



Children's Media Use

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COLMAR BRUNTON
A Kantar Company

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NZ On Air and the Broadcasting Standards Authority (BSA) jointly commissioned Colmar Brunton to conduct research into the media used by tamariki in New Zealand.

Research on this topic was last commissioned in 2014 and since that time the media landscape in Aotearoa has continued to evolve. Most notably, we now have greater choice when it comes to the media we consume, and how, when and where we consume it. This has resulted in increasingly fragmented audiences across a range of domestic and international platforms. Other trends that have impacted the media landscape include the growth of video on demand services, increased popularity of unregulated platforms, changing views of what's acceptable for children and their parents and caregivers, and increased concerns about how we protect children from topics such as violence and terrorism.

Given these developments there is a clear need to update our understanding of children's media use.

Key research questions include:

- What media are children and young people consuming?
- When, where and how are they accessing the content they consume?
- What content do they prefer and what do they not enjoy?
- How do tamariki deal with challenging content?
- What are parents and caregivers concerned about their child seeing or hearing? Also, what are they doing to minimise exposure to challenging content?



Method

Historically *Children's Media Use* has been conducted using a face to face survey. However, in 2020 the decision was made to use a mixed method approach, online and face to face, with the majority of the fieldwork to be completed online.

The key reasons for shifting towards online were to:

- **Future-proof the survey:** It is becoming increasingly challenging to reach a representative sample of households with six to fourteen year olds with a face to face survey in a cost effective way.
- **Offer additional value:** We were able to increase the sample size and ask respondents more questions within the 20 minute timeframe using the online approach.

The reasons for retaining a notable face to face sample, as opposed to shifting the survey purely online were to:

- **Achieve a representative sample:** With a face to face approach we can ensure we reach low income households that may not have access to internet enabled devices.
- **Safeguard the ability to make comparisons in time series data:** There are often notable shifts in attitudes and self-reported behaviours when switching from an interviewer-led approach to online. Conducting face to face interviews in parallel with the online interviews meant we could understand what impact (if any) the change in methodology had on the results.

When comparing results across the online and face to face surveys, we found them to be very similar both in terms of magnitude and rank order of usage, areas of concern and broader attitudes. Consequently, we can be confident that any shift in the results is due to a real change since 2014. Also, as the different methodologies produced such comparable results, we merged them together into one holistic view.



Sampling

We used the Colmar Brunton online panel to recruit parents and caregivers of children aged six to fourteen. Interviews took place between the 2nd and 23rd of March 2020.

We initially set out to conduct 700 interviews online and 300 interviews face to face. However, the viability of face to face interviews was hampered by the arrival of Covid-19. Community concerns saw a significant decline in response rates. Because of this, as well as a desire to put participant and interviewer safety first, we ceased face to face interviews and transitioned the remaining fieldwork online.

In total we interviewed 1,112 children aged six to fourteen and their parents / caregivers (1,005 online and 107 face to face). A sample size of 1,112 has a margin of error of +/- 2.9%.

	Online survey	Face to face survey
Sample size (n)	1,005	107
Interview duration	30 minutes	35 minutes
Response rate	24.5%	13.7%

Weighting was applied to ensure the final sample profile was representative of the six to fourteen year old population by age, gender, region, ethnicity, and household income. The sample was also weighted by day of the week to ensure questions relating to “yesterday” were representative across the week.



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Executive summary



Key findings

What media are children consuming?

On any given day, 98% of children are interacting with some form of media content. Watching videos on overseas platforms like YouTube and using websites and apps are the most popular activities overall.

Netflix and YouTube are the most popular platforms for watching **programmes and shows**. Unregulated platforms like YouTube and streaming services have seen high levels of growth since 2014. This growth has come at the expense of more traditional television channels such as TVNZ 2, which in 2014 was the second most popular source of programmes and shows for children. Local on demand sites such as TVNZ OnDemand have had some success in growing their platforms with children, however the HEIHEI website and app has yet to get a foothold.

A third of children use **social media**. In general, use of social media is low up until children reach 10 years old, at this point usage starts to pick up. Social media apps that allow children to tell stories through images and video are the most popular, and none more so than TikTok. TikTok offers a fun and controlled environment for children to interact with others online. It's possibly because of this that TikTok has a younger audience than the other apps.

Spotify and YouTube are the most popular platforms for **accessing audio content**. Like Netflix, Spotify has enjoyed significant growth since 2014.

Video games are incredibly popular, with nine in ten children playing them. Boys and Māori children are more likely than average to play them, while younger children are less likely.

When, where and how are they accessing content?

Reflecting the trend towards streaming services and unregulated platforms, the **devices present in family homes** have changed dramatically since 2014. Access to streaming services and Smart TVs has increased, while access to radio, DVD players, and SKY TV has dropped off. On average, there are eight devices in each home, of which children have access to six.

Television is the most **popular device** for watching programmes and shows on. However, many children also watch through a second device.

Forty-eight percent of children **access content outside of their home**, the most common activities are ones that can easily be done on smaller devices i.e. surfing the internet, watching YouTube and using social media.

There are certain **times of day when children are more likely to consume different types of content**. Some children watch programmes and shows before school, but the most common time to watch is between 6pm and 8.30pm. Online use tends to peak slightly earlier in the afternoon, between 3pm and 6pm. Those who listen to live radio appear to be doing so on their way to and from school, with similar sized peaks in the morning and early afternoon.

Watching programmes and shows and using the internet are largely solo activities. In contrast, children mostly listen to the radio with an adult around, suggesting much of children's radio exposure is second hand and they are not actively seeking out this type of content on their own. The proportion of children engaging in these activities on their own increases as they age.

What content do they prefer and what do they not enjoy?

Cartoons have the broadest appeal of any **genre**. Enthusiasm for cartoons is greatest when children are young. As they age the genres they enjoy begin to broaden. Genre preferences often differ by gender, boys are more likely to enjoy action and adventure, tech and gaming, and sports shows. Girls, on the other hand, tend to prefer comedy and drama, food and cooking, music, reality, and variety shows.

Children's **favourite programmes and shows** vary greatly, reflecting a highly fragmented media landscape. Overseas programmes Peppa Pig and Paw Patrol are clear favourites among pre-school children, however most don't have a favourite New Zealand-made show. This suggests that local content for pre-schoolers isn't keeping up with the overseas offerings.

A third of parents and caregivers think YouTube is the **best platform** for their six to fourteen year olds and 10% think Netflix is, beyond this preferences are highly fragmented. **Favourite websites or platforms for pre-schoolers** are less varied, this may reflect fewer good-quality options for this age group.

Adventure and multi-player games are the most **popular types of video game**. Older children, particularly boys, are more likely to prefer multiplayer, fighting and shooting, and sports games than average. Younger children and girls are more likely to enjoy educational games. Many children enjoy the social aspect of playing video games, and like to play with their friends and family.



Three quarters of parents and caregivers agree that it's important for their children to watch local programmes and shows that reflect them and their world, and 42% of those aware of HEIHEI agree it's a good place to find local content.

Awareness of HEIHEI is sitting at 49% among children, and 17% have used it. However, despite the fact that nearly half of those children who have used HEIHEI enjoy it, children are not using it regularly. Platforms with higher reach such as Netflix and YouTube are more likely to be top of mind when children are deciding where to go to access their content. It will be difficult to contend with these goliaths.

Key findings

How do tamariki deal with challenging content?

Most 10 to 14 year old children have been exposed to **content that has bothered or upset them** (87% for programmes and shows, 72% for internet and 54% for radio). The most common types of content children find upsetting to see relate to sex and nudity, violence and animal harm.

Children fundamentally rely on adult advice (71%) to **navigate the risk of being exposed to harmful content**. Parents and caregivers do this by signalling to children what is appropriate and inappropriate for their age e.g. naked bodies (59%), rude or naughty words (49%) and violence (48%).

Classification labels (51%) and **warning messages** (47%) provide important support to parents, caregivers and children by making the risk of seeing inappropriate content clear and accessible. Most children have a clear idea of which classification level is right for them.

The **8.30pm watershed** continues to be an important and well remembered broadcast television mechanism for half (46%) of children. However, as viewing moves more to on demand, we are seeing awareness levels decline (39% not aware in 2020 compared to 26% in 2007).

Tamariki respond to **distressing material on programmes or shows** by quickly removing the offending material by switching to something else (48%) or physically shielding their eyes (32%). Telling an adult is a coping mechanism for 39% and in most instances (92%) children feel better after talking about it.

For **distressing content on the internet**, children most often navigate to a different website (41%) or close the offending window (36%). One in three talk to an adult and 89% feel better as a result of that interaction. Twenty percent of children block offending material, but only 11% use the built-in reporting protocols for websites and apps.

What are parents and caregivers concerned about their child seeing or hearing?

Nearly all parents and caregivers are concerned about what their children might encounter when consuming media. Parents and caregivers are most concerned about their children being exposed to inappropriate content when watching programmes and shows and using the internet. They are somewhat less concerned that their children will hear inappropriate content on the radio.

For **programmes and shows**, parents and caregivers are most concerned about content that shows sex (81%), violent or abusive behaviour (79%), torture (76%), animal torture (74%), killing (72%) and drug taking (71%). Racist language is also a concern for two in three parents and caregivers.

When their tamariki are **on the internet**, they are most worried about them being exposed to sexual material and pornography (80%), contact with strangers (79%), bullying (72%), viruses (62%) and derogatory views such as racism, extremism or sexism (70%). Interacting with others on chatrooms and forums is also troubling for 63%. With the increased prevalence of smartphones, uploading of pictures is a worry for 60% of parents and caregivers.

For **radio and audio streaming services**, sexually suggestive language (67%), sexist comments (63%), racist comments (63%), and explicit or inappropriate lyrics (61%) are of most concern to parents and caregivers. Coverage of world events such as terrorism, war, death or natural disasters is problematic for just under half (49%) of parents and caregivers.

What are parents and caregivers doing to minimise exposure to challenging content?

Protecting children from inappropriate content on **programmes and shows** means almost all parents and caregivers (96%) have rules in place. Most (86%) have enforced time restrictions, and 75% have rules around supervision. Two thirds (67%) have rules about the types of content their tamariki can view. Only four in ten (42%) are using parental control settings. Given only 15% of children are allowed to watch programmes and shows unsupervised, “always-on” tools like parental controls have the potential to play a greater role.

Many children (58%) have a set curfew for **watching programmes and shows**. On average this is 7.30pm for six to eight year olds, 8pm for nine to eleven year olds and 9pm for twelve to fourteen year olds. While there is a high reliance on household rules to protect children, fewer are aware of the 8.30pm watershed than in 2014, and parents are using classifications and warnings to guide their decisions less frequently.

Ninety-three percent of parents and caregivers have rules in place about **using the internet**. Common controls include regularly checking on what their child is doing, and restricting screen time. Most parents and caregivers check on what their children have been doing online at least some of the time by looking at their app usage. Half (48%) of all parents and caregivers use filtering software or in-app controls to stop their children from accessing inappropriate content. Technical savvy is playing a role in adoption of these controls. The main reason people don't try to restrict what their children can access through filtering software or in-app controls is that they trust their child to pick appropriate content. Others don't know how to go about this (24%), this is particularly true for Māori (36%).

Rules around **audio content** exist in 75% of households. Most often parents and caregivers switch off or change inappropriate content, regularly check in on what their child is listening to, and monitor volume levels. Only 22% have restrictions on what content they can access.

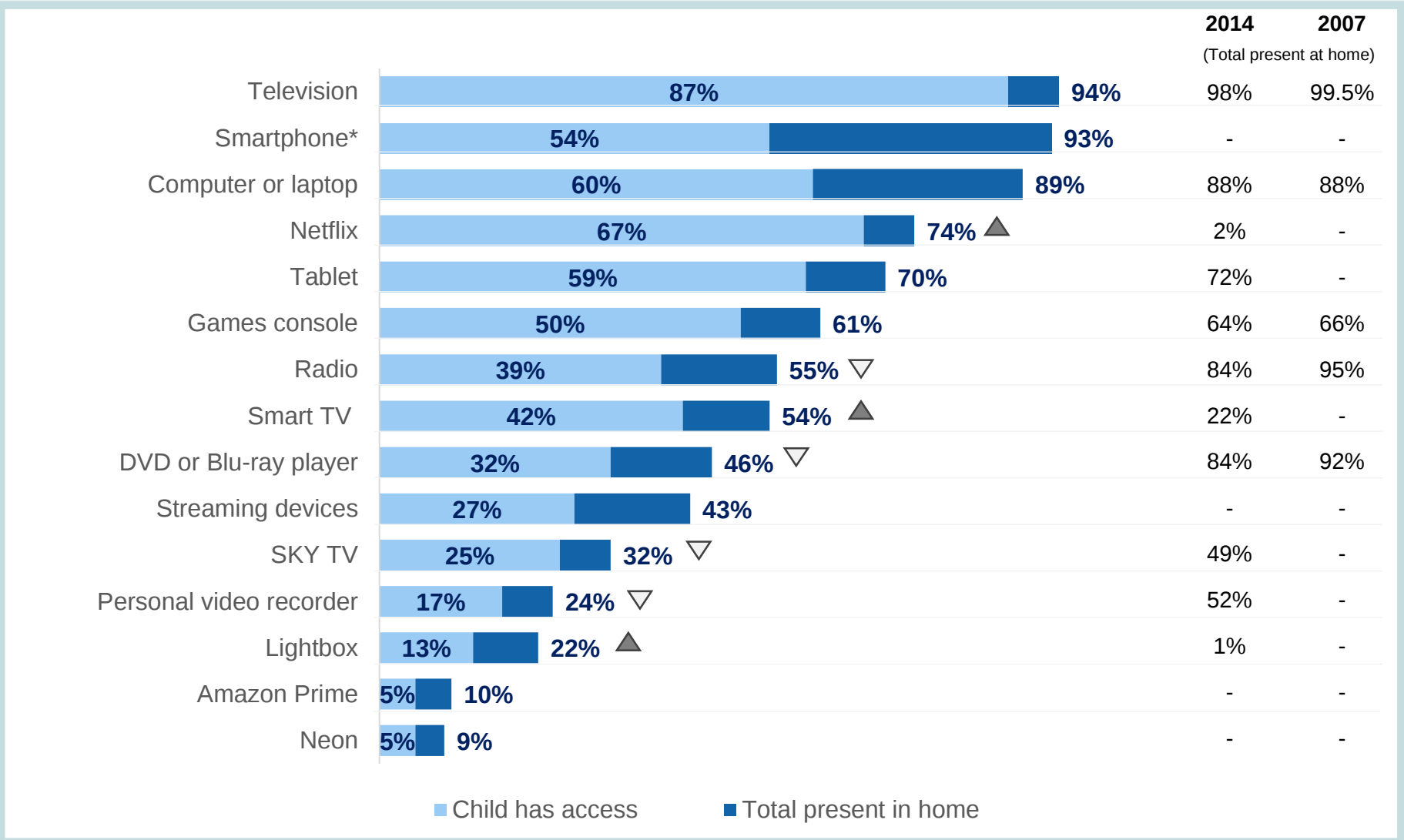
Devices available and used

Devices and platforms / services available

Access to streaming services and Smart TVs has increased dramatically since 2014, while access to radio, DVD players, and SKY TV has dropped off.

There is widespread access to television, smartphones and computers.

On average, children have eight of these things in their household, and have access to six of them.



*Proportion of children with access to their own personal smartphone was 48% in 2014
Note: Please interpret these results with caution, an online method is likely to overestimate levels of access to devices. It's worth noting that access to devices was broadly consistent between online and face to face samples. However, we observed relatively lower levels of access to TV, games consoles, and Sky TV for face to face participants.
Source: S1Q1. Firstly, which of these do you have in your home? | S1Q2. And which of these does [CHILD] have access to?
Base size: All parents and caregivers of 6 to 14 year olds 2020 (n=1,112); 2014 (n=708); 2007 (n=604)

Devices and platforms / services available

Pacific and Asian children are less likely than average to have access to a range of devices, as are children from low income households.

	Total	Ethnicity				Region					Household income			
		NZ European	Māori	Pacific peoples	Asian	Auckland	Wellington	Other North Island	Canterbury	Other South Island	Up to \$50,000	\$50,001 to \$80,000	\$80,001 to \$120,000	Over \$120,000
Television	94%	96%	95%	92%	90%	93%	97%	94%	96%	93%	92%	95%	93%	96%
Smartphone	93%	94%	92%	90%	92%	92%	96%	93%	98%	91%	92%	92%	93%	95%
Computer or laptop	89%	91%	86%	80%	90%	87%	92%	86%	92%	92%	78%	86%	92%	94%
Streaming services	77%	81%	80%	74%	57%	76%	76%	78%	76%	77%	62%	71%	77%	87%
Tablet	70%	73%	66%	59%	64%	68%	73%	66%	75%	76%	57%	66%	69%	79%
Games console	61%	64%	69%	64%	47%	57%	63%	63%	64%	59%	56%	62%	61%	62%
Radio	55%	61%	52%	45%	46%	51%	69%	50%	67%	60%	47%	56%	60%	58%
Smart TV	54%	55%	50%	48%	51%	56%	50%	51%	59%	51%	27%	49%	56%	68%
DVD or Blu-ray player	46%	54%	43%	27%	34%	35%	55%	46%	52%	60%	36%	37%	51%	50%
Streaming devices	43%	48%	45%	31%	31%	39%	49%	44%	45%	47%	31%	34%	43%	55%
SKY TV	32%	34%	36%	31%	14%	27%	35%	35%	31%	34%	21%	26%	32%	40%
Personal video recorder	24%	30%	21%	15%	10%	23%	24%	25%	21%	32%	14%	17%	23%	33%

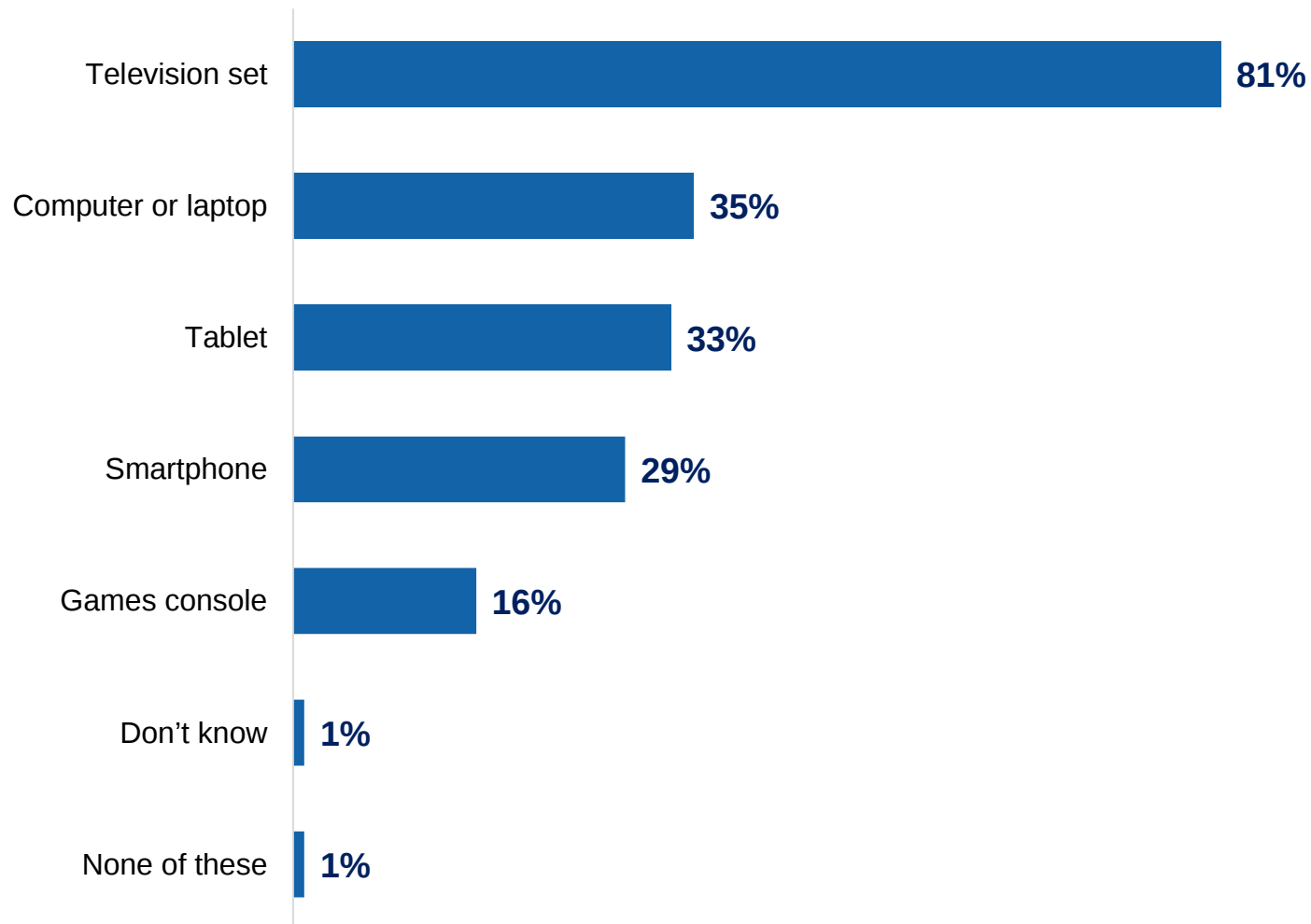
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Source: S1Q1. Firstly, which of these do you have in your home?
Base size: All parents and caregivers of 6 to 14 year olds 2020 (n=1,112)



Devices used to watch programmes and shows

Television is the most widely used device for watching programmes and shows.

Children use two devices to watch programmes and shows on average.

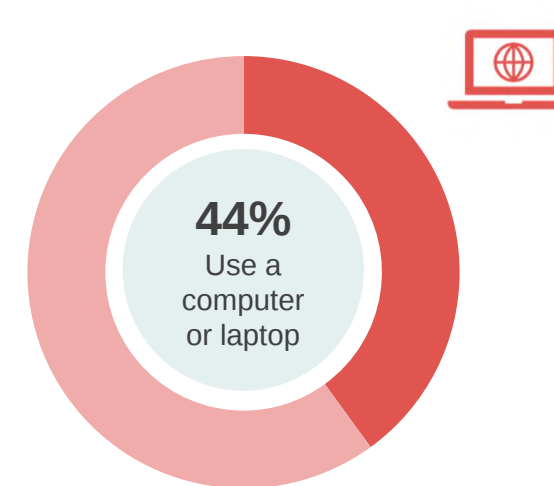
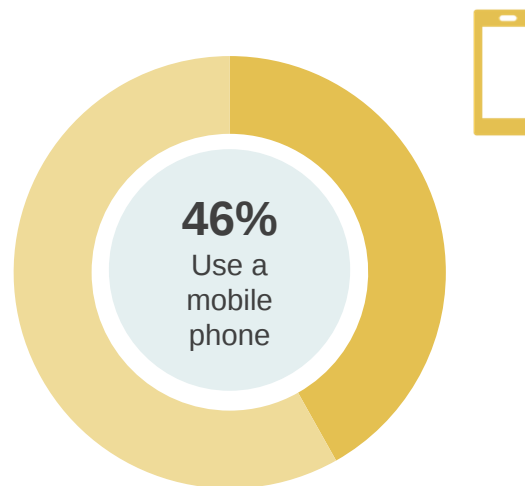
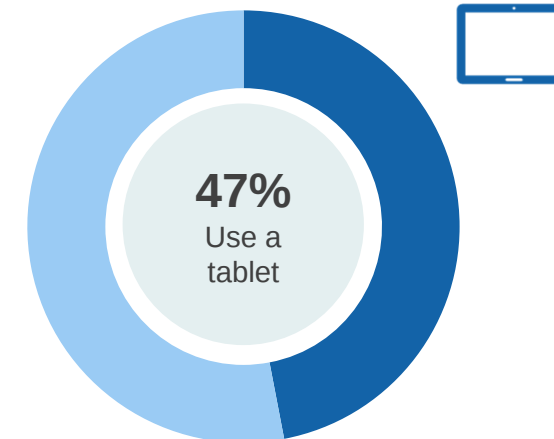
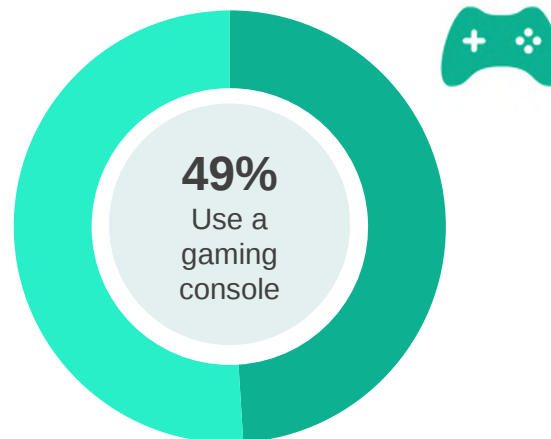




Devices used for gaming

While there is a clear preference for watching programmes and shows on television, there isn't a preferred device for gaming. Gaming consoles, tablets, mobile phones, and computers are all equally popular.

	Lower than average	Higher than average
Gaming console	Girls (38%) Asian (33%)	Boys (59%) NZ European (53%)
Tablet	12 to 14 yrs. (33%)	6 to 8 yrs. (58%)
Mobile phone	6 to 8 yrs. (30%)	12 to 14 yrs. (61%)
Computer or laptop	6 to 8 yrs. (30%)	12 to 14 yrs. (52%) 9 to 11 yrs. (50%)





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Media consumption



Media consumption: section summary

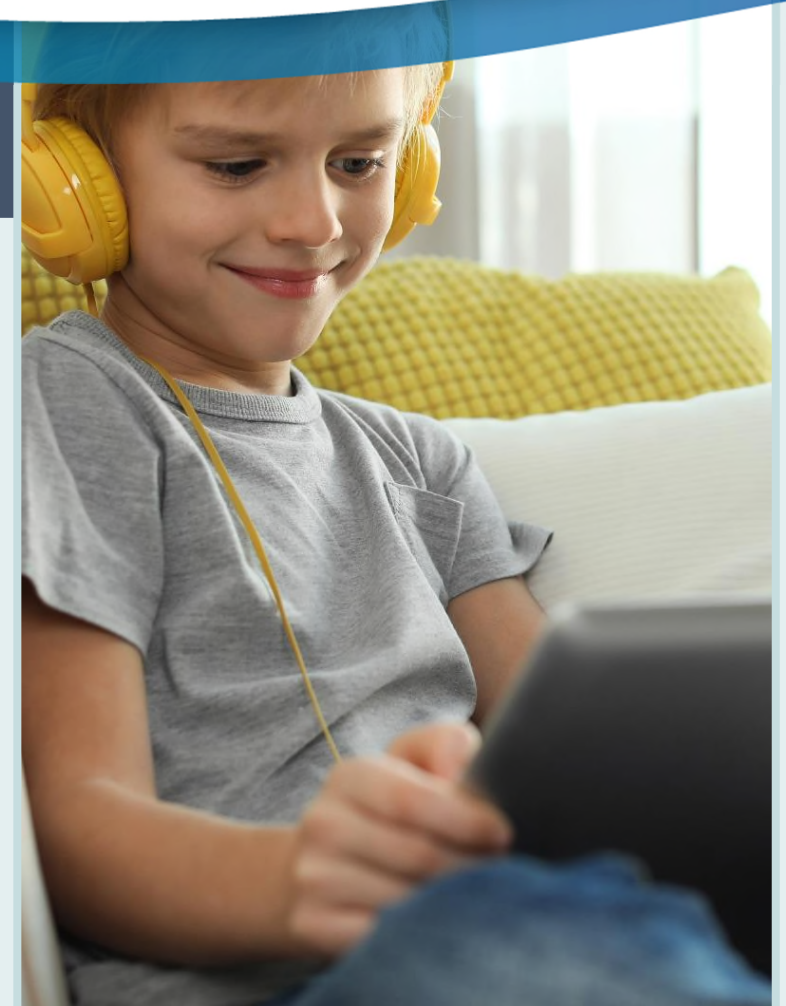
On any typical day, most tamariki interact with some form of media content. Watching programmes and shows (82%) and using the internet (82%) are most present.

When looking at specific activities, watching videos on overseas platforms like YouTube and using websites and apps are the most popular. They are also the activities children spend the most time on. In general, older children are more likely to use online platforms and services which would require the user to find content on their own.

There are distinct patterns for when children consume different types of content. Some children watch programmes and shows before school, but the most common time to watch is between 6pm and 8.30pm. Online use tends to peak slightly earlier in the afternoon, between 3pm and 6pm. Those who listen to live radio appear to be doing so on their way to and from school, with similar sized peaks in the morning and early afternoon.

Forty-eight percent of children access content outside of their home, the most common activities are ones that can easily be done on smaller devices i.e. surfing the internet, watching YouTube and using social media.

Watching programmes and shows and using the internet are largely solo activities. In contrast, children mostly listen to the radio with a grown up around, suggesting much of children's radio exposure is second hand and they are not actively seeking out this type of content on their own.



Media consumption: section summary

Programmes and shows



Netflix and YouTube are the most popular platforms and services for watching programmes and shows. Unregulated platforms like YouTube and streaming services have seen high levels of growth since 2014. On demand channels are also growing in popularity.

Fewer children now watch TVNZ 2, Cartoon Network and Nickelodeon.

Sixteen percent of caregivers turn on captioning for their children when watching programmes and shows. Most often this is for language learning (10%), this is particularly common among Asian children (32%).

Internet



YouTube is the most common place children consume content online, followed by watching shows on streaming services. A third of children use social media. TikTok, Instagram and Snapchat are the most popular. In general, use of social media is low up until children reach 10 years old, at this point usage starts to pick up.

Of all the platforms and apps asked about, YouTube, TikTok, Instagram and Snapchat are most ingrained into the daily lives of users.

Most children are still using the internet at 7pm, after this point they start to log off. Only 21% are still online by 9pm.

Audio content



Spotify and YouTube are the most popular platforms for accessing audio content, with 42% of children listening to each of these respectively.

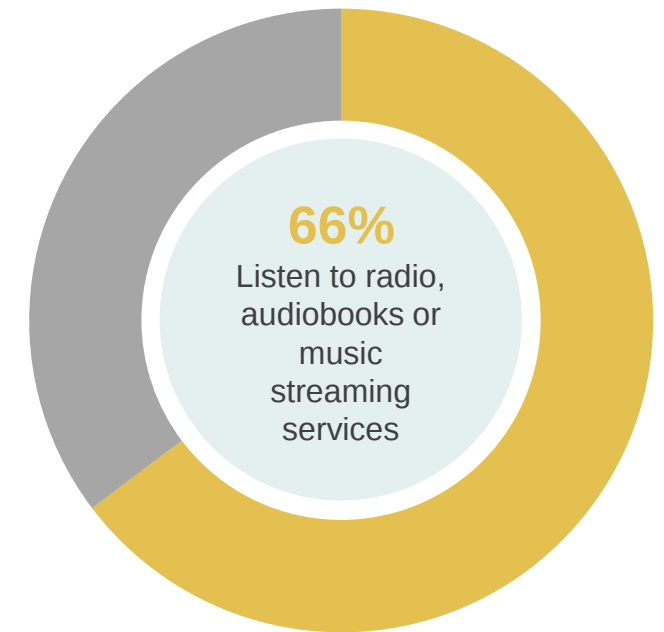
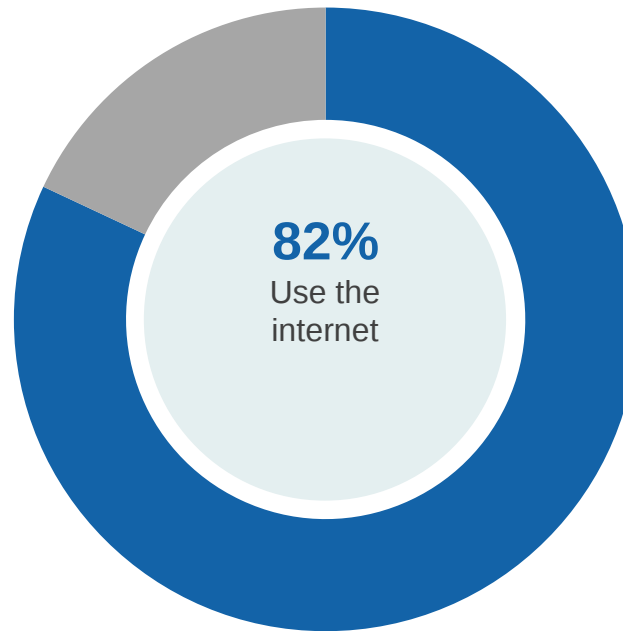
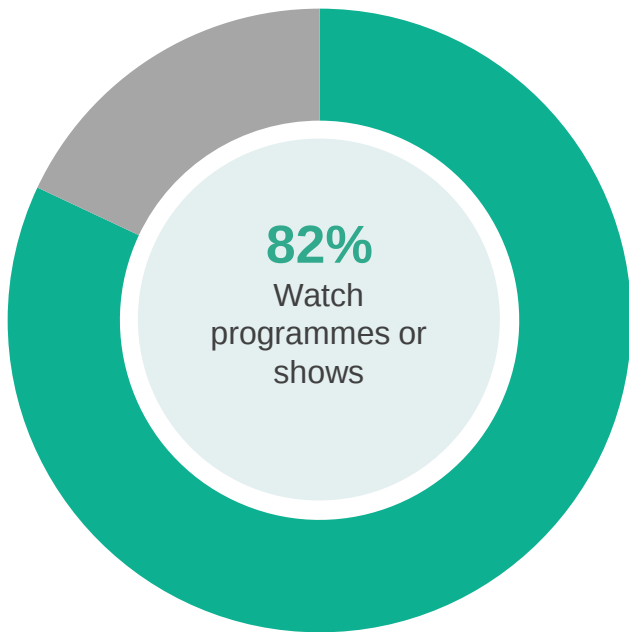
Video games



Nine in ten children play video games. Boys and Māori children are more likely to play than average, while younger children and girls are less likely.

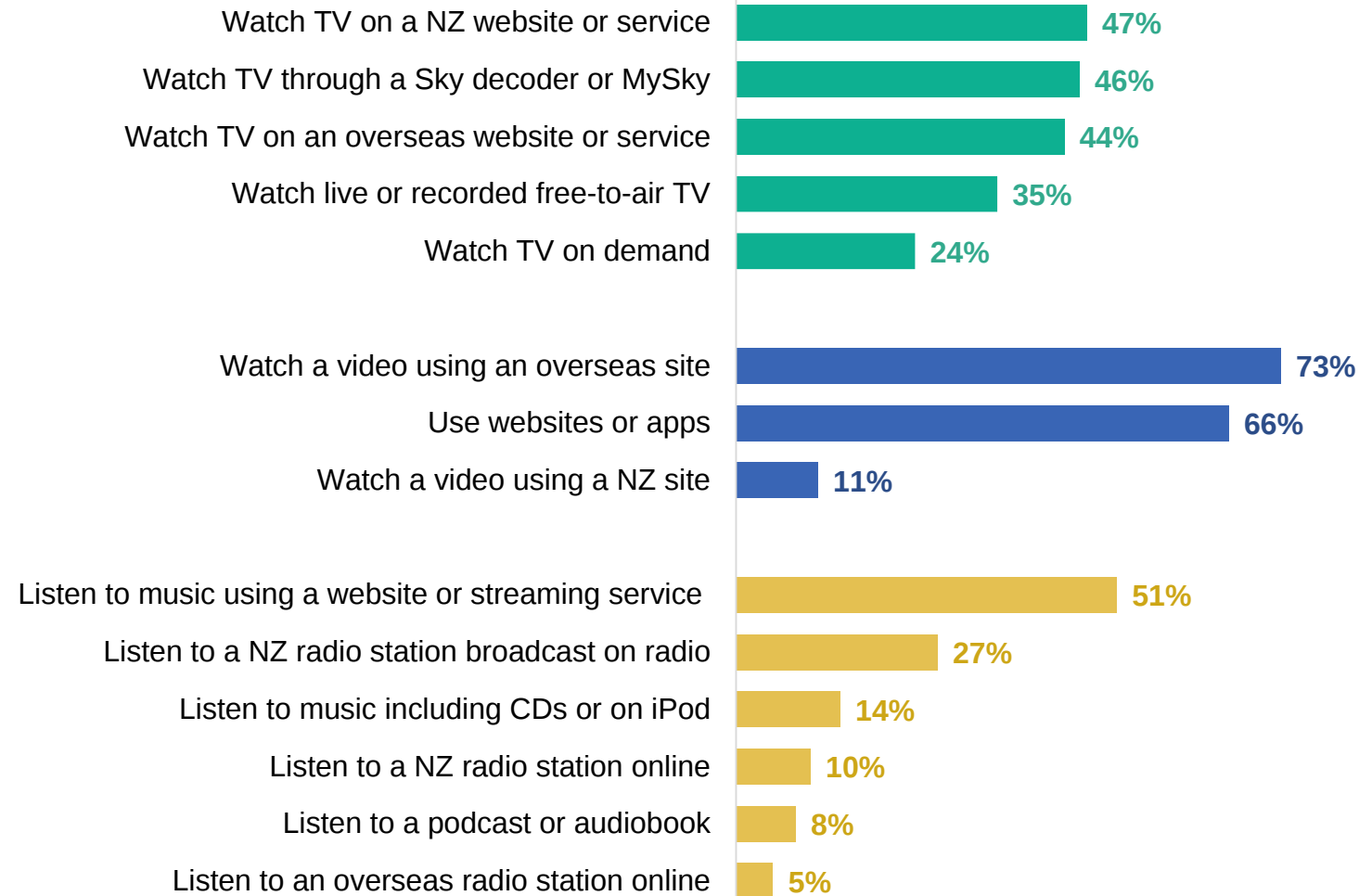
Type of media children consume each day

Almost all children (98%) interact with some form of media content each day. Eighty-two percent of children watch programmes and shows and use the internet respectively, and two thirds listen to radio, audiobooks or streaming services.



Type of media children consume each day

When we break these broad categories down, we see the most popular activities are watching videos online and using websites and apps.



Type of media children consume each day

Age is the biggest differentiator when it comes to the content children consume. Older children are more likely to use online platforms and apps which often require the user to find content themselves.

