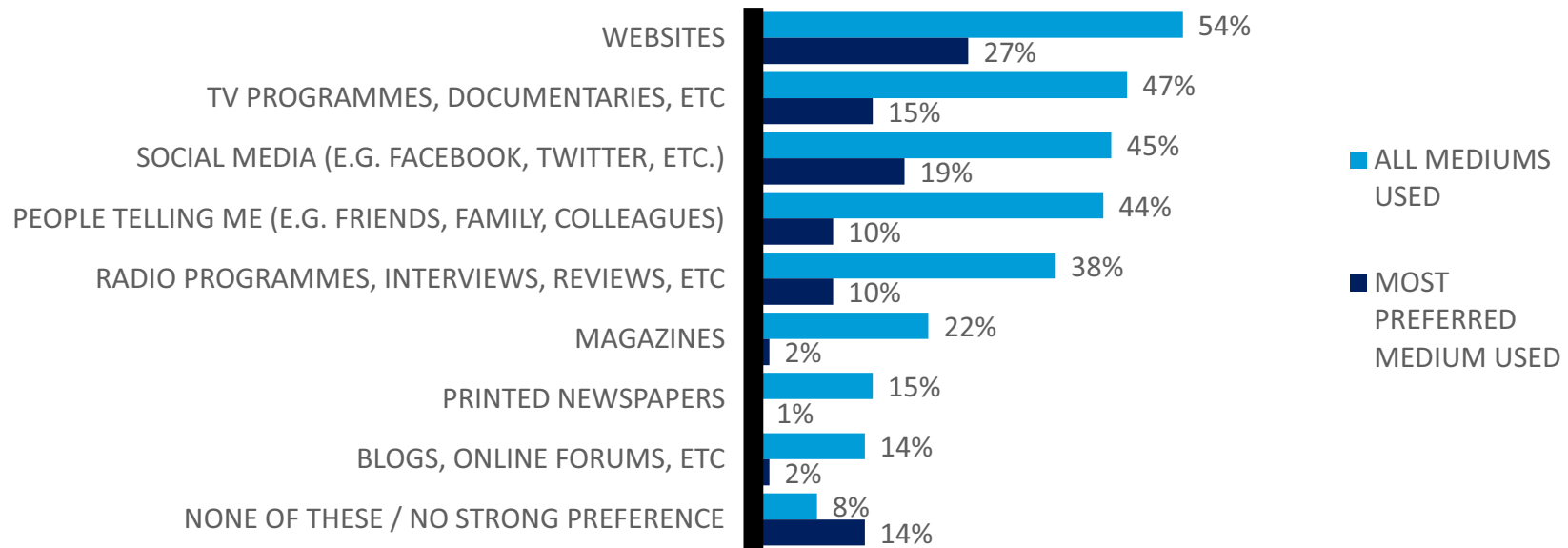
Base: Those who listen to music 'sometimes or more often' (Q5)
Q28: How often, if at all, do you find out about music for the following reasons?

● OFTEN/VERY OFTEN
● SOMETIMES

USED AND PREFERRED SOURCES OF INFORMATION



WEBSITES & SOCIAL MEDIA ARE THE MOST PREFERRED WAYS TO SOURCE INFO ABOUT MUSIC



Base: Those who listen to music 'sometimes or more often' (Q5) / Base: Those who answered Q29 except those who selected 'none of these'
Q29: Which of the following **ways do you normally use** to get these types of information and news about music and people associated with music?
Q30: And which of these would be your **most preferred** way to use when getting information and news about music and people associated with music?



USAGE OF SOURCES OF INFORMATION

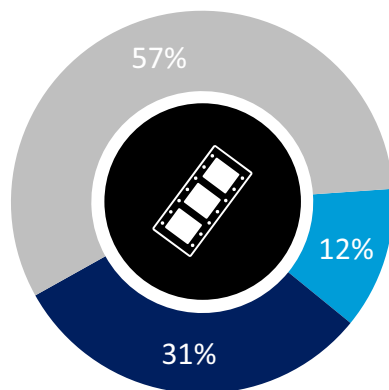


ONLY 15% LISTEN TO PODCAST AT LEAST SOMETIMES

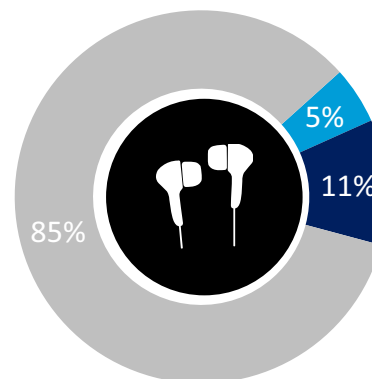
Whereas nearly half (43%) would watch documentaries related to music at least sometimes

FREQUENCY OF MEDIA CONSUMPTION ASSOCIATED WITH MUSIC

WATCH DOCUMENTARIES



LISTEN TO PODCASTS



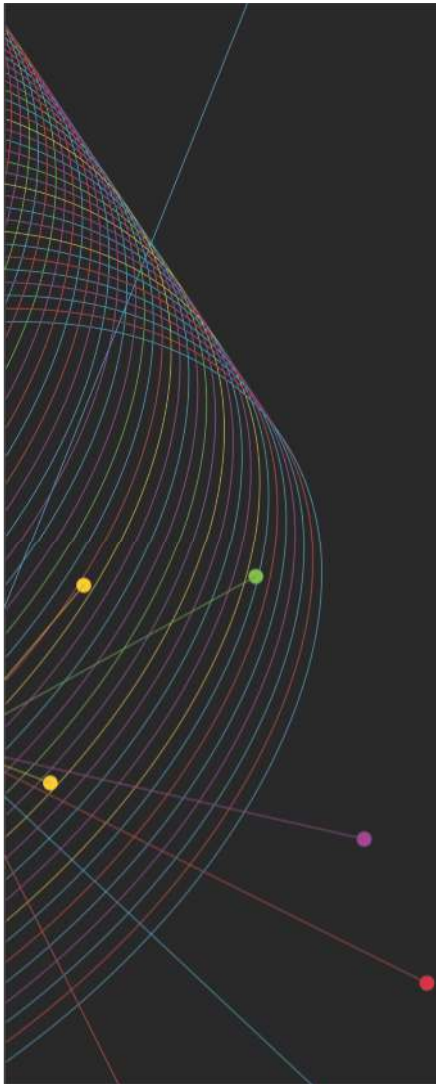
- OFTEN / VERY OFTEN
- SOMETIMES
- NEVER / ODD OCCASION

Base: Those who listen to music 'sometimes or more often' (Q5)
Q7: And how often do you...

AN UNCOMMON SENSE OF THE CONSUMER™



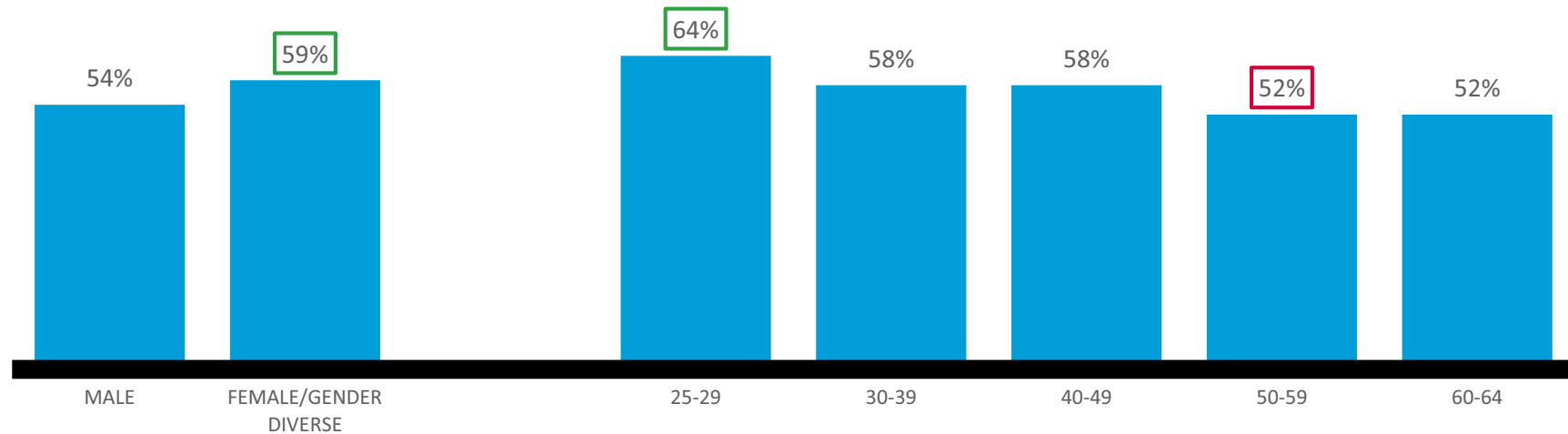
INTRODUCING THE MUSIC SEGMENTS



A GROUP THAT HAS SOMETHING IN COMMON

A demographic group is one type of segment, but often with limited application

For example: Music is a part of who I am – demographic view



Base: All respondents (n=1977)

Q24. How much you agree or disagree with the following statements...Scale: Disagree strongly, Disagree slightly, Neither agree nor disagree, Slightly agree, Strongly agree).

(% Slightly/Strongly Agree)

□ Sig. lower vs. total □ Sig. higher vs. total

SEGMENTATION DESIGN – WHY

What is a segment?

- A segment is a group of people that share one or more behaviours and/or characteristics, which lead them to have similar needs or behave in similar ways

What makes a segment?

- A true segment meets all of the following criteria:
 - It is distinct from other segments;
 - It exhibits common attributes that are recognisable; and,
 - People in the segment respond similarly to a stimulus.

Benefits of customer segmentation for RNZ MUSIC

- Improve your listeners/users' experience
- Understand needs and preferences of segments
- Provide a targeted experience for each segment (grow your audience)
- Differentiate from other broadcasters
- Prioritise segments to focus resources on the most important segments for RNZ

THE PREDICTORS OR UNDERLYING THEMES

Relationship with music:

- Music is a vital core to who I am – it's important or even essential to me
- Music affects and reflects how I feel

Motivations for listening :

- To support or enhance my mood, to soothe and/or stimulate
- As background or company, to fill the silence or help pass time
- To understand the music, to challenge and broaden my musical horizons
- For worship or prayer

Interest in information:

- The people and the industry
- Reviews of music and performances
- The music itself --the lyrics, background, composition of the music

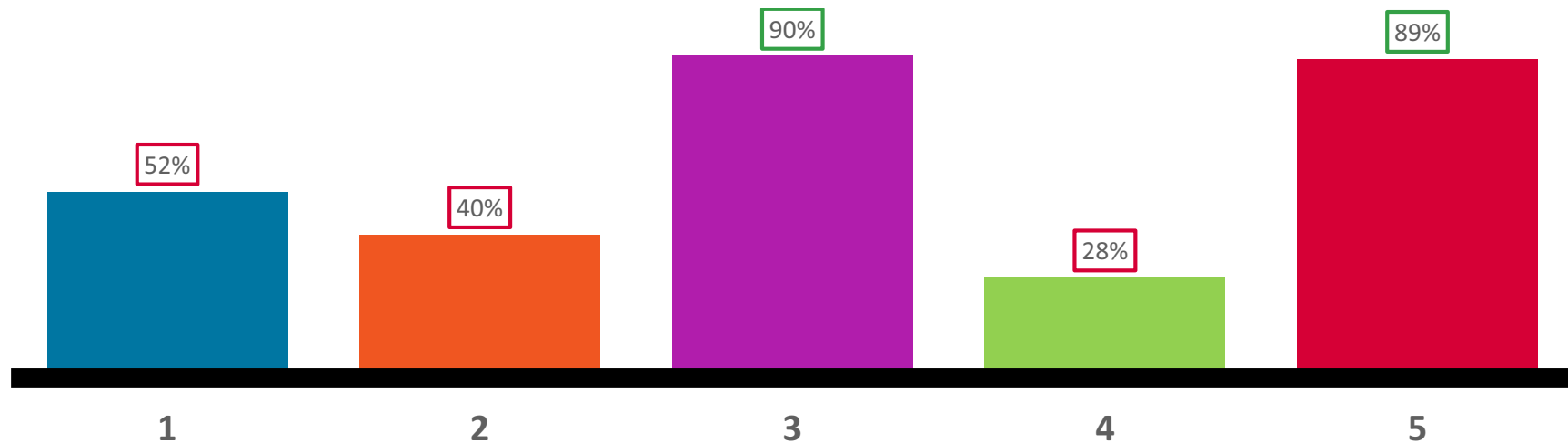
Motivations for wanting information:

- To broaden my knowledge of music and society
- To better appreciate music
- To keep up with trends
- For fun and enjoyment
- To discuss/ 'water-cooler' gossip

A GROUP THAT HAS SOMETHING IN COMMON

Segmentation based on needs and preferences paints a very different picture!