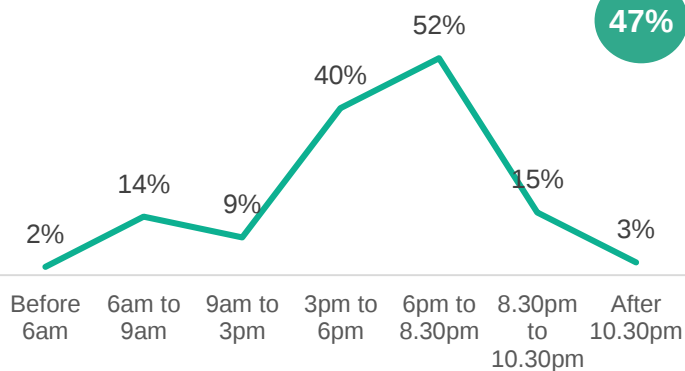
	Total	Age			Gender		Ethnicity				Household income			
		6 to 8 years	9 to 11 years	12 to 14 years	Male	Female	NZ European	Māori	Pacific peoples	Asian	Up to \$50,000	\$50,001 to \$80,000	\$80,001 to \$120,000	Over \$120,000
Watch TV on a NZ website or service	47%	49%	45%	48%	44%	51%	47%	49%	49%	41%	40%	51%	44%	52%
Watch TV through SKY decoder or MySky	46%	44%	47%	48%	45%	48%	46%	52%	45%	36%	47%	46%	48%	45%
Watch TV on an overseas website or service	44%	46%	40%	48%	43%	47%	41%	49%	47%	46%	42%	46%	42%	48%
Watch live or recorded free-to-air TV	35%	33%	36%	35%	34%	35%	34%	31%	31%	35%	41%	32%	39%	32%
Watch TV on demand	24%	23%	22%	27%	24%	24%	21%	28%	30%	24%	32%	23%	24%	22%
Watch a video online using an overseas site	73%	61%	72%	86%	73%	72%	71%	78%	74%	77%	77%	69%	77%	72%
Use websites or apps	66%	45%	69%	87%	65%	67%	66%	68%	72%	60%	66%	68%	70%	65%
Watch a video online using a NZ site	11%	8%	9%	16%	12%	9%	9%	10%	14%	14%	13%	10%	12%	11%
Listen to music on a website or streaming service	51%	41%	46%	69%	49%	54%	48%	61%	58%	57%	49%	51%	56%	50%
Listen to a NZ radio station broadcast on radio	27%	26%	29%	26%	26%	28%	29%	29%	21%	23%	27%	22%	31%	28%
Listen to music on CDs or iPod	14%	14%	11%	18%	14%	14%	11%	15%	13%	18%	21%	14%	14%	12%
Listen to a NZ radio station online	10%	11%	10%	11%	11%	10%	9%	9%	15%	10%	7%	12%	14%	10%
Listen to a podcast or audiobook	8%	9%	6%	8%	9%	7%	6%	7%	10%	12%	8%	8%	10%	7%
Listen to an overseas radio station online	5%	6%	4%	5%	6%	4%	3%	4%	11%	8%	5%	8%	8%	2%



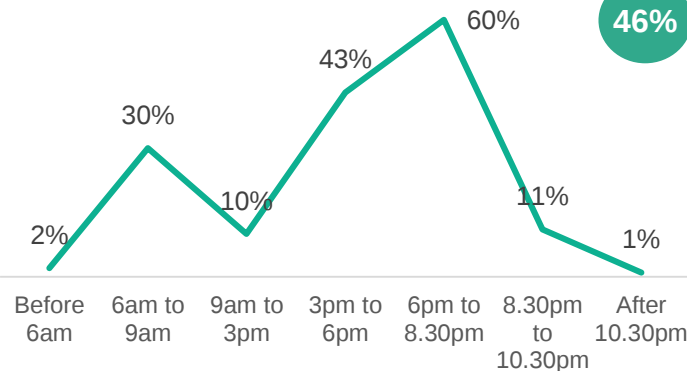
When children watch programmes and shows

A small number of children are watching programmes and shows in the early morning, before school. The proportion of children watching programmes and shows increases after school hours and peaks between 6pm and 8.30pm, after which it declines drastically. It is worth noting that only 9% of children watch free-to-air TV after the 8.30pm watershed.

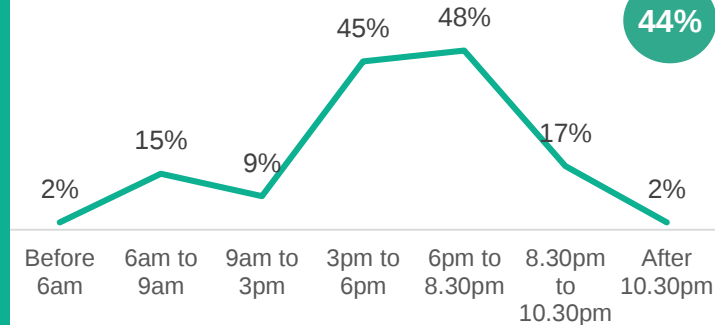
Watch TV on a NZ website or service



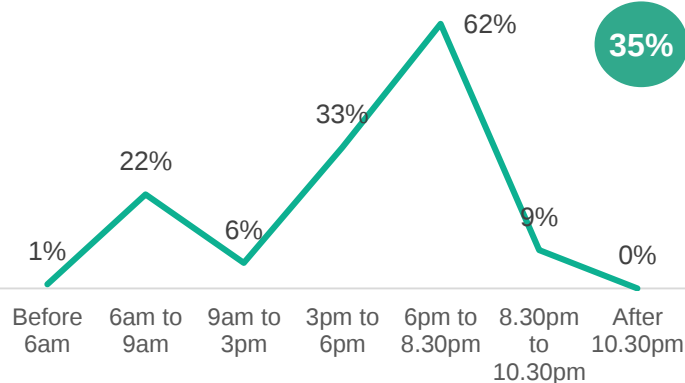
Watch TV through a Sky decoder or MySky



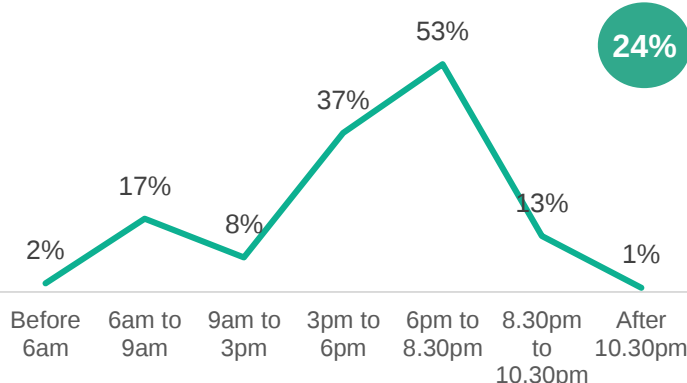
Watch TV on an overseas site or service



Watch live or recorded free-to-air TV



Watch TV on demand

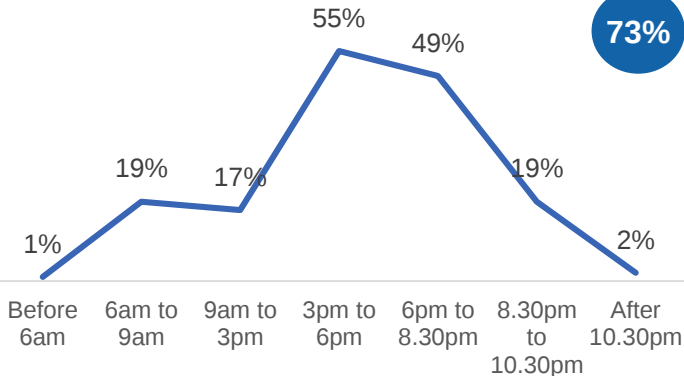




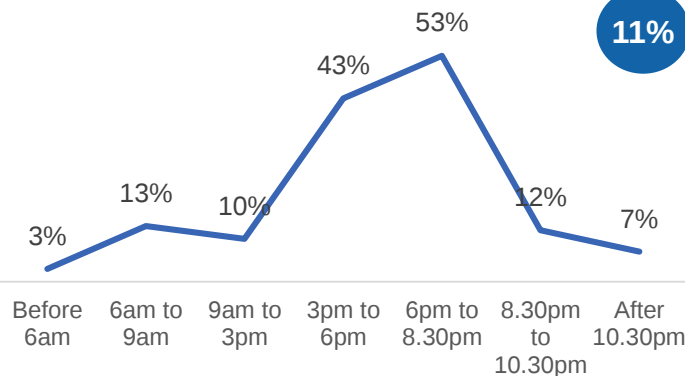
When children are online

Looking at online behaviour, we don't see the same pre-school spike that we do with programmes and shows. Online use tends to peak earlier in the afternoon, between 3pm and 6pm.

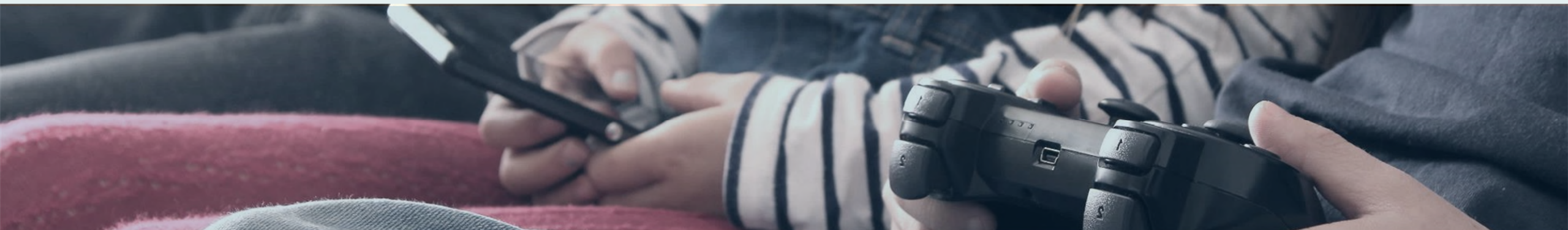
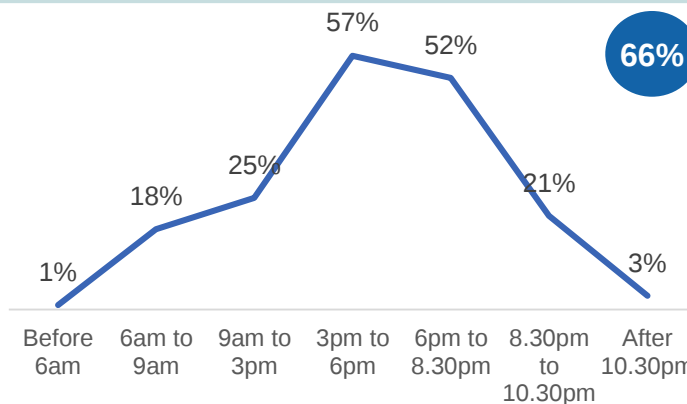
Watch a video online using an overseas site



Watch a video online using a NZ site



Use website or apps

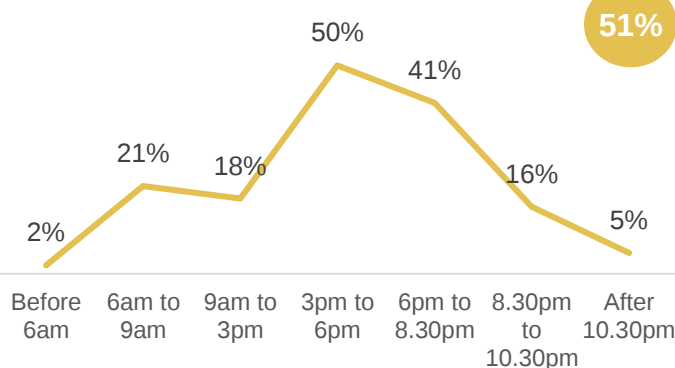




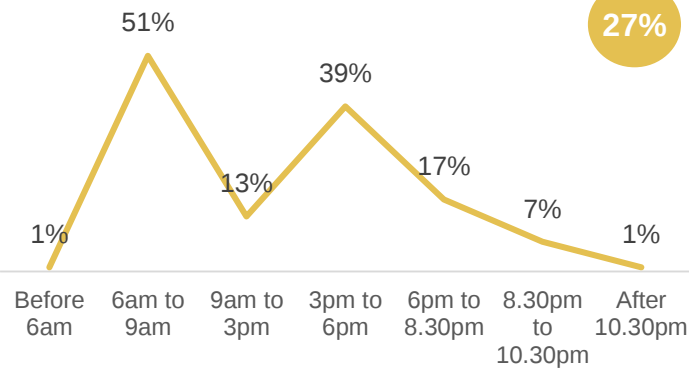
When children are listening to audio content

Media consumption patterns for audio content vary. Those listening to New Zealand radio appear to be doing so on their way to and from school, with peaks in the morning and early afternoon. In contrast, listening to music, podcasts and audiobooks appears to be more of an evening activity.

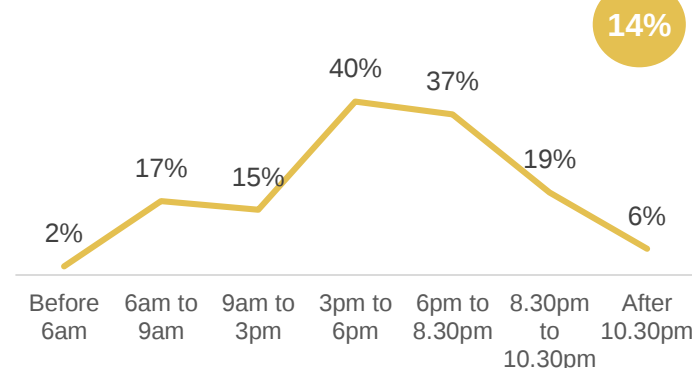
Listen to music on site or streaming service



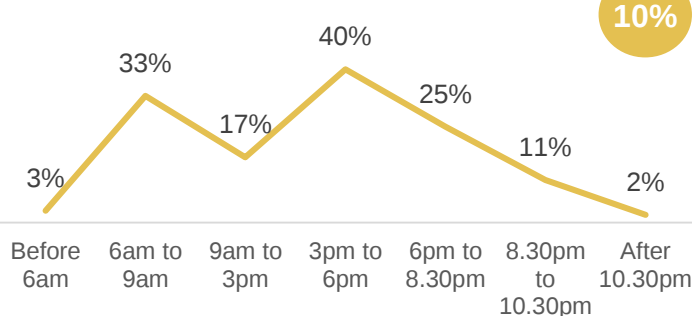
Listen to a NZ radio station broadcast live



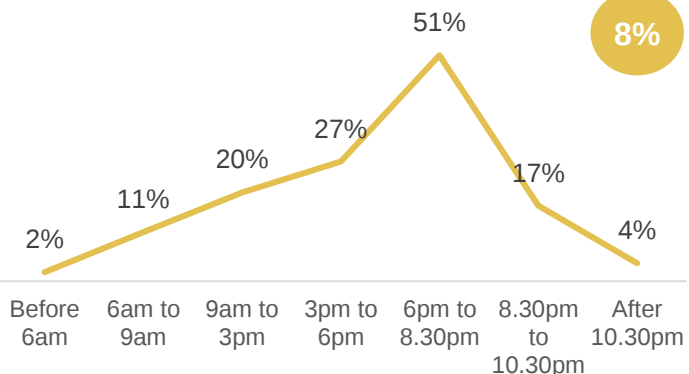
Listen to music on CDs or iPod



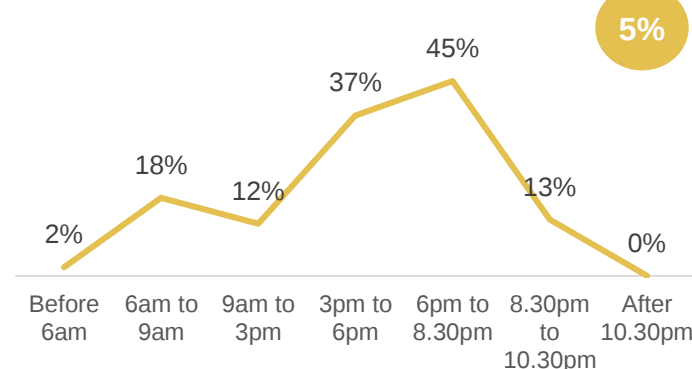
Listen to a NZ radio station online



Listen to a podcast or audiobook



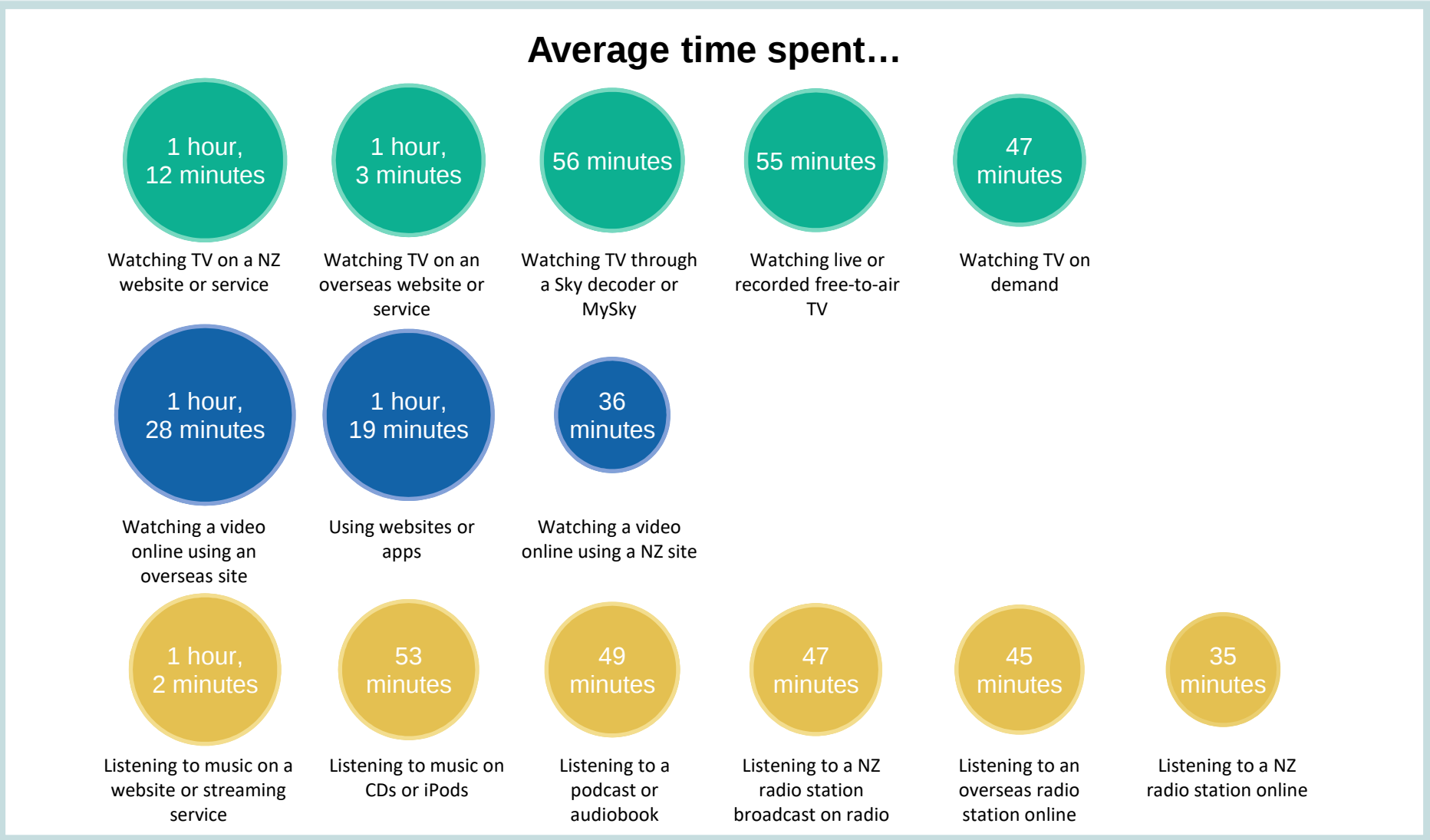
Listen to an overseas radio station online



How long children spend on different activities

Of all the activities we asked about, children spend the most time watching videos online on overseas platforms.

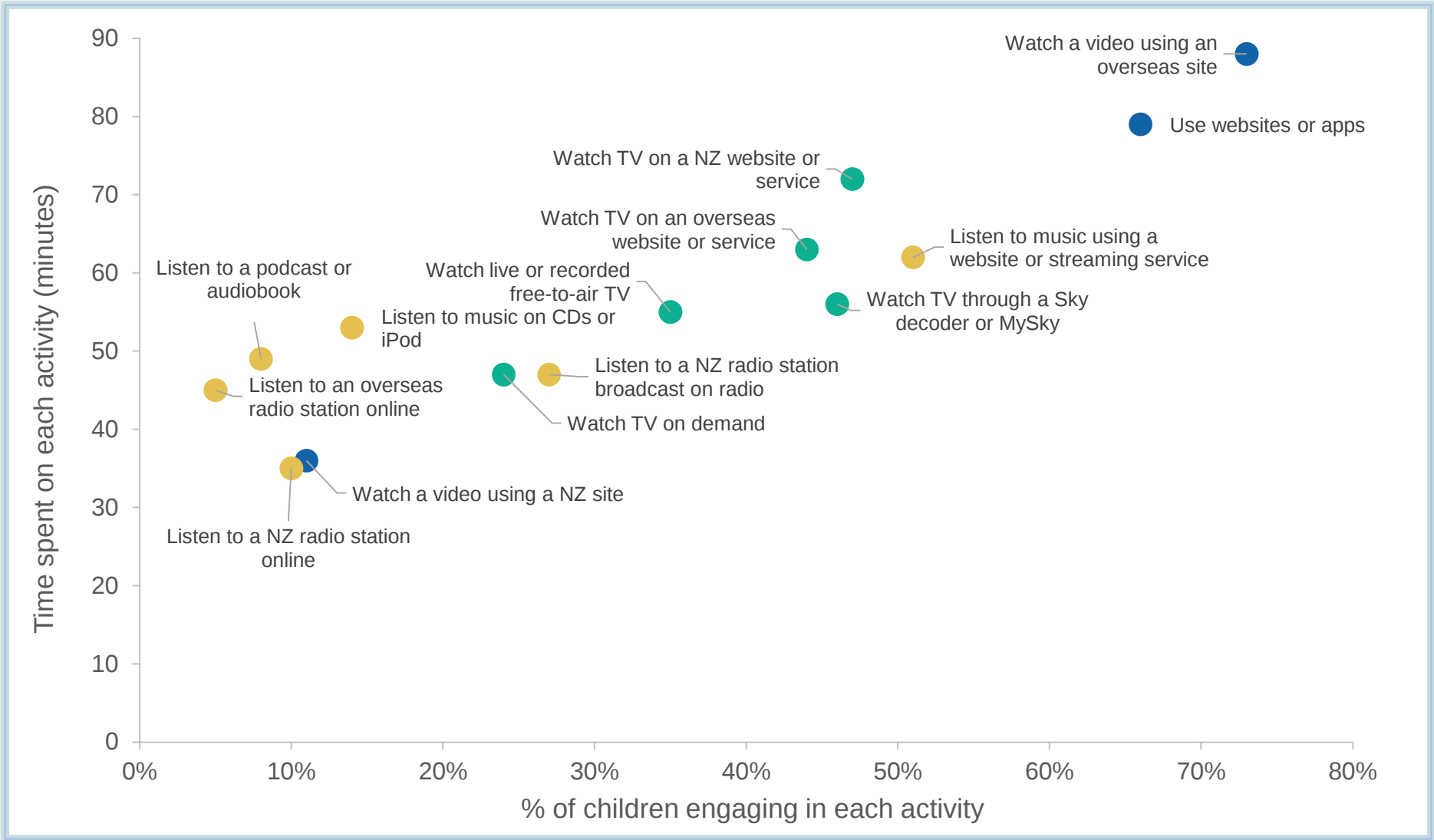
The least amount of time is spent listening to New Zealand radio online, and watching video content on local websites.



Source: S1Q7. Still thinking about yesterday, how long did [CHILD] spend on each of these activities in total?
Base size: All parents and caregivers of 6 to 14 year olds who did each activity yesterday (n=58 to n=789).

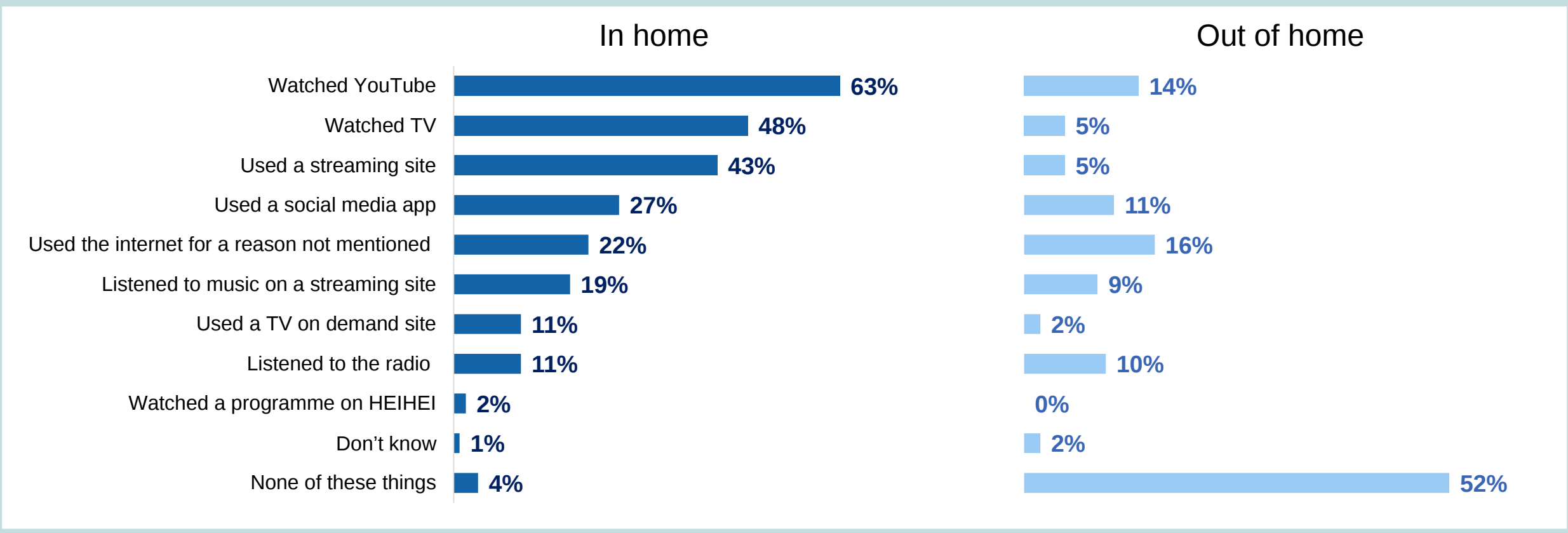
Time spent by the proportion engaging in each activity

Children spend the most time on the most popular activities.



Content consumption in home versus out of home

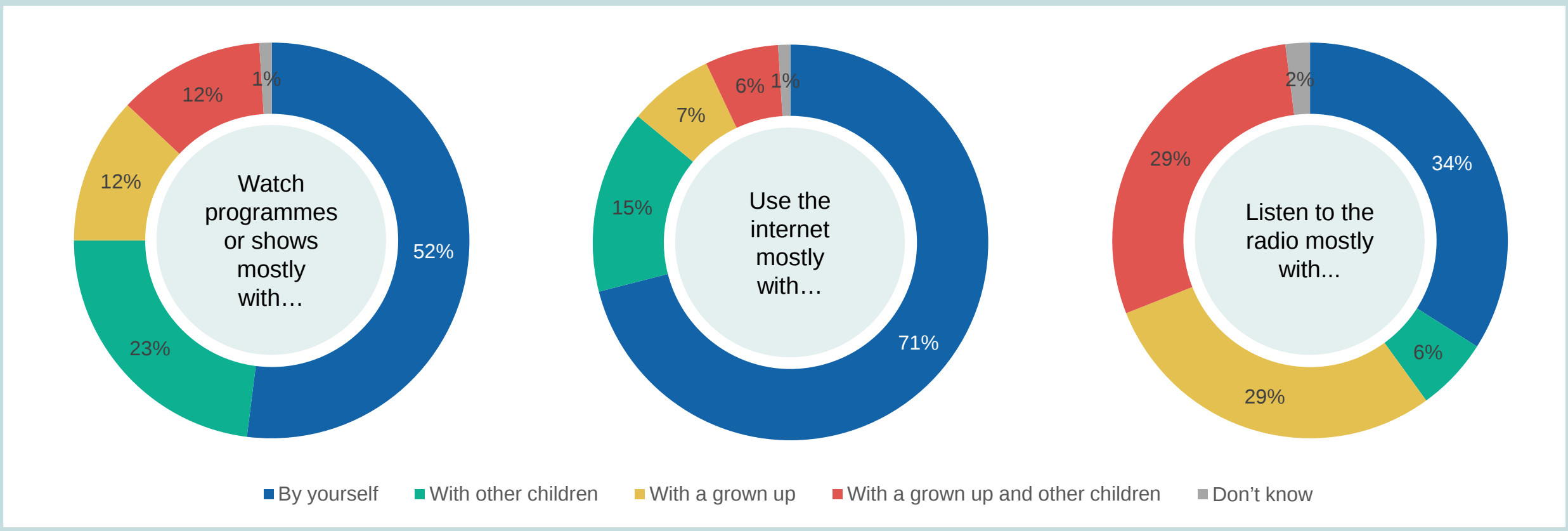
Around half of children access content outside of their home. Most common out of home activities include surfing the internet, watching YouTube, and using social media – all activities that can easily be done on a smaller device.



Source: Q6. Which of these did you do at home yesterday? | Q6b. Which of these did you do when you were away from home yesterday?
Base size: All 6 to 14 year olds (n=1,112)

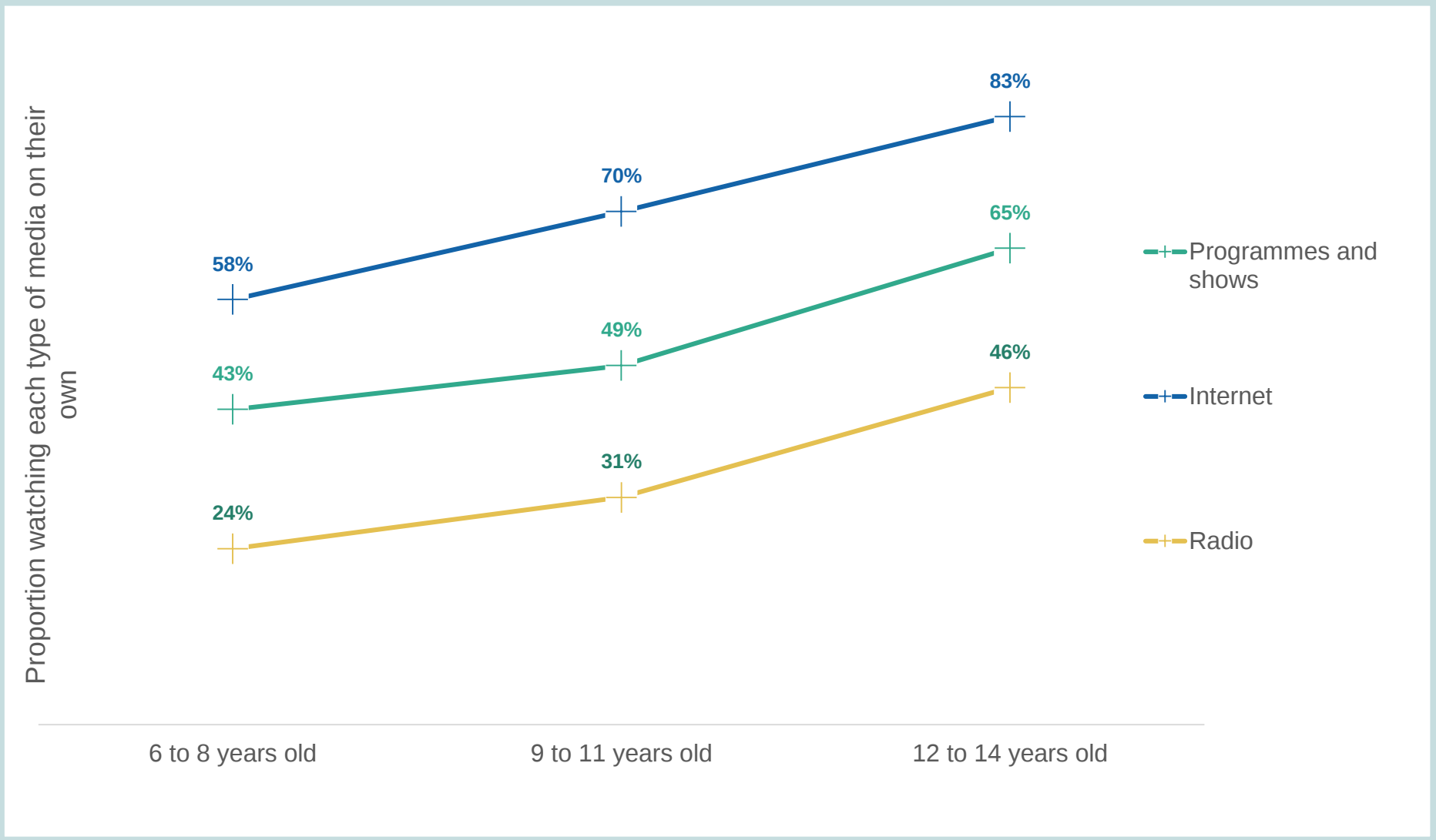
Who is the child with while they use each media?

Watching programmes and shows and using the internet are largely solo activities. In contrast, children most often listen to the radio with a grown up present, suggesting much of children’s radio exposure is second hand and they are not actively seeking out this type of content on their own.



Who is the child with while they use each media?

As children age they are more likely to consume media on their own.





Media consumption: *Programmes and shows*



Daily reach of platforms, channels and streaming services for watching programmes and shows

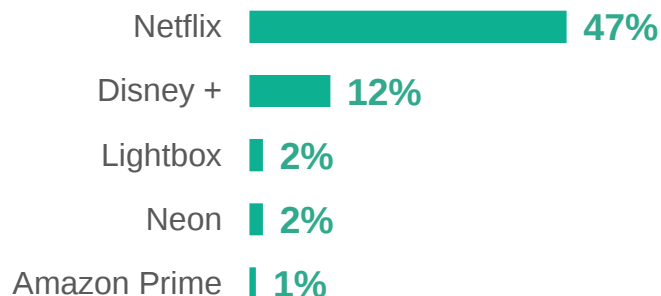
Netflix and YouTube have the highest daily reach of all the platforms, channels and streaming services we asked about.

Both unregulated platforms like YouTube and streaming services have seen high levels of growth since 2014. On demand free-to-air TV channels are also increasingly popular, although HEIHEI and Māori TV OnDemand have yet to get a foothold.

Fewer children now watch TVNZ 2, Cartoon Network and Nickelodeon.

Streaming Services (nett 53%*)

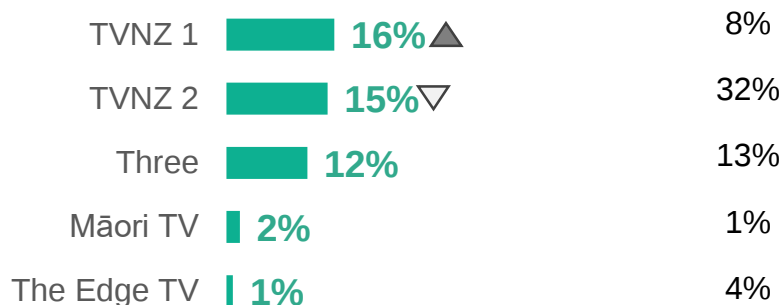
2014
result



YouTube (nett 51%)

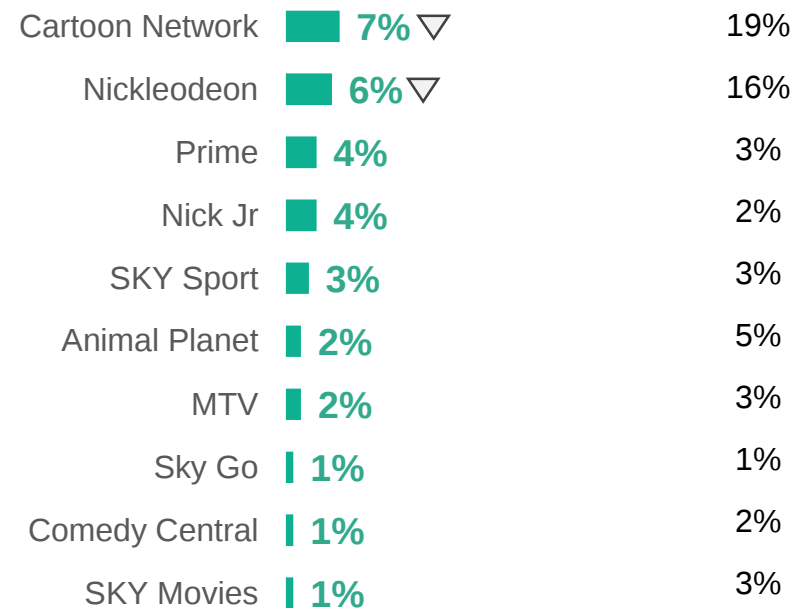


Live free-to-air (nett 31%)

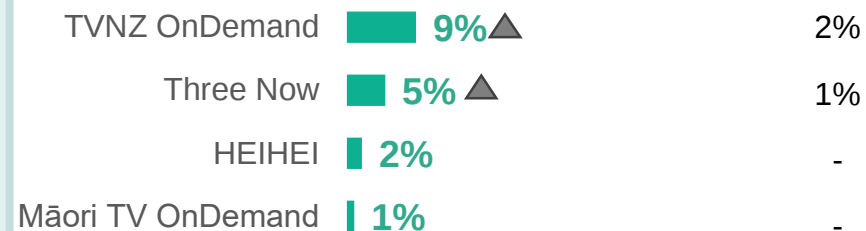


Sky TV channels (nett 17%)

2014
result



On demand free-to-air TV (nett 14%)



*NOTE: daily reach of streaming sites was 1% in 2014
Source: Q1f. Which of these did you watch yesterday?
Base size: All 6 to 14 year olds 2020 (n=1,112), 2014 (n=708)



Demographic differences in daily reach of top five platforms, channels and streaming services

Younger children are less likely to watch YouTube, TVNZ 1 and Three.

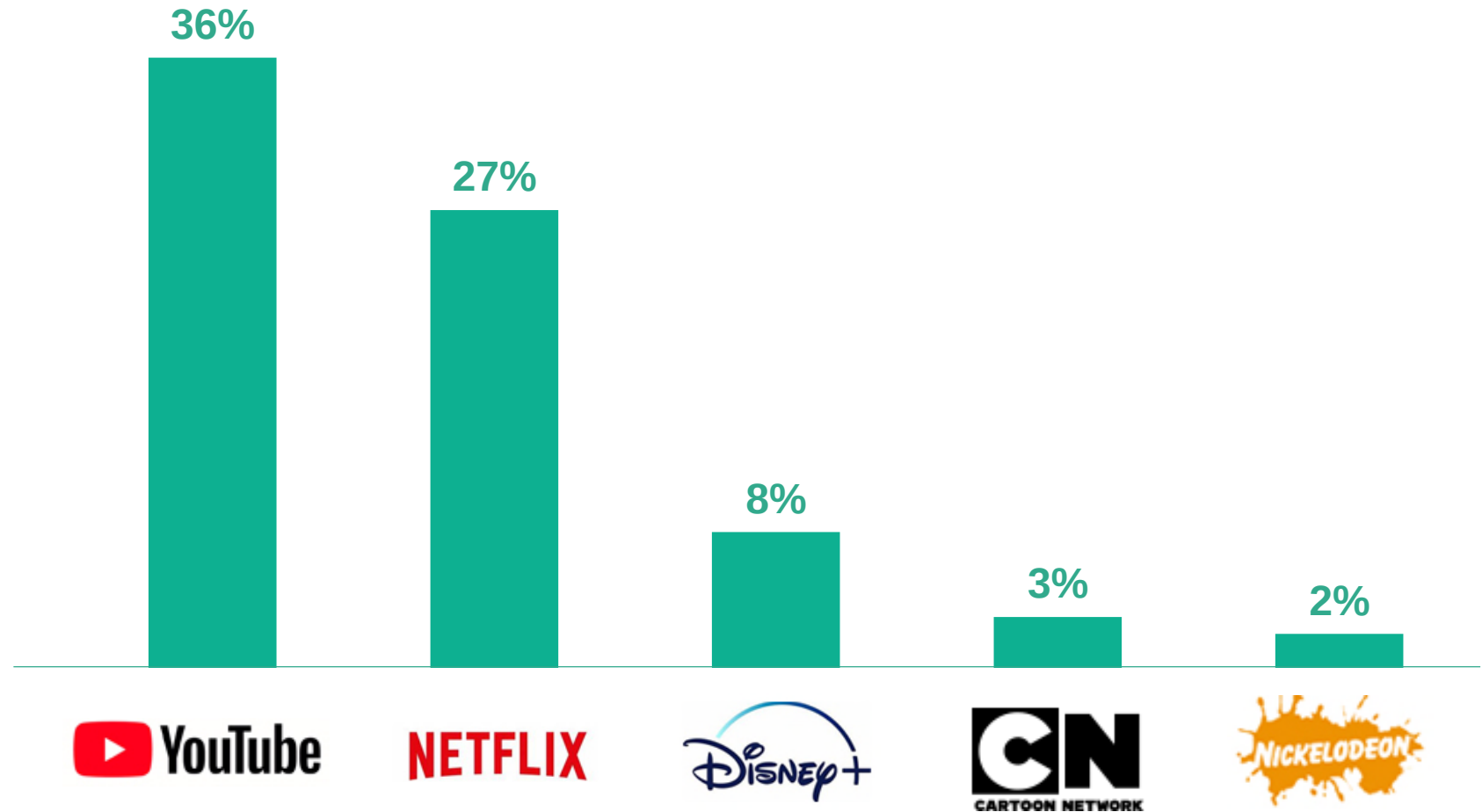
Higher income families are more likely to have paid for a Netflix subscription.