For example: Music is a part of who I am – needs and preferences view (i.e. segment view)



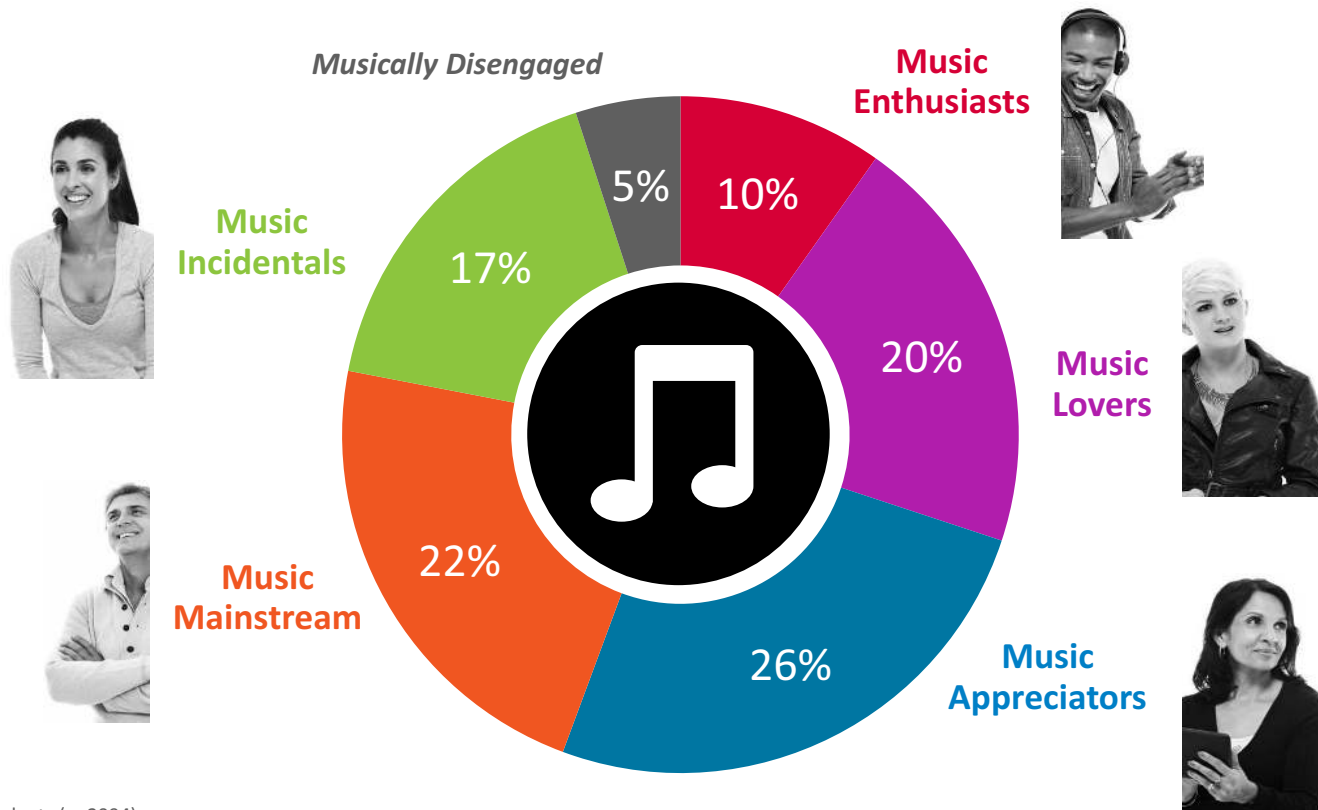
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(% Slightly/Strongly Agree)

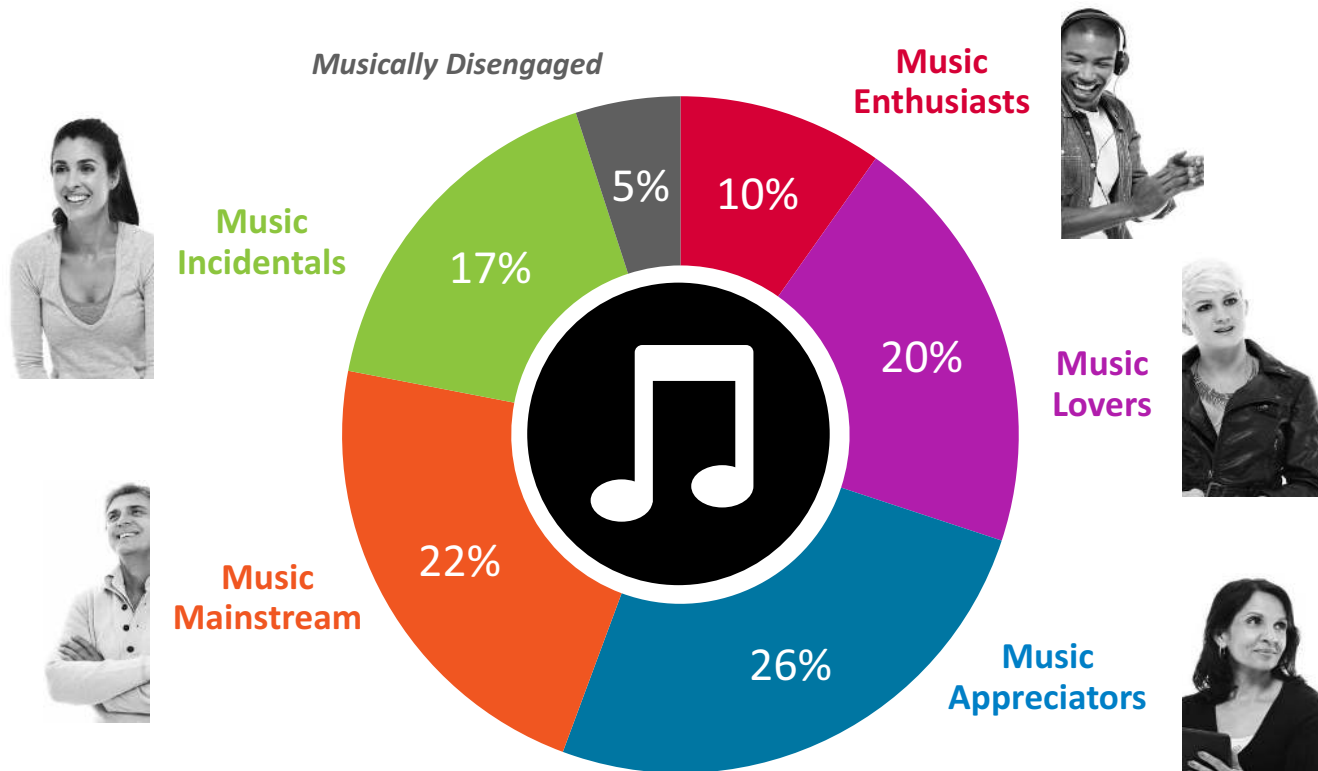
□ Sig. lower vs. total □ Sig. higher vs. total

MUSIC SEGMENTS AND THEIR SIZE



Base: All respondents (n=2094)
 Note: segment model was developed without the 'Musically Disengaged'

MUSIC SEGMENTS AND THEIR SIZE



Base: All respondents (n=2094)
Note: segment model was developed without the 'Musically Disengaged'

An abstract graphic on the left side of the slide. It features a dark background with a grid of thin, multi-colored lines (red, green, blue, yellow) that curve and intersect. Several colored dots (yellow, green, purple, red) are placed at various points where the lines intersect, with thin lines extending from them across the grid.

PROFILES OF THE DIFFERENT SEGMENTS



MEET THE MUSIC ENTHUSIASTS – 10%

I have an extremely strong attachment to listening to music and I am very interested in information about music.

I analyse music and want to understand it more, I constantly challenge myself to broaden my musical horizons.






LARGEST VARIATIONS FROM THE NORM

DIFFERING MOTIVATIONS FOR LISTENING	% OFTEN TO VERY OFTEN	INDEX VS. TOTAL
TO ANALYSE AND UNDERSTAND THE MUSIC MORE (E.G. ITS COMPOSITION, STRUCTURE, LYRICS)	61	407
TO CHALLENGE MYSELF AND BROADEN MY MUSICAL HORIZONS BY LISTENING TO SOMETHING DIFFERENT	65	361

DIFFERING MOTIVATIONS FOR FINDING OUT INFORMATION	% OFTEN TO VERY OFTEN	INDEX VS. TOTAL
TO GET THE GOSSIP ON WHAT'S HAPPENING IN THE MUSIC SCENE	55	688
TO DISCOVER HOW MUSIC INFLUENCES SOCIETY	65	591
TO GET A DETAILED ANALYSIS OF THE MUSIC I AM LISTENING TO	58	580
TO BE ABLE TO DISCUSS IT WITH OTHERS	60	545

Q25 / Q27 / Q28

DEMOGRAPHIC PROFILE

		OVER-INDEX	UNDER-INDEX
GENDER		MALE 57% cf. 48% total	FEMALE 43% cf. 52% total
AGE		25 – 39 YEARS 25 – 29: 22% cf. 12% total 30 – 39: 32% cf. 24% total	50 – 64 YEARS 50 – 59: 17% cf. 26% total 60 – 64: 6% cf. 11% total
ETHNIC GROUP		ETHNICALLY DIVERSE 18% cf. 12% total Maori, 12% cf. 6% Pacific Islander & 27% cf. 13% Asian	NZ EUROPEAN 43% cf. 70% total
QUALIFICATION		UNIVERSITY QUAL. 49% cf. 39% total	NO UNIVERSITY QUAL. 17% cf. 29% total
HOURS LISTENING		TOTAL AVERAGE HOURS A WEEK 33.0 hours cf. 27.1 hours total	N/A

Q1, Q2, Q3, Q38, Q15a+Q16a

GENRES LISTENED TO



ENTHUSIASTS LIKE TO LISTEN TO AN AVERAGE OF AROUND 7 GENRES

PREFERRED GENRES BY SEGMENT	TOTAL	MUSIC ENTHUSIASTS
POP	68%	68%
ROCK	65%	61%
HIP-HOP OR RAP	30%	47%
SOUL, FUNK AND R&B	36%	44%
ALTERNATIVE	28%	42%
REGGAE	28%	40%
ELECTRONIC & DANCE	26%	40%
BLUES	29%	39%
COUNTRY	33%	38%
CLASSICAL MUSIC	25%	35%

PREFERRED GENRES BY SEGMENT	TOTAL	MUSIC ENTHUSIASTS
JAZZ	21%	31%
WORLD MUSIC	19%	29%
MUSIC FROM STAGE MUSICALS AND SHOWS	20%	26%
METAL	24%	25%
PACIFIC MUSIC	13%	24%
FOLK MUSIC	13%	23%
RELIGIOUS AND SPIRITUAL MUSIC	17%	22%
MAORI MUSIC	13%	21%
OPERA	8%	14%
OTHER	4%	3%

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 Q17: Please tell us which of the following genres or types of music you like to listen to?