Daily reach	Lower daily reach	Higher daily reach
 YouTube 51%	6 to 8 year olds (45%)	9 to 11 year olds (56%)
NETFLIX 47%	Boys (43%) Asian (38%)	Girls (53%), High income families earning over \$120,000 per year (55%)
tvnz 1 16%	6 to 8 year olds (10%)	-
tvnz 2 15%	High income families earning over \$120,000 per year (9%)	Māori (21%)
+HRE 12%	6 to 8 year olds (7%) Asian (6%)	12 to 14 year olds (17%)



Favourite place to watch programmes and shows

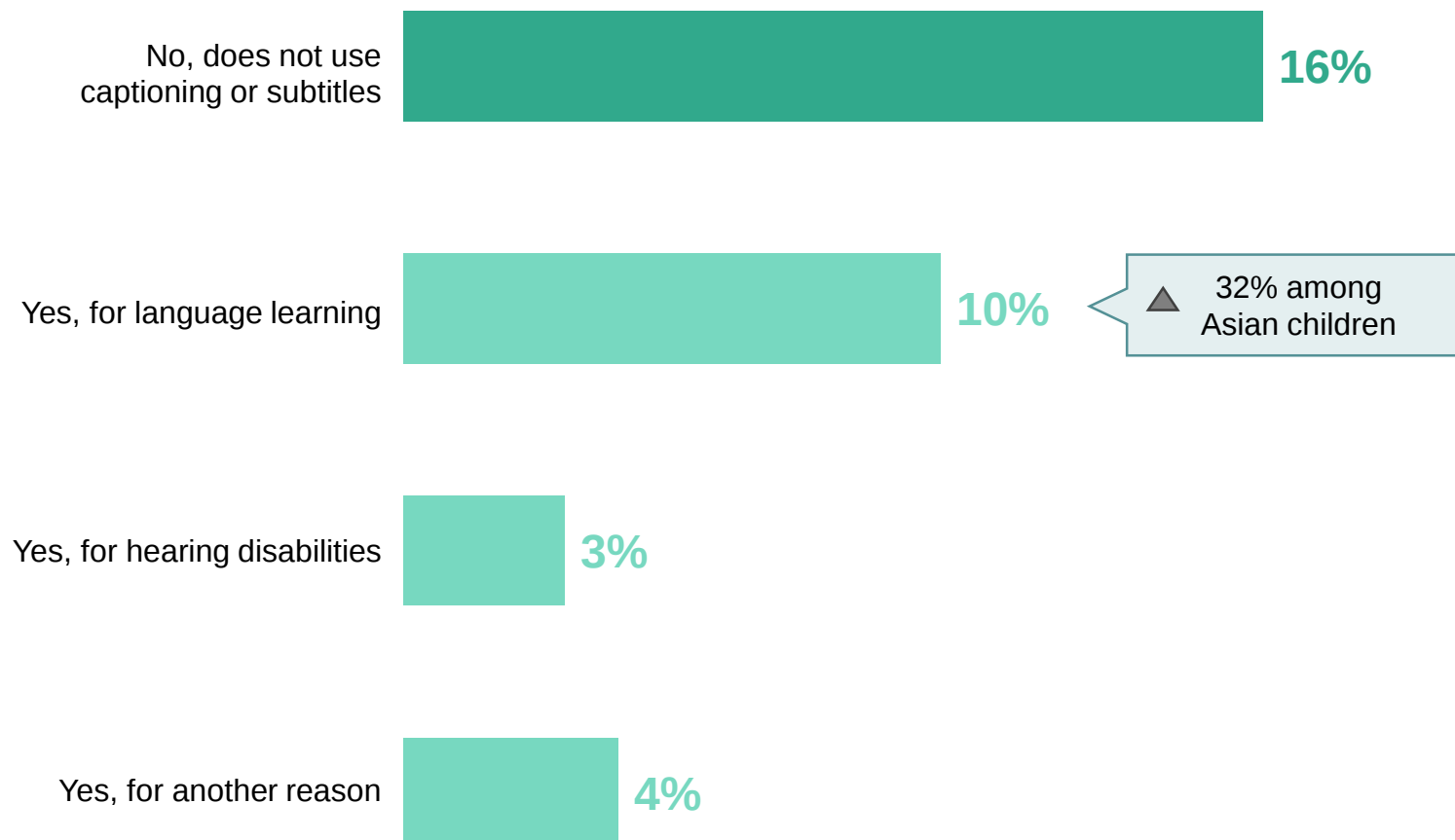
We asked children to select their favourite place to watch programmes and shows. The five most popular were YouTube, Netflix, Disney +, Cartoon Network and Nickelodeon. All other options were selected by 1% of children or less.





Use of captioning and subtitles

In total, 16% of parents and caregivers turn on captioning and subtitles for their children. Most often this is for language learning. This is particularly common for Asian children.





Media consumption: *Online content*



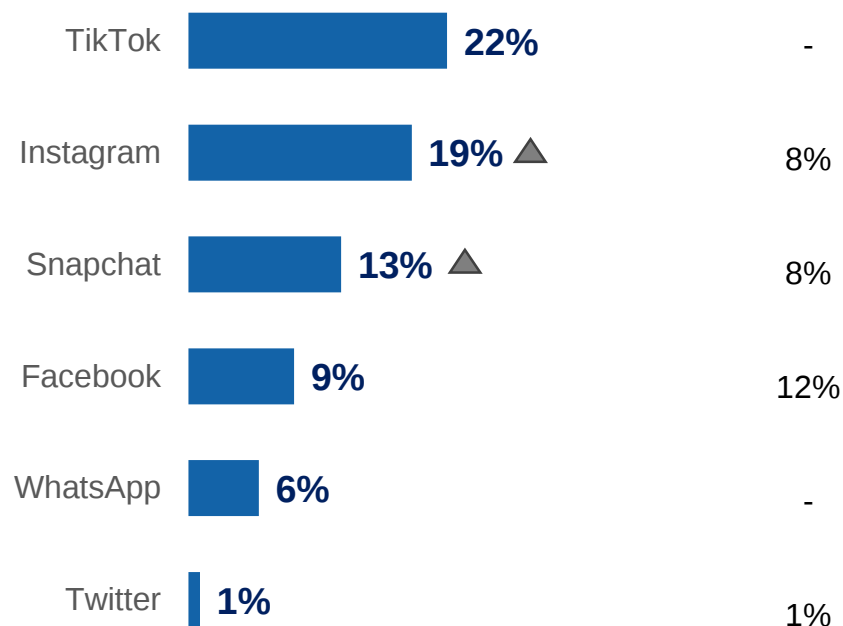
Daily reach of social media, streaming services and websites

Children prefer social media platforms that focus on sharing videos or images, with TikTok, Instagram and Snapchat in the top three. Reach for both Instagram and Snapchat has increased since 2014.

Spotify is the most popular online platform to listen to music on. Reach for Spotify has grown dramatically since 2014.

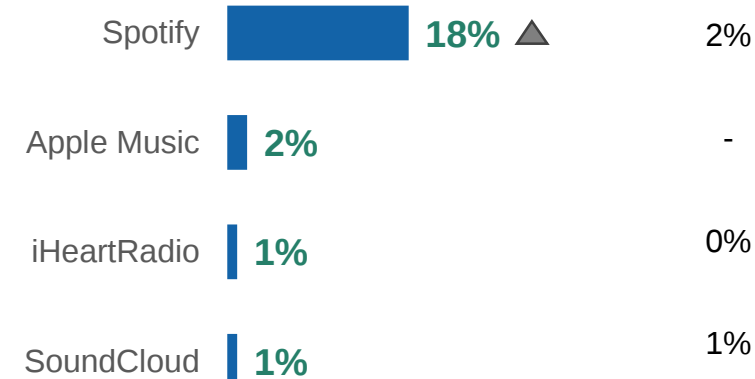
Social media (nett 30%)

2014
result



Music (nett 20%)

2014
result



TradeMe (nett 3%)



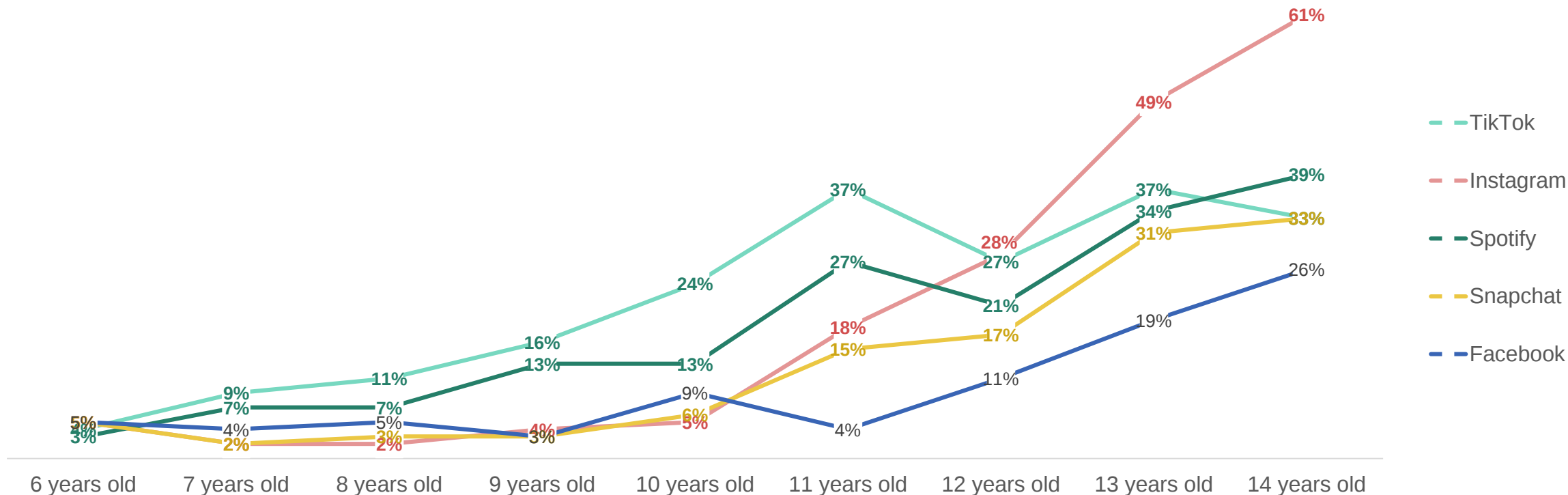
News sites (nett 3%)





Daily reach of social media and streaming services

Looking at the top five social media and streaming platforms, there is a clear relationship between age and use. In general, use of these platforms is low up until 10 years, and then it starts to pick up.





Demographic differences in daily reach of social media and streaming services

While age is the biggest differentiator, gender, ethnicity and income are also important.

TikTok and Snapchat are more popular among girls and Māori children, and less popular among Asian children.

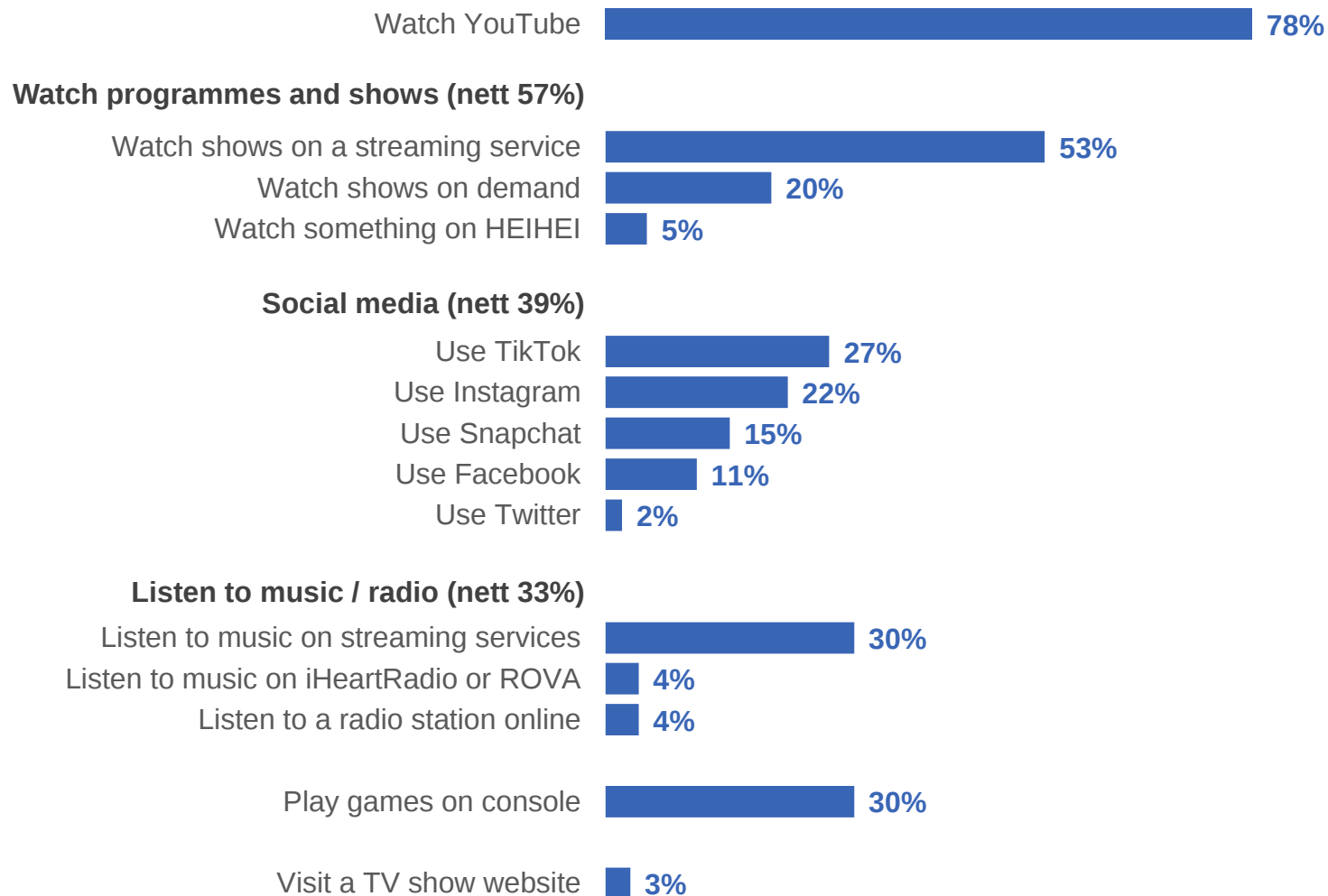
Children from high income households are more likely to have access to Spotify, but less likely to be on Facebook.

	Daily reach	Lower daily reach	Higher daily reach
	22%	Boys (16%) Asian (14%)	Pacific Island (30%) and Māori (29%) Girls (28%)
	19%	-	-
	18%	Pacific Island (10%)	High income families earning over \$120,000 per year (23%) NZ European (21%)
	13%	Boys (10%) Asian (4%)	Māori (19%) Girls (15%)
	9%	NZ European (7%) High income families earning over \$120,000 per year (5%)	Low income families earning less than \$50,000 per year (14%)



Total engagement in online activities

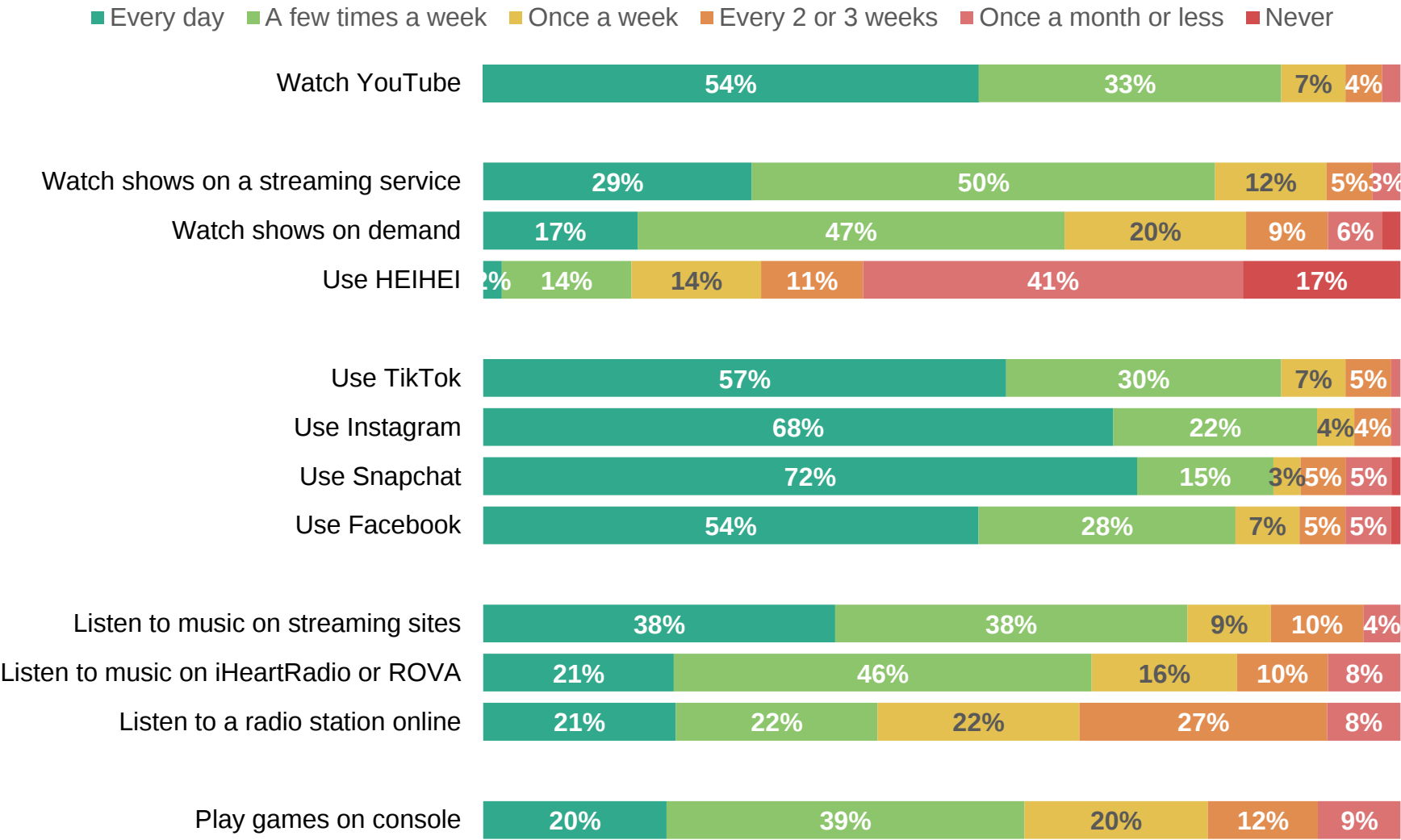
YouTube is the most common place for children to be online, followed by watching shows on streaming services.





Frequency of engagement in online activities

YouTube, TikTok, Instagram and Snapchat are the most ingrained into the daily life of users.



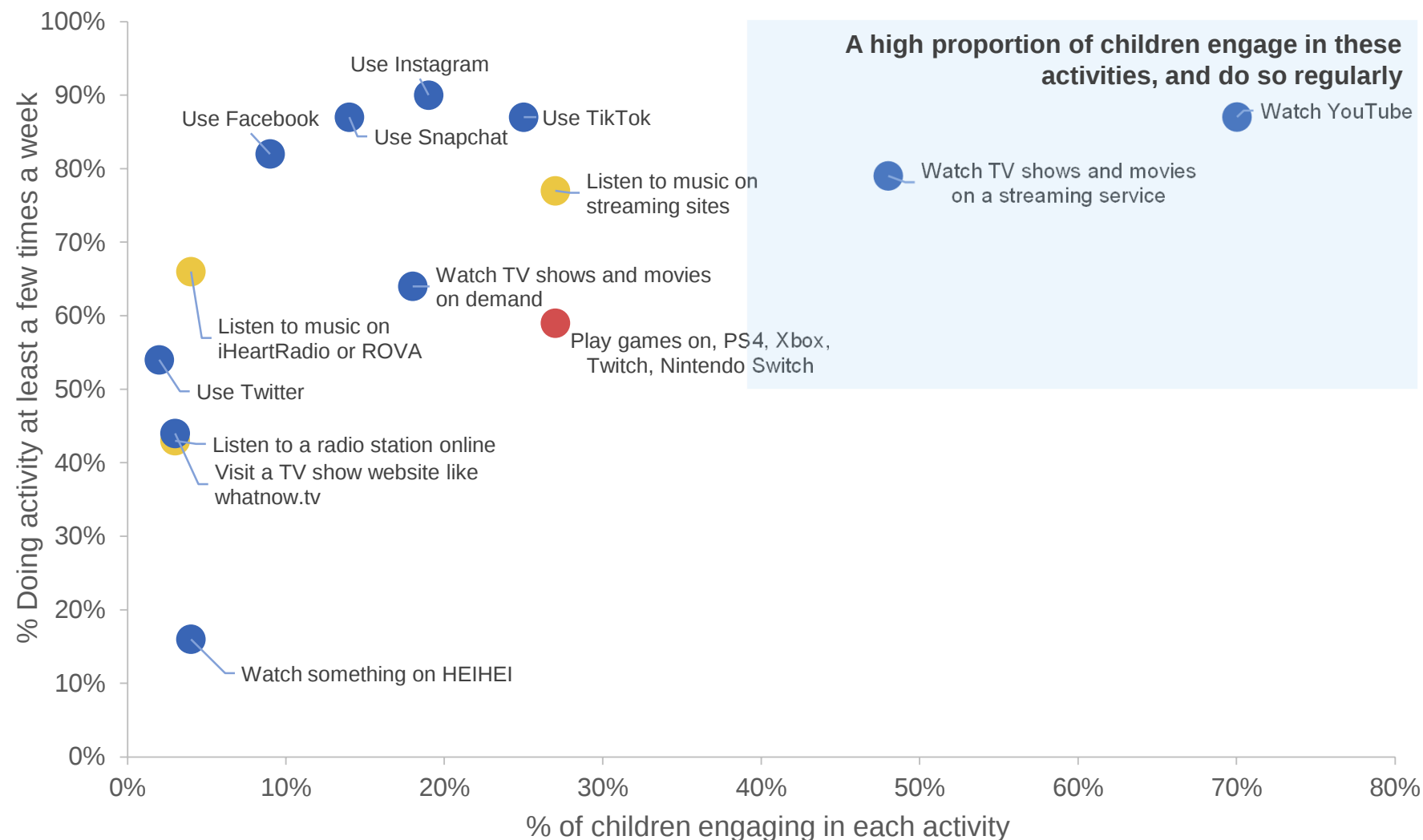
NOTE: Results where sample size is less than 30 have been suppressed.
Source: Q10b About how often do you...
Base size: All 6 to 14 year olds who engage in each activity (n = 31 to 773). Excludes 'don't know' responses.



Frequency of engagement by the proportion engaging in each activity

A high proportion of children watch YouTube and use streaming services to watch programmes and shows.

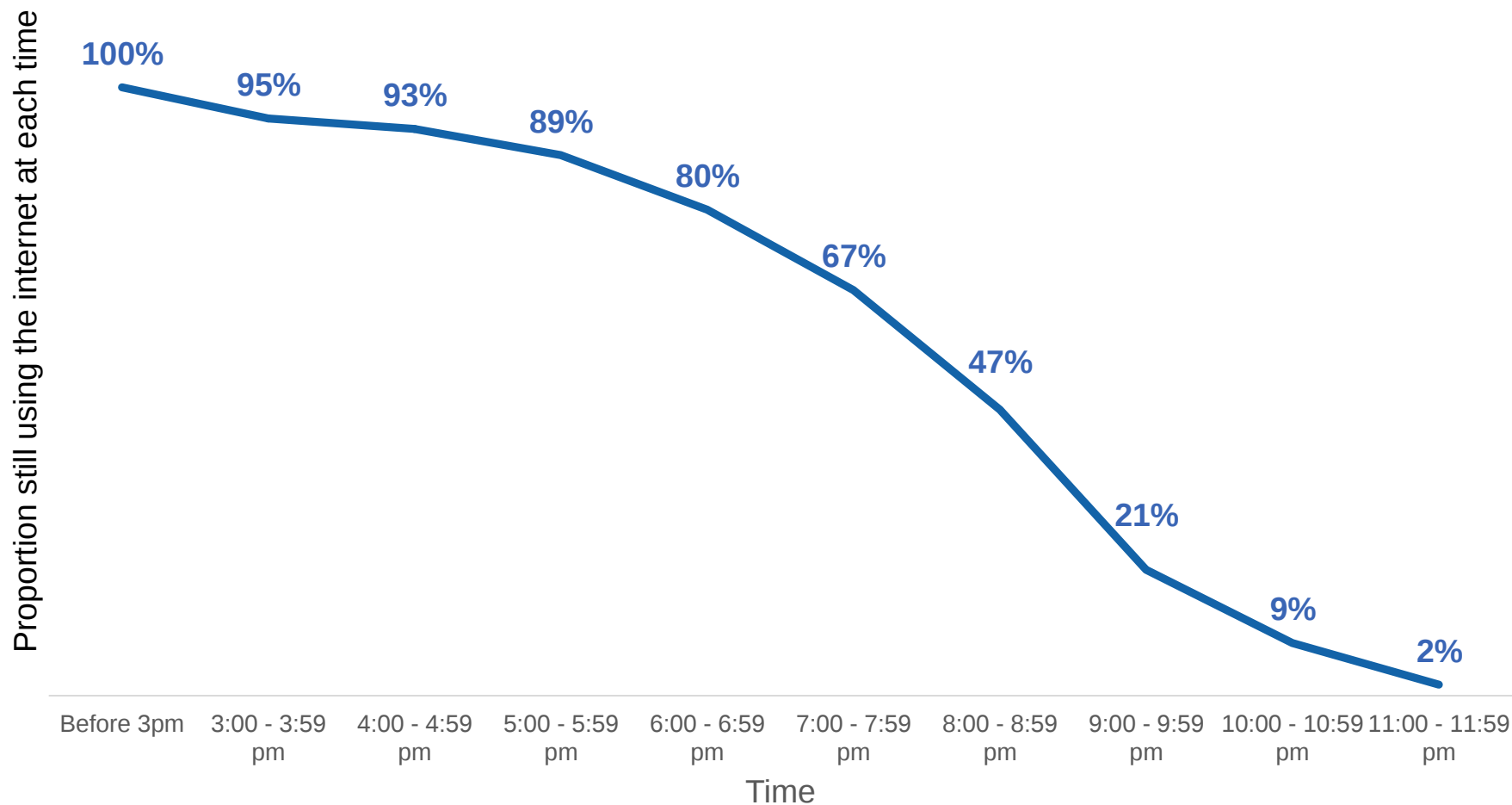
Fewer children use social media platforms such as TikTok, Instagram, Snapchat and Facebook. But those that do are using them often.





When children stop using the internet

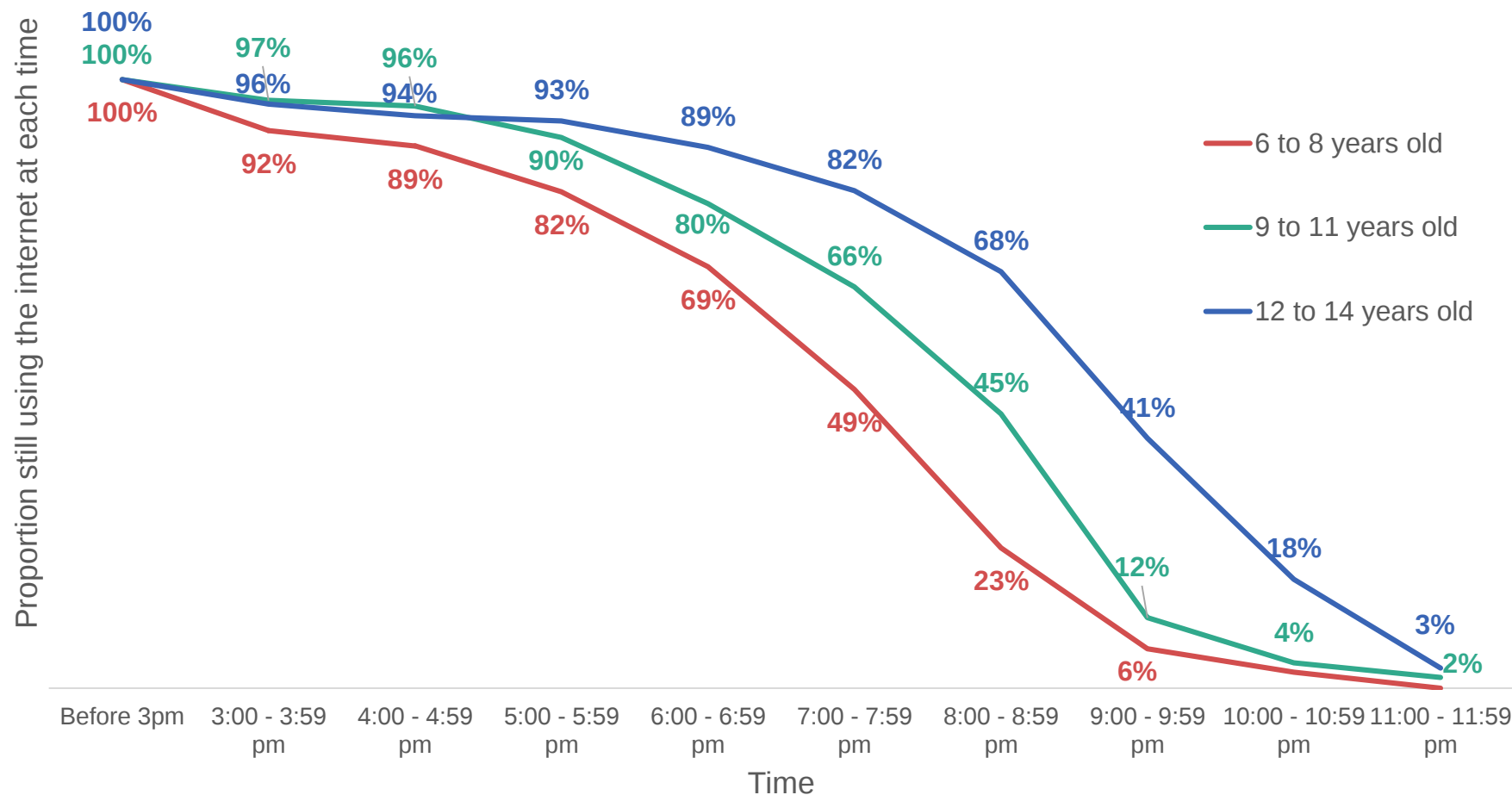
Most children are still using the internet at 7pm, after this point children start to log off. Only 21% are still online by 9pm.





When children stop using the internet by age group

As might be expected, older children use the internet later into the evening than younger children.



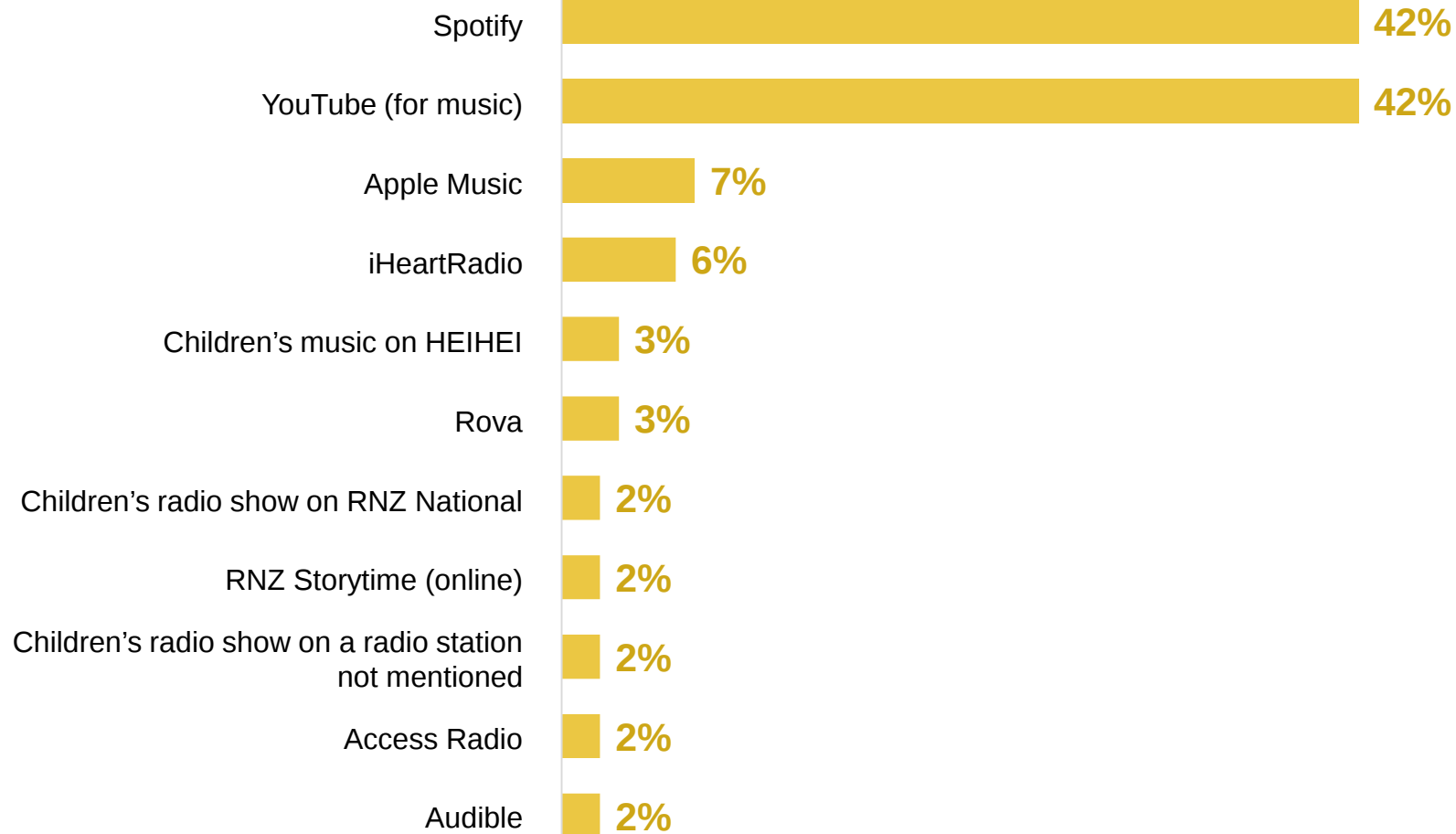


Media consumption: *Audio content*



What children listen to

Spotify and YouTube are the most popular platforms for accessing audio content.





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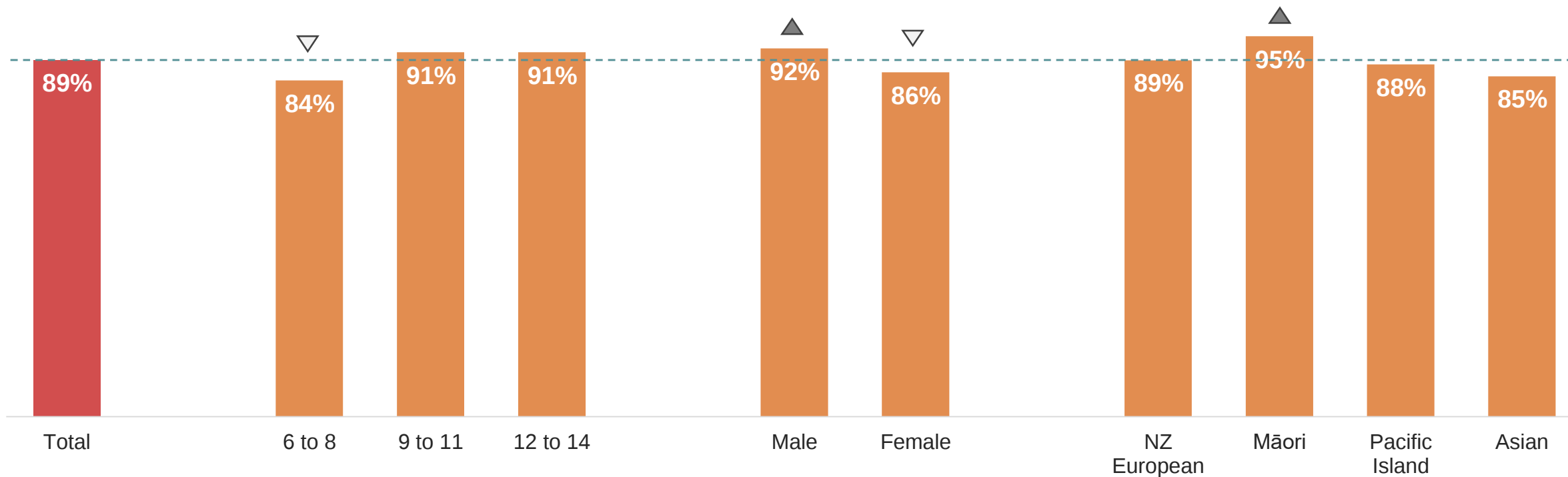
Media consumption: *Gaming*





Who plays video games?

Nine out of ten children play video games. Boys and Māori children are more likely to play video games than average, while girls and younger children (aged six to eight) are less likely.



Content preferences

Content preferences: section summary

Programmes and shows



Children watch programmes and shows for a variety of reasons, the most common being that it's a fun thing to do and stops boredom.

Cartoons continue to have the broadest appeal of any genre. Enthusiasm for cartoons is greatest when children are young. As they age the genres they enjoy begin to broaden. Genre preferences often differ by gender - boys are more likely to enjoy action and adventure, tech and gaming, and sports shows. Girls, on the other hand, tend to prefer comedy and drama, food and cooking, music, reality, and variety shows.

Children's favourite programmes vary widely, however The Simpsons is the most popular. Overseas programmes such as Peppa Pig and Paw Patrol are favourites among pre-school children. Most pre-schoolers don't have a favourite New Zealand-made show.

What Now and Fanimals are the most well-known of the New Zealand shows we asked about, despite awareness of What Now nearly halving since 2014.

Internet



A third of parents and caregivers think YouTube is the best platform for their six to fourteen year olds and 10% think Netflix is. Beyond this preferences are highly fragmented. Favourite websites for pre-schoolers are less varied, potentially reflecting fewer good-quality options for this age group.

Forty-nine percent of children are aware of HEIHEI, in line with the proportion of parents and caregivers aware of it. Seventeen percent of six to fourteen year olds have used it before. Usage among pre-school children is similar (16%). Nearly half (47%) of those children who have used HEIHEI enjoy it, and only 8% don't like it.

Younger children are more likely to enjoy HEIHEI than average. The main criticism about HEIHEI is that the content isn't mature enough*.

Video games



Adventure and multi-player games are the most popular types of video game. Older children (particularly boys) are more likely to prefer multi-player, fighting and shooting, and sports games than average. Younger children and girls are more likely to enjoy educational games.

The most common reason for playing games is for fun (84%). It's also a social activity for some, with 51% enjoying playing with their friends or family.

*HEIHEI is targeted at children aged 5 to 9 years.

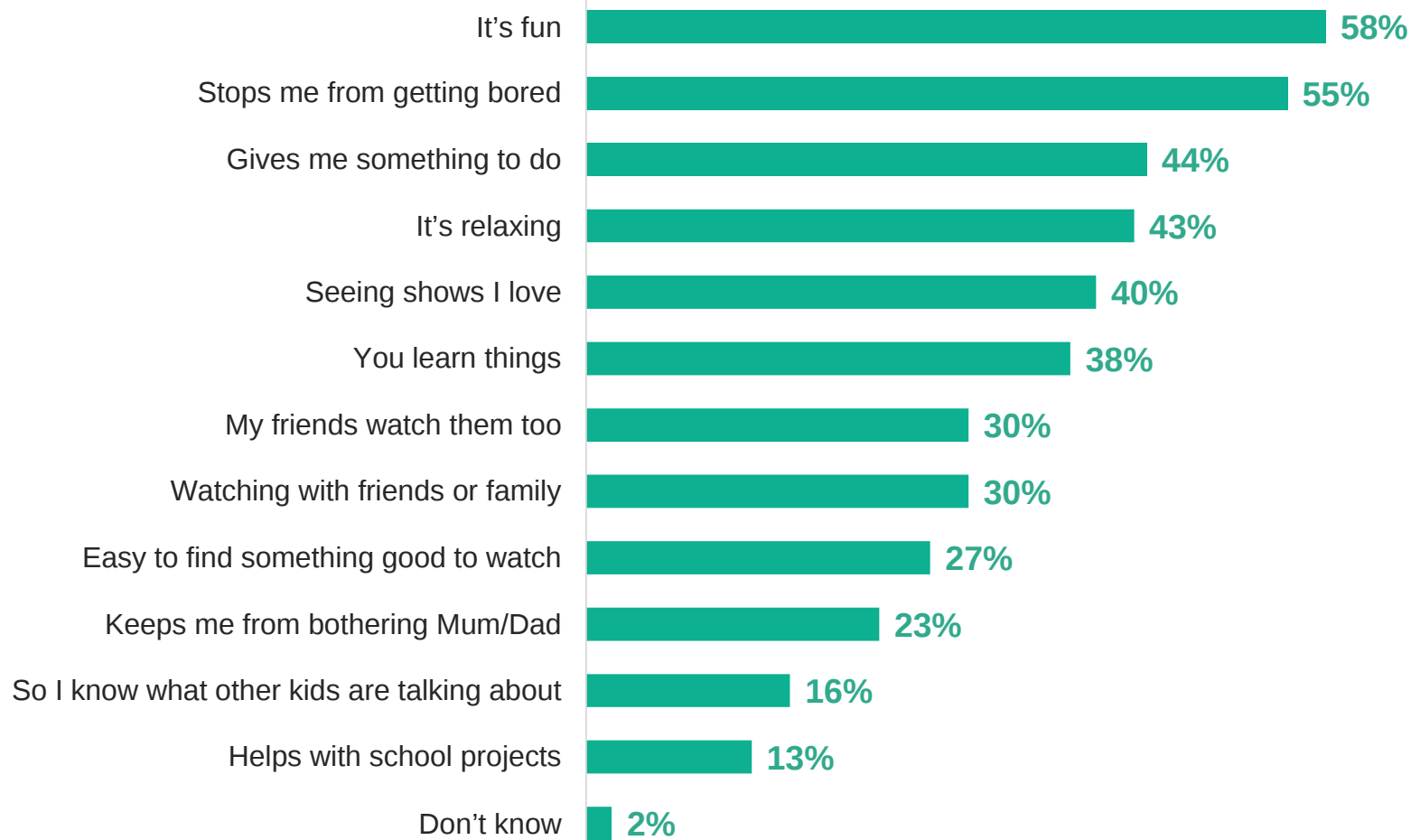


Content preferences: *Programmes and shows*



Why children watch programmes and shows

Children watch programmes and shows for a range of different reasons, the most common being that it's a fun thing to do and stops them from getting bored.

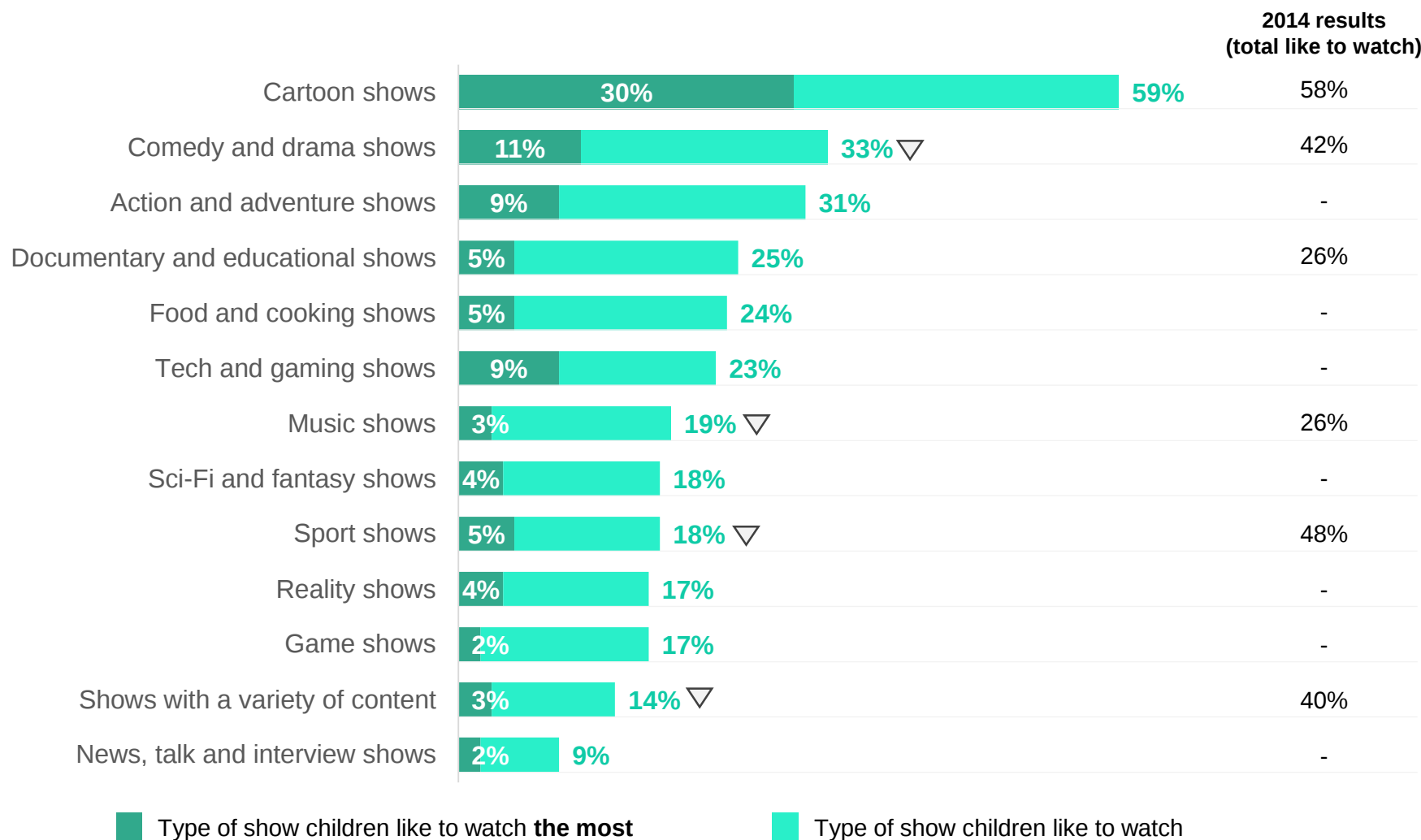




Children's enjoyment of different genres

Consistent with 2014, cartoons continue to have the broadest appeal and the greatest preference.

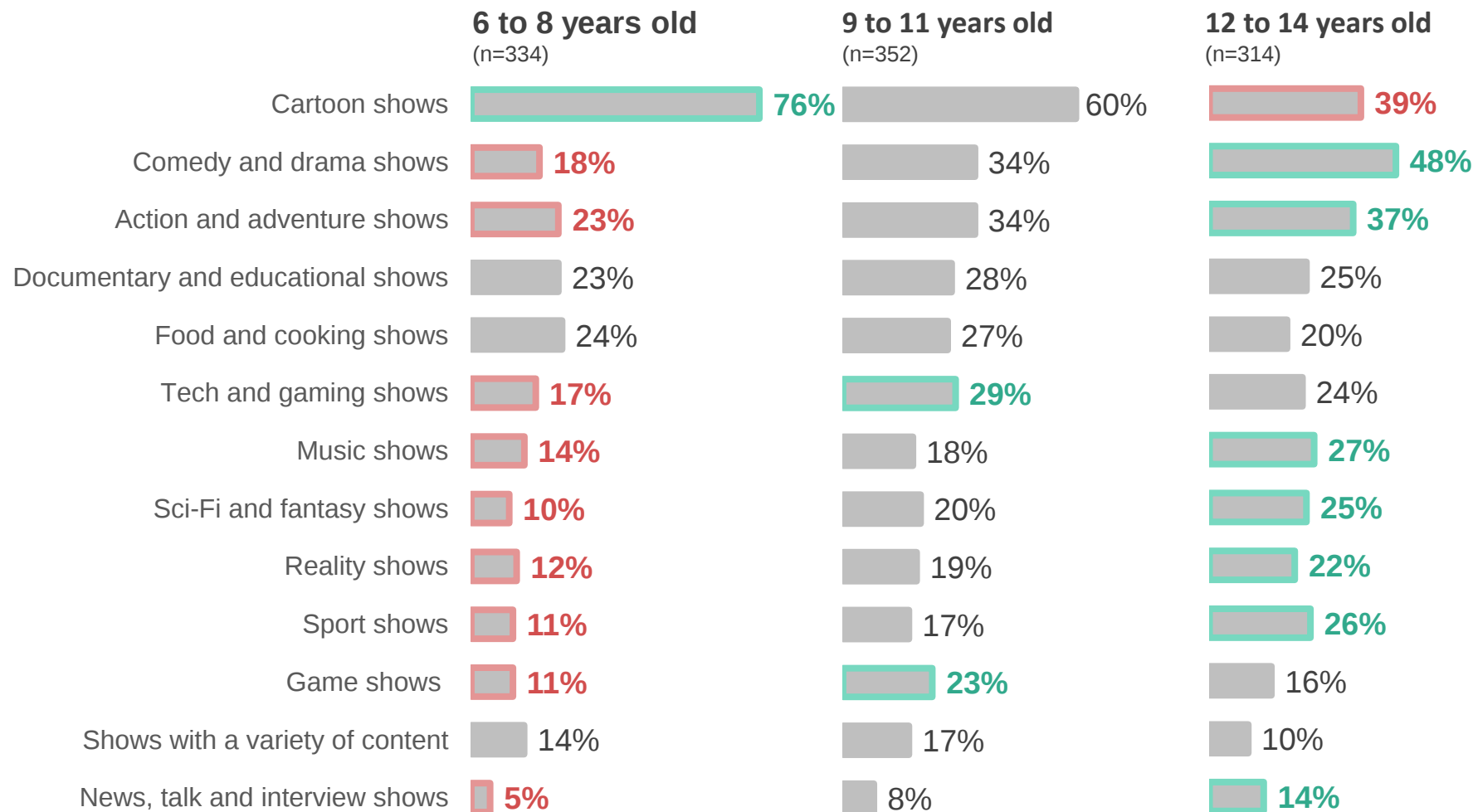
Interest in comedy and drama, music, sport and variety shows has declined.





Children's enjoyment of different genres by age

Enthusiasm for cartoons is greatest when children are younger. As they age the genres they enjoy begin to broaden.



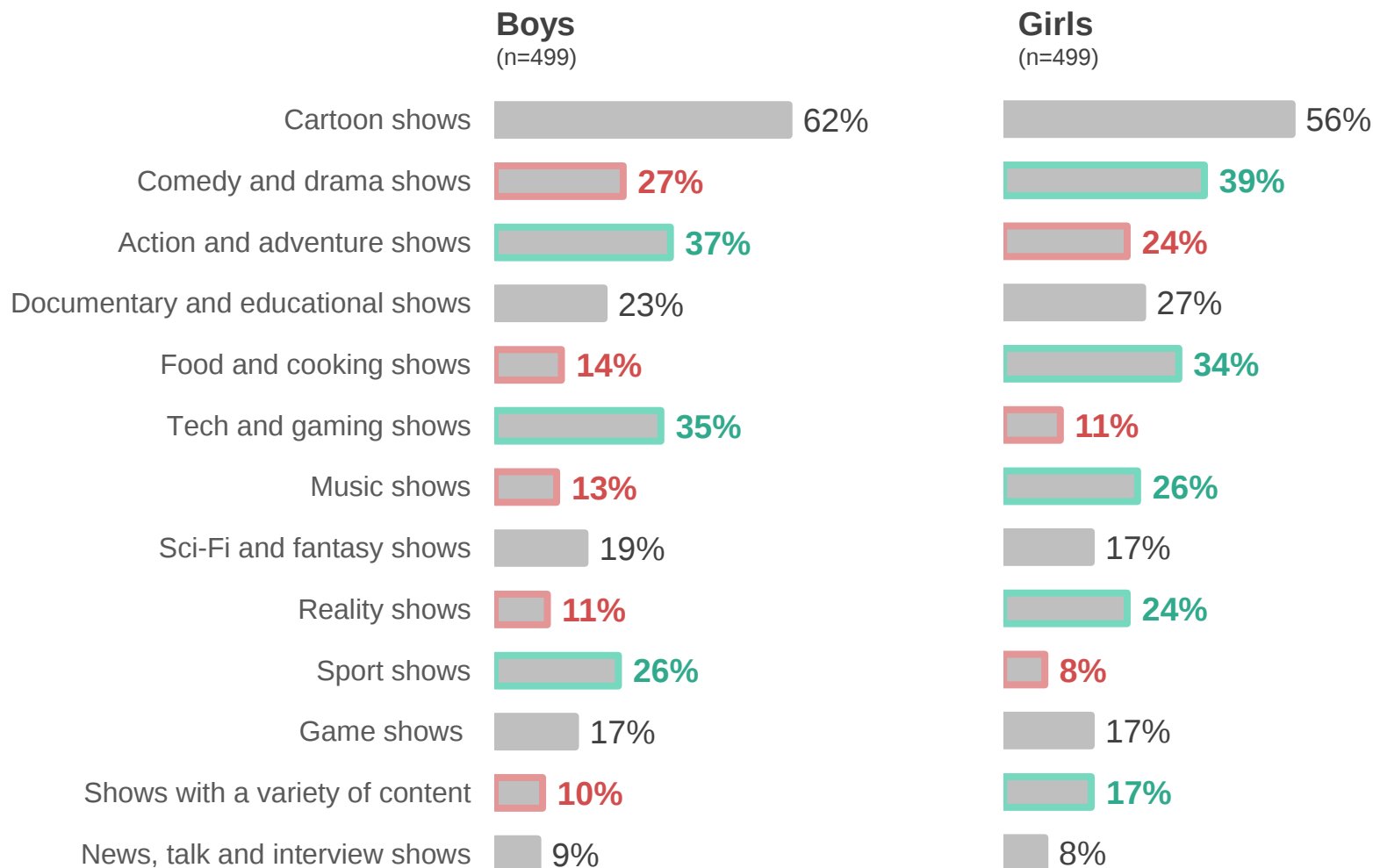


Children's enjoyment of different genres by gender

While some genres (such as cartoons) are equally liked by boys and girls, most are preferred more by one gender than the other.

Boys have a stronger preference for action and adventure, tech and gaming, and sports shows.

Girls tend to prefer comedy and drama, food and cooking, music, reality, and variety shows.



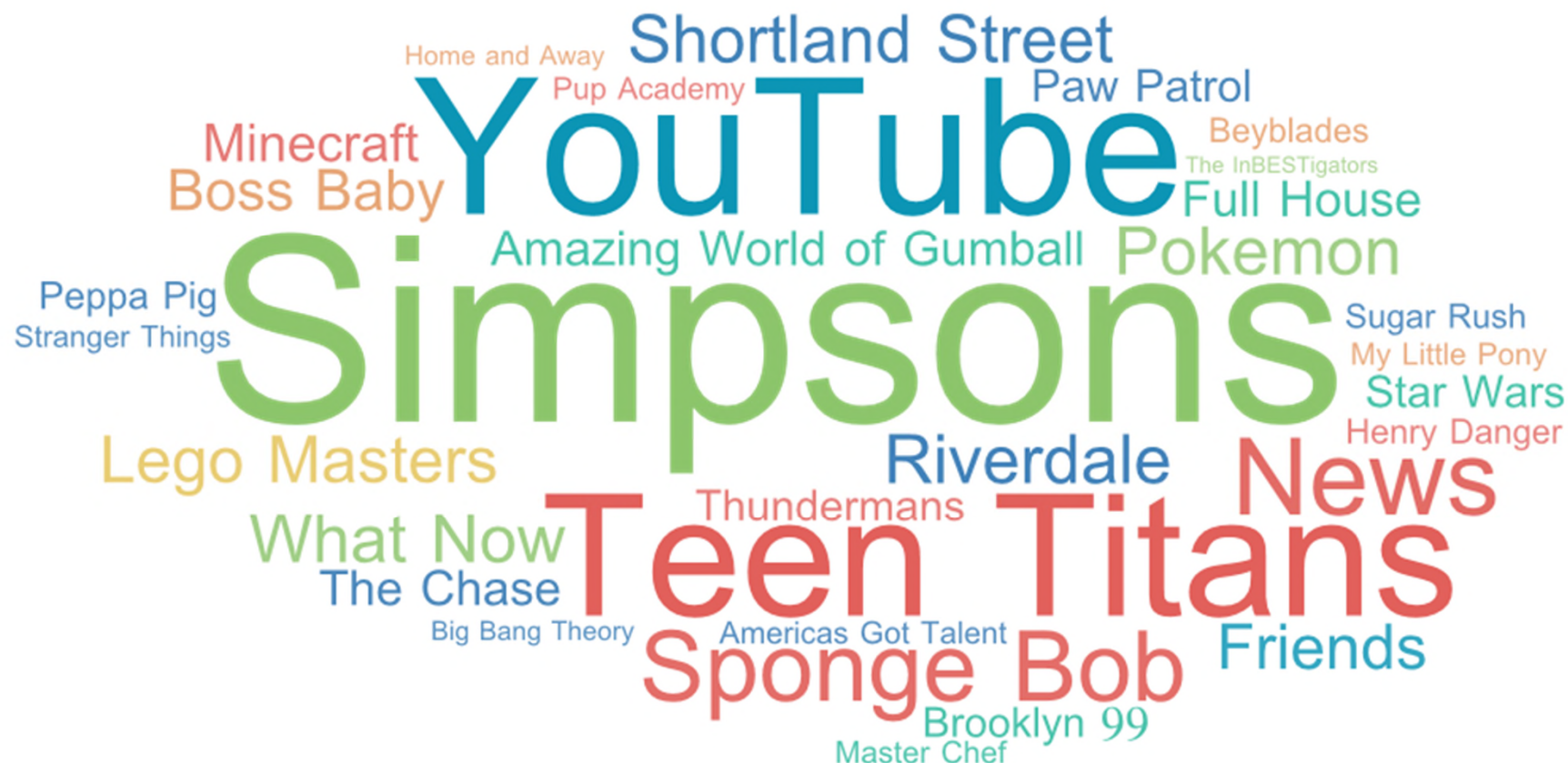
Significantly higher than the average

Significantly lower than the average



Children's favourite programmes and shows to watch (unprompted)

We asked children what their three favourite TV shows are. The answers they gave varied widely, reflecting a highly fragmented media environment. The most popular titles are The Simpsons and Teen Titans.



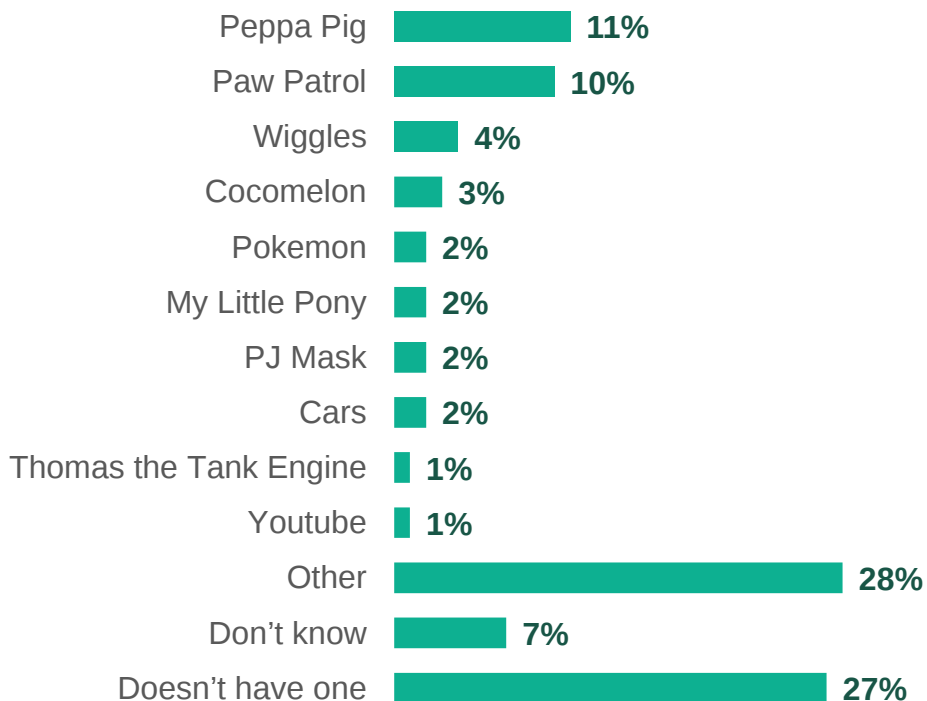
The size of each word reflects how often it was mentioned. The Simpsons was mentioned most often (by 6% of children)



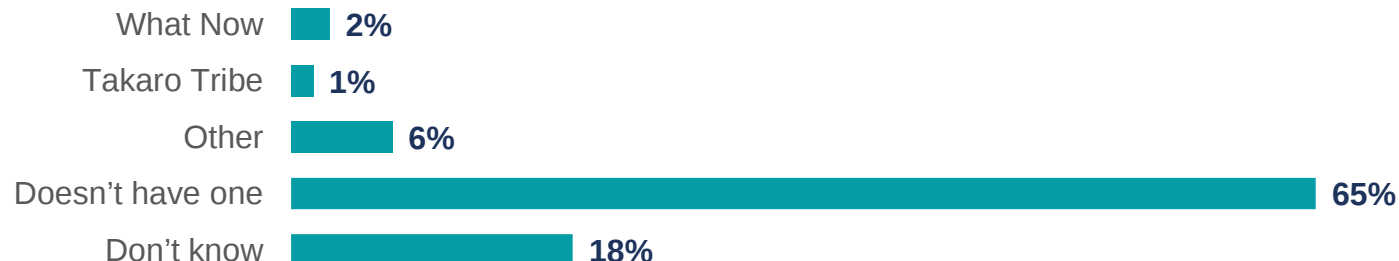
Pre-school children's favourite show (unprompted)

Peppa Pig and Paw Patrol are the firm favourites among pre-school children. Most don't have a favourite New Zealand show.

Favourite show



Favourite New Zealand show

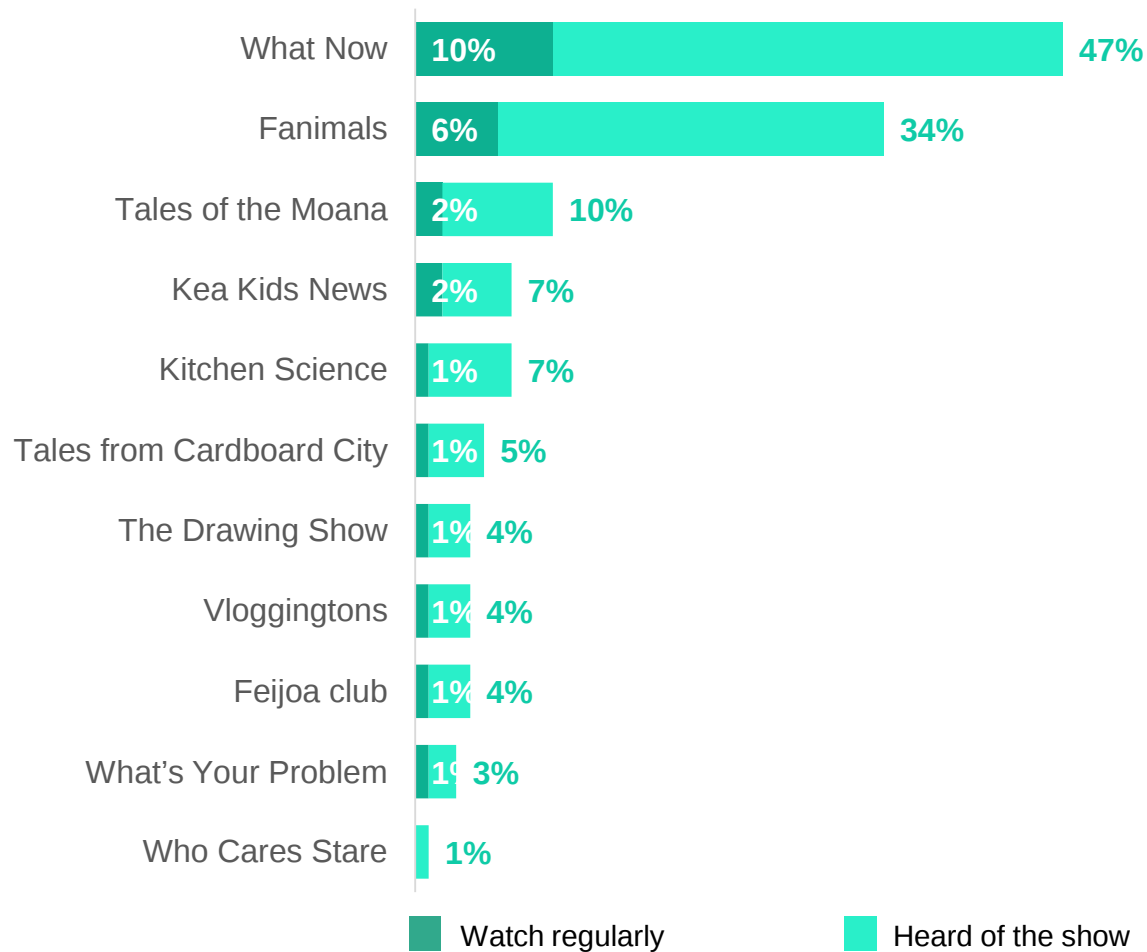




Awareness and reach of New Zealand children's programmes

What Now and Fanimals are the most well-known New Zealand shows, despite awareness for What Now nearly halving since 2014.

What Now is regularly watched by 10% of children, and Fanimals by 6%.

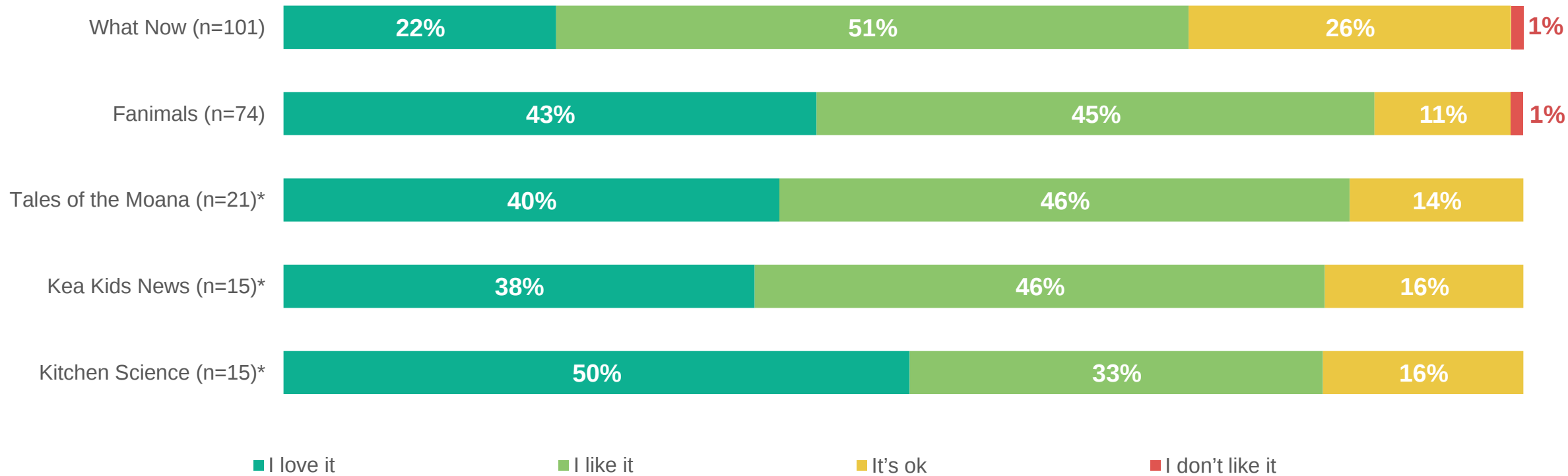


83% aware of What Now in 2014



How much children like specific New Zealand programmes

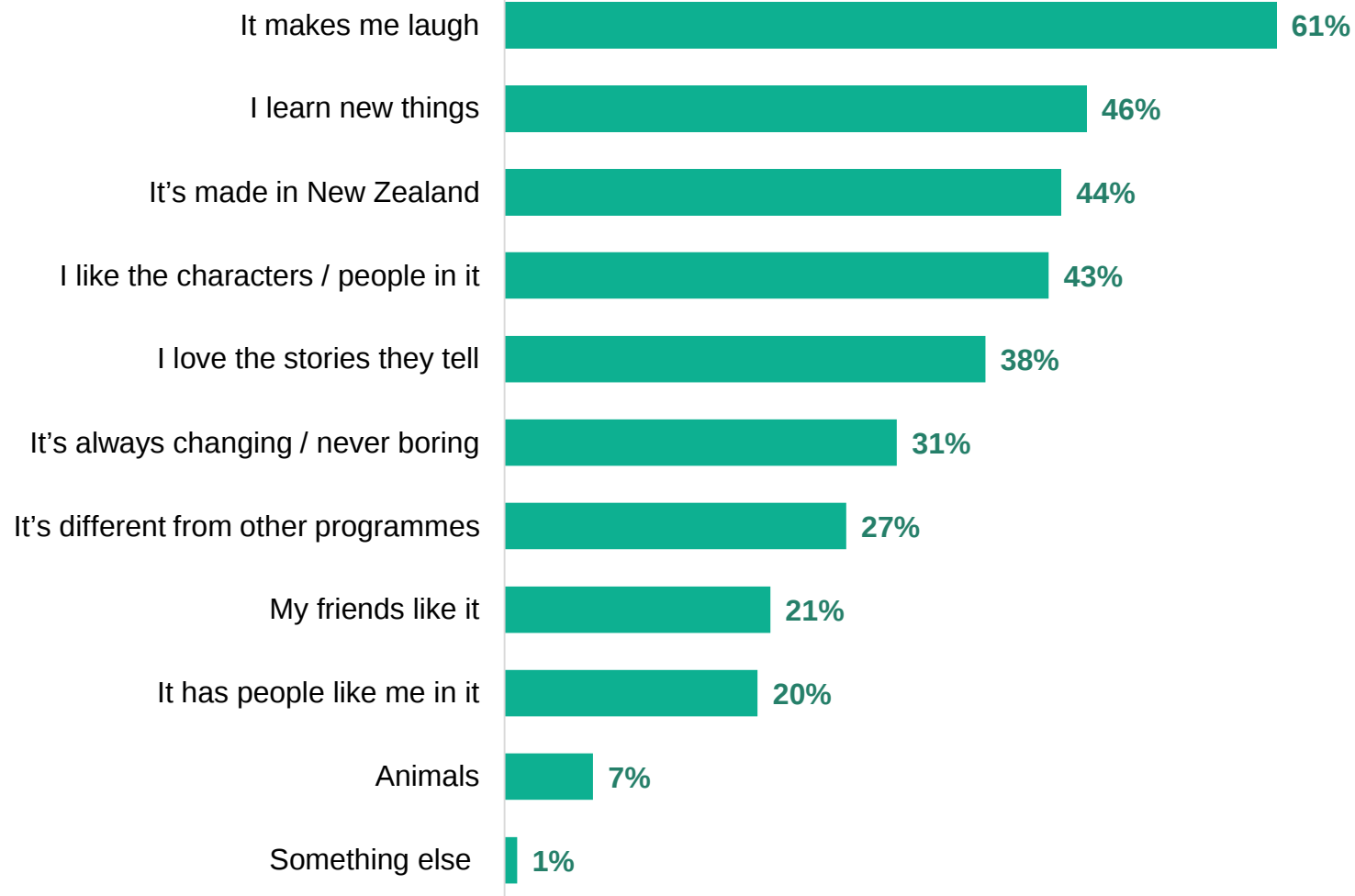
The programmes with the strongest following are those found online / on demand as opposed to linear television.





What makes a good TV programme

Tamariki love programmes and shows which make them laugh, share knowledge and tell engaging stories from a New Zealand perspective.



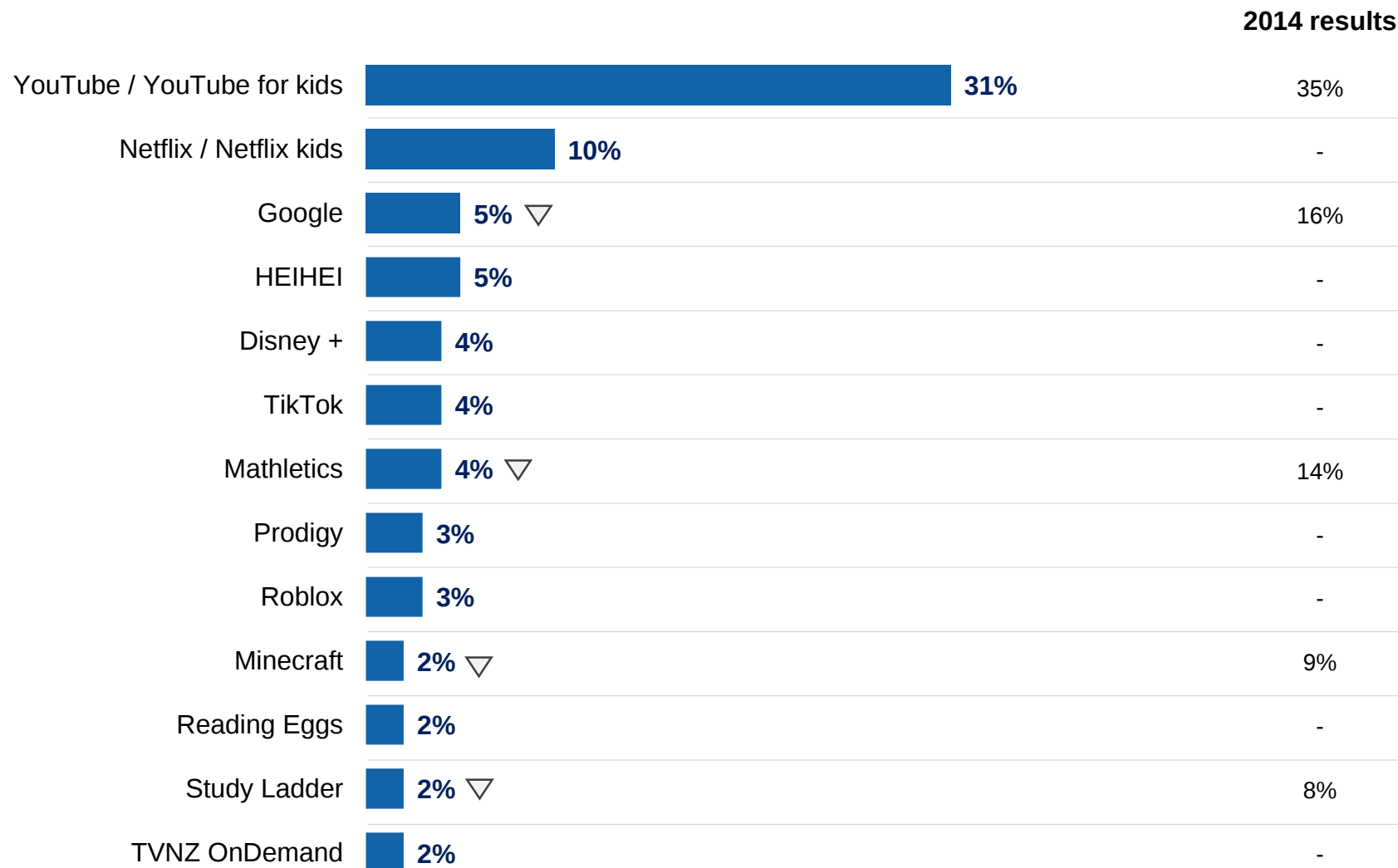


Content preferences: *Online content*



Parents' and caregivers' favourite online platforms for their children aged six to fourteen

A third of parents and caregivers think YouTube is the best platform for their children, and 10% think Netflix is. Beyond these two, preferences are extremely fragmented*.