Sig. lower vs. total Sig. higher vs. total

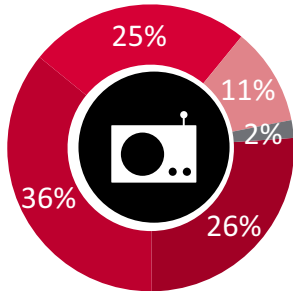
MUSIC SOURCES

THEY SOURCE MUSIC FROM EVERYWHERE BUT PARTICULARLY ONLINE

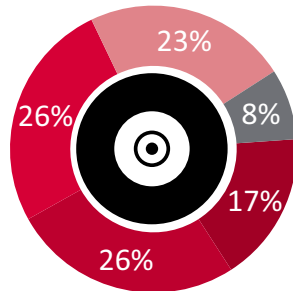


FREQUENCY OF LISTENING OR WATCHING MUSIC

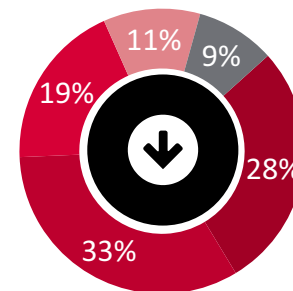
RADIO STATION



CDs, CASSETTES, RECORDS

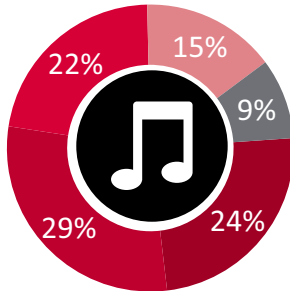


DOWNLOADED MUSIC

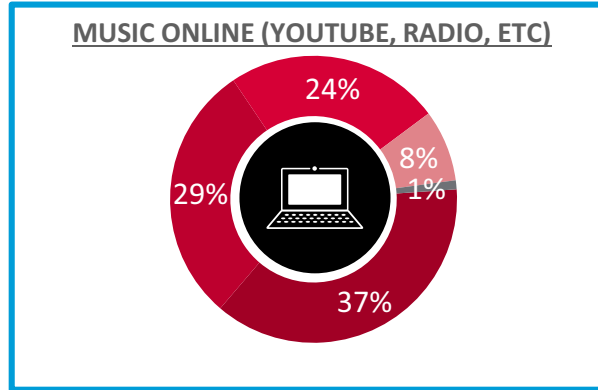


- VERY OFTEN
- OFTEN
- SOMETIMES
- ODD OCCASION
- NEVER

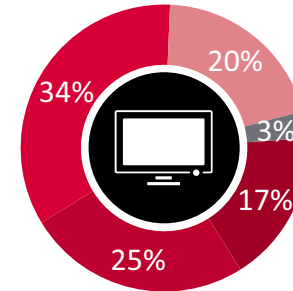
STREAMING SERVICES



MUSIC ONLINE (YOUTUBE, RADIO, ETC)



MUSIC VIDEOS ON TV



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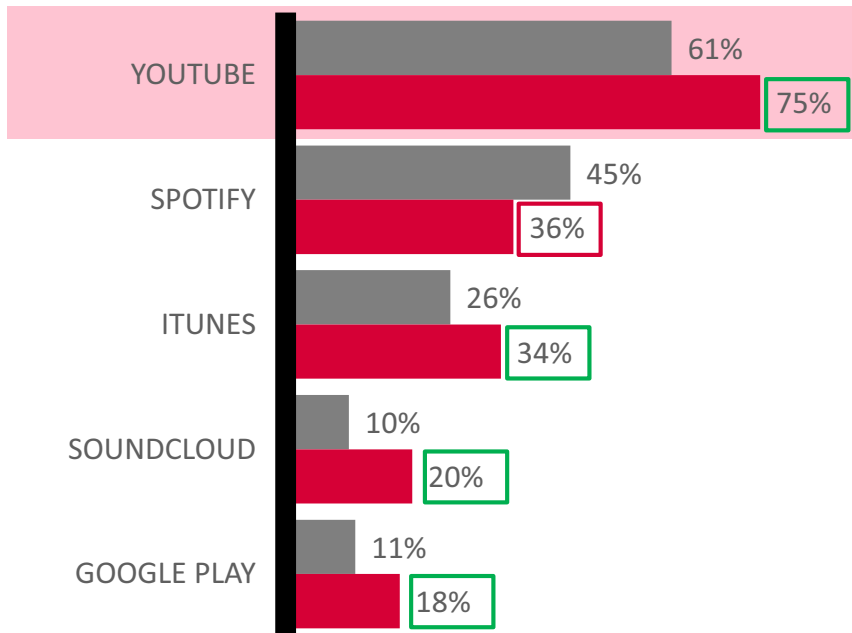
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 Q6: When thinking about music in general, how often do you listen / watch...

STREAMING AND PLAYLISTS

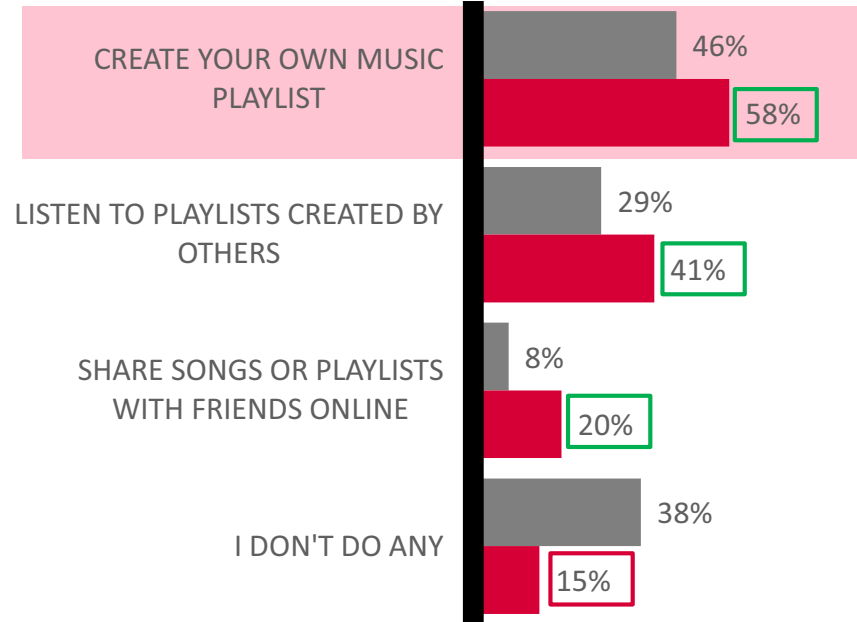


ENTHUSIASTS ARE DIGITALLY SAVVY IN TERMS OF STREAMING SERVICES (91% STREAM); YOUTUBE IS TOP CHOICE

TOP 5 STREAMING SERVICES USED



PLAYLISTING – DO YOU...



■ TOTAL
■ MUSIC ENTHUSIASTS

□ Significantly higher (95% level)
□ Significantly lower (95% level)

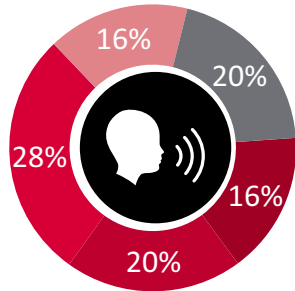
Base: Those who listen to music on streaming services 'sometimes or more often' (Q6)
Base: Those who download music, stream or watch/listen online sometimes or more often (Q6)
Q22: Which of the following do you use? / Q23: Do you...

PHYSICAL ACTIVITIES INVOLVING MUSIC

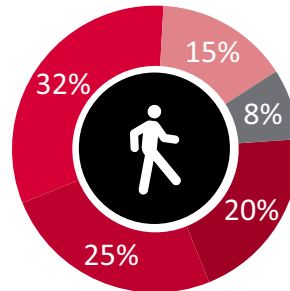
ENTHUSIASTS ACTIVELY ENGAGE WITH MUSIC BY SINGING OR PLAYING, DANCING AND LISTENING DURING ACTIVITIES

FREQUENCY OF ACTIVITIES WITH MUSIC

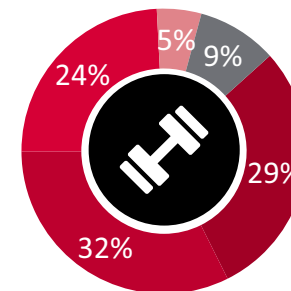
PLAY INSTRUMENTS OR SING



DANCE



LISTEN TO MUSIC DURING PHYSICAL ACTIVITIES

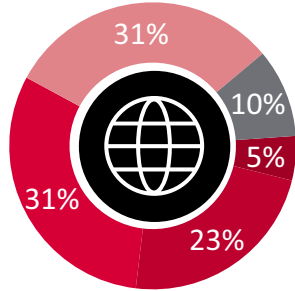


- VERY OFTEN
- OFTEN
- SOMETIMES
- ODD OCCASION
- NEVER

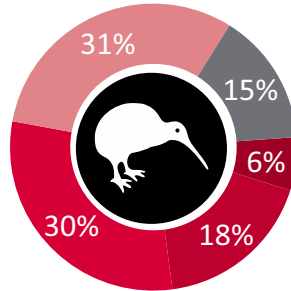
THEY ATTEND LIVE MUSIC OF ALL KINDS

FREQUENCY OF ATTENDING PERFORMANCES & BUYING MUSIC

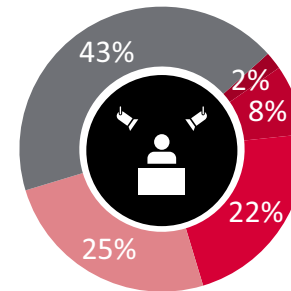
INTERNATIONAL CONCERTS



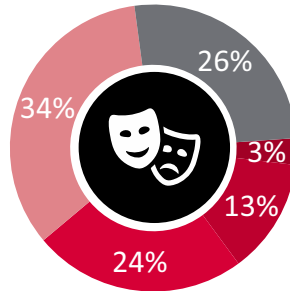
LOCAL CONCERTS



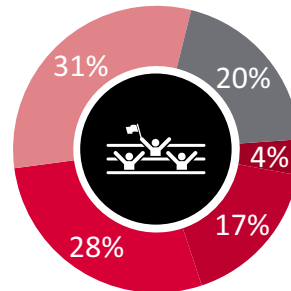
CLASSICAL CONCERTS



STAGE MUSICAL



MUSICAL FESTIVAL



- VERY OFTEN
- OFTEN
- SOMETIMES
- ODD OCCASION
- NEVER

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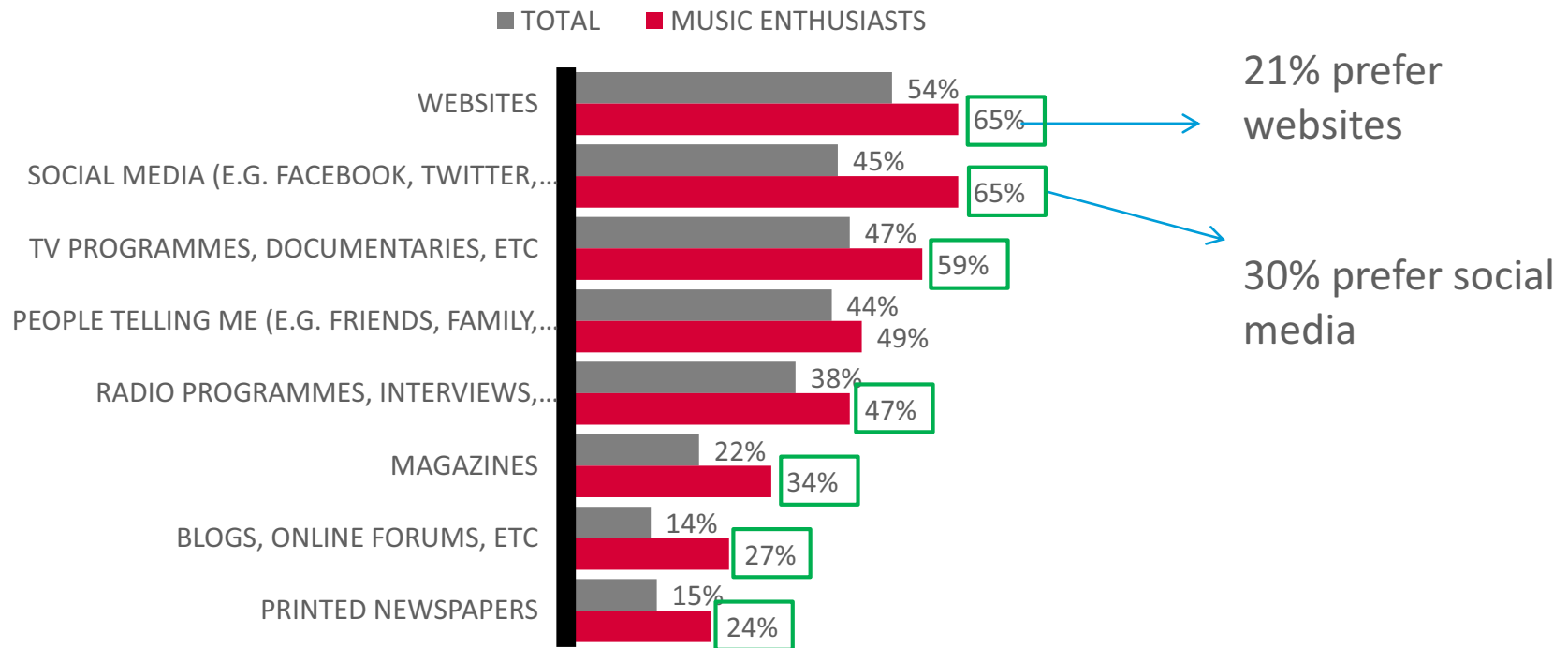
Base: Those who listen to music 'sometimes or more often' (Q5)
Q10: And how often do you...



USED AND PREFERRED SOURCES OF INFORMATION



THE ENTHUSIASTS SOURCE THEIR INFORMATION ABOUT MUSIC FROM A RANGE OF SOURCES, BUT ONLINE DOMINATES PREFERENCE



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Base: Those who listen to music 'sometimes or more often' (Q5)

Q29: Which of the following **ways do you normally use** to get these types of information and news about music and people associated with music?

Q30: And which of these would be your **most preferred** way to use when getting information and news about music and people associated with music?

Significantly higher (95% level)
Significantly lower (95% level)

DIGITAL SOURCES OF MUSIC INFORMATION USED

YOUTUBE AND FACEBOOK DOMINATE FOR CONTENT ABOUT MUSIC



TOP 15 DIGITAL PLATFORMS AND SITES USED FOR MUSIC INFORMATION AND NEWS BY SEGMENTS	TOTAL	MUSIC ENTHUSIASTS
YOUTUBE (YOUTUBE.COM)	64%	78%
FACEBOOK	52%	64%
GOOGLE	61%	57%
STUFF (STUFF.CO.NZ)	31%	33%
WIKIPEDIA (HTTPS://EN.WIKIPEDIA.ORG)	30%	31%
ARTIST / BAND WEBSITES	20%	26%
NEW ZEALAND HERALD (NZHERALD.CO.NZ)	17%	23%
ROLLING STONE (ROLLINGSTONE.COM)	7%	15%
RADIO NZ WEBSITE (RADIONZ.CO.NZ)	9%	15%
TWITTER	8%	15%
BBC (BBC.CO.UK / BBC.COM)	9%	12%
UNDER THE RADAR (UNDERTHERADAR.CO.NZ)	4%	9%
THE GUARDIAN ONLINE (THEGUARDIAN.COM)	3%	6%
NME ONLINE (NME.COM)	2%	6%
PITCHFORK (PITCHFORK.COM)	2%	6%

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Base: Those who use websites, blogs, online forums, social media, etc (Q29)

Q31: Which websites or online platforms do you visit to get information and news about music and people associated with music?

 Significantly higher (95% level)
 Significantly lower (95% level)

MEET THE MUSIC LOVERS - 20%

I have a very deep emotional attachment to music. It evokes powerful emotions, I see it as an absolutely essential part of my life and can't imagine living without it.

It is a part of who I am.



DEEPER EMOTIONAL CONNECTION AND WEAKER INTEREST IN THINKING ABOUT MUSIC THAN THE ENTHUSIASTS

UNDERLYING RELATIONSHIP	MUSIC ENTHUSIASTS	MUSIC LOVERS
MUSIC IS A PART OF WHO I AM	89%	90%
MUSIC IS IMPORTANT TO ME	89%	99%
MUSIC IS AN ESSENTIAL PART OF MY LIFE	87%	97%
FOR ME, LIFE WITHOUT MUSIC WOULD BE EMPTY	85%	94%
I CAN'T IMAGINE NOT HAVING MUSIC IN MY LIFE	89%	98%
WHEN I LISTEN I ANALYSE AND UNDERSTAND THE MUSIC MORE	87%	51%
TO CHALLENGE MYSELF AND BROADEN MY MUSICAL HORIZONS	95%	70%






INFORMATION ABOUT MUSIC – IT IS PERSONAL AND EMOTIONAL FOR MUSIC LOVERS

INFORMATION ABOUT MUSIC (% interested or % sometimes motivated to find out for this reason)	MUSIC LOVERS	MUSIC ENTHUSIASTS
BACKGROUND OR STORY BEHIND A SONG OR PIECE OF MUSIC	76%	95%
THE LYRICS OF A SONG AND THEIR MEANING	70%	90%
ANALYSING THE COMPOSITION OF A PIECE OF MUSIC OR SONG	31%	86%
REVIEWS OF MUSIC VIDEOS	28%	89%
(WHY?) TO STAY IN TOUCH WITH POPULAR TRENDS	39%	94%
(Why?) TO GET THE GOSSIP ON WHAT'S HAPPENING IN THE MUSIC SCENE	28%	94%

Q24 / Q25 / Q26 / Q27 / Q28



DEMOGRAPHIC PROFILE

		OVER-INDEX	UNDER-INDEX
GENDER		FEMALE 57% cf. 52% total	MALE 43% cf. 48% total
AGE		NO DIFFERENCE	
ETHNIC GROUP		NZ EUROPEAN (e.g. European 74% cf. 70% total)	ASIAN 8% cf. 13% total
QUALIFICATION		NO DIFFERENCE	
HOURS LISTENING		TOTAL AVERAGE HOURS A WEEK 32.0 hours cf. 27.1 hours total	N/A

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Q1, Q2, Q3, Q38, Q15a+Q16a

GENRES LISTENED TO

MUSIC LOVERS LIKE AN AVERAGE OF 6 GENRES

n

PREFERRED GENRES BY SEGMENT	TOTAL	MUSIC LOVERS
ROCK	65%	79%
POP	68%	70%
SOUL, FUNK AND R&B	36%	47%
ALTERNATIVE	28%	40%
HIP-HOP OR RAP	30%	38%
REGGAE	28%	38%
BLUES	29%	37%
COUNTRY	33%	34%
METAL	24%	33%
ELECTRONIC & DANCE	26%	31%

PREFERRED GENRES BY SEGMENT	TOTAL	MUSIC LOVERS
CLASSICAL MUSIC	25%	26%
MUSIC FROM STAGE MUSICALS AND SHOWS	20%	25%
WORLD MUSIC	19%	24%
JAZZ	21%	22%
MAORI MUSIC	13%	17%
PACIFIC MUSIC	13%	16%
FOLK MUSIC	13%	16%
RELIGIOUS AND SPIRITUAL MUSIC	17%	14%
OPERA	8%	7%
OTHER	4%	4%

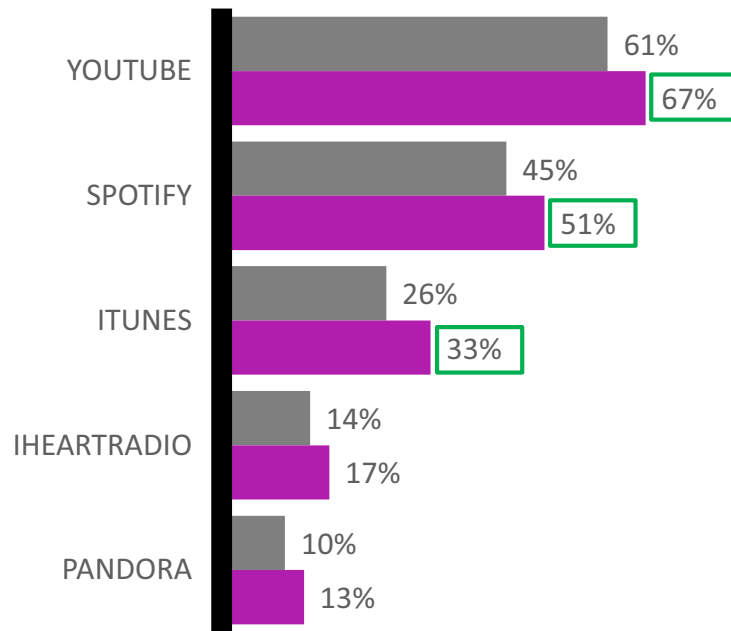
Base: Those who listen to music 'sometimes or more often' (Q5)
 Q17: Please tell us which of the following genres or types of music you like to listen to?

Sig. lower vs. total **Sig. higher vs. total**

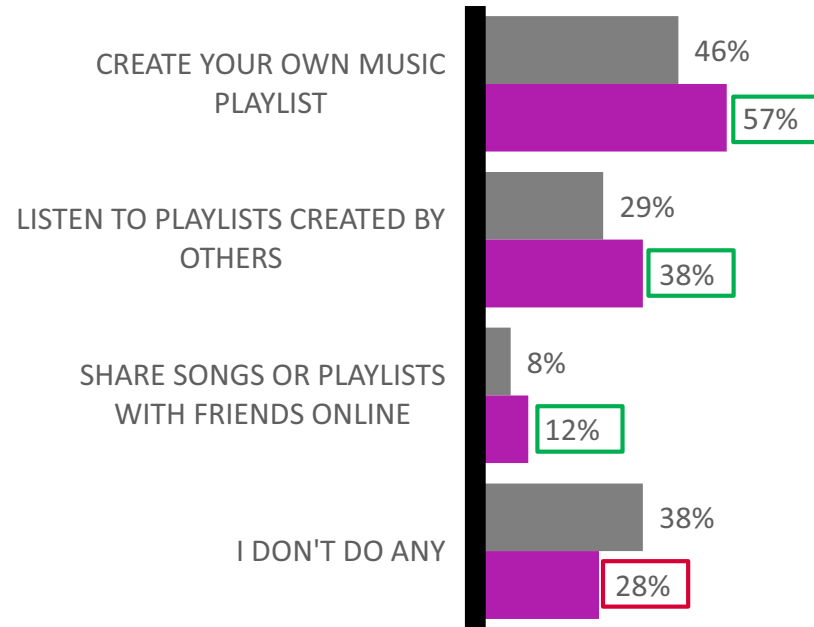
STREAMING AND PLAYLISTS

THE 69% OF MUSIC LOVERS WHO STREAM MUSIC ARE MORE LIKELY TO USE YOUTUBE, SPOTIFY AND ITUNES

TOP 5 STREAMING SERVICES USED



PLAYLISTING – DO YOU...



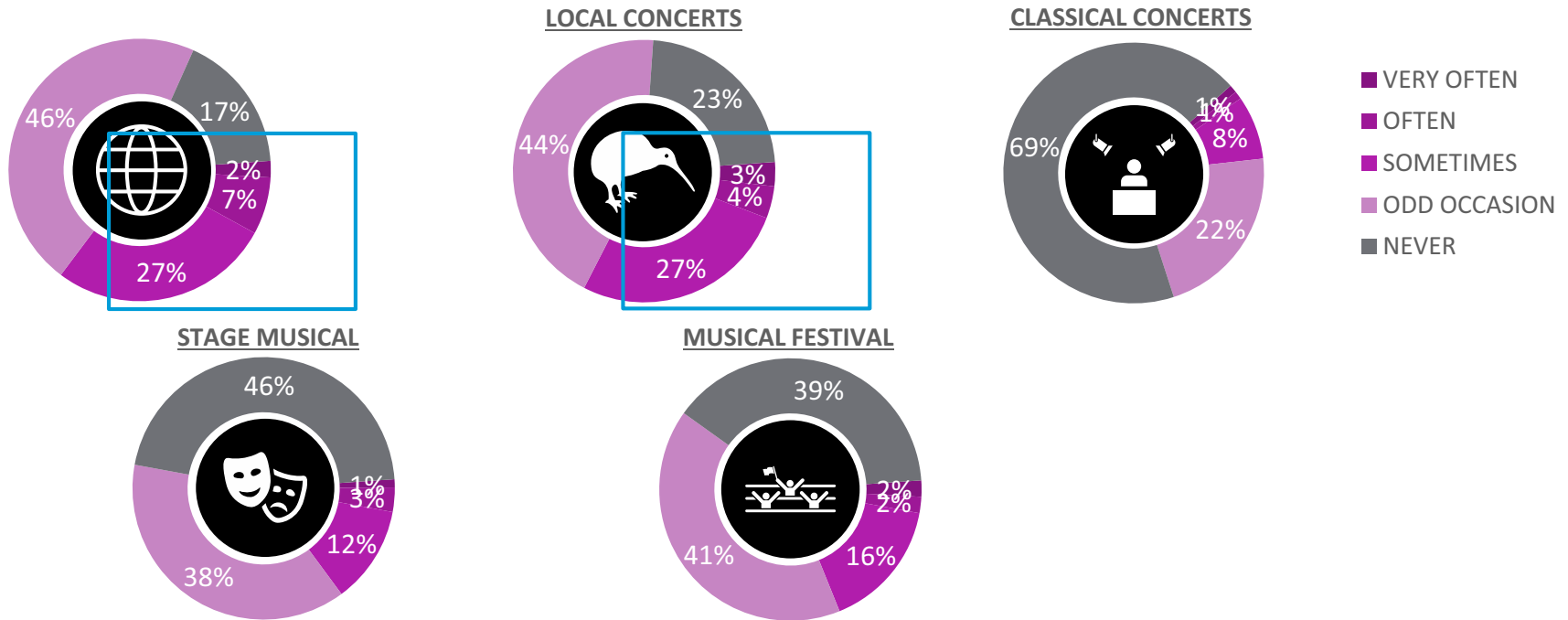
■ TOTAL
■ MUSIC LOVERS

□ Significantly higher (95% level)
□ Significantly lower (95% level)

Base: Those who listen to music on streaming services 'sometimes or more often' (Q6)
Base: Those who download music, stream or watch/listen online sometimes or more often (Q6)
Q22: Which of the following do you use? / Q23: Do you...