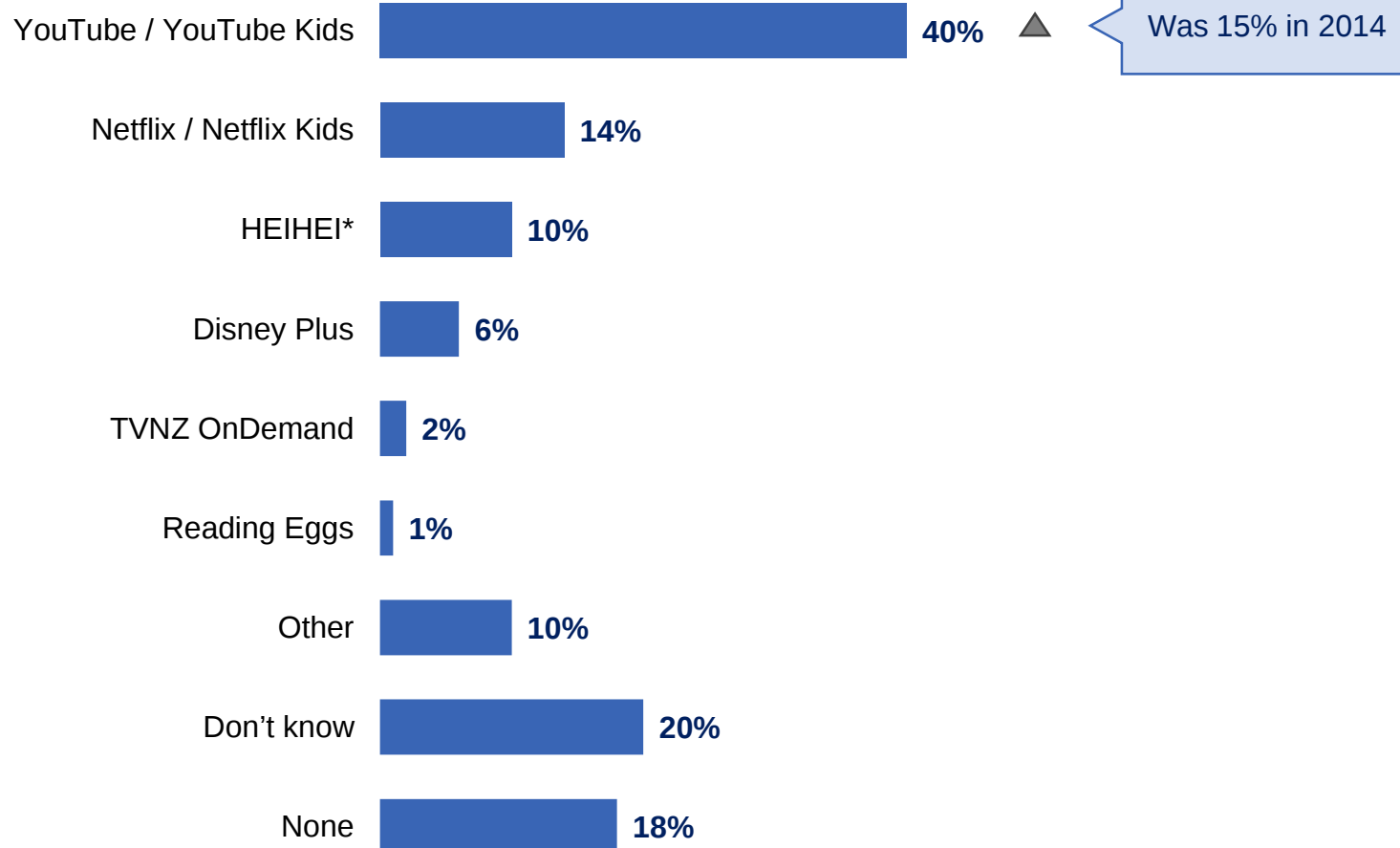


NOTE: Only websites and apps mentioned by 2% or more have been shown.
Source: S4Q2. What are the best websites/apps you have seen for [CHILD]?
Base size: All parents and caregivers of 6 to 14 year olds who use websites and apps (n=931)

Parents' and caregivers' favourite online platforms for their pre-school children

Parents' and caregivers' favourite platforms for their pre-school children are less varied, potentially reflecting fewer good-quality options for this age group.

YouTube still comes out on top, followed by Netflix and HEIHEI.



*HEIHEI is targeted at children aged 5 to 9 years.

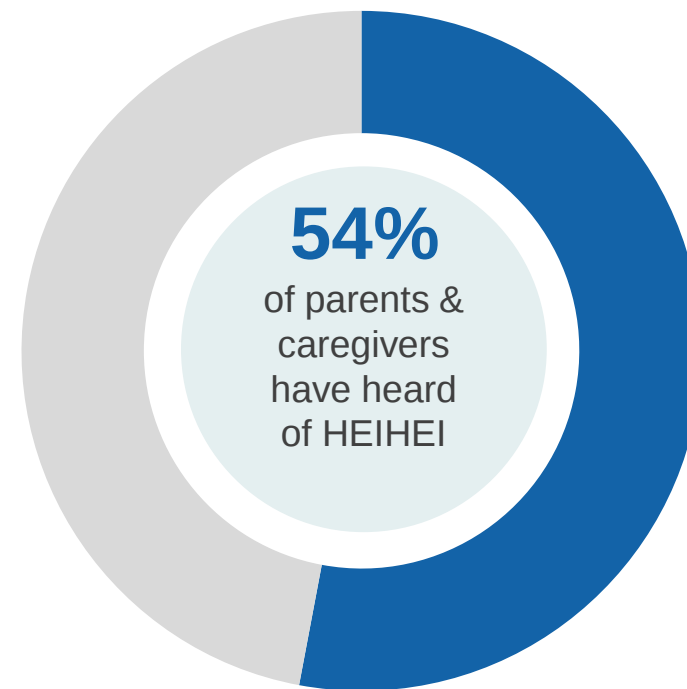
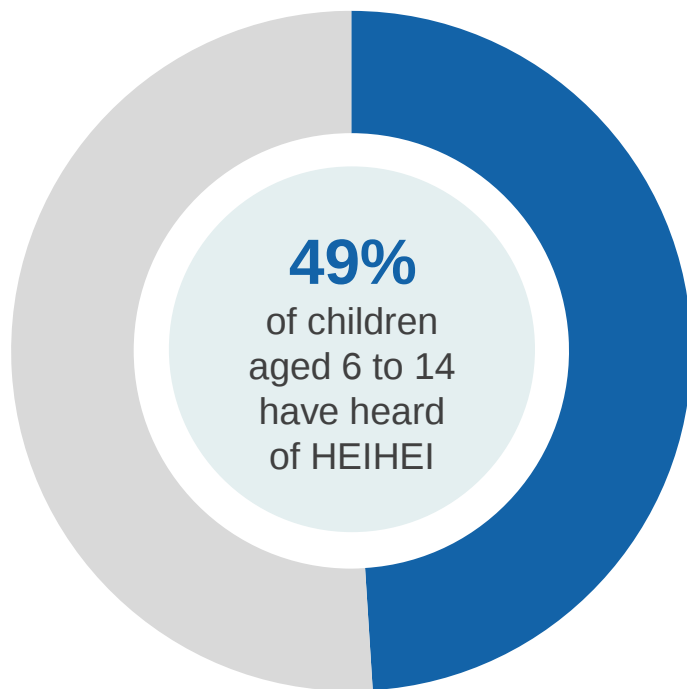
NOTE: Only websites and apps mentioned by 1% or more have been shown.

Source: S6Q7. What are the best websites/apps you have seen to find content for children aged 2 to 5?

Base size: All parents and caregivers of 2 to 5 year olds (n=152)



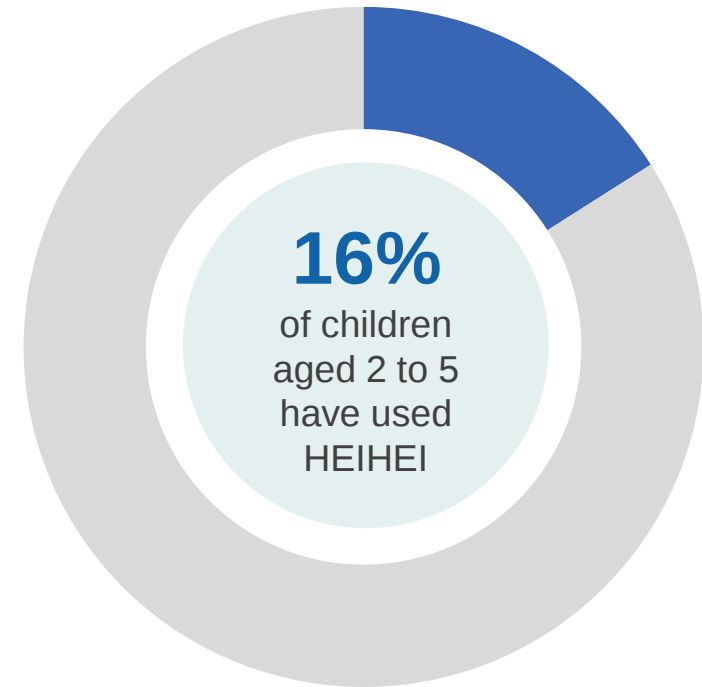
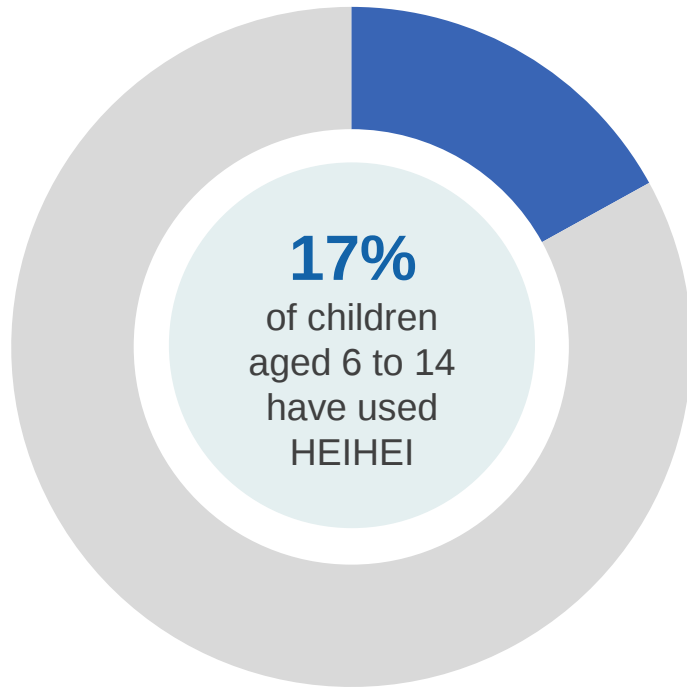
Forty-nine percent of children know about HEIHEI, in line with the proportion of parents and caregivers who have heard of it.





Usage of HEIHEI

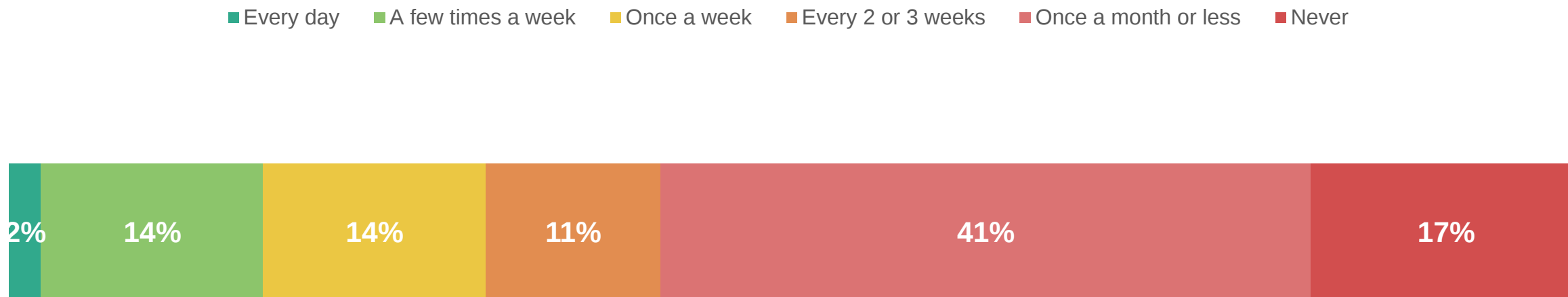
While nearly half of all children aged six to fourteen have heard of HEIHEI, only 17% have used it. Usage among pre-school children is similar, at 16%.





Frequency of use - HEIHEI

Of those who have used HEIHEI, 16% use it at least a few times a week. There are no demographic differences of note when it comes to frequency of use.

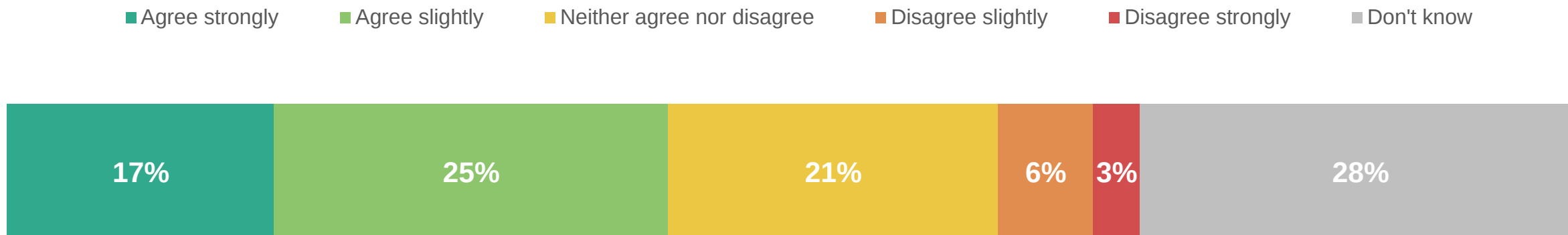




Perceptions of HEIHEI as being a great place to find local content

Forty-two percent of parents and caregivers (aware of HEIHEI) agree that it is a great place to find local content and shows, and only a small minority disagree. There is a sizeable proportion (49%) who don't hold a strong view either way. It may be that these parents and caregivers don't know enough about HEIHEI to have formed an opinion.

Q. How much do you agree or disagree that HEIHEI is a great place to find local children's shows?





Enjoyment of HEIHEI

Nearly half of those tamariki who have used HEIHEI enjoy it, with 13% saying they love it. However, this does leave 53% who aren't particularly enthusiastic about the platform. Younger children tend to like HEIHEI more than older children.



Six to eight year olds are more likely than average to say they love or like HEIHEI (64% vs. 47%)



Suggestions for improving HEIHEI

There's an opportunity to widen the audience of HEIHEI by including content for older children (aged ten plus)*. As children age they start to lose interest in cartoons and become more interested in comedy and drama, and action and adventure shows**.

MORE CONTENT FOR OLDER CHILDREN

- “More shows for older children, 13 and up.” (*girl, 13 years*)
- “More stuff for my age.” (*girl, 13 years*)
- “More teenage content.” (*boy, 12 years*)
- “Aimed for my age group.” (*boy, 12 years*)
- “I’m too old for it now. It’s more for young kids.” (*boy, 12 years*)
- “Having shows for kids aged 10 to 13.” (*boy, 11 years*)
- “Less kiddy. A bit more mature than the real kiddy stuff.” (*girl, 10 years*)
- “More big kids stuff.” (*boy, 9 years*)
- “It’s a little bit young for me.” (*boy, 8 years*)



*HEIHEI is currently targeted at children aged 5 to 9 years.

**See slide 50 for more information.

Source: What would make HEIHEI better?



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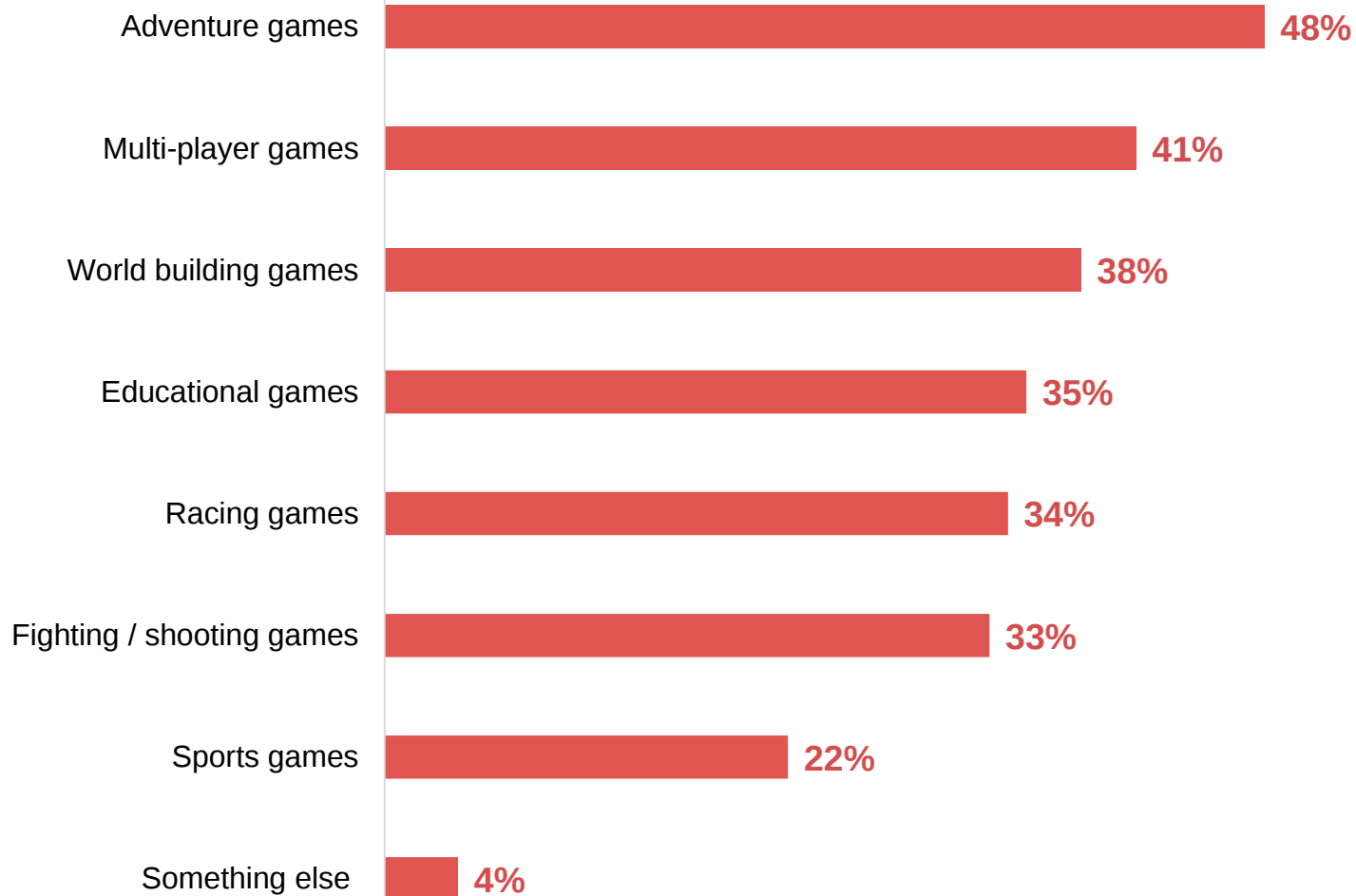
Content preferences: *Gaming*





Types of games children like to play

Adventure and multi-player games are the most popular types of games to play.





Demographic differences in game preferences

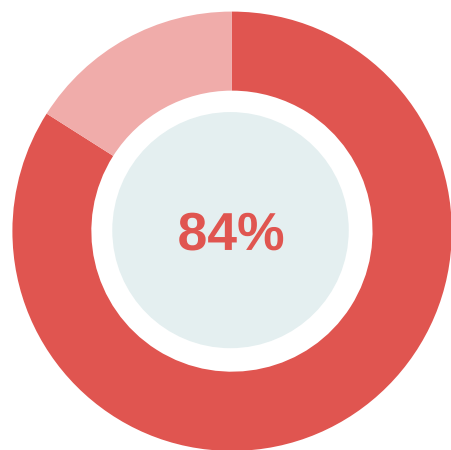
Older children (particularly boys) are more likely to prefer multi-player, fighting and shooting, and sports games than average.

	Daily reach	Less likely to enjoy playing	More likely to enjoy playing
Adventure games	48%	-	9 to 11 year olds (54%)
Multi-player games	41%	Girls (34%) 6 to 8 year olds (29%)	9 to 11 (46%) and 12 to 14 (47%) year olds Boys (46%)
World building games	38%	Asians (26%)	-
Educational games	35%	Boys (26%) 12 to 14 year olds (21%)	Girls (46%) 6 to 8 year olds (45%)
Racing games	34%	Girls (24%)	Boys (43%)
Fighting / shooting games	33%	6 to 8 year olds (23%) Girls (14%)	Boys (49%) 12 to 14 year olds (41%)
Sports games	22%	6 to 8 year olds (13%) Girls (12%)	Boys (30%) 12 to 14 year olds (27%)

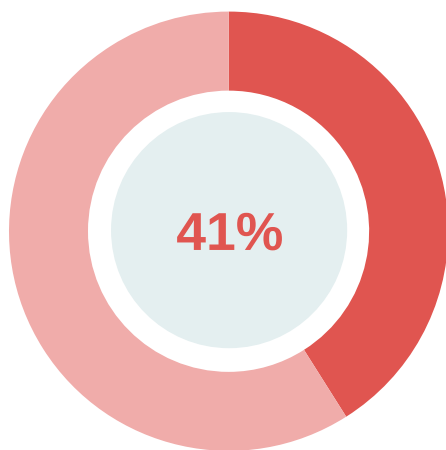


Why do children play games?

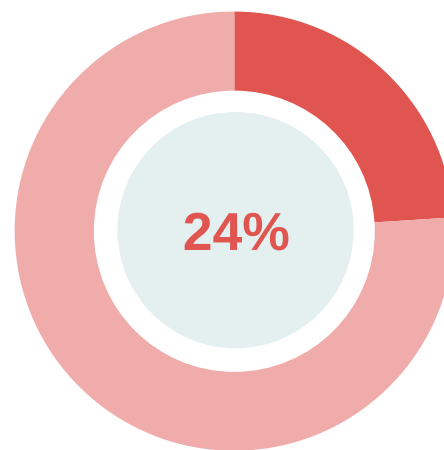
The most common reason tamariki play games is for fun. It's a social time for many, with 51% saying it's something they like to do with others.



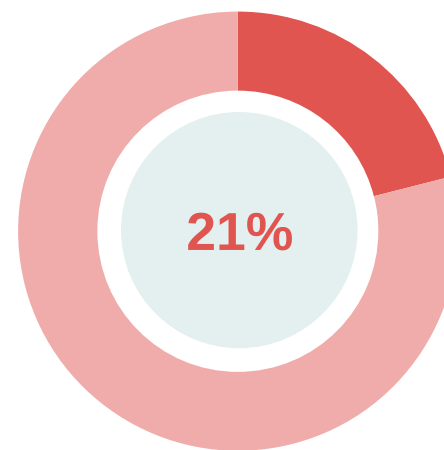
For fun



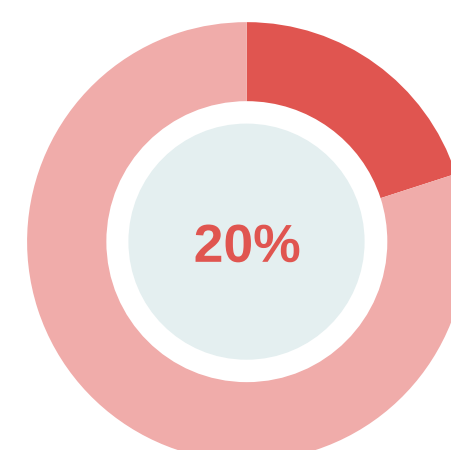
Something I like to do with friends



Something I like to do with my family



To learn



To beat the highest score

New Zealand content

New Zealand content: section summary

Six in ten tamariki watch local content at least once a week. Māori children tend to watch local content with greater regularity than average. Four in ten children say they see themselves represented on programmes and shows, however Pacific children see themselves represented less often than average.

More than 50% of children feel good when they watch stories that are about New Zealand, and see children that look and speak like them on a show. A third of children feel good when they hear te reo Māori on a show, however nearly a fifth don't like it.

Three quarters of parents and caregivers agree that it's important for children to watch New Zealand-made shows which reflect them and their world, and very few disagree. Four in ten think New Zealand-made shows are good quality, and are just as good as those made overseas.

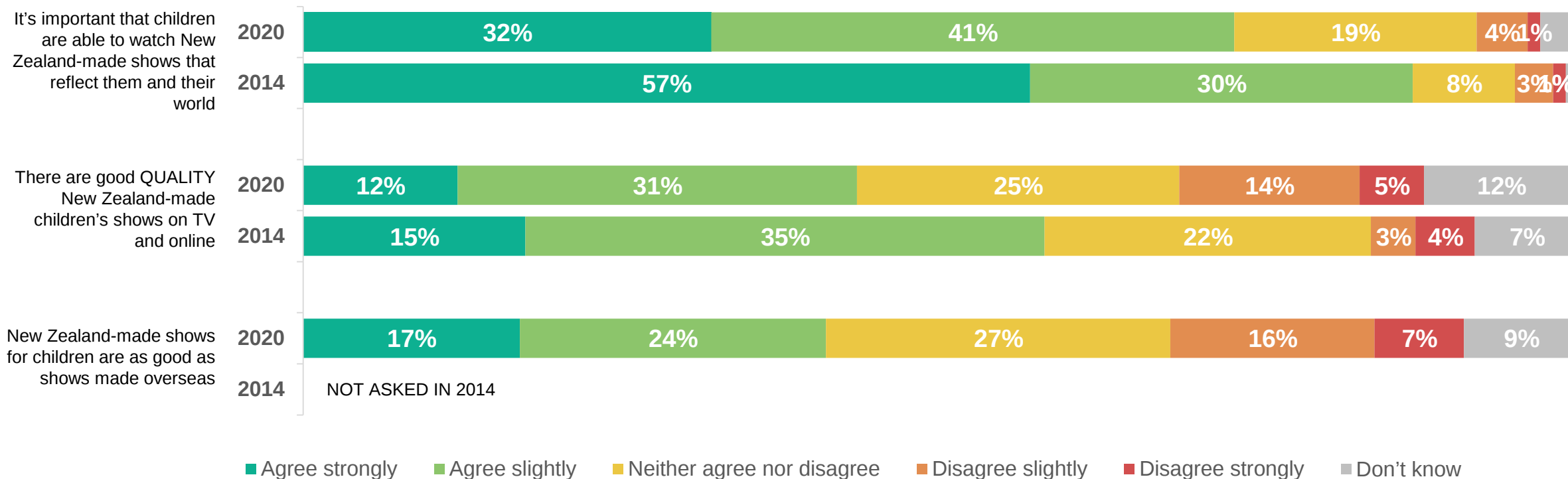
A greater proportion agree than disagree that online is a better place to find children's content than TV. Just over 30% of parents and caregivers agree that the New Zealand-made shows on offer provide a good variety and range of content, however a quarter disagree. Similar results were observed for pre-school children.





Attitudes of parents and caregivers to New Zealand-made children's programmes and shows

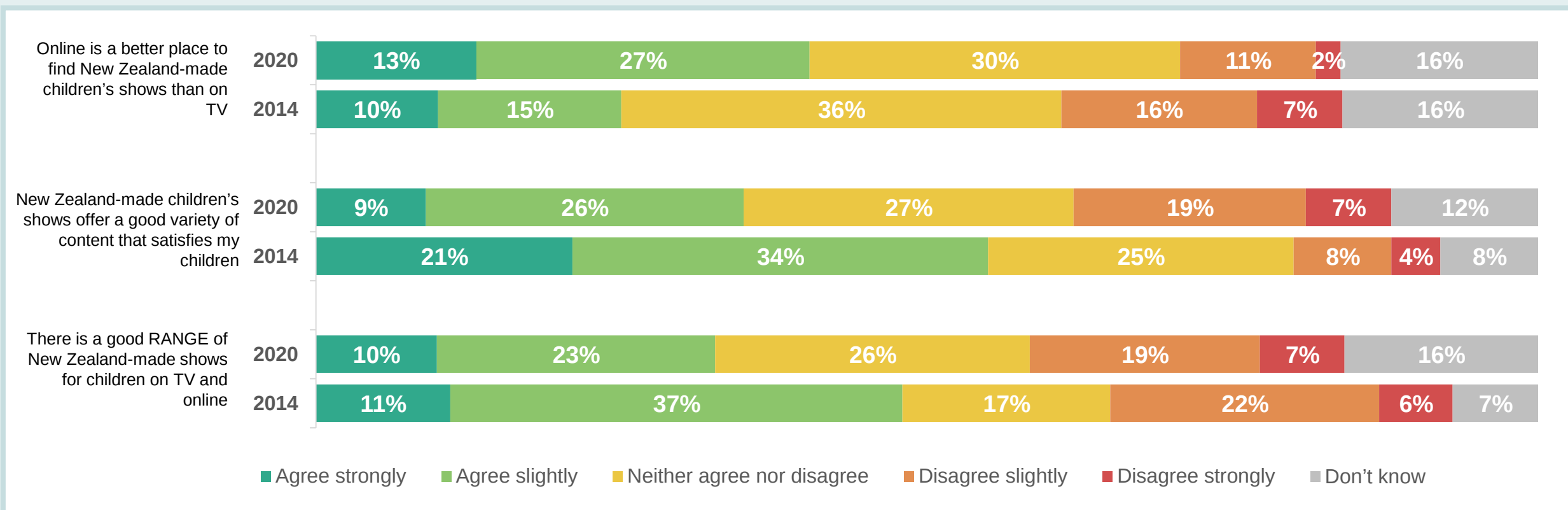
Three quarters of parents and caregivers agree that it's important for tamariki to watch New Zealand-made shows that reflect their world, and only 5% disagree. Four in ten think New Zealand-made children's shows are good quality, with roughly the same proportion agreeing that they are just as good as shows made overseas.





Attitudes of parents and caregivers to New Zealand-made children's programmes and shows

More parents and caregivers agree than disagree that online is a better place to find New Zealand-made children's content than TV. Just over 30% of parents and caregivers agree that New Zealand-made shows offer a good variety and range of content, however a quarter disagree.



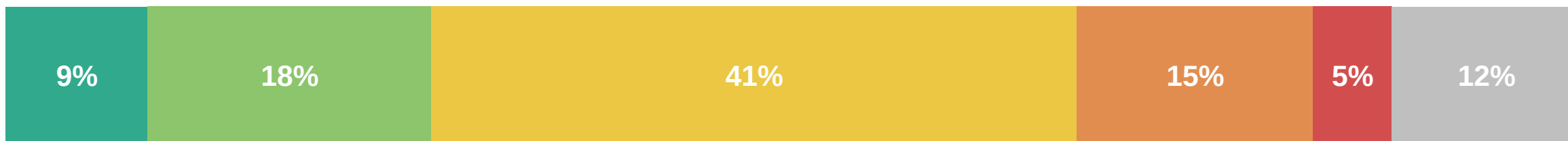


Satisfaction with the range of New Zealand-made content for pre-school children on free-to-air TV

Twenty-six percent of parents and caregivers are satisfied with the range of New Zealand content available for their pre-school children, however 20% disagree. The remaining 53% are on the fence.

Q. How satisfied or dissatisfied are you with the range of New Zealand content that is currently available for pre-school children on free-to-air TV?

■ Very satisfied ■ Quite satisfied ■ Neither satisfied nor dissatisfied ■ Quite dissatisfied ■ Very dissatisfied ■ Don't know



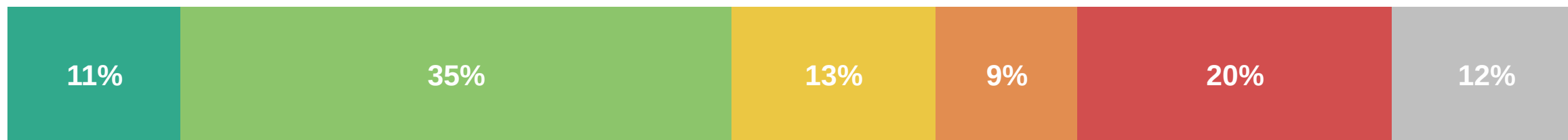


How often children watch local programmes and shows

Six in ten children watch local programmes and shows at least once a week. Māori tamariki are more likely than average to watch local content.

Q. How often does [CHILD] watch local programmes and shows with New Zealand locations and characters?

■ Every day ■ A few times a week ■ Once a week ■ Every 2 or 3 weeks ■ Once a month or less ■ Never



Māori children are more likely than average to watch local content (69% vs. 59%)



How often children see themselves represented in programmes and shows

Four in ten children say they see people like them in programmes and shows at least some of the time. Pacific children see themselves represented in programmes and shows less often than average.

Q. How often do you see people like you in the programmes and shows you watch?

■ Most of the time ■ Some of the time ■ A few times ■ Never ■ I don't know

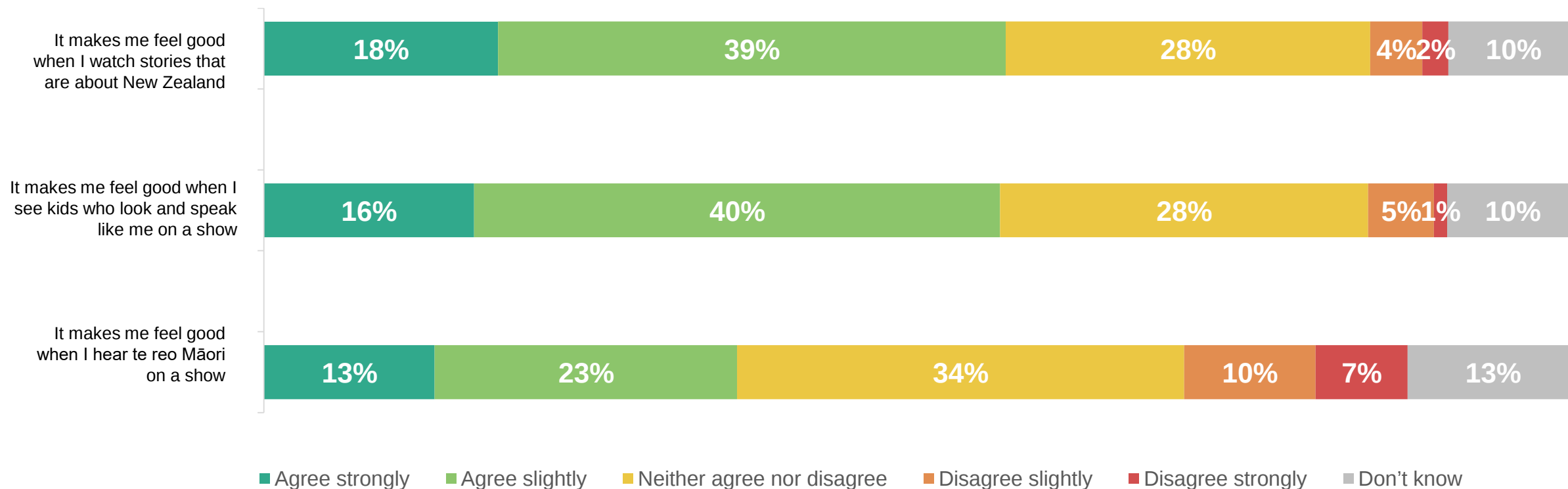


Pacific children are less likely than average to see themselves represented in programmes and shows (31% vs. 42%)



Children's attitudes to New Zealand content

Over half of children agree that it makes them feel good when they watch stories that are about New Zealand, and see children that look and speak like them on a show. Very few disagree with each statement. A third of children agree that hearing te reo Māori on a show makes them feel good, however 17% disagree.





Demographic differences in children's attitudes to New Zealand content

Girls are more likely than average to feel good when they see New Zealand stories, and when they hear te reo on a show. Māori are also more likely than average to feel good when they hear te reo.

Asian children are less likely to say they feel good when they watch New Zealand shows – it is possible these do not reflect how they experience New Zealand.

Strongly agree / agree	Less likely to agree with the statement than average	More likely to agree with the statement than average
It makes me feel good when I watch stories that are about New Zealand 57%	Boys (52%) Asian (47%)	Girls (61%)
It makes me feel good when I see kids who look and speak like me on a show 56%	12 to 14 year olds (50%)	-
It makes me feel good when I hear te reo Māori on a show 36%	Boys (31%) NZ European (31%)	Māori (56%) Girls (41%)



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Discovering new content

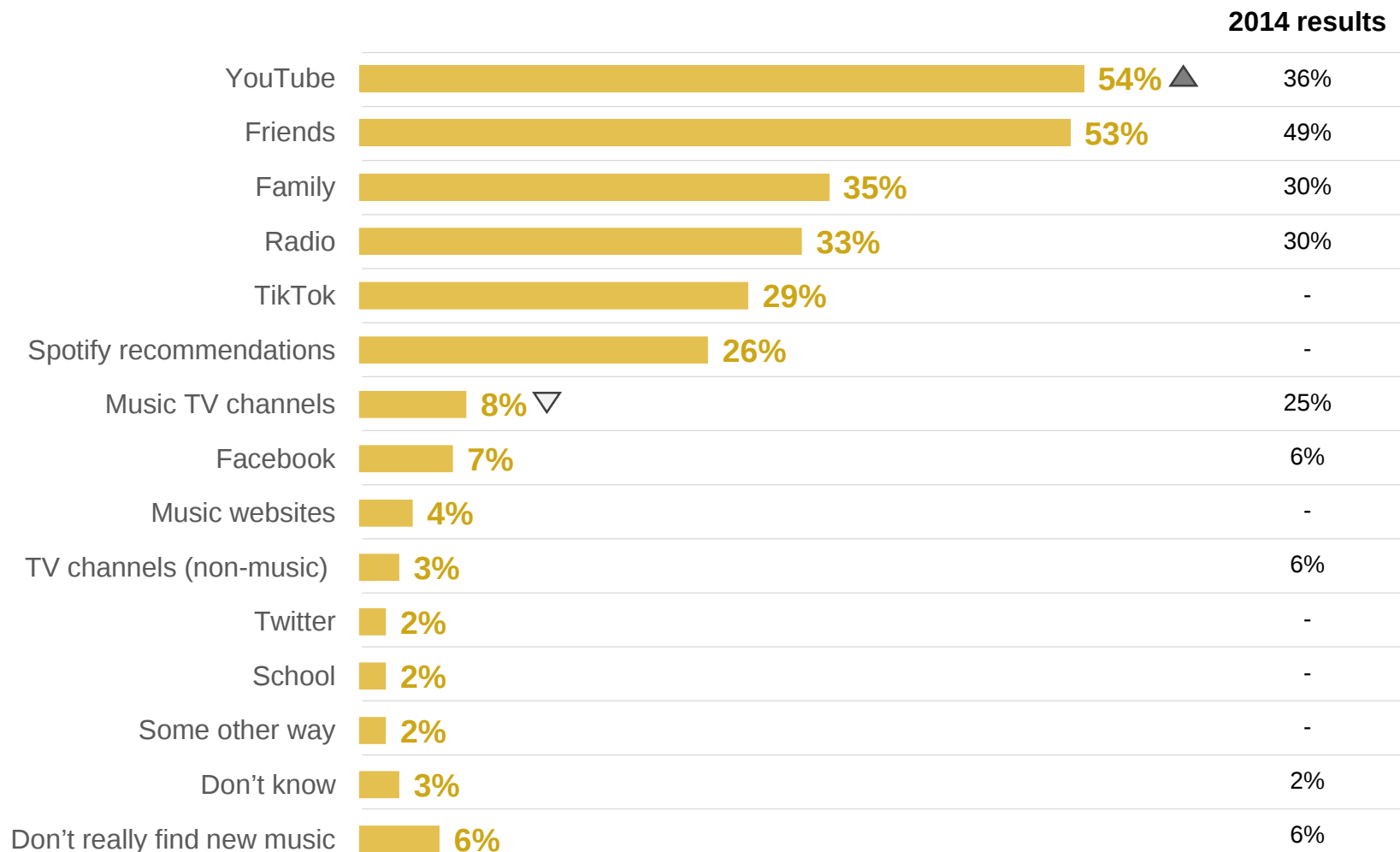




How children discover new music

YouTube and word of mouth from friends are the most common ways of discovering new music.

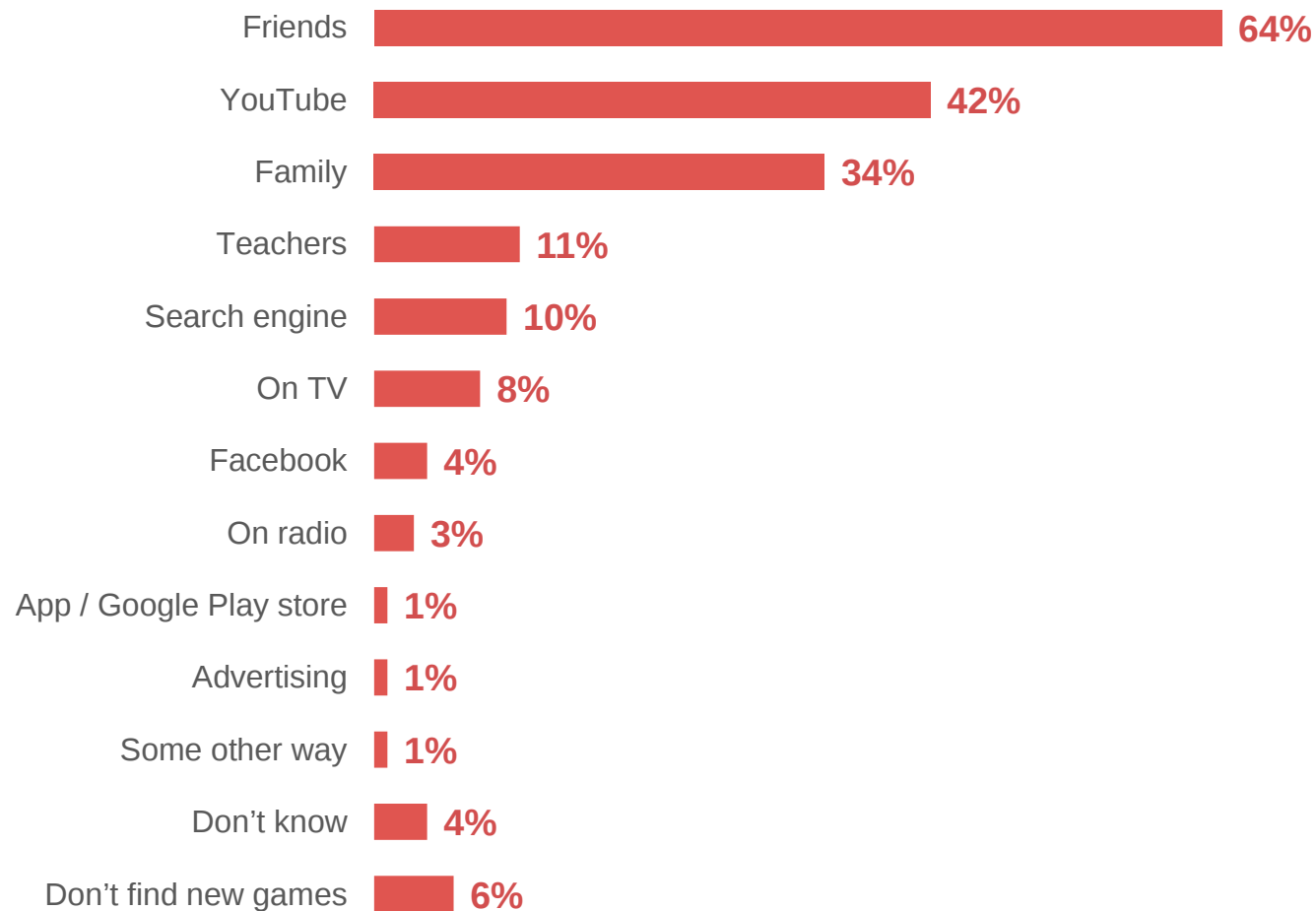
Music TV channels are a less common source of new music than in 2014.





How children discover new games

As with music, the most common ways tamariki find out about new games are through their friends and YouTube.

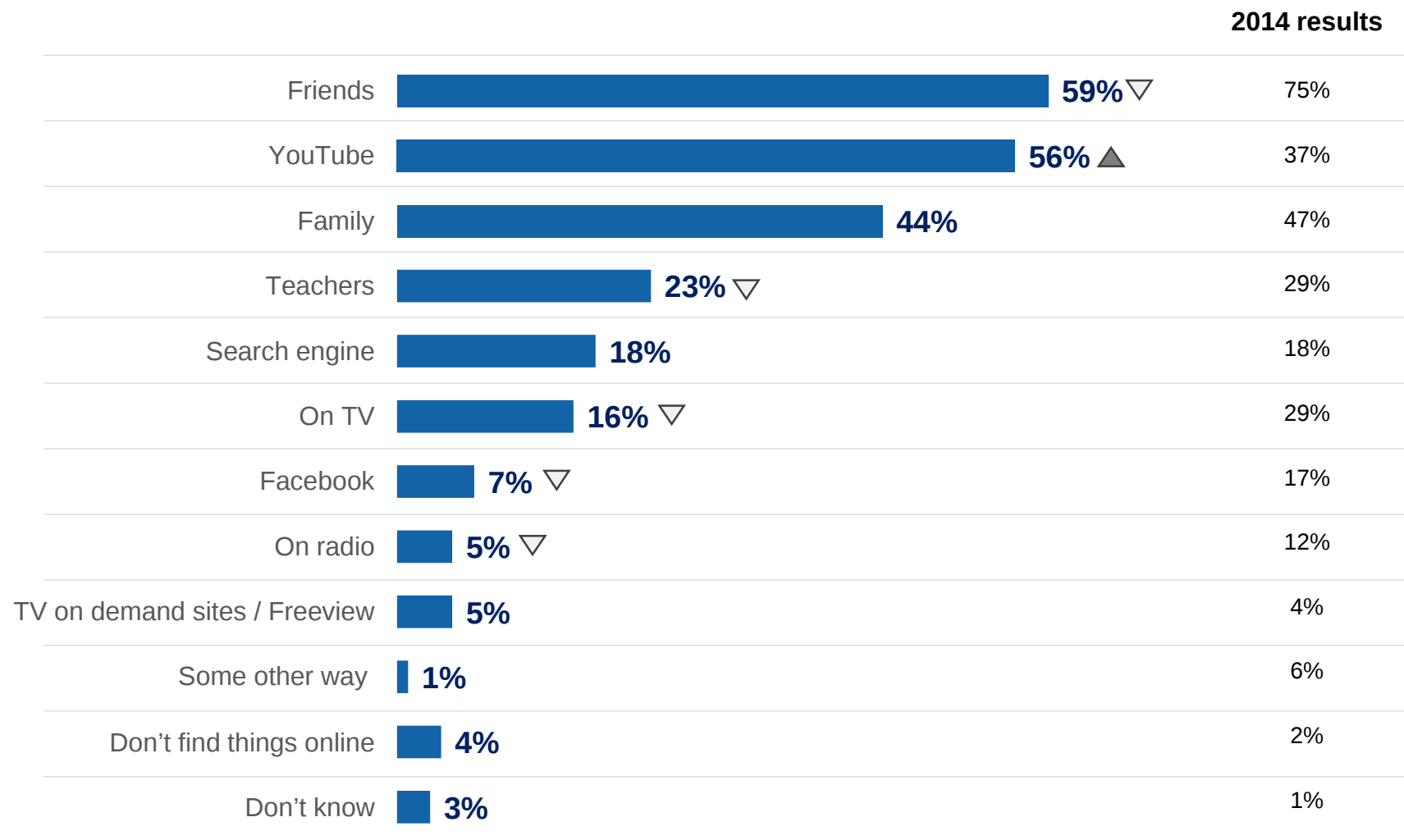




How children discover things online

The same is true for how children discover things online.

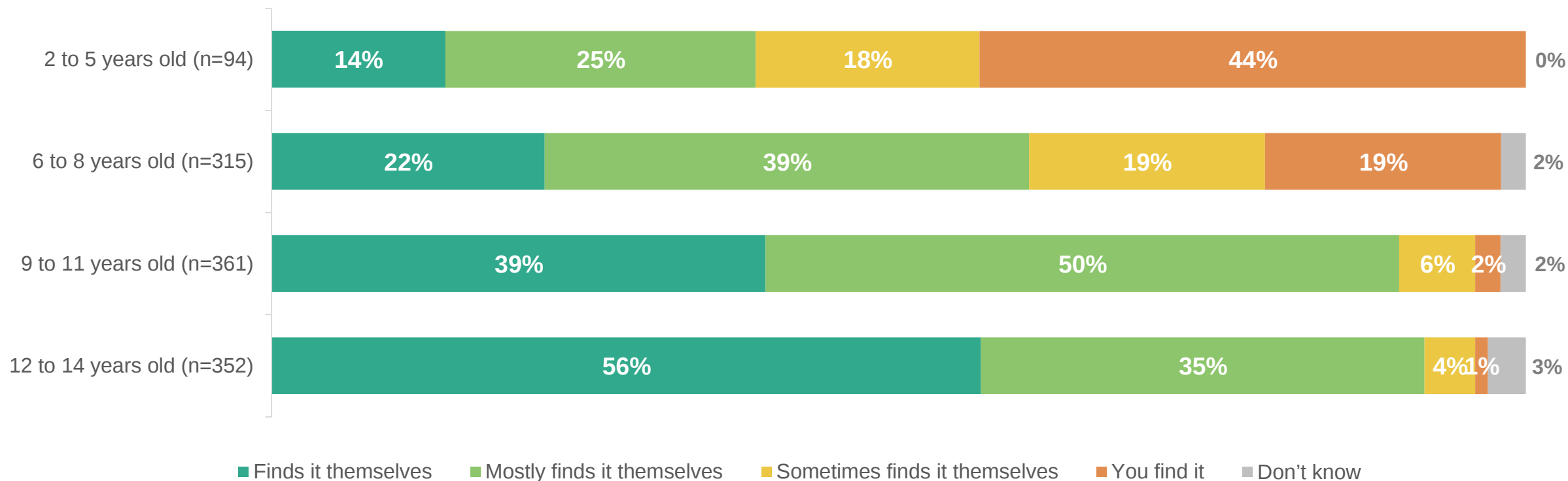
Since 2014 YouTube has become more influential, while friends, teachers, TV, Facebook and radio have become less so.





How children find content online

Not surprisingly, children are increasingly likely to find online content by themselves as they age. Between two and five years old only 38% are finding content on their own, by the time they reach the start of their teenage years 91% are finding content themselves.





Challenging content

Challenging content: section summary

Programmes and shows



On-screen classifications are effective, helping 51% of children understand when a programme is not for them. In general, children have a good grasp of what classification ratings mean.

Consistent with 2014, 15% of children know the watershed is at 8.30pm. However, awareness of there being a time of night when TV is not okay for kids has gone down (was 69%, now 61%).

Nine in ten tamariki have seen content on programmes and shows that has upset them. The most common types of content which children find upsetting (when they see or listen to it) relate to sex and nudity, violence and animal harm.

The most common strategies used by children to cope with distressing content are to turn the show off, watch something else instead, or to tell an adult.

Younger children are more likely to tell an adult than older children (this is consistent across all media types). What children do to cope is largely in line with what parents and caregivers think they do, although slightly more think their children are telling an adult than actually are. Most children (92%) who talk to an adult feel much better afterwards. This matches the perceptions of parents and caregivers (93%).

Internet



Seven in ten children have seen something online that has bothered them. As with programmes and shows, the most common types of content which children find upsetting (when they see or listen to it) relate to sex and nudity, violence and animal harm.

When children see something that makes them uncomfortable online many simply click out of the website. Only a third will tell an adult. Talking to adults helps most children (89%) feel better about what they've seen online.

Audio content



Fifty-four percent of children who listen to audio content have heard something that has bothered them. This is low relative to the other media types.

As with the other two media types, the main strategy children use for coping with upsetting audio content is to stop listening. Twenty-nine percent would tell an adult. Again, almost all children (91%) who talk to an adult about upsetting audio content feel better once they do.

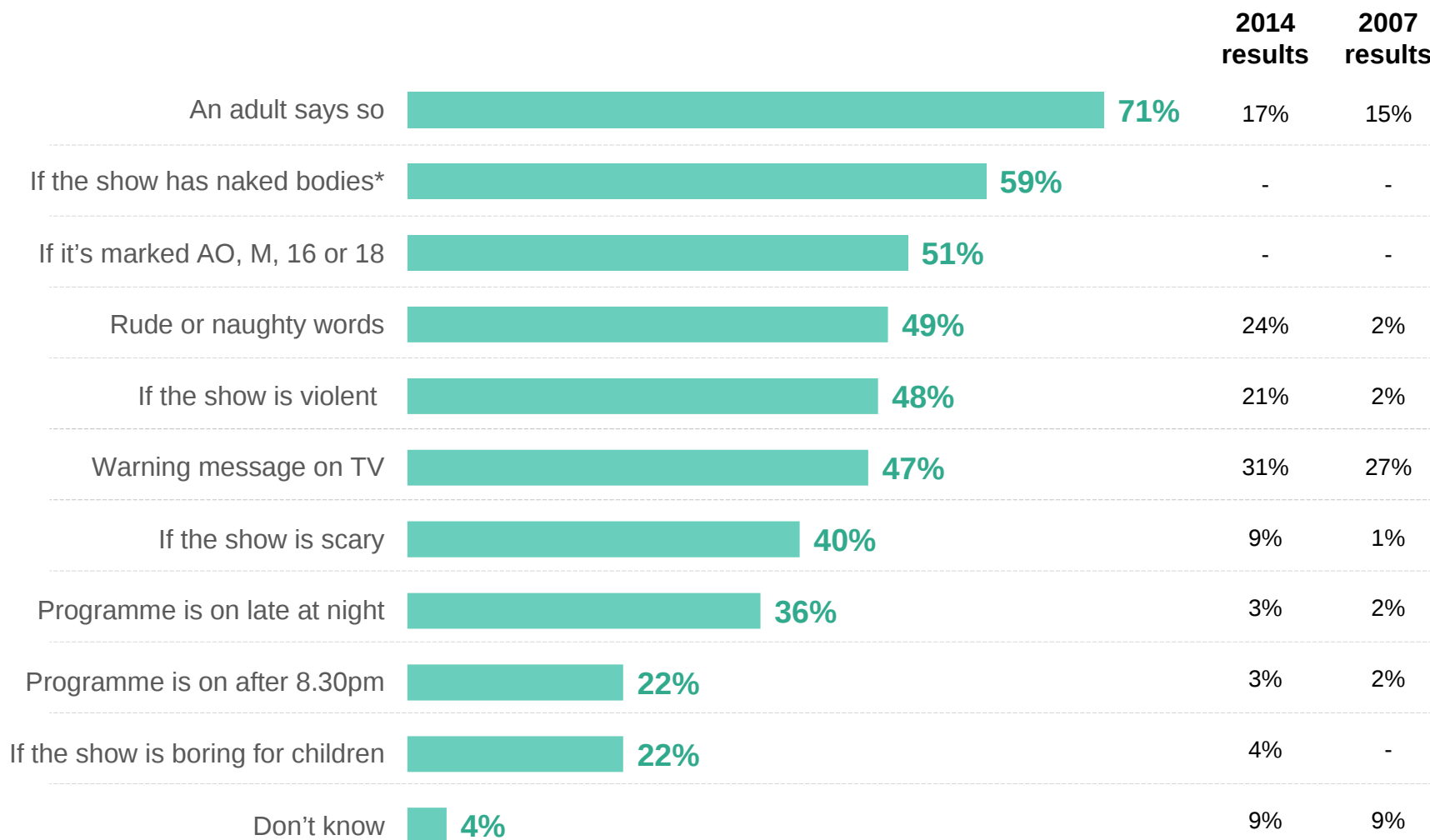


Challenging content: *Programmes and shows*



How children know a programme is not for them

On screen classifications successfully help 51% of children understand when a programme is not for them. What their parent or caregiver says and the presence of naked bodies in the programme are the only indicators they rely on more often.

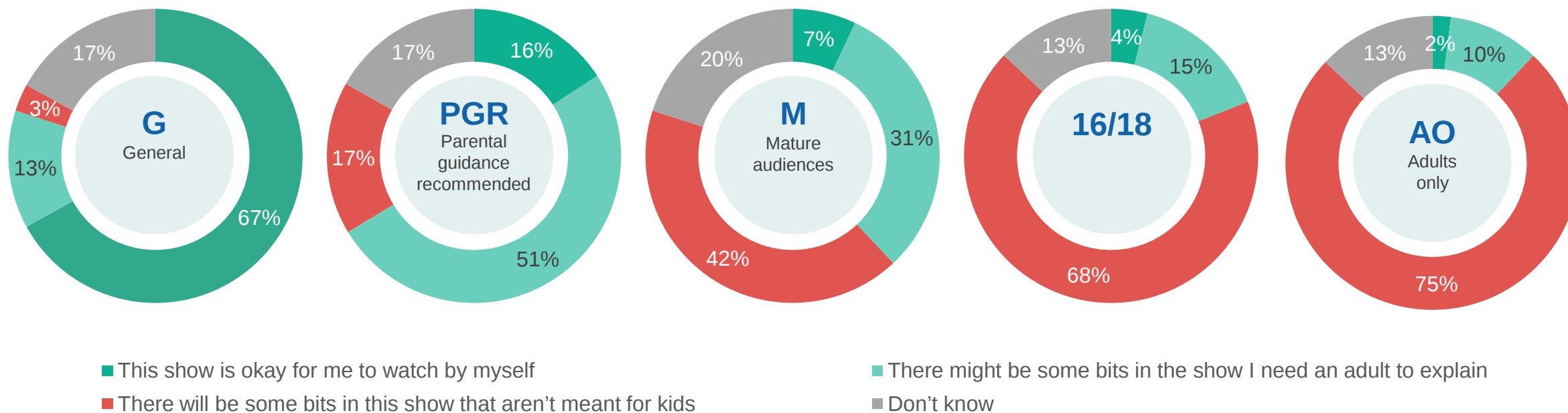


All results significantly higher than in 2014



Children's understanding of classification labels

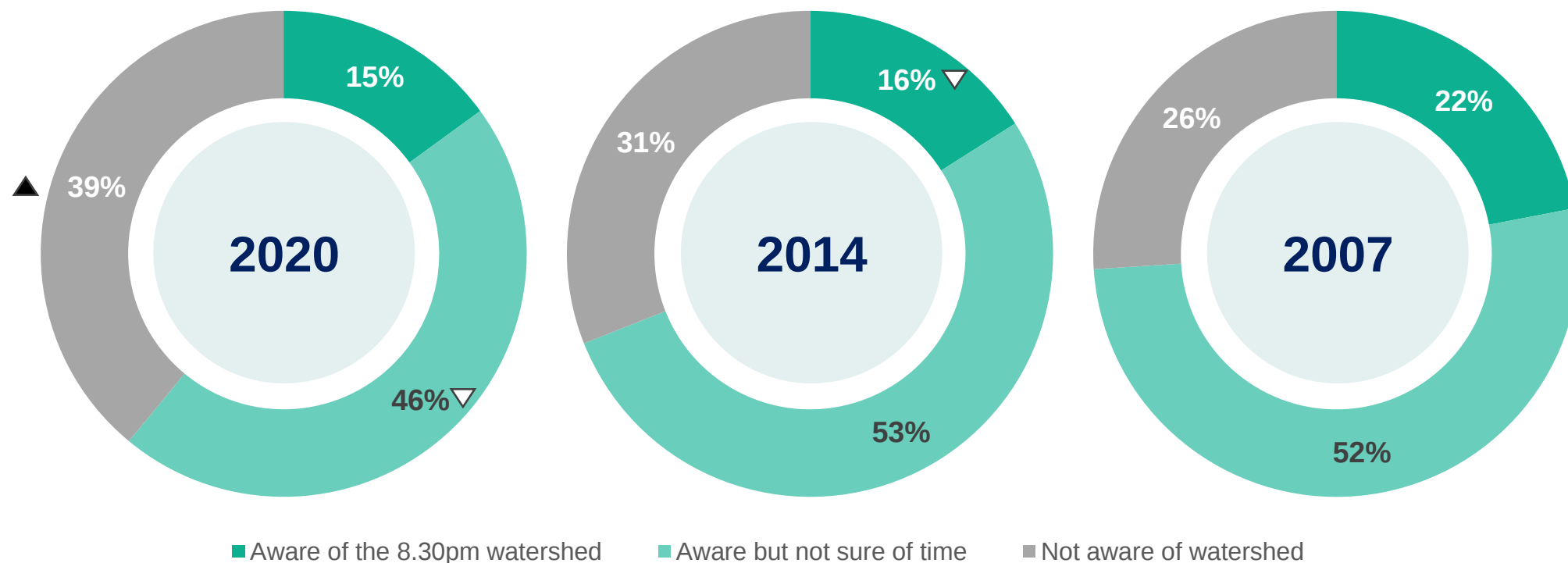
In general children have a good grasp of what programme classification ratings mean. Compared to the other classification labels, more children understand what AO means.





Children's awareness of the 8.30pm watershed on television

Six in ten children are aware there is a time of night when programmes are not ok for children, but only 15% know it is 8.30pm.



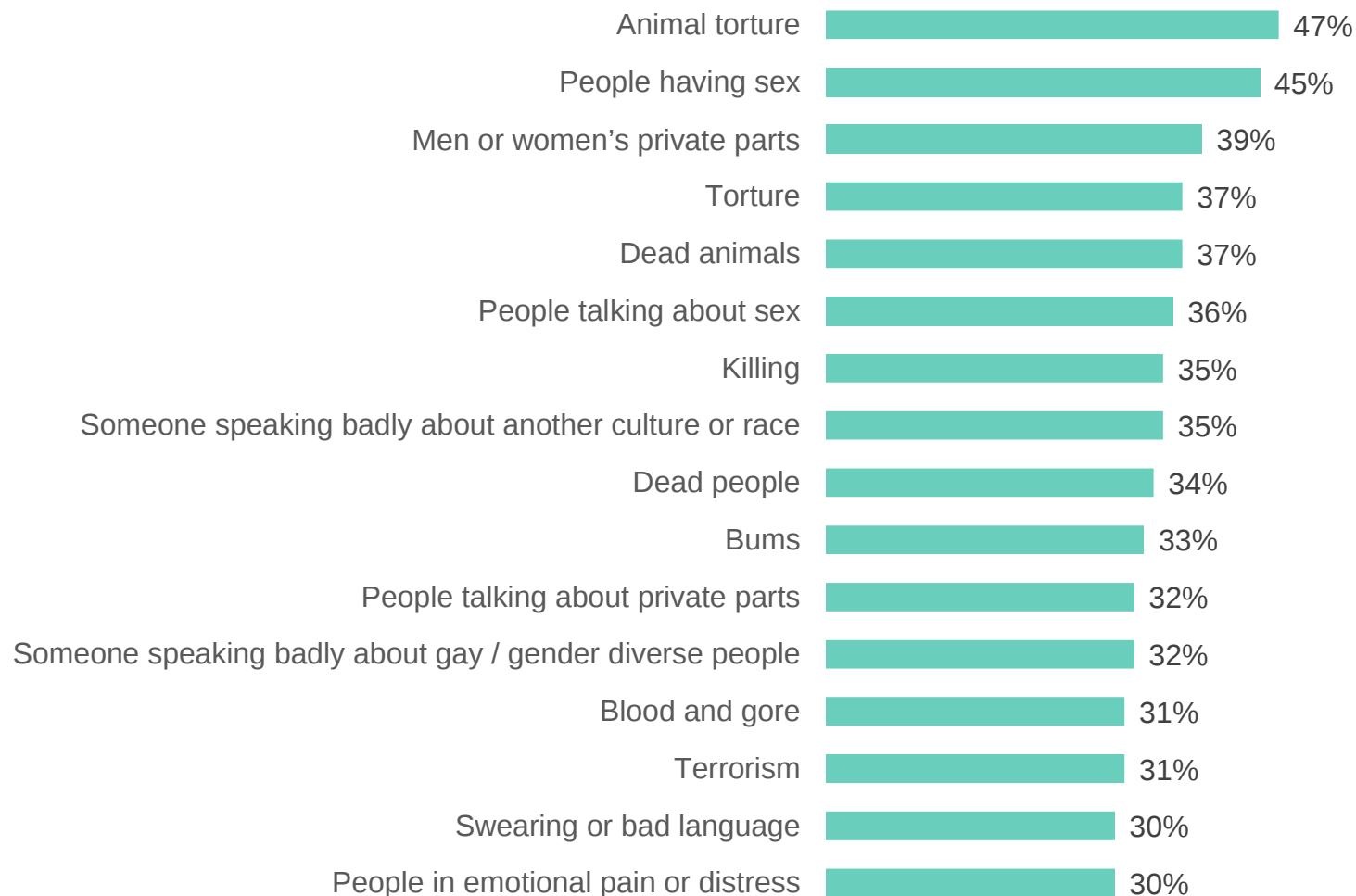
▲ ▼ Significantly higher / lower than previous wave



What is distressing or disturbing content for children?

In total, 87% of children aged ten plus have seen content on programmes and shows that's upset them.

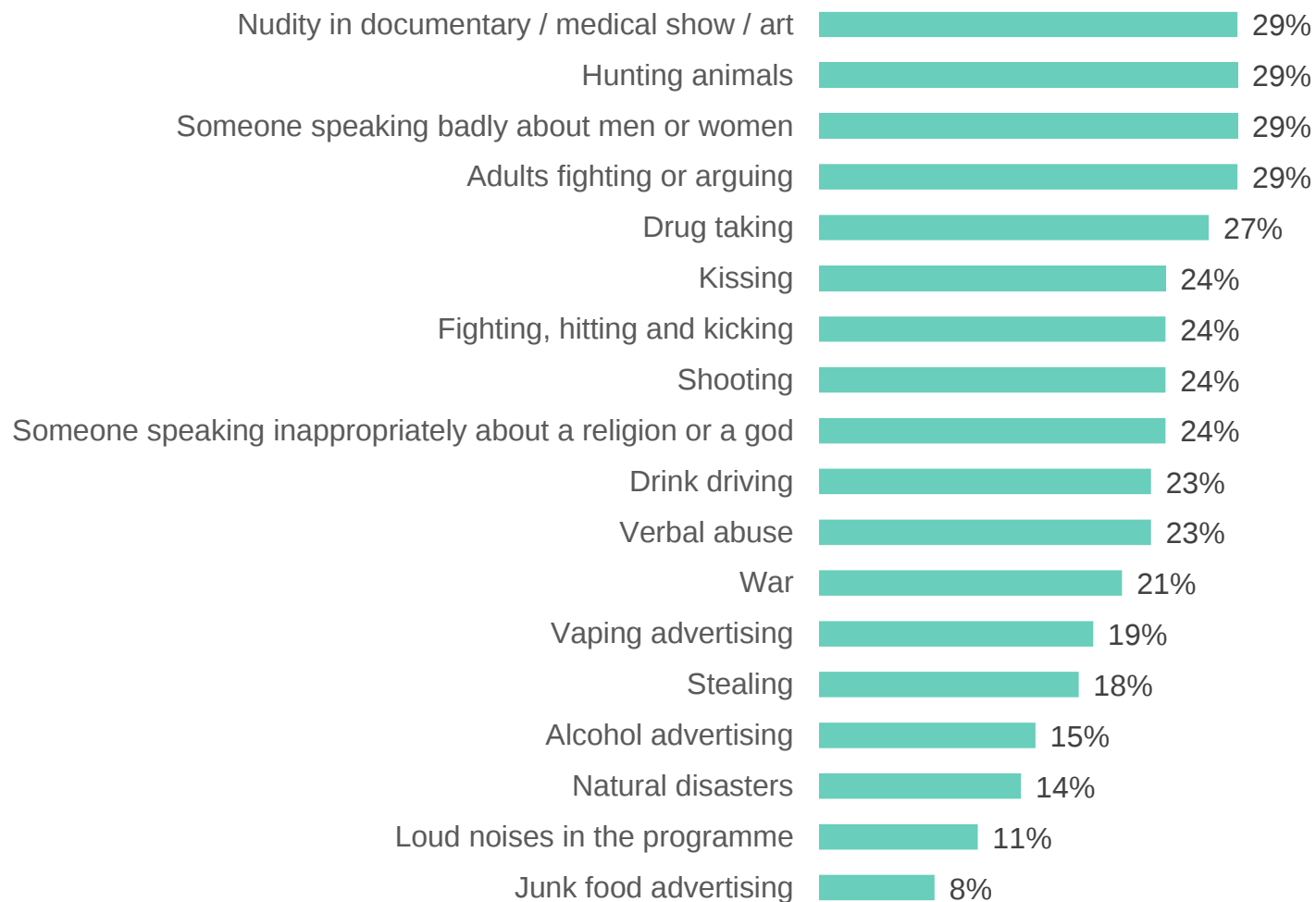
Children are most often upset by seeing animal torture and sex scenes.





What is distressing or disturbing content for children?

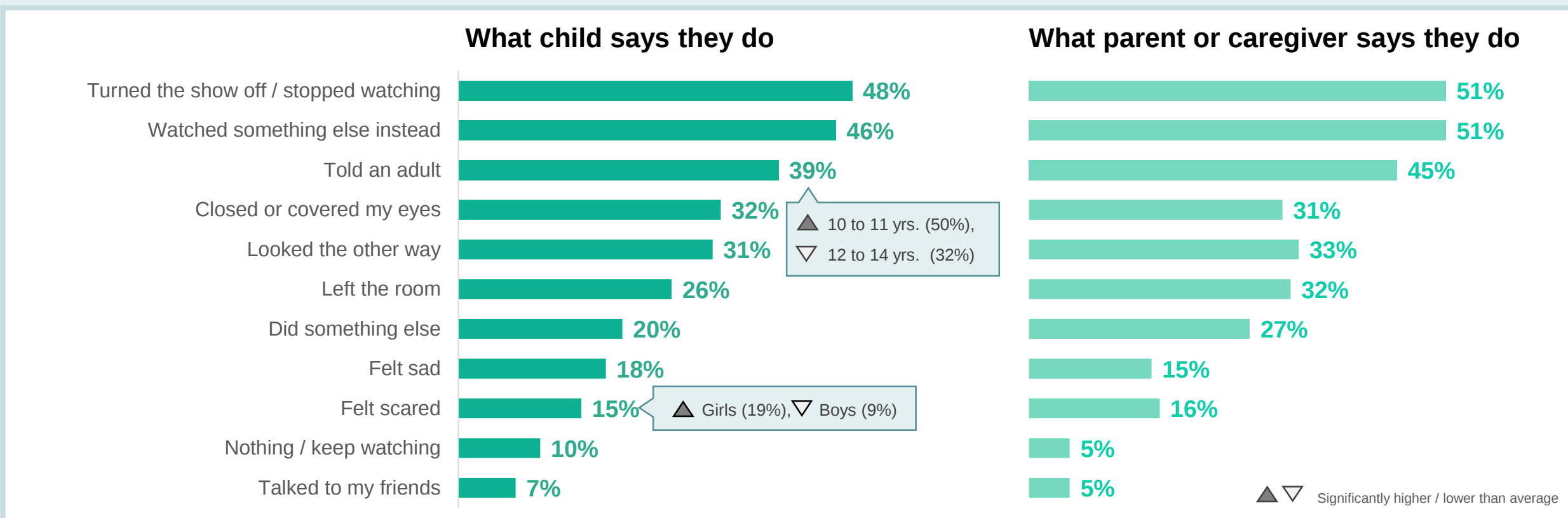
Less upsetting is loud noises within a programme and junk food advertising.





Coping with distressing content on programmes and shows

When they encounter distressing content, children's most common reactions are to turn it off, watch something else or talk to an adult. Parents' and caregivers' experience of their child's coping strategies is largely consistent with what children are actually doing, although it's worth noting that more think their children are telling an adult than actually are (45% vs. 39%).



NOTE: Questions about distressing content were only asked of 10 to 14 year olds.

Source: Q8l. And what did you do when you came across the things that upset you? | S2Q8. What does [CHILD] do if they see something in programmes and shows that upsets them?

Base size: All parents and caregivers of 10 to 14 year olds (n=429) | All 10 to 14 year olds who watch programmes and shows and saw something upsetting (n=429)



Impact of talking to adults about distressing content on programmes and shows

The vast majority of children who talk to an adult if they see something distressing on a programme or show feel better afterwards. This lines up with the experience of caregivers.

Child perspective



Parent / Caregiver perspective



■ Much better ■ A little better ■ It made no difference ■ A little worse ■ Much worse ■ Not sure / Can't remember

NOTE: Questions about distressing content were only asked of 10 to 14 year olds.

Source: Q8li. Thinking of the last time you told an adult about something that had bothered or upset you on a show or programme, how did you feel afterwards? | S2Q9. Thinking of the last time your child told you about something that had bothered or upset them on a show or programme, how did they feel after they had talked to you?

Base size: All parents and caregivers of 10 to 14 year olds whose children talk to them when they see distressing content (n=223) | All 10 to 14 year olds who talk to an adult when they see distressing content (n=164)



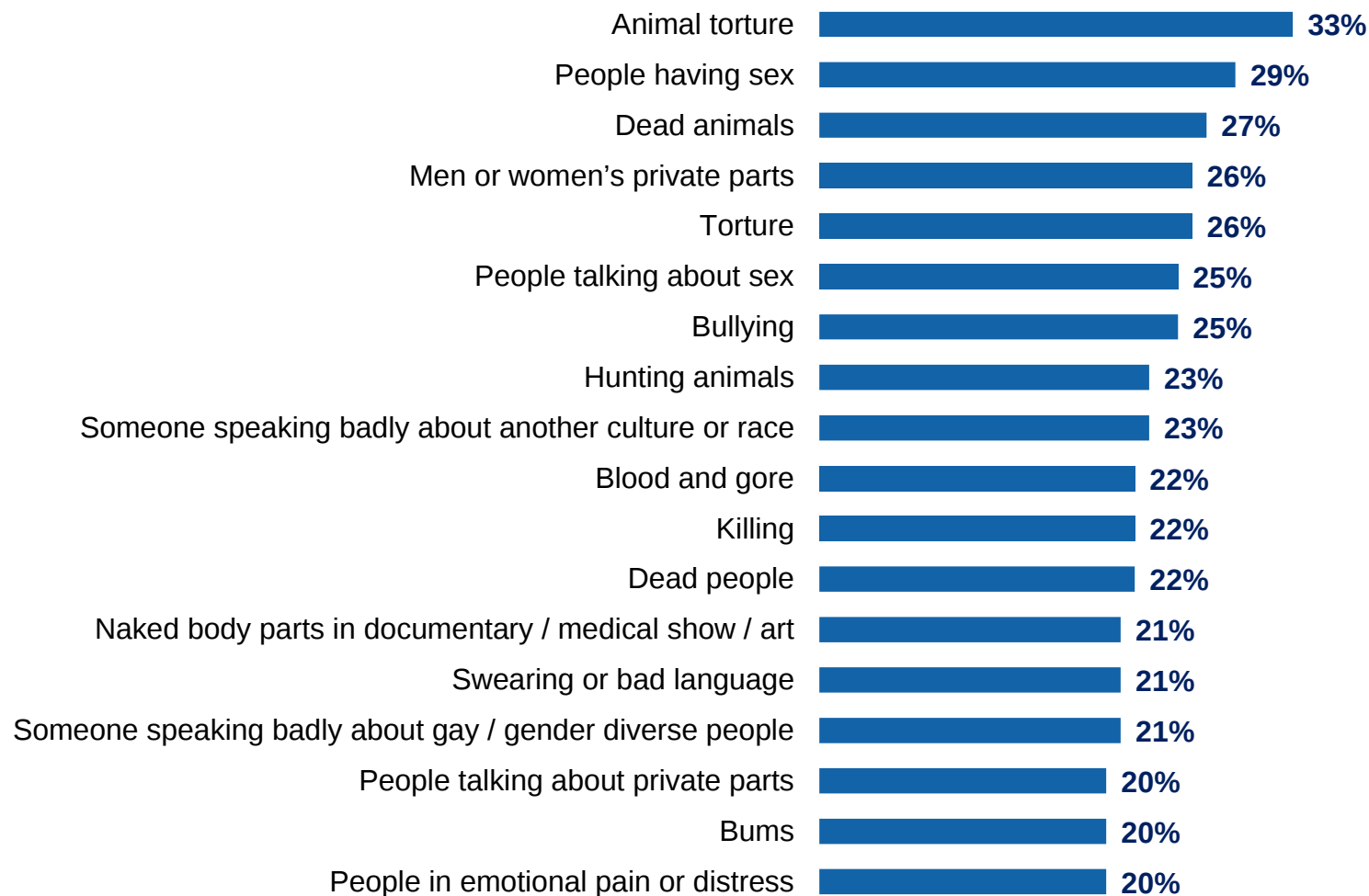
Challenging content: *Online content*



What is distressing or disturbing online content for children?

Seven in ten (72%) children aged ten plus have seen something online that has bothered them.

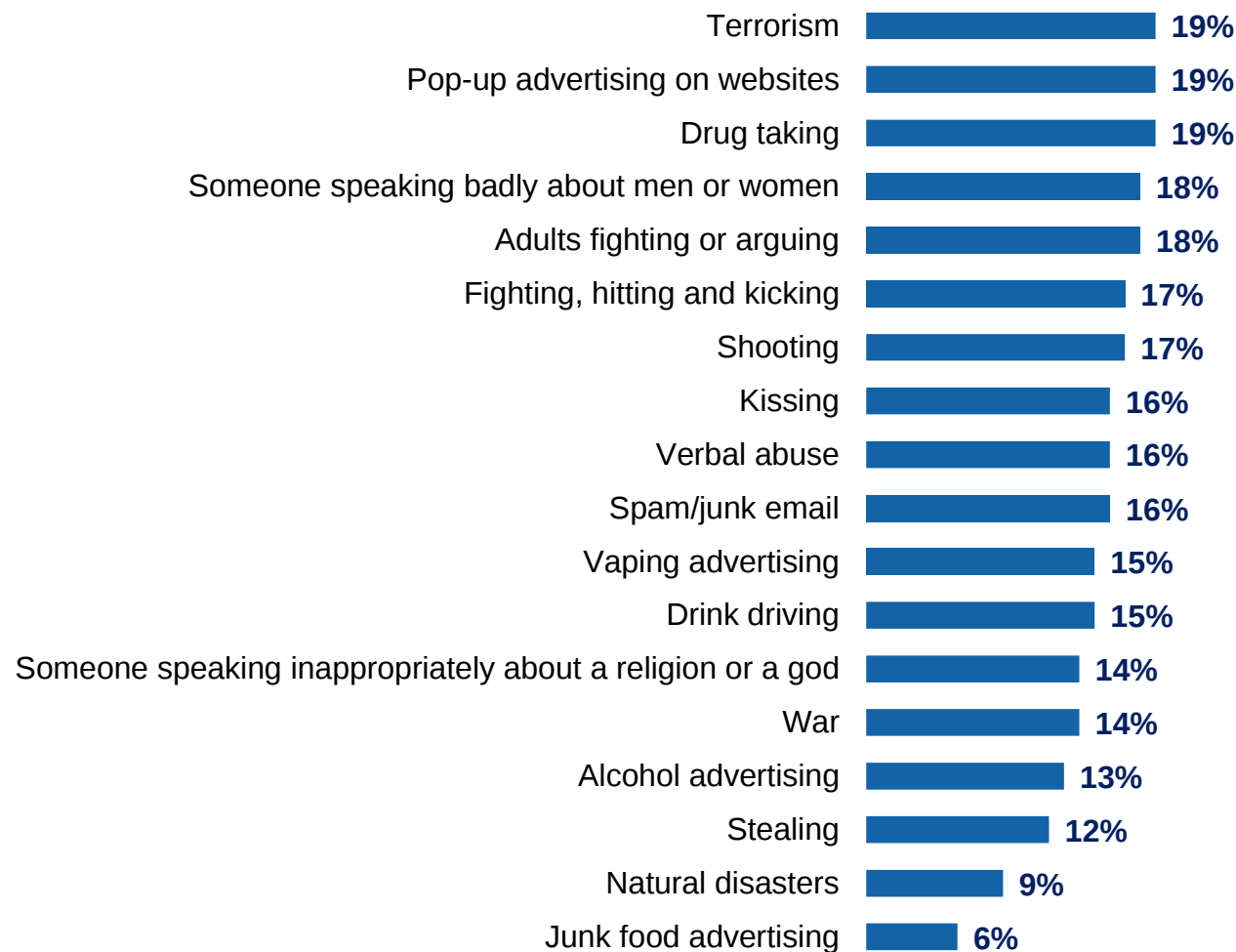
In an online environment, children are most often upset by seeing animal torture and people having sex.