LIVE MUSIC ATTENDANCE

AROUND A THIRD ATTEND INTERNATIONAL OR LOCAL CONCERTS SOMETIMES OR OFTEN

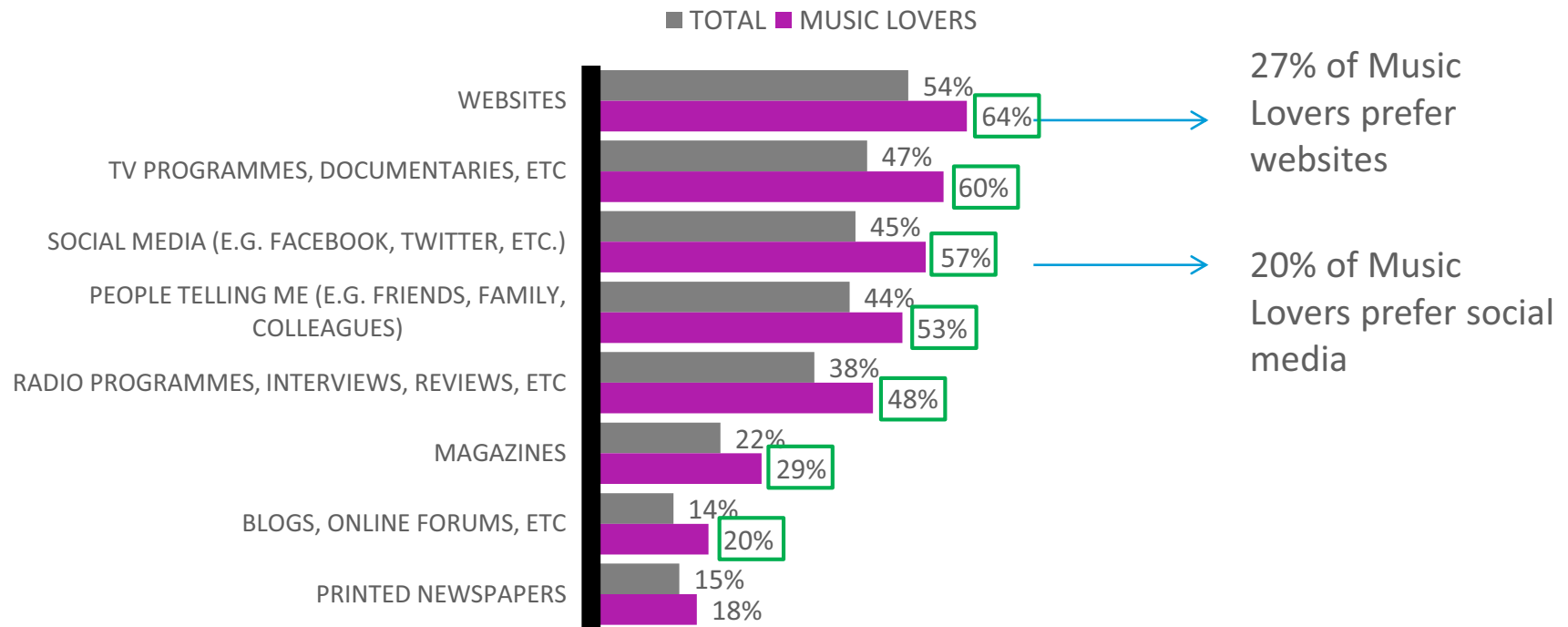


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Base: Those who listen to music 'sometimes or more often' (Q5)
 Q10: And how often do you...



MULTIPLE SOURCES OF INFORMATION ABOUT MUSIC



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Base: Those who listen to music 'sometimes or more often' (Q5)

Q29: Which of the following ways do you normally use to get these types of information and news about music and people associated with music?

Q30: And which of these would be your most preferred way to use when getting information and news about music and people associated with music?

Significantly higher (95% level)
Significantly lower (95% level)

DIGITAL SOURCES OF MUSIC INFORMATION USED

OF THOSE WHO SOURCE INFORMATION ONLINE, YOUTUBE IS MOST PREVALENT



TOP 15 DIGITAL PLATFORMS AND SITES USED FOR MUSIC INFORMATION AND NEWS BY SEGMENTS	TOTAL	MUSIC LOVERS
YOUTUBE (YOUTUBE.COM)	64%	74%
GOOGLE	61%	63%
FACEBOOK	52%	57%
WIKIPEDIA (HTTPS://EN.WIKIPEDIA.ORG)	30%	36%
STUFF (STUFF.CO.NZ)	31%	36%
ARTIST / BAND WEBSITES	20%	32%
NEW ZEALAND HERALD (NZHERALD.CO.NZ)	17%	21%
ROLLING STONE (ROLLINGSTONE.COM)	7%	11%
RADIO NZ WEBSITE (RADIONZ.CO.NZ)	9%	10%
TWITTER	8%	9%
BBC (BBC.CO.UK / BBC.COM)	9%	8%
OTHER	4%	7%
UNDER THE RADAR (UNDERTHERADAR.CO.NZ)	4%	5%
THE GUARDIAN ONLINE (THEGUARDIAN.COM)	3%	3%
THE SPINOFF (THESPINOFF.CO.NZ)	2%	3%

 Significantly higher (95% level)
 Significantly lower (95% level)

Base: Those who use websites, blogs, online forums, social media, etc (Q29)

Q31: Which websites or online platforms do you visit to get information and news about music and people associated with music?



MEET THE MUSIC APPRECIATORS – 26%

I really like music and it is important to have an appreciation of it. Music is an important part of society and culture and of a well balanced life.

Music is particularly important for worship or reflection.








VARIATIONS FROM THE NORM

DIFFERING NEEDS	% OFTEN TO VERY OFTEN	INDEX VS. TOTAL
FOR WORSHIP, PRAYER OR REFLECTION	31	182
I CAN HAPPILY GO FOR LONG PERIODS OF TIME WITHOUT MUSIC	30	115
TO SOOTHE OR RELAX OTHER PEOPLE (E.G. CHILDREN, ETC)	26	113
MUSIC NOURISHES MY SPIRITUALITY	56	108
IT IS IMPORTANT THAT WE EMBRACE SOMBRE OCCASIONS WITH MUSIC	44	107

DIFFERING INFORMATION INTERESTS	% VERY INTERESTED TO PASSIONATE / % OFTEN TO VERY OFTEN	INDEX VS. TOTAL
STUDYING THE LYRICS OF A SONG E.G. WHAT THE LYRICS MEAN	20	105
TO DISCOVER HOW MUSIC INFLUENCES SOCIETY	10	91
THE CULTURAL SIGNIFICANCE OF A SONG OR PIECE OF MUSIC	11	85
THE BACKGROUND/STORY BEHIND A SONG OR PIECE OF MUSIC OR ALBUM	17	81
WHAT MUSIC ACTS, CONCERTS OR FESTIVALS ARE COMING UP IN MY AREA	16	73

Q25 / Q27 / Q28

DEMOGRAPHIC PROFILE

		OVER-INDEX	UNDER-INDEX
GENDER		NO DIFFERENCE	
AGE		NO DIFFERENCE	
ETHNIC GROUP		ETHNICALLY DIVERSE 15% cf. 12% Maori & 19% cf. 13% Asian	NZ EUROPEAN 59% cf. 70% total
QUALIFICATION		UNIVERSITY QUAL. 47% cf. 39% total	
HOURS LISTENING		NO DIFFERENCE	

Q1, Q2, Q3, Q38, Q15a+Q16a

GENRES LISTENED TO



AVERAGE OF 5 GENRES AND OVER-INDEX ON CLASSICAL, RELIGIOUS, JAZZ AND OPERA

PREFERRED GENRES BY SEGMENT	TOTAL	MUSIC APPRECIATORS
POP	68%	65%
ROCK	65%	54%
SOUL, FUNK AND R&B	36%	36%
COUNTRY	33%	36%
CLASSICAL MUSIC	25%	34%
RELIGIOUS AND SPIRITUAL MUSIC	17%	31%
HIP-HOP OR RAP	30%	28%
REGGAE	28%	28%
BLUES	29%	28%
ALTERNATIVE	28%	24%

PREFERRED GENRES BY SEGMENT	TOTAL	MUSIC APPRECIATORS
JAZZ	21%	24%
ELECTRONIC & DANCE	26%	23%
WORLD MUSIC	19%	22%
MUSIC FROM STAGE MUSICALS AND SHOWS	20%	19%
METAL	24%	18%
PACIFIC MUSIC	13%	15%
FOLK MUSIC	13%	15%
MAORI MUSIC	13%	14%
OPERA	8%	10%
OTHER	4%	3%

Base: Those who listen to music 'sometimes or more often' (Q5)
 Q17: Please tell us which of the following genres or types of music you like to listen to?

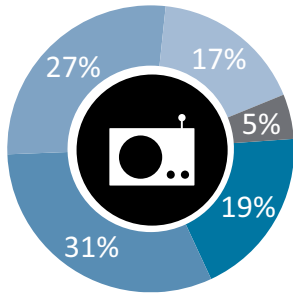
Sig. lower vs. total **Sig. higher vs. total**

SOURCES OF MUSIC

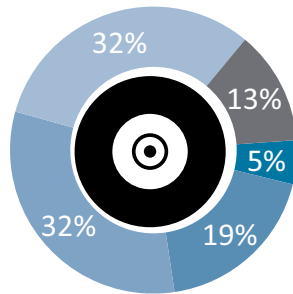


APPRECIATORS ARE MORE LIKELY TO LISTEN TO THE RADIO & WATCH/LISTEN TO MUSIC ONLINE VS. OTHER LISTENING MODES

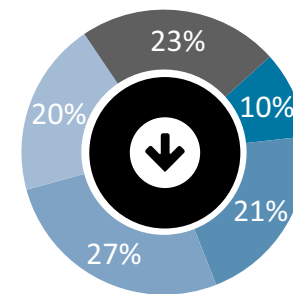
RADIO STATION



CDs, CASSETTES, RECORDS

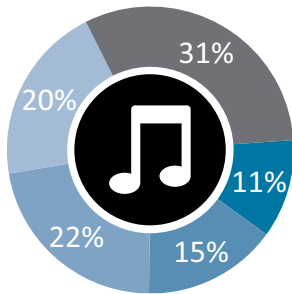


DOWNLOADED MUSIC

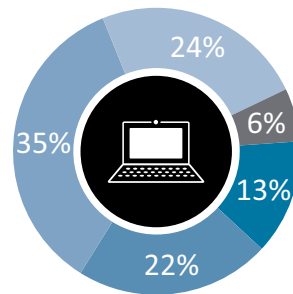


- VERY OFTEN
- OFTEN
- SOMETIMES
- ODD OCCASION
- NEVER

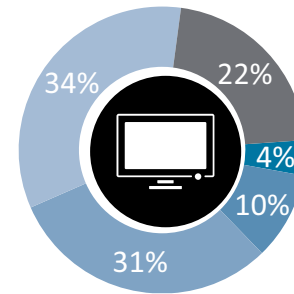
STREAMING SERVICES



MUSIC ONLINE (YOUTUBE, RADIO, ETC)



MUSIC VIDEOS ON TV



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Base: Those who listen to music 'sometimes or more often' (Q5)
 Q6: When thinking about music in general, how often do you listen / watch...