What is distressing or disturbing online content for children?

Seeing natural disasters and junk food advertising is less upsetting to children.

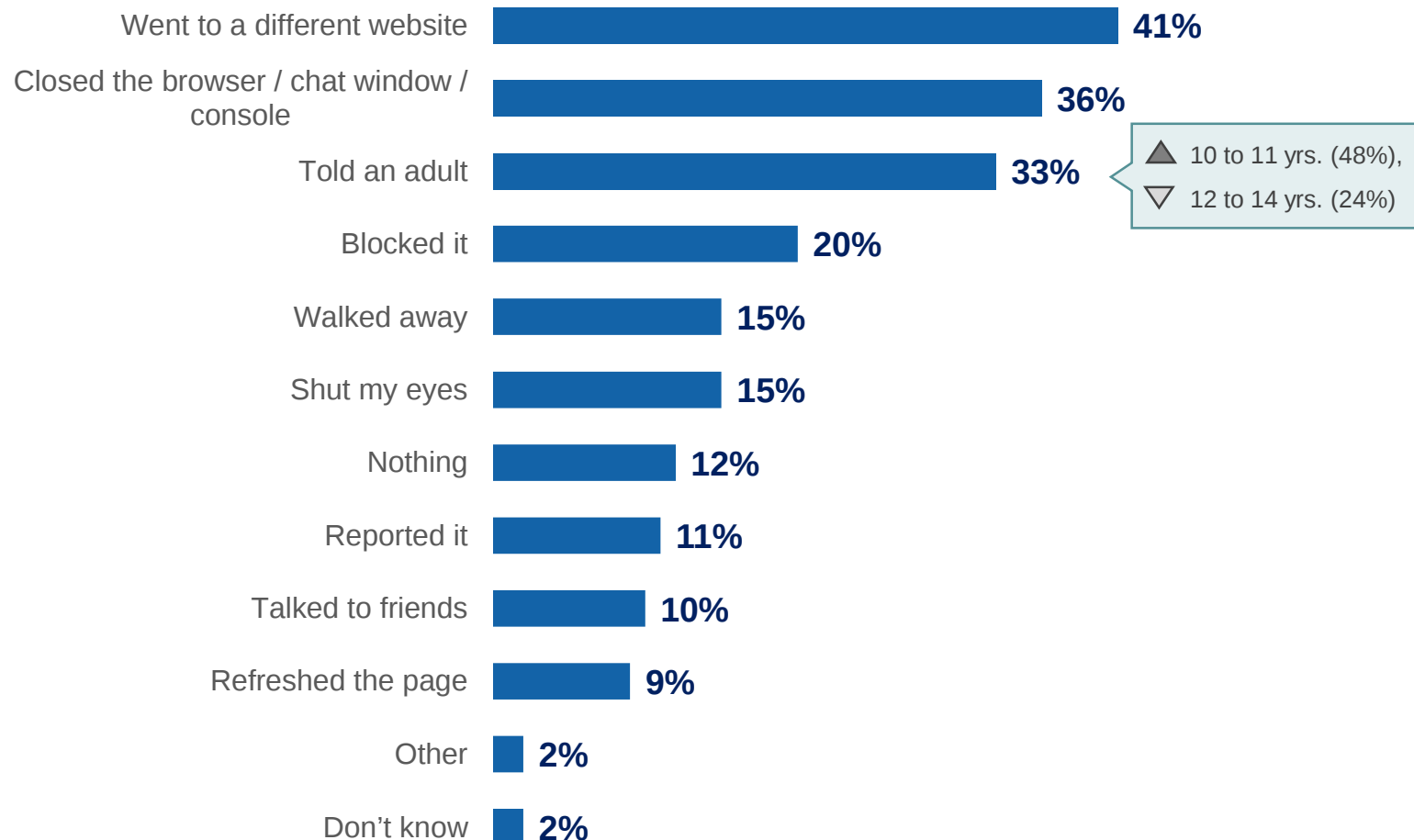




Coping with distressing content online

When children come across something that upsets them online, their most common reactions are to go to a different website, close their browser or speak to an adult.

Many tamariki are not talking to an adult or friend about distressing content they are seeing online. As with the other types of media, younger children are more likely to tell an adult than older children.

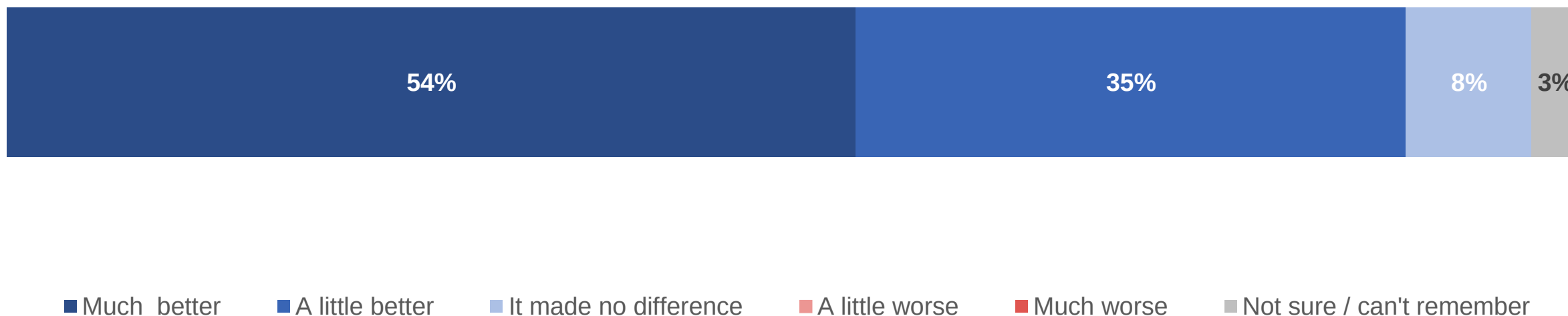


▲ ▼ Significantly higher / lower than average



Impact of talking to adults about distressing online content

Talking to adults is an effective strategy for coping with distressing online content. Nine in ten felt better after doing so, and no child felt worse.



NOTE: Questions about distressing content were only asked of 10 to 14 year olds.

Source: Q10fi. Thinking of the last time you told an adult about something that had bothered or upset you on a show or programme, how did you feel afterwards?

Base size: All 10 to 14 year olds who talk to an adult when they see distressing content (n=126)



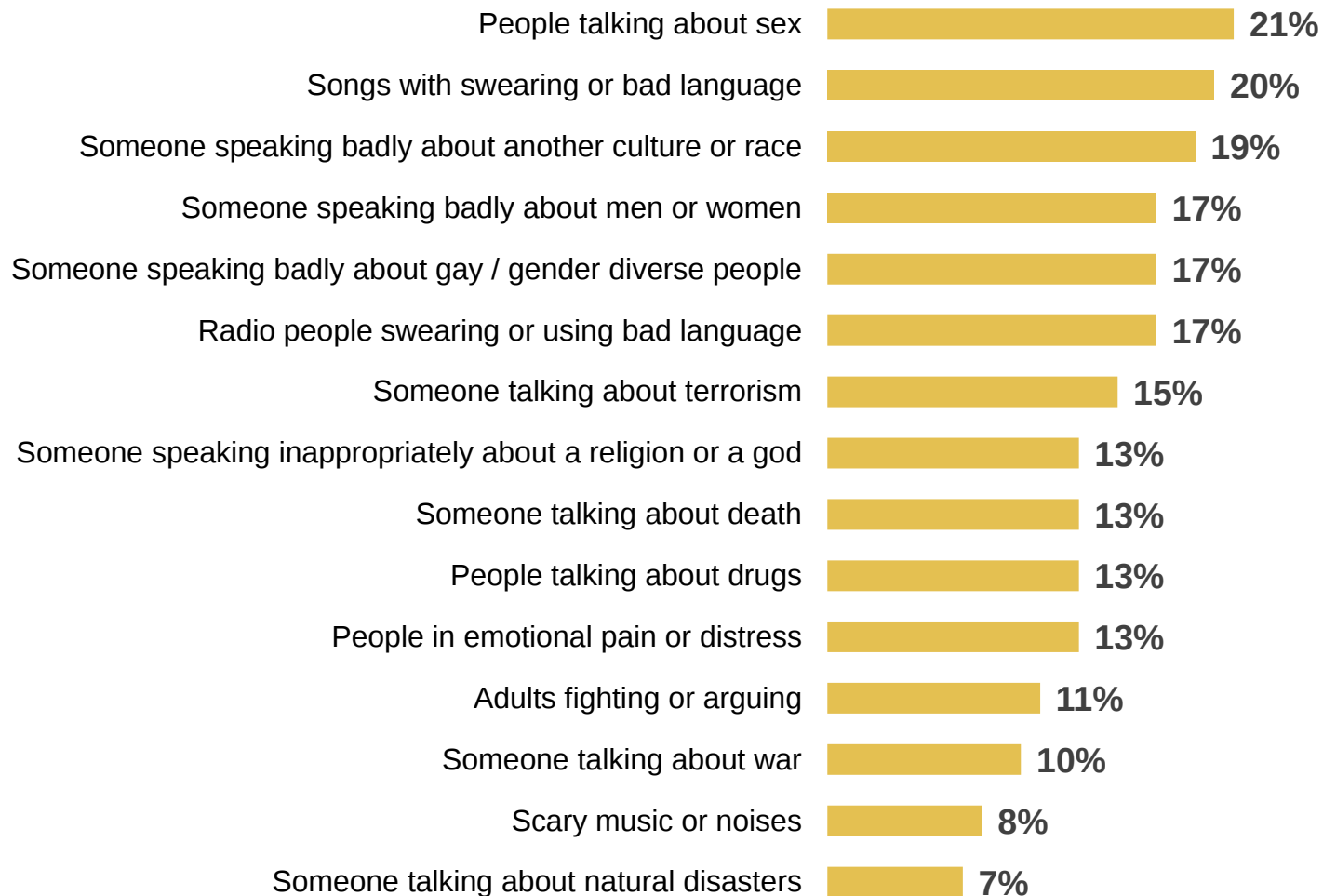
Challenging content: *Audio content*



What is distressing or disturbing content for children?

Just over half (54%) of all children who listen to audio content have heard something that has bothered them.

People talking about sex, and songs containing bad language are the most common things children hear that upsets them.

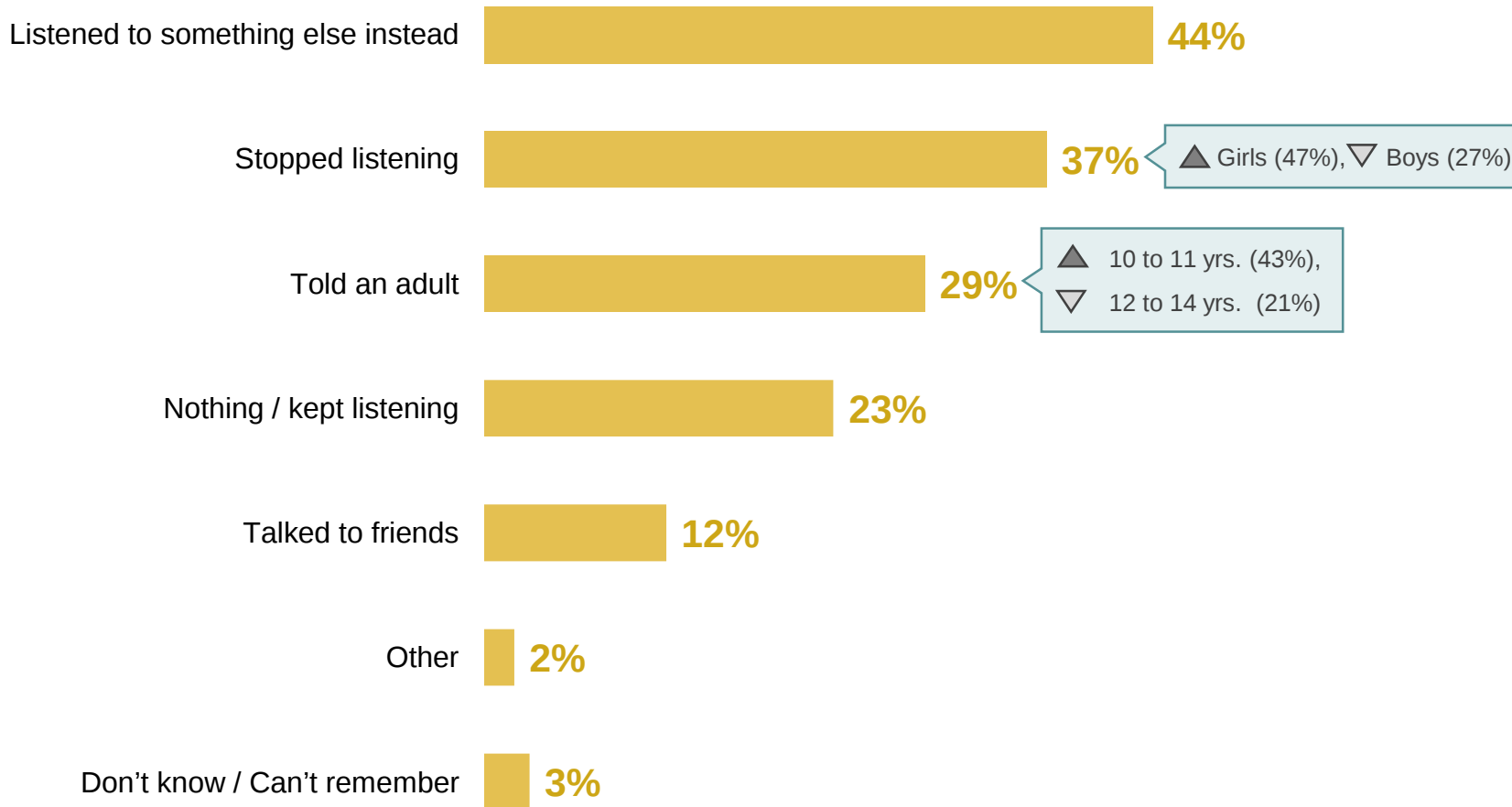




Coping with distressing content on audio

The most common coping strategy for audio content is to listen to something else instead or to stop listening entirely.

Older children are less likely to tell an adult than younger children. There is little overlap between children who would tell an adult and tell their friends.

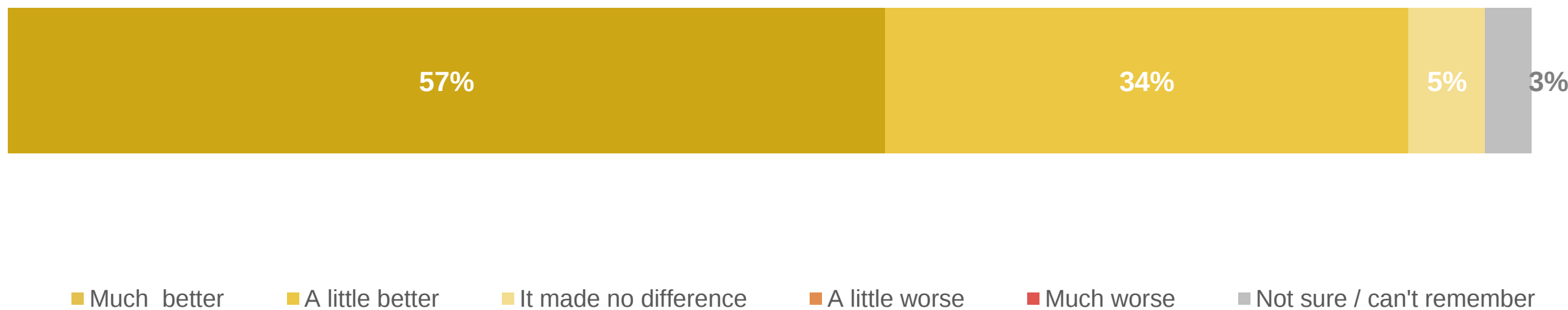


▲ ▼ Significantly higher / lower than average



Impact of talking to adults about distressing audio content

Almost all (91%) children who talk to an adult if they hear upsetting audio content feel better once they do.



NOTE: Questions about distressing content were only asked of 10 to 14 year olds.

Source: Q9i. Thinking of the last time you told an adult about something that had bothered or upset you on the radio, streamed music, podcasts or audiobooks, how did you feel afterwards?

Base size: All 10 to 14 year olds who talk to an adult when they see distressing content (n=69)

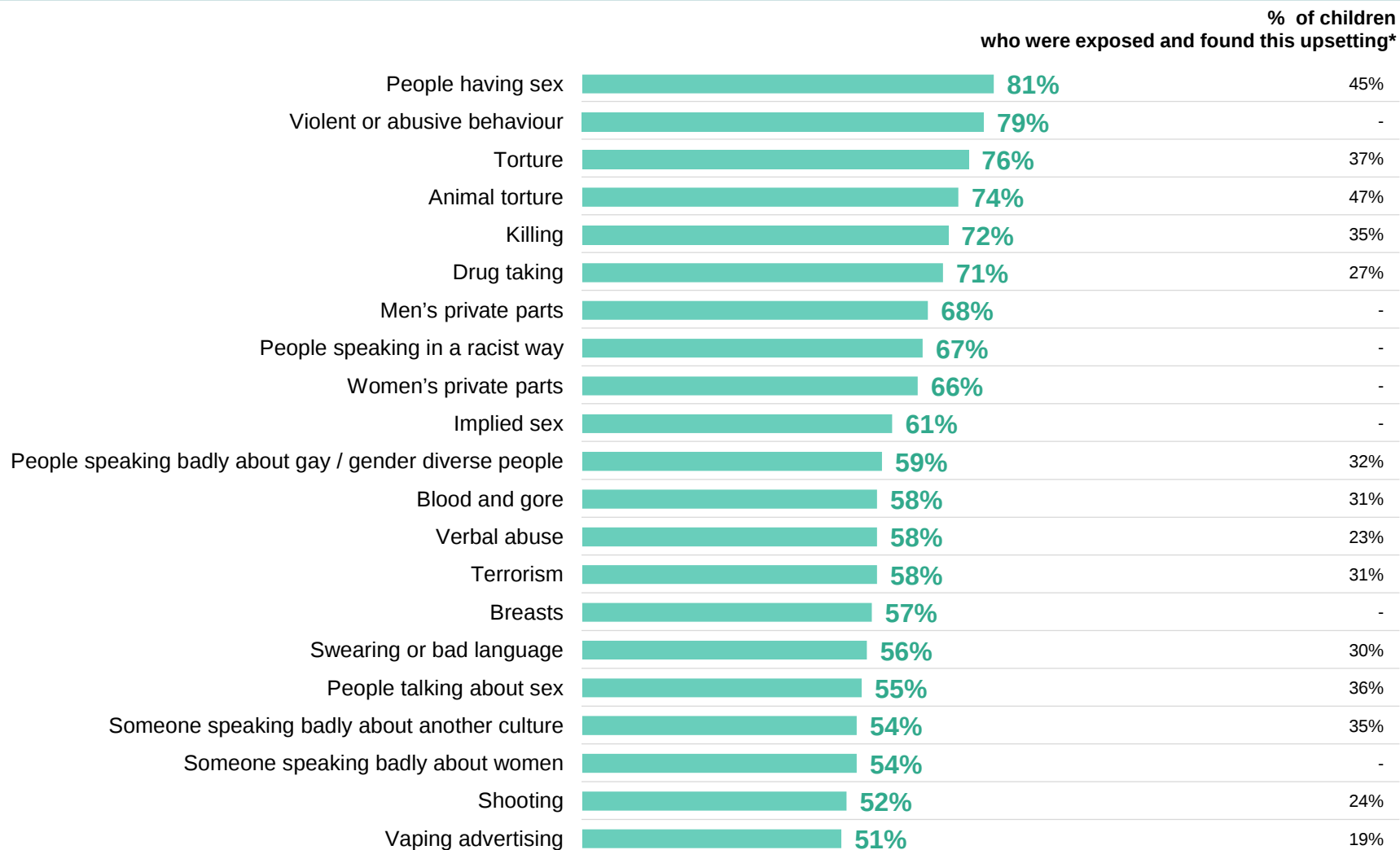
Parental concerns



What parents and caregivers are concerned about their child seeing on programmes and shows

Nearly all parents and caregivers (97%) have concerns about what their child might view on programmes and shows.

They are most concerned about their child watching programmes that contain sex scenes, and violent or abusive behaviour.



*NOTE: Questions about distressing content (Q8k) were only asked of 10 to 14 year olds (n=547). Some questions that were asked to adults were not asked to this age group because the subject matter was too sensitive.

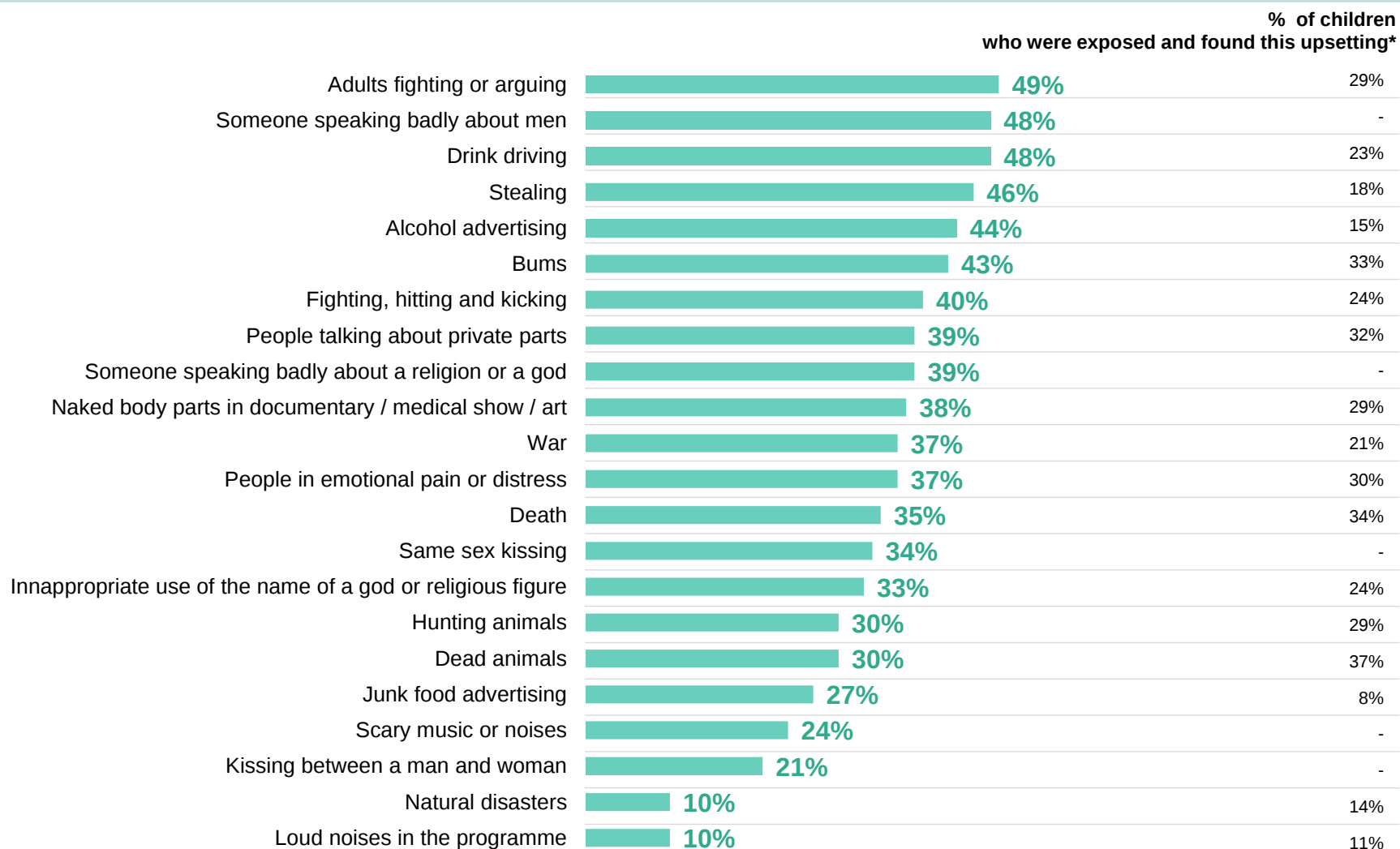
Source: S2Q7. What type of things do you have concerns or worries about [CHILD] seeing on programmes or shows?

Base size: All parents and caregivers of 6 to 14 year olds who watch programmes and shows (n=971)



What parents and caregivers are concerned about their child seeing on programmes and shows

Parents and caregivers are least concerned about their children seeing coverage of natural disasters or hearing a loud noise in a programme.



*NOTE: Questions about distressing content (Q8k) were only asked of 10 to 14 year olds (n=547). Some questions that were asked to adults were not asked to this age group because the subject matter was too sensitive.

Source: S2Q7. What type of things do you have concerns or worries about [CHILD] seeing on programmes or shows?

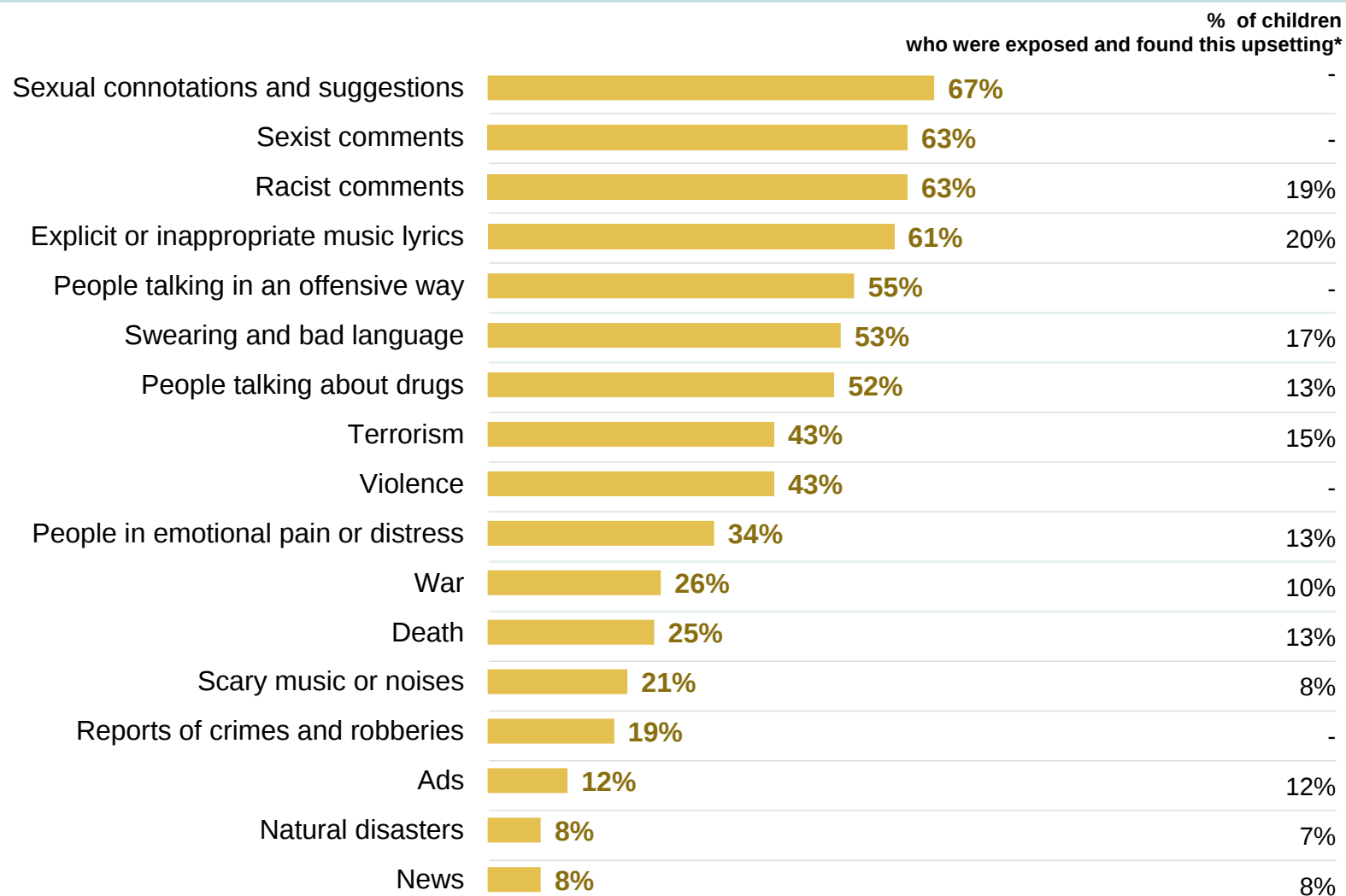
Base size: All parents and caregivers of 6 to 14 year olds who watch programmes and shows (n=971)



What parents and caregivers are concerned about their child hearing on the radio and streaming services

Ninety percent of parents and caregivers are concerned about what their child might hear on the radio or streaming services.

The top concern is sexual connotations and suggestions, followed by sexist and racist comments.



*NOTE: Questions about distressing content (Q9c) were only asked of 10 to 14 year olds (n=486). Some questions that were asked to adults were not asked to this age group because the subject matter was too sensitive.

Source: S3Q3. What type of things do you have concerns or worries about [CHILD] hearing on the radio and streaming services?

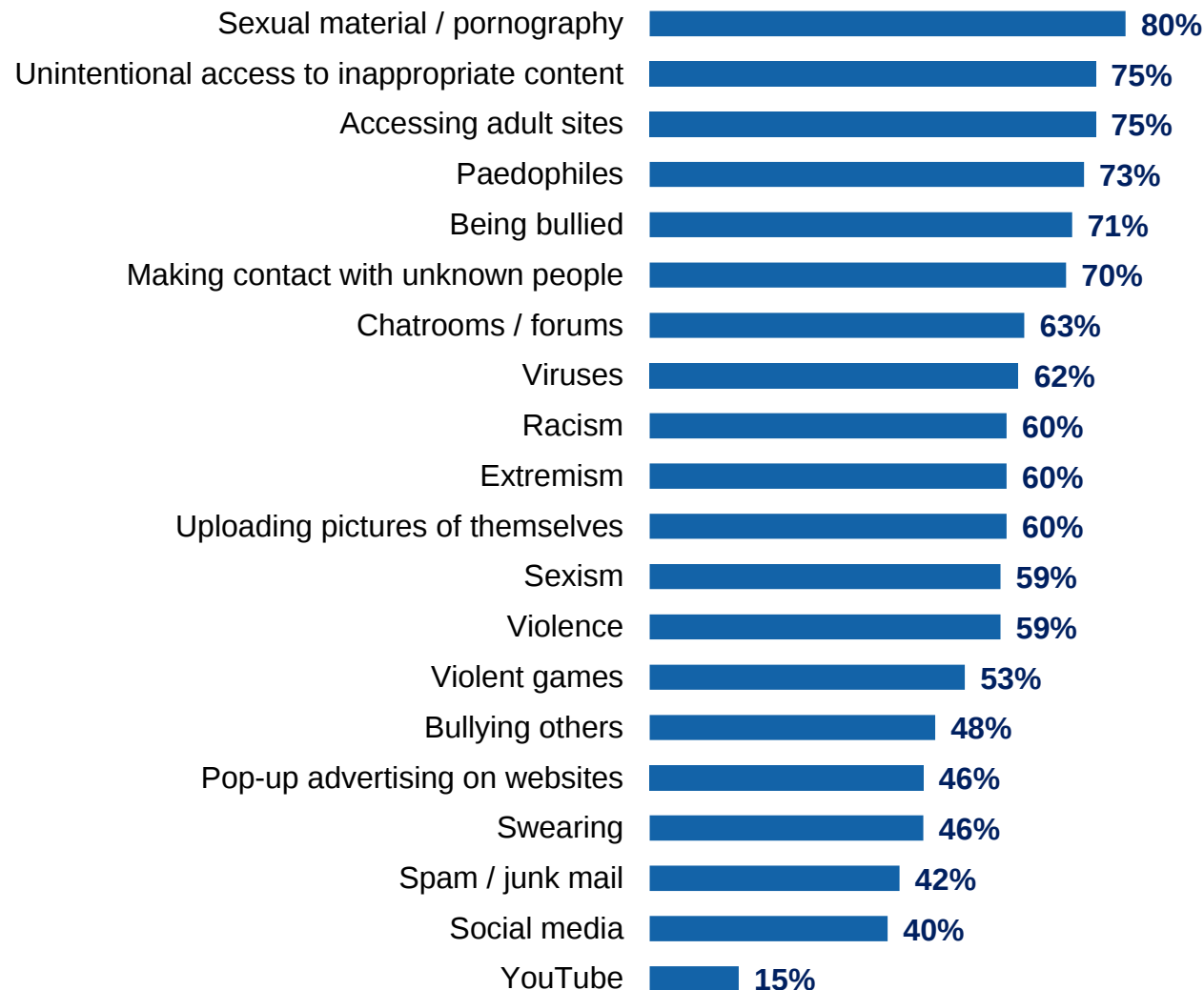
Base size: All parents and caregivers of 6 to 14 year olds who listen to audio content (n=734)



What parents and caregivers are concerned about their child being exposed to on the internet

The internet is perceived by parents and caregivers as a potentially unsafe space for their tamariki.

Almost all parents and caregivers (97%) hold some concerns about what their child might come across online. Of particular concern is pornographic and age inappropriate content.





Protecting children from inappropriate content

Protecting children from inappropriate content: section summary

Programmes and shows

Tamariki can't always distinguish between what is real and what is not. At six to eight years old, only 10% fully understand the difference, this increases to 36% by the time children reach the start of their teenage years.

Programmes and shows are reported by parents and caregivers to negatively impact some children's behaviour. A third of children learned inappropriate words in the past year, 20% had nightmares or difficulty sleeping, and 19% copied aggressive behaviours. Boys tend to be more likely to pick up negative behaviours from programmes and shows than girls.

To protect children from inappropriate content on programmes and shows, and their negative consequences, almost all parents and caregivers (96%) have rules in place. Eight-six percent have enforced time restrictions, and 75% have rules around supervision.

Six in ten children have a set curfew for watching programmes and shows. On average this is 7.30pm for six to eight year olds, 8pm for nine to eleven year olds and 9pm for twelve to fourteen year olds.

Parents and caregivers use a range of approaches to protect their children from harm. For example, most have time restriction and supervision rules in place. In addition, four in ten make use of parental control settings, while three quarters use classification and warning labels.

While there's widespread use of these approaches, it should be noted that parents and caregivers are using classifications and warnings to guide their decisions less frequently than in 2014, and fewer are aware the watershed is at 8.30pm.



Internet

Half (48%) of all parents and caregivers use filtering software or in-app controls to stop their children from accessing inappropriate content. Technical savvy is playing a role in adoption of these controls as indicated by younger parents and caregivers being more likely to use these tools. The main reason people don't try to restrict what their children can access through filtering software or in-app controls is that they trust their child to pick appropriate content. Others simply don't know how to go about this, this is particularly true for Māori.

Most parents and caregivers check on what their children have been doing online at least some of the time. They look at what apps have been downloaded most frequently.

Ninety-three percent of parents and caregivers have rules in place about using the internet. Common controls include regularly checking on what the child is doing, and restricting screen time.



Audio content

Rules around audio content are less common than other types of media, but their prevalence has increased since 2014.

In total 75% of households have rules in place. Most often parents and caregivers switch off or change inappropriate content, regularly check in on what their child is listening too, and monitor volume levels. Only 22% have restrictions on what content they can access.

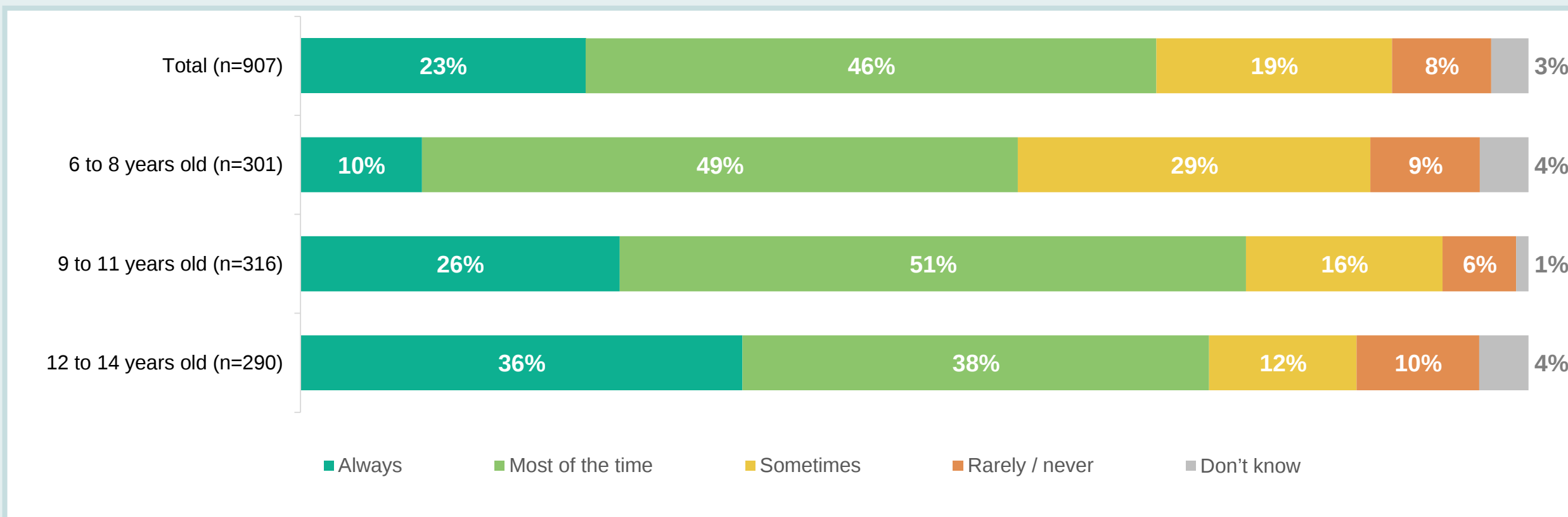
Seventeen percent of children aren't allowed to listen to audio content after a certain time. For these children, the majority are still allowed to listen at 8pm. However by 9pm the proportion allowed to listen drops to 26%.





How often children can distinguish fiction and non-fiction

One of the reasons children need protection from certain types of content is because they sometimes can't tell the difference between what is real and what is not. Parents and caregivers report that at six to eight years old only 10% fully understand the difference, this rises to 36% by the time children reach 12 to 14 years.