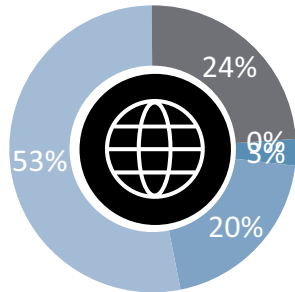
LIVE MUSIC ATTENDANCE

MUSIC APPRECIATORS ARE MORE LIKELY THAN AVERAGE TO EVER ATTEND CLASSICAL CONCERTS

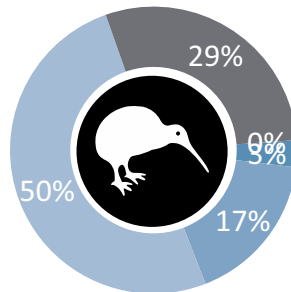


FREQUENCY OF ATTENDING PERFORMANCES & BUYING MUSIC

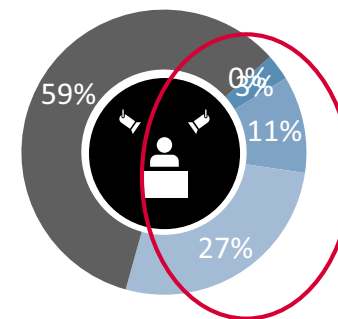
INTERNATIONAL CONCERTS



LOCAL CONCERTS

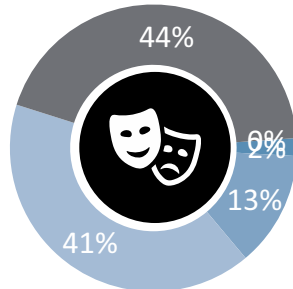


CLASSICAL CONCERTS

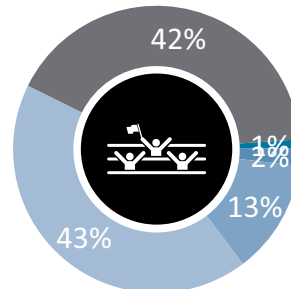


- VERY OFTEN
- OFTEN
- SOMETIMES
- ODD OCCASION
- NEVER

STAGE MUSICAL



MUSICAL FESTIVAL



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Base: Those who listen to music 'sometimes or more often' (Q5)
Q10: And how often do you...

DIGITAL SOURCES OF INFORMATION

OF THE 77% WHO GO ONLINE FOR MUSIC CONTENT, 13% GO TO RNZ'S WEBSITE FOR INFORMATION ABOUT MUSIC



TOP 15 DIGITAL PLATFORMS AND SITES USED FOR MUSIC INFORMATION AND NEWS BY SEGMENTS	TOTAL	MUSIC APPRECIATORS
YOUTUBE (YOUTUBE.COM)	64%	65%
GOOGLE	61%	63%
FACEBOOK	52%	53%
STUFF (STUFF.CO.NZ)	31%	31%
WIKIPEDIA (HTTPS://EN.WIKIPEDIA.ORG)	30%	26%
NEW ZEALAND HERALD (NZHERALD.CO.NZ)	17%	18%
ARTIST / BAND WEBSITES	20%	14%
RADIO NZ WEBSITE (RADIONZ.CO.NZ)	9%	13%
BBC (BBC.CO.UK / BBC.COM)	9%	10%
TWITTER	8%	6%
ROLLING STONE (ROLLINGSTONE.COM)	7%	5%
UNDER THE RADAR (UNDERTHERADAR.CO.NZ)	4%	3%
OTHER	4%	3%
NME ONLINE (NME.COM)	2%	2%
VICE (VICE.COM)	2%	2%

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Base: Those who use websites, blogs, online forums, social media, etc (Q29)

Q31: Which websites or online platforms do you visit to get information and news about music and people associated with music?

 Significantly higher (95% level)
 Significantly lower (95% level)

MEET THE MUSIC MAINSTREAM – 22%

I have quite an emotional connection to music – but perhaps within my limited repertoire of the more mainstream genres. I think music is important but I might not think of it as essential.

I enjoy listening though and music keeps me company, I often have it in the background and it helps me pass the time when I'm doing something else.



VARIATIONS FROM THE NORM

DIFFERING NEEDS	% OFTEN TO VERY OFTEN / % SLIGHTLY AGREE TO STRONGLY AGREE	INDEX VS. TOTAL
I CAN HAPPILY GO FOR LONG PERIODS OF TIME WITHOUT MUSIC	30	115
AS BACKGROUND OR TO HELP PASS TIME WHEN I'M DOING SOMETHING ELSE	59	102
IT JUST MAKES OTHER THINGS I DO MORE ENJOYABLE	29	100
I LISTEN TO A WIDE VARIETY OF MUSIC	69	99
I PREFER TO LISTEN TO MUSIC I KNOW	65	98

DIFFERING CONTENT INTERESTS	% VERY INTERESTED TO PASSIONATE / % OFTEN TO VERY OFTEN	INDEX VS. TOTAL
JUST FOR A BIT OF FUN AND ENJOYMENT	20	63
WHAT MUSIC ACTS, CONCERTS OR FESTIVALS ARE COMING UP IN MY AREA	13	59
COVERAGE OF MUSIC PERFORMANCES AND / OR FESTIVALS, INCLUDING LIVE MUSIC RECORDINGS	4	29
BEHIND THE SCENES COVERAGE OF TOURS AND FESTIVALS (E.G. THE SET-UP, PRODUCTION)	3	27
AS A TREAT TO BREAK UP MY DAY, AS A TIME-OUT FOR ME	6	27

Q24 / Q25 / Q27 / Q28



DEMOGRAPHIC PROFILE

		OVER-INDEX	UNDER-INDEX
GENDER		NO DIFFERENCE	
AGE		50+ YEARS 43% cf. 37% total	25 – 29 YEARS 8% cf. 12% total
ETHNIC GROUP		NZ EUROPEAN 81% cf. 70% total	PACIFIC ISLANDER AND ASIAN 3% cf. 6% total all Pacific Islander & 6% cf. 13% total all Asian
QUALIFICATION		NO DIFFERENCE	
HOURS LISTENING		WEEKEND AVERAGE HOURS / DAY 2.9 hours cf. 3.2 hours total	

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Q1, Q2, Q3, Q38, Q15a+Q16a

GENRES LISTENED TO



MAINSTREAM AVERAGE AROUND 5 GENRES, OVER-INDEX ON POP AND ROCK

PREFERRED GENRES BY SEGMENT	TOTAL	MUSIC MAINSTREAM
POP	68%	72%
ROCK	65%	70%
SOUL, FUNK AND R&B	36%	33%
COUNTRY	33%	32%
BLUES	29%	29%
HIP-HOP OR RAP	30%	27%
ALTERNATIVE	28%	25%
METAL	24%	25%
ELECTRONIC & DANCE	26%	24%
REGGAE	28%	23%

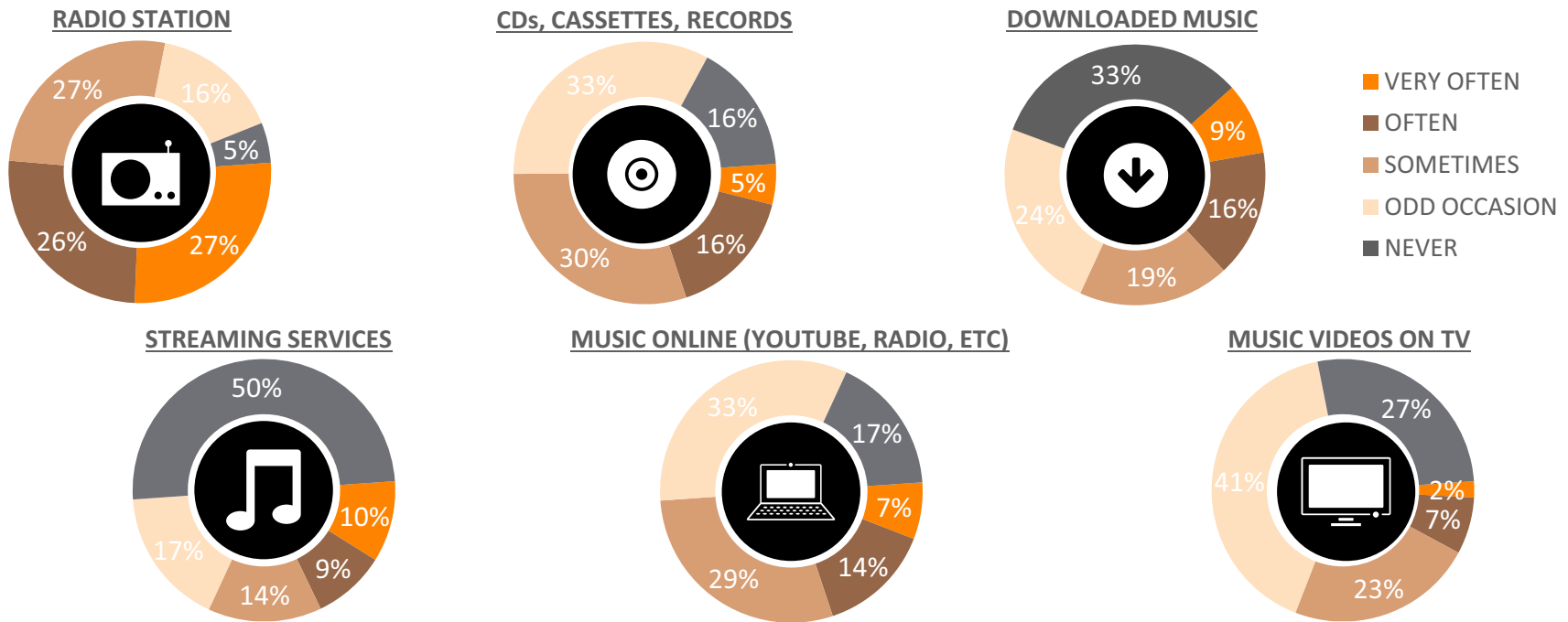
PREFERRED GENRES BY SEGMENT	TOTAL	MUSIC MAINSTREAM
CLASSICAL MUSIC	25%	19%
JAZZ	21%	19%
MUSIC FROM STAGE MUSICALS AND SHOWS	20%	18%
WORLD MUSIC	19%	14%
FOLK MUSIC	13%	10%
PACIFIC MUSIC	13%	8%
MAORI MUSIC	13%	8%
OPERA	8%	6%
RELIGIOUS AND SPIRITUAL MUSIC	17%	4%
OTHER	4%	4%

Base: Those who listen to music 'sometimes or more often' (Q5)
 Q17: Please tell us which of the following genres or types of music you like to listen to?

Sig. lower vs. total Sig. higher vs. total

MAINSTREAMS ARE MORE LIKELY TO LISTEN TO MUSIC ON THE RADIO THAN OTHER MODES OF MUSIC LISTENING

FREQUENCY OF LISTENING OR WATCHING MUSIC



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Base: Those who listen to music 'sometimes or more often' (Q5)
 Q6: When thinking about music in general, how often do you listen / watch...

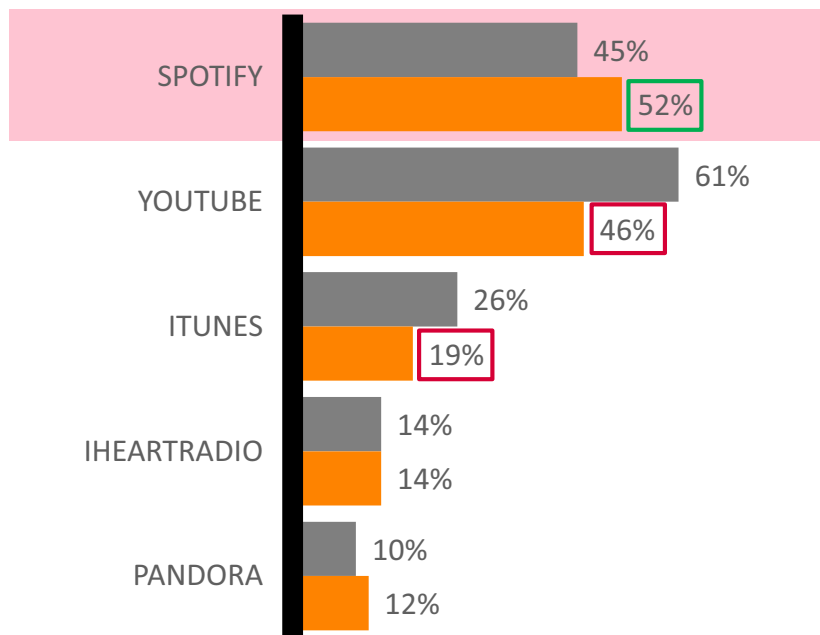


STREAMING AND PLAYLISTS

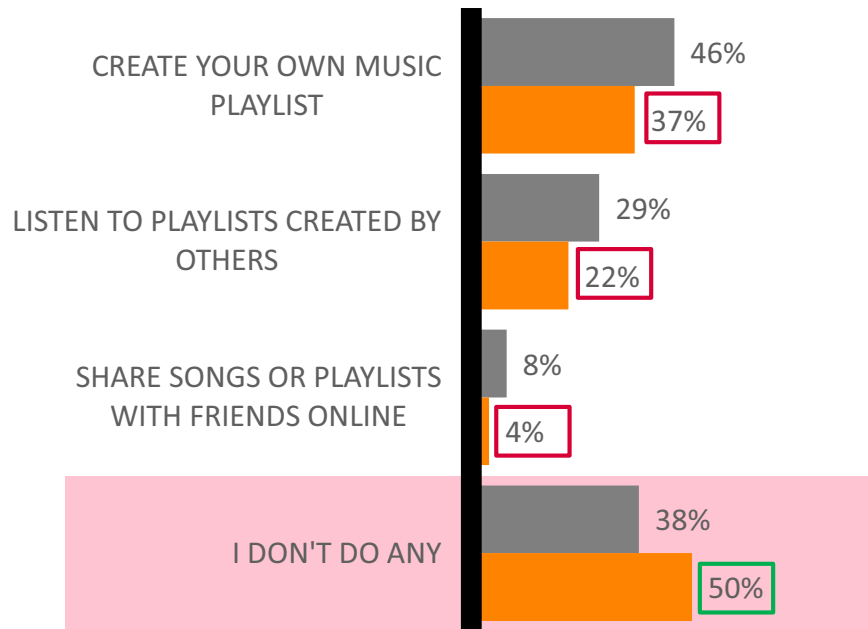


OF THE 50% WHO STREAM, SPOTIFY IS THE MAIN STREAMING SERVICE.

TOP 5 STREAMING SERVICES USED



PLAYLISTING – DO YOU...



■ TOTAL
 ■ MUSIC MAINSTREAM

□ Significantly higher (95% level)
 □ Significantly lower (95% level)

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Base: Those who listen to music on streaming services 'sometimes or more often' (Q6)
 Base: Those who download music, stream or watch/listen online sometimes or more often (Q6)
 Q22: Which of the following do you use? / Q23: Do you...

MEET THE MUSIC INCIDENTALS – 17%

My relationship with music is almost incidental to other things going on at the same time. I don't really see music as part my make-up, it is not that important in my life.

To be fair, it's more a means to an end rather than an end in itself. Music is a nice distraction in the background, to pass the time – perhaps something that makes other things more enjoyable.








VARIATIONS FROM NORM

NEEDS	% OFTEN TO VERY OFTEN / % SLIGHTLY AGREE TO STRONGLY AGREE	INDEX VS. TOTAL
I CAN HAPPILY GO FOR LONG PERIODS OF TIME WITHOUT MUSIC	35	135
IT JUST MAKES OTHER THINGS I DO MORE ENJOYABLE	35	121
I PREFER TO LISTEN TO MUSIC I KNOW AS BACKGROUND OR TO HELP PASS TIME WHEN I'M DOING SOMETHING ELSE	66 46	100 79
INFORMATION INTERESTS	% VERY INTERESTED TO PASSIONATE / % OFTEN TO VERY OFTEN	INDEX VS. TOTAL
JUST FOR A BIT OF FUN AND ENJOYMENT	7	22
WHAT MUSIC ACTS, CONCERTS OR FESTIVALS ARE COMING UP IN MY AREA	4	18

Q24 / Q25 / Q27 / Q28

DEMOGRAPHIC PROFILE

		OVER-INDEX	UNDER-INDEX
GENDER		FEMALE 59% cf. 52% total	MALE 41% cf. 48% total
AGE		40 – 49 YEARS 34% cf. 28% total	N/A
ETHNIC GROUP		NZ EUROPEAN 83% cf. 70% total	MAORI AND ASIAN 4% cf. 12% Maori & 8% cf. 13% Asian
QUALIFICATION		NO UNIVERSITY QUAL. 34% cf. 29% total	UNIVERSITY QUAL. 30% cf. 39% total
HOURS LISTENING		TOTAL AVERAGE HOURS A WEEK 22.0 hours cf. 27.1 hours total	N/A

Q1, Q2, Q3, Q38, Q15a+Q16a

GENRES LISTENED TO

INCIDENTALS LISTEN TO AN AVERAGE OF 3.7 GENRES



PREFERRED GENRES BY SEGMENT	TOTAL	MUSIC INCIDENTALS
POP	68%	62%
ROCK	65%	59%
COUNTRY	33%	26%
SOUL, FUNK AND R&B	36%	24%
BLUES	29%	18%
METAL	24%	18%
ELECTRONIC & DANCE	26%	18%
HIP-HOP OR RAP	30%	17%
REGGAE	28%	17%
CLASSICAL MUSIC	25%	15%

PREFERRED GENRES BY SEGMENT	TOTAL	MUSIC INCIDENTALS
RELIGIOUS AND SPIRITUAL MUSIC	17%	15%
ALTERNATIVE	28%	14%
MUSIC FROM STAGE MUSICALS AND SHOWS	20%	14%
JAZZ	21%	11%
WORLD MUSIC	19%	11%
FOLK MUSIC	13%	7%
MAORI MUSIC	13%	6%
OTHER	4%	6%
PACIFIC MUSIC	13%	5%
OPERA	8%	3%

Base: Those who listen to music 'sometimes or more often' (Q5)
 Q17: Please tell us which of the following genres or types of music you like to listen to?

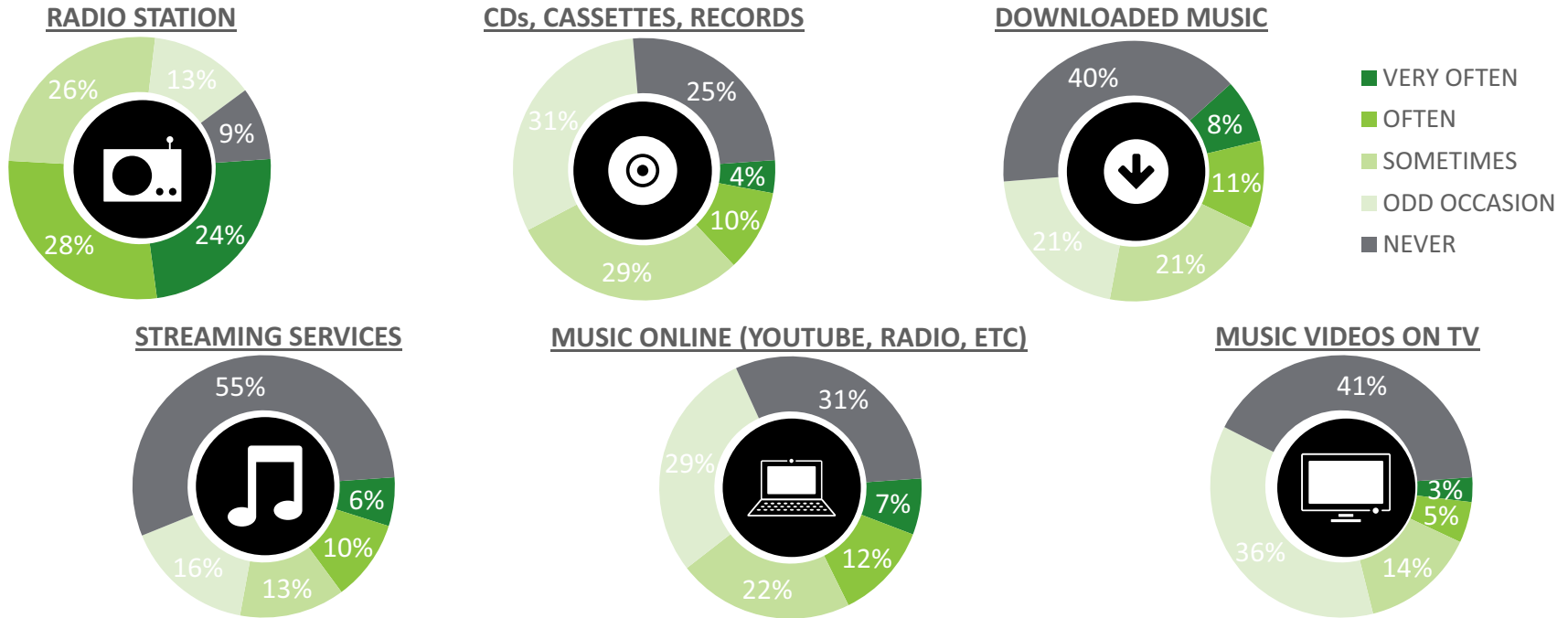
Sig. lower vs. total Sig. higher vs. total

MUSIC SOURCES



INCIDENTALS TEND TO LISTEN TO MUSIC ON RADIO STATIONS VS. OTHER MODES OF MUSIC LISTENING

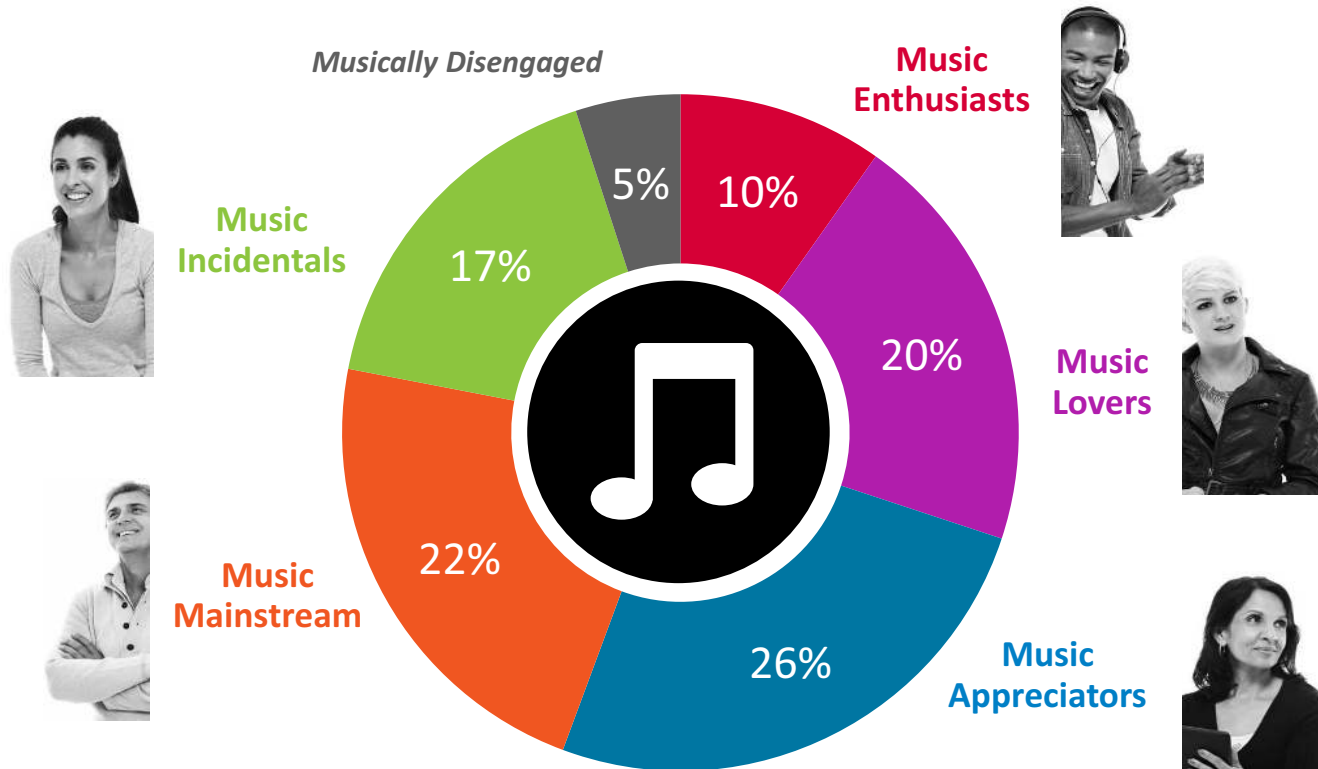
FREQUENCY OF LISTENING OR WATCHING MUSIC



Copyright ©2017 The Nielsen Company. Confidential and proprietary.

Base: Those who listen to music 'sometimes or more often' (Q5)
 Q6: When thinking about music in general, how often do you listen / watch...

MUSIC SEGMENTS AND THEIR SIZE

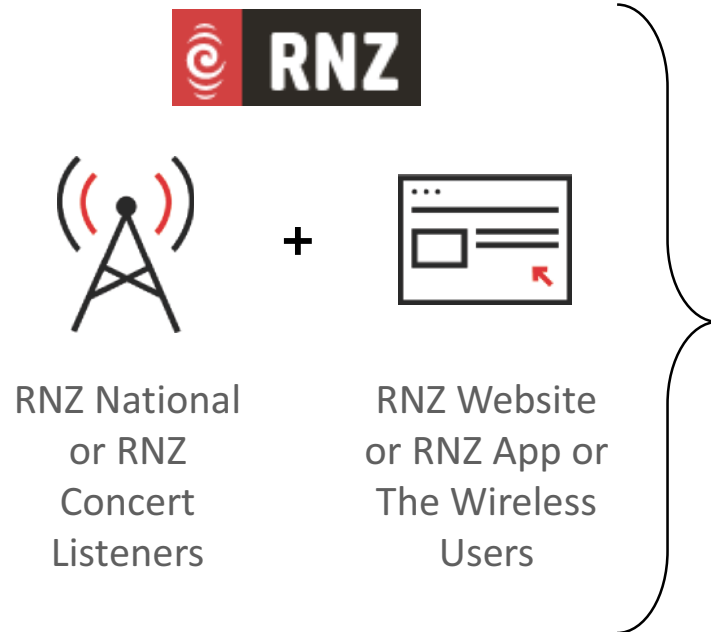


Base: All respondents (n=2094)
 Note: segment model was developed without the 'Musically Disengaged'

An abstract graphic on the left side of the slide features a dark background with a grid of thin, curved lines in various colors (blue, green, yellow, red, purple) that converge towards the top left. Several colored dots (yellow, green, purple, red) are placed at various points along these lines, with thin lines extending from them across the dark space.

RNZ LISTENERS & DIGITAL USERS

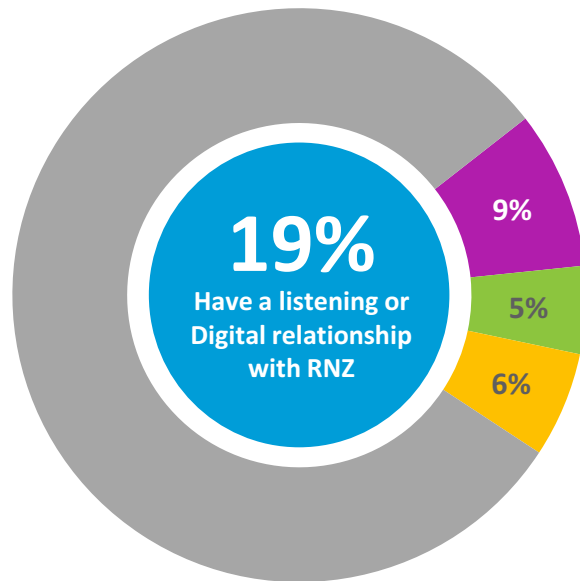
PREFACE: THOSE IN THE MUSIC POPULATION WHO HAVE A RELATIONSHIP WITH RNZ IN GENERAL



Remember, we are talking about people aged 25 – 64 years old who listen to music at least sometimes

- RNZ listeners are those who **like to** listen to RNZ Concert or National
- RNZ Digital users are those who **use** RNZ Digital media (RNZ website, RNZ App, The Wireless)

THOSE WHO HAVE ANY RELATIONSHIP WITH RNZ COMPARED TO THE REST



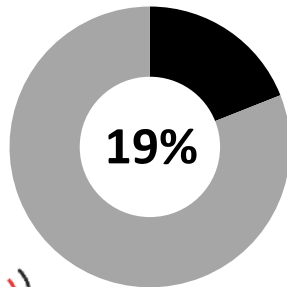
RNZ Listeners or Digital Users

- RNZ Listeners only
- RNZ Digital Users only
- Both Listeners & Digital Users
- No relationship with RNZ

One in five (19%) have a relationship with RNZ either through their liking to listen to RNZ National or Concert and/or using RNZ Digital media (RNZ website, RNZ App, The Wireless)

SEGMENTS' RELATIONSHIP WITH RNZ OVERALL

RNZ
TOTAL RNZ LISTENERS /
DIGITAL USERS

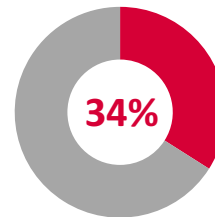


RNZ National or
RNZ Concert

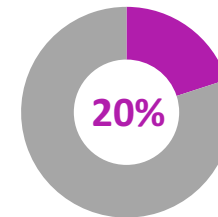
+

RNZ Website or RNZ
App or
The Wireless

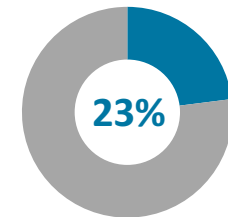
RNZ LISTENERS / DIGITAL USERS
BY SEGMENTS



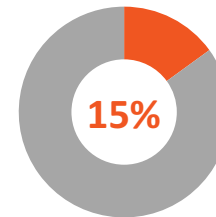
ENTHUSIASTS



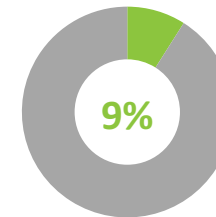
LOVERS



APPRECIATORS



MAINSTREAM



INCIDENTALS

Base: Those who listen to music 'sometimes or more often' (Q5)

Q18: Which of the following radio stations do you like to listen to? / Q33: Which of the following apps and websites, if any, do you use on a regular basis?

SEGMENTS' RELATIONSHIP WITH RNZ MEDIA

	TOTAL n=1,977	ENTHUSIASTS n=183	LOVERS n=416	APPRECIATORS n=522	MAINSTREAM n=480	INCIDENTALS n=376
ALL RNZ	19%	34%	20%	23%	15%	9%
ALL RNZ LISTENERS	14%	17%	16%	17%	14%	7%
RNZ NATIONAL	13%	15%	15%	15%	13%	6%
RNZ CONCERT	3%	4%	3%	5%	2%	2%
ALL RNZ DIGITAL USERS	10%	26%	12%	12%	6%	3%
RNZ WEBSITE	8%	17%	10%	9%	6%	3%
RNZ APP	3%	9%	4%	3%	0%	1%
THE WIRELESS WEBSITE	1%	5%	1%	2%	0%	0%

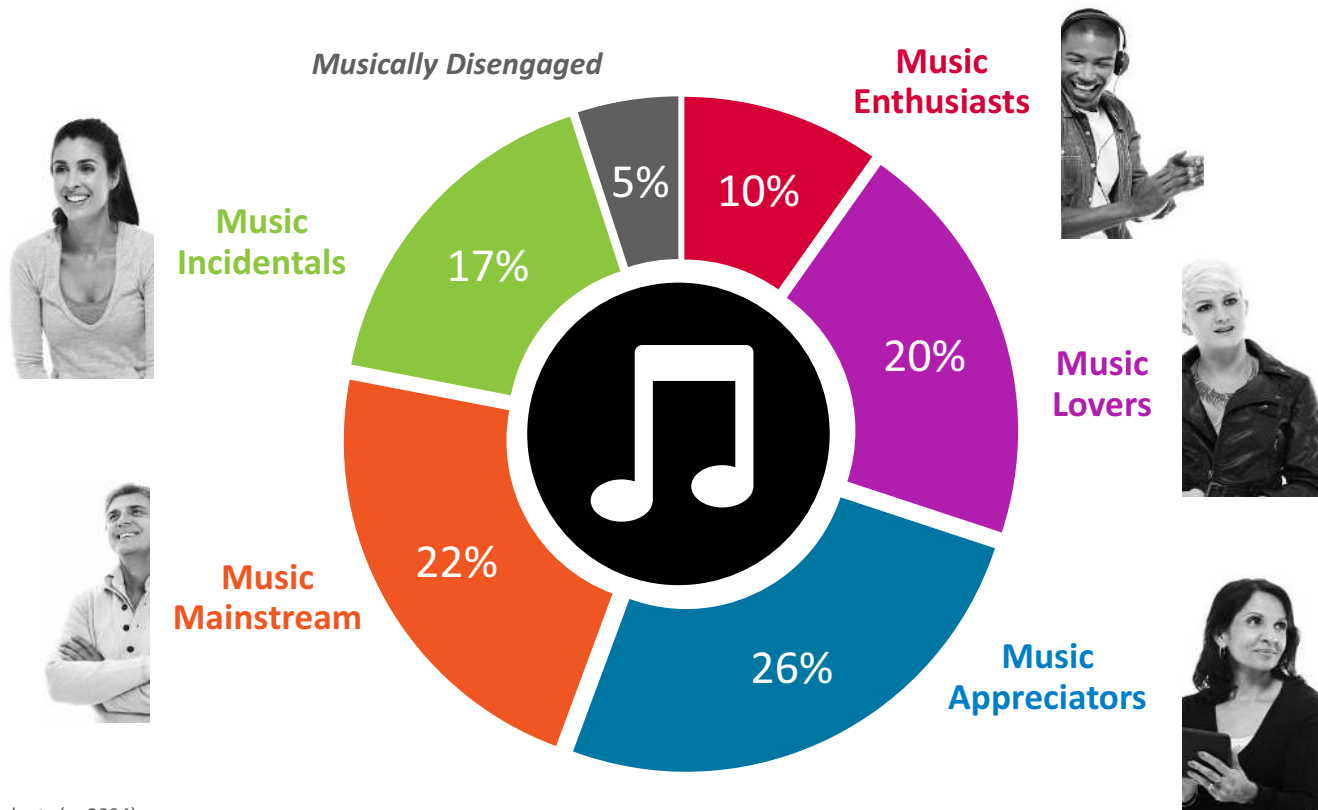
Base: Those who listen to music 'sometimes or more often' (Q5)

Q18: Which of the following radio stations do you like to listen to? / Q33: Which of the following apps and websites, if any, do you use on a regular basis?

Sig. lower vs. total

Sig. higher vs. total

MUSIC SEGMENTS AND THEIR SIZE



Base: All respondents (n=2094)
 Note: segment model was developed without the 'Musically Disengaged'

The image features a dark grey background with an abstract graphic on the left side. This graphic consists of a dense, overlapping grid of thin, multi-colored lines (red, blue, green, yellow) that form a curved, wave-like shape. From the top edge of this grid, several thin lines extend upwards and outwards, each ending in a small, solid-colored dot. The dots are in various colors: blue, red, green, yellow, and purple. In the upper right quadrant, the word "nielsen" is written in a white, lowercase, serif font. Below the name, there are seven small white dots arranged in a horizontal line. Underneath the dots, the tagline "AN UNCOMMON SENSE OF THE CONSUMER™" is written in a smaller, white, uppercase, sans-serif font.

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