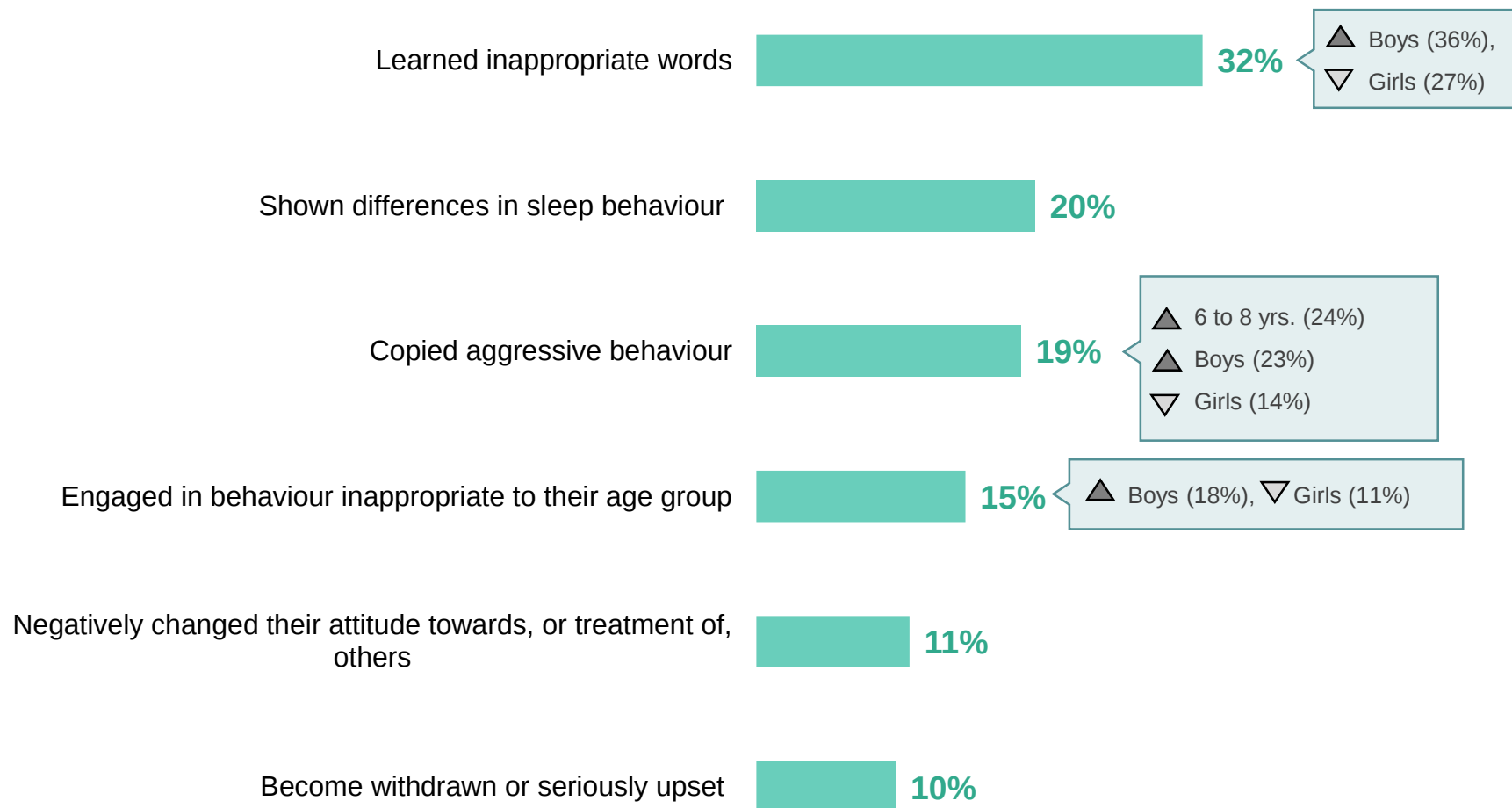


Learned behaviours and impacts from programmes and shows

In addition, what children see on programmes and shows can negatively impact their behaviour.

A third of children learned inappropriate words in the past year, 20% had nightmares or difficulty sleeping, and 19% copied aggressive behaviours.

Boys tend to be more likely to pick up negative behaviours from programmes and shows.



▲ ▼ Significantly higher / lower than average



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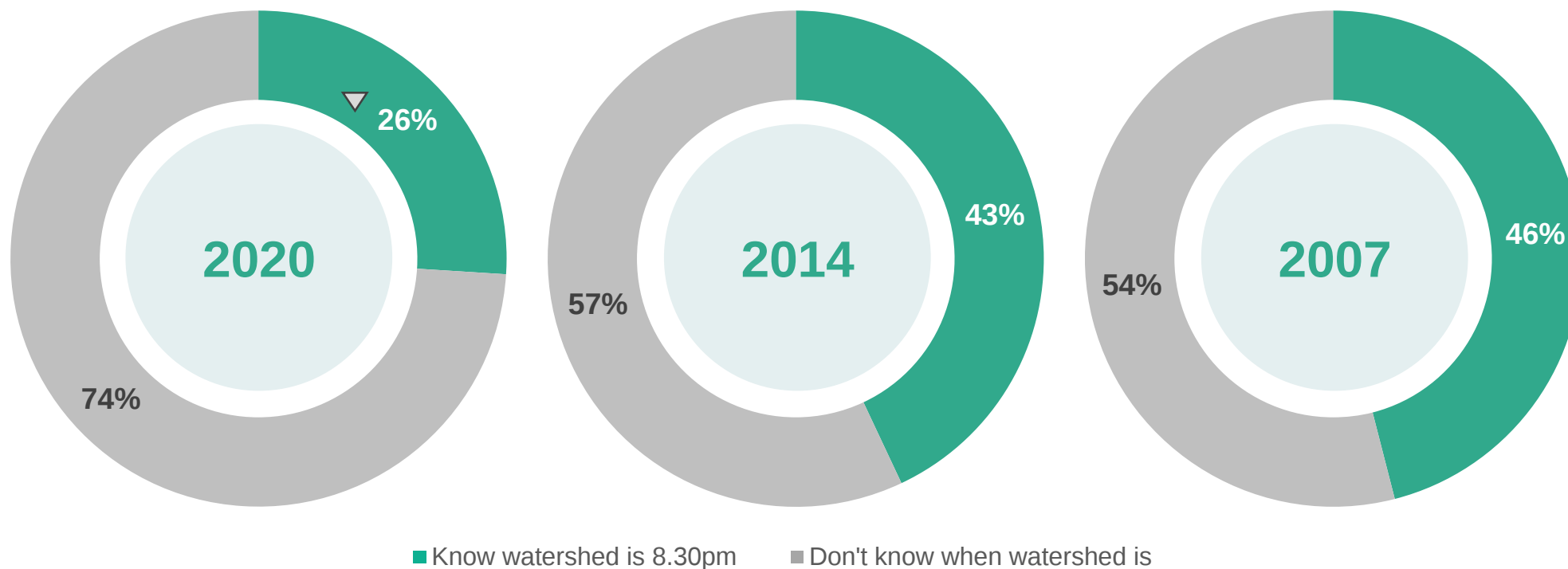
Protecting children from inappropriate content: *Programmes and shows*





Parents' and caregivers' awareness of the 8.30pm watershed

The proportion of parents and caregivers aware that the watershed is 8.30pm has nearly halved since 2014. This is in part due to the shift to on demand viewing.

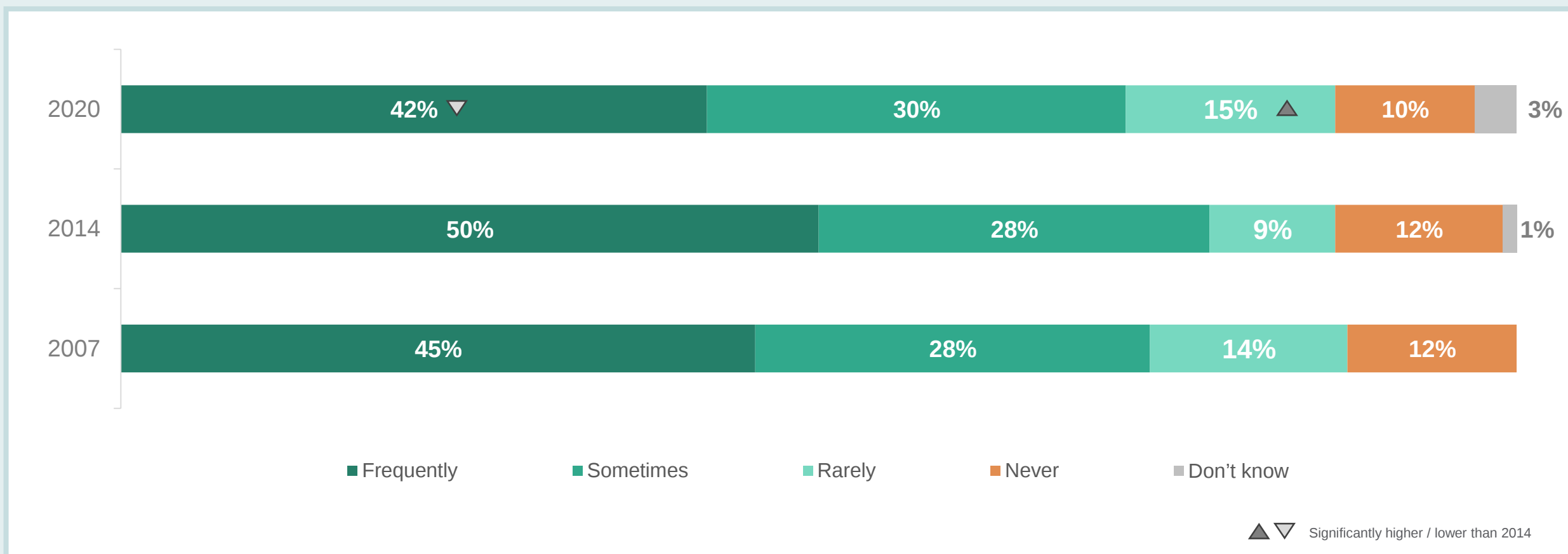


▲ ▼ Significantly higher / lower than previous wave



Use of classifications and warnings to guide children's TV viewing

Seven in ten parents and caregivers use classifications and warnings at least some of the time.

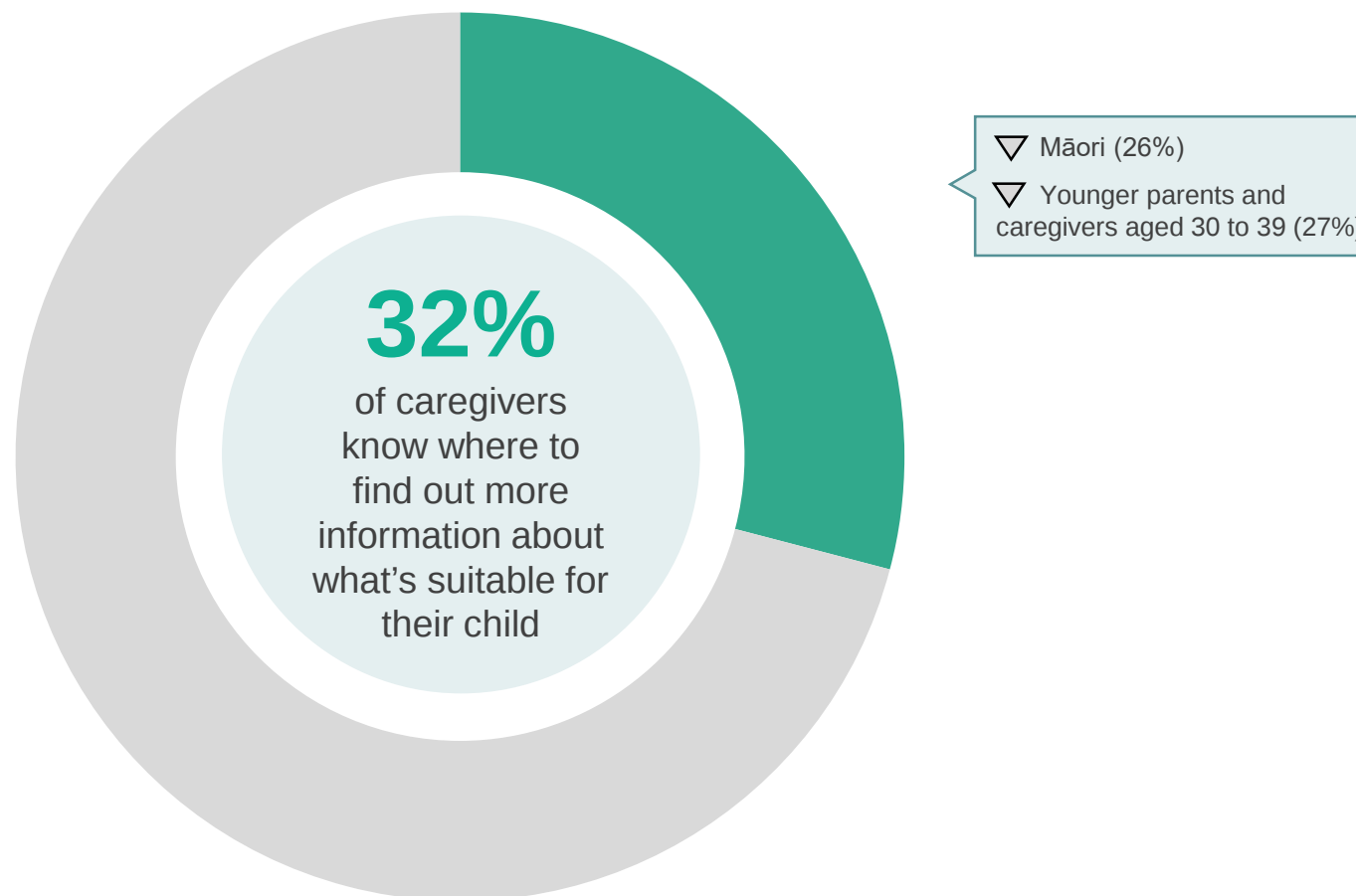




Knowledge of where to go to find out more information on suitable content for child

A third of parents and caregivers know where to go to find out more information on what's suitable for their child.

Younger parents and caregivers, and Māori are less likely to know where to look.

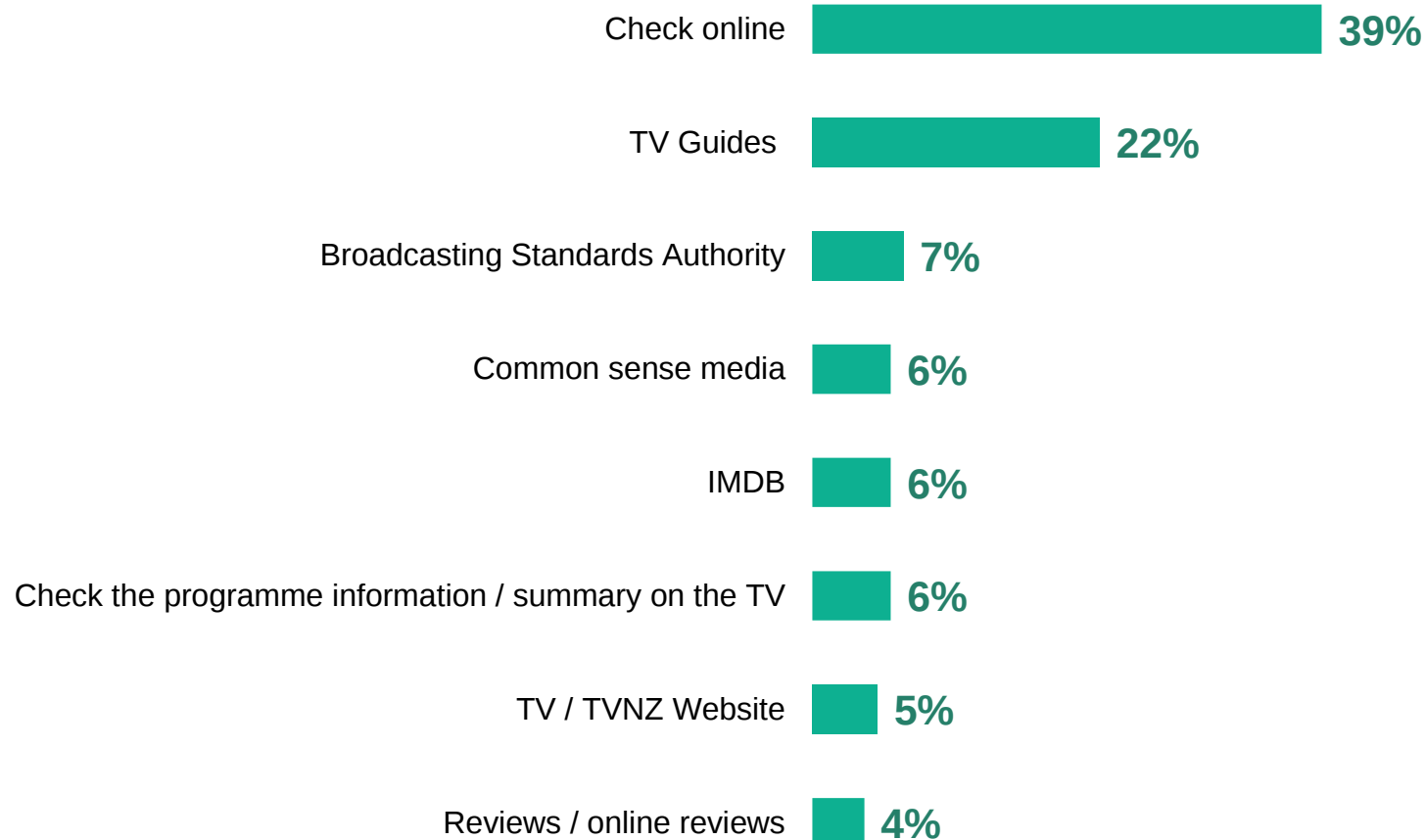


▲ ▽ Significantly higher / lower than average



Where parents and caregivers go to find out more information on what's suitable for children

Of those who have some idea where to look, most would simply do a quick online search.



NOTE: Themes mentioned by 3% or more of parents and caregivers

Source: S2Q15. Do you know where to go to find out more information about TV programmes that will help you make decisions on what's appropriate for [CHILD]?

Base size: All parents and caregivers of 10 to 14 year olds who watch programme and shows and know where to go to find out information about what is appropriate for their child to watch (n=294)



Parents' and caregivers' controls / rules for child watching TV

Parents and caregivers are placing more controls on their children's viewing of programmes and shows.

Nearly all (96%) parents and caregivers have rules about watching programmes and shows.

Eighty-six percent have enforced time restrictions, and three quarters have rules around supervision.

Time restriction rules (86%)

		2014	2007
Restrict number of hours	65%	45%	39%
No screen time after a certain time	58%	32%	28%
Only allowed to watch after homework / chores	47%	21%	15%
Only allowed watch TV at certain times of the day	38%	-	-

Supervision rules (77%)

Regularly check on what child is watching	62%	17%	18%
Change programme if adult decides content is inappropriate	57%	16%	7%
Not allowed to watch in bedroom	32%	7%	4%
Only watch programmes classified PGR with an adult present	24%	5%	6%
Not allowed to watch unsupervised	15%	7%	4%
Not allowed to use a streaming service without supervision	14%	-	-
Only watch programmes classified AO with an adult present	10%	4%	4%



Parents' and caregivers' controls / rules for child watching TV

A further 67% have rules about the type of content their children are allowed to watch.

Four in ten make use of parental control settings.

Content / ratings (67%)

		2014	2007
Don't watch programmes with AO classification	49%	24%	22%
Only watch videos / DVD / Blu-ray with appropriate classification	29%	7%	5%
Only allowed to watch children's programmes or channels	27%	20%	14%
Only watch programmes if a parent has reviewed its classification	21%	-	-
Check warnings on programmes first	19%	-	-
Can only watch programme if parent has checked programme guide first	15%	-	-
Not allowed to watch Pay TV (Sky)	13%	-	-
Don't watch programmes with PGR classification	6%	7%	2%

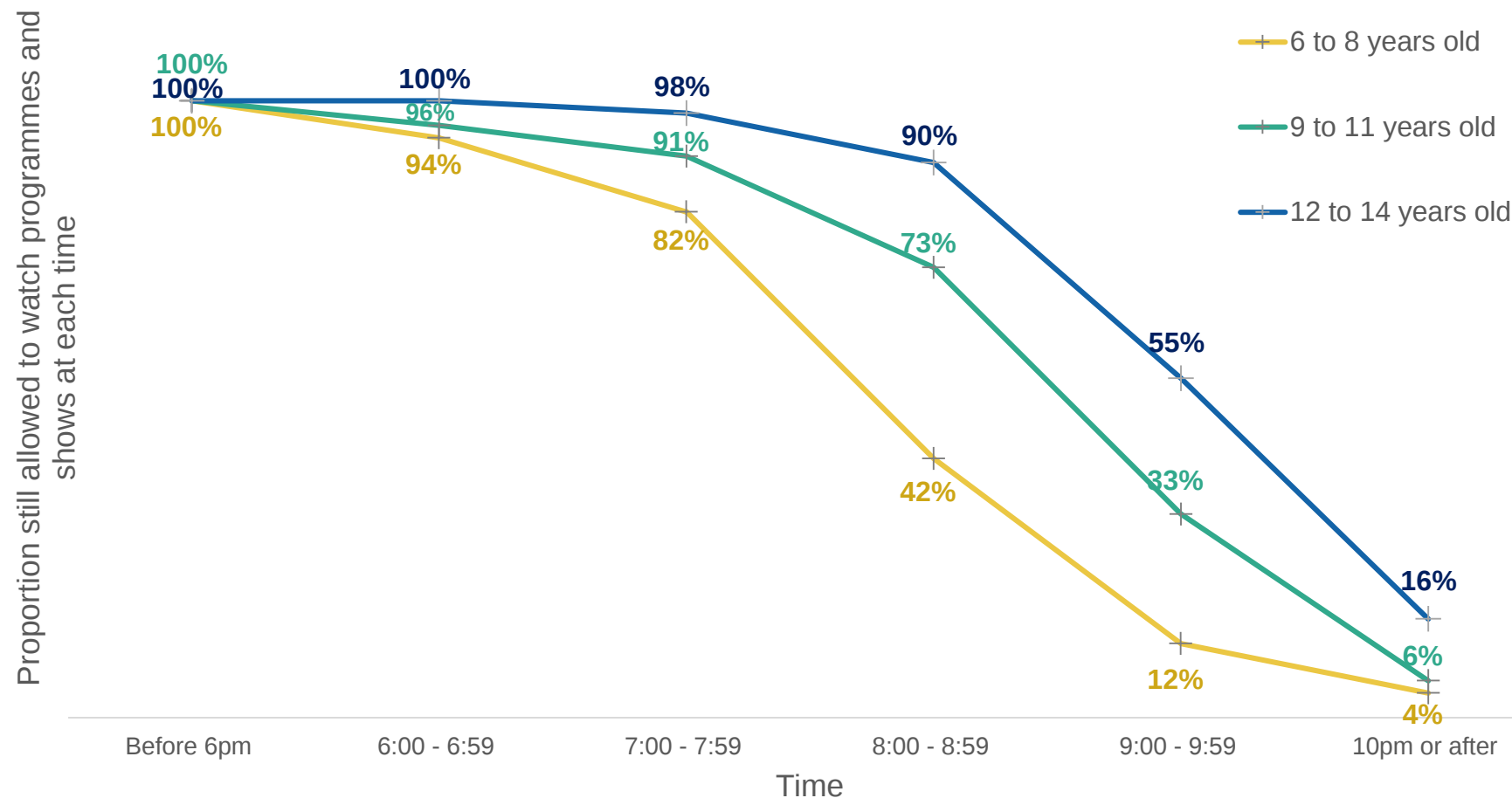
Parental control settings (42%)

Age restriction controls on streaming service	35%	-	-
Parental control settings on Freeview, Sky decoder or Smart TV	23%	-	-



Curfew for watching programmes and shows

On average six to eight year olds have a curfew of 7.30pm, this increases to 8pm for children aged nine to 11, and 9pm for preteens*.



*Averages rounded to the nearest half hour.

Source: S2Q6. You mentioned that your child isn't allowed to watch any programmes or shows after a certain time. Could you please tell us when this is?

Base size: All parents and caregivers of children who use the internet and have a curfew (n=489). 6 to 8 year olds (n=163), 9 to 11 year olds (n=196), 12 to 14 year olds (n=167).



Protecting children from inappropriate content:

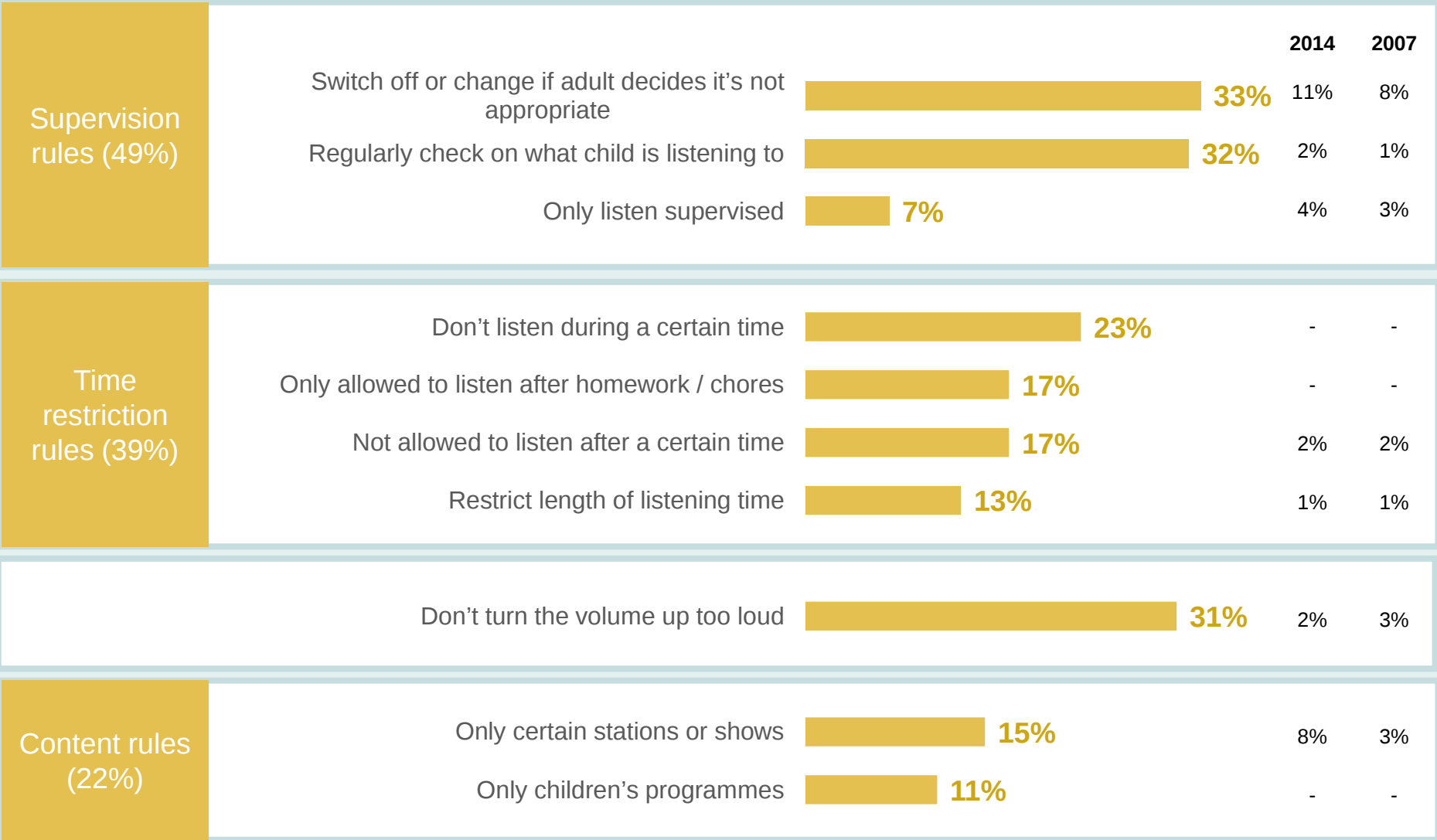
Audio content



Parents' and caregivers' controls / rules for child listening to audio content

Parents and caregivers are taking more of a role in controlling what their tamariki listen to compared to 2014.

Three quarters of parents and caregivers (74%) have rules around listening to audio content. Supervision rules are most common.

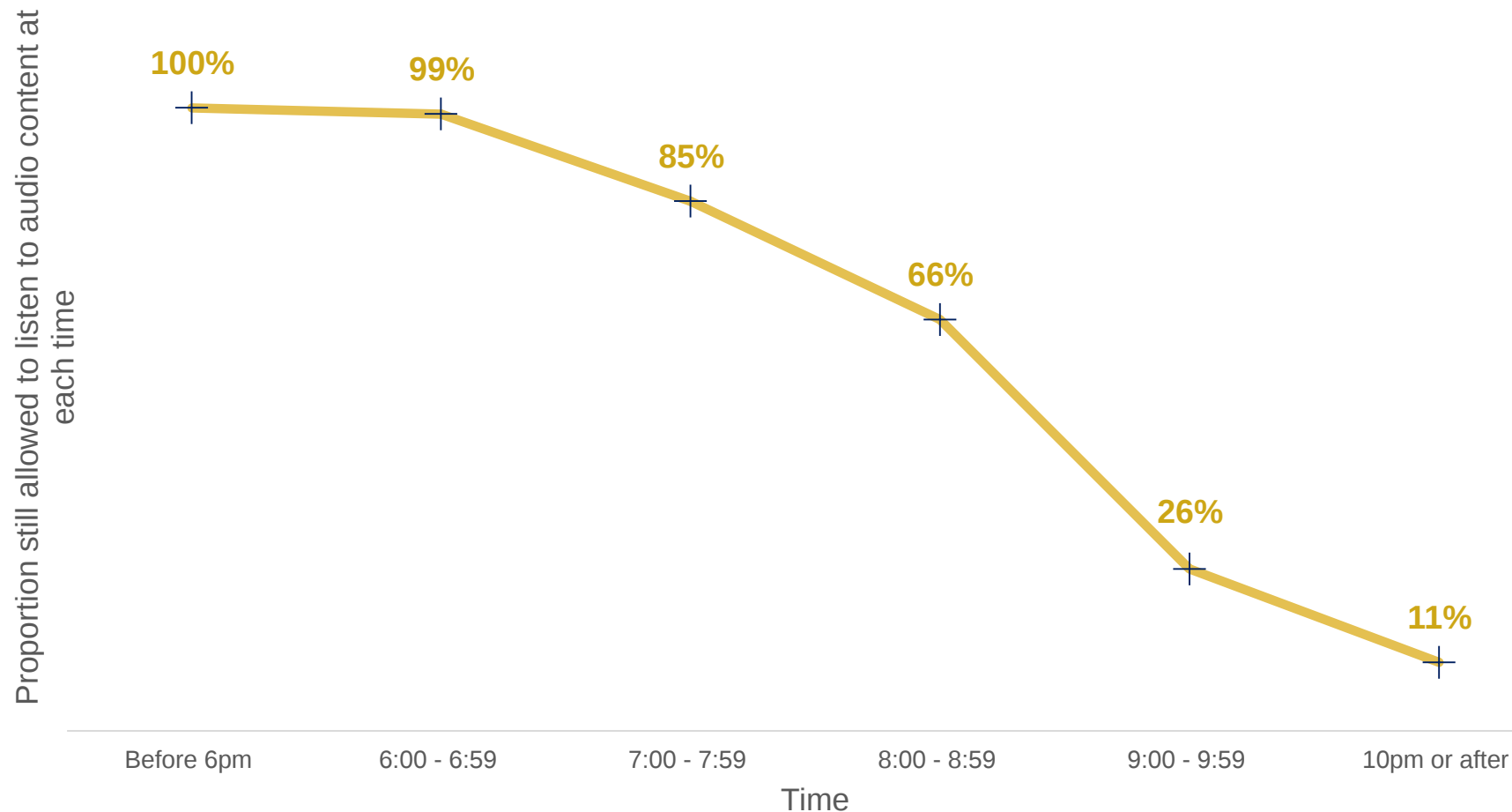


Source: S3Q1. Do you do anything to control radio listening or streaming music, podcasts and audiobooks for [CHILD]?
Base size: All parents and caregivers of 6 to 14 year olds who watch listen to audio content (n=734), 2014 (n=587), 2007 (n=579)



Curfew for listening to audio content

The majority of children who have a curfew are still allowed to listen to audio content at 8pm (66%), by 9pm the proportion allowed to listen drops to 26%.





Protecting children from inappropriate content:

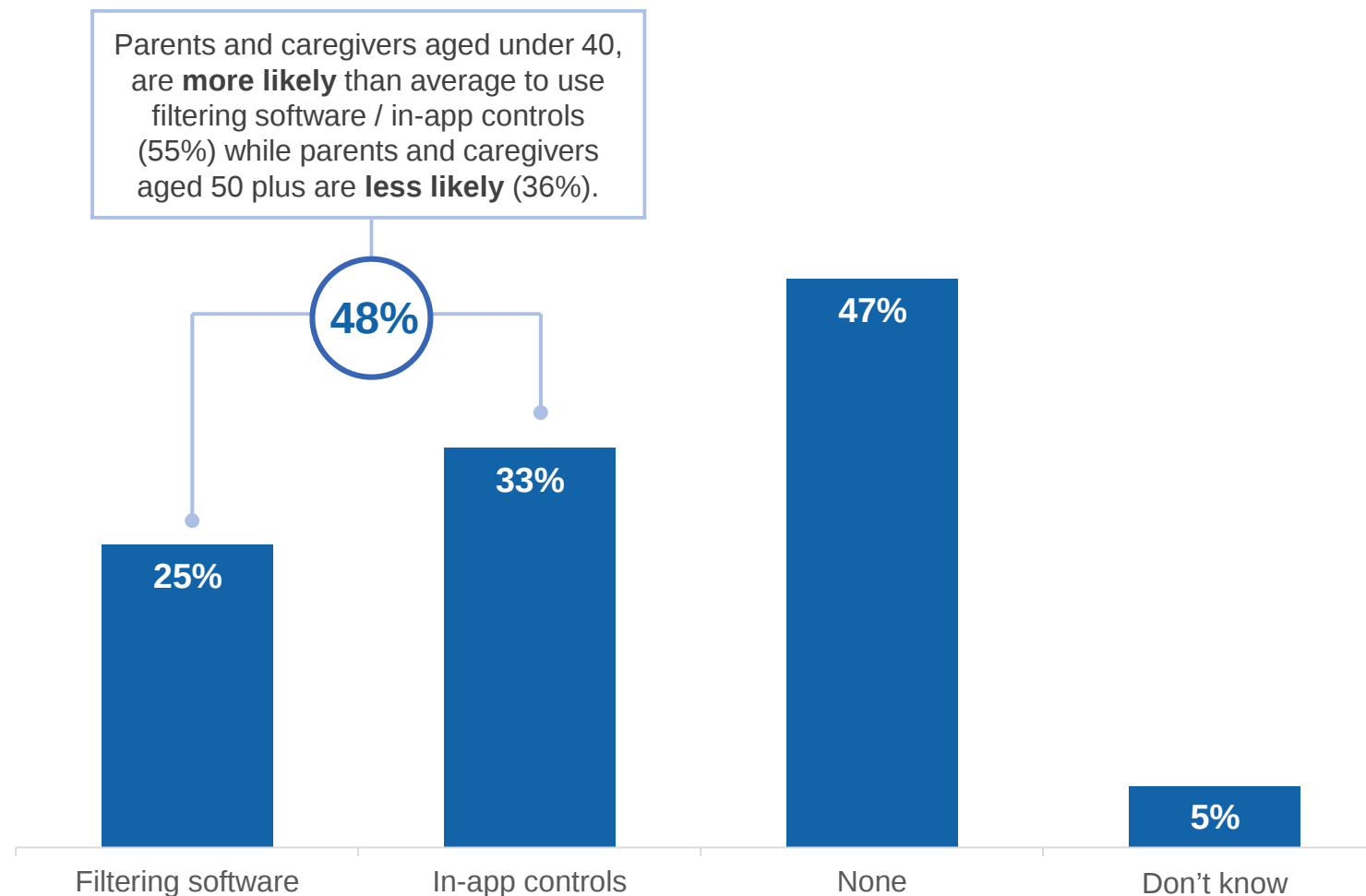
Online content



Use of software / in-app controls

Half (48%) of all parents and caregivers use filtering software or in-app controls to stop their children from accessing inappropriate content.

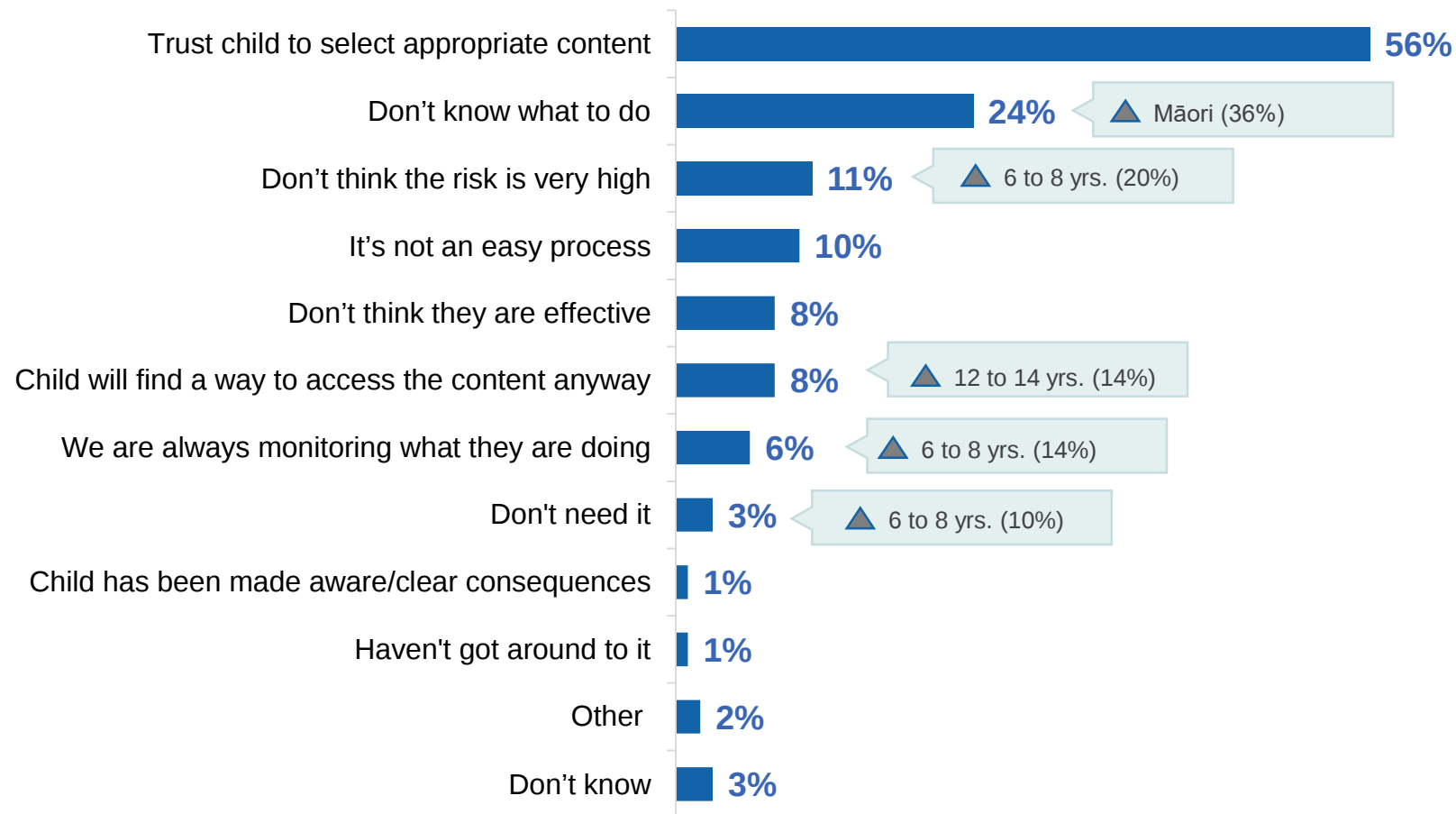
Younger parents and caregivers are more likely to use these tools.





Why some parents and caregivers don't use software / in-app controls

The main reason parents and caregivers don't try to restrict what their child can access through filtering software or in-app controls is that they trust their child to pick appropriate content. Other parents and caregivers simply don't know how to go about this, in particular Māori.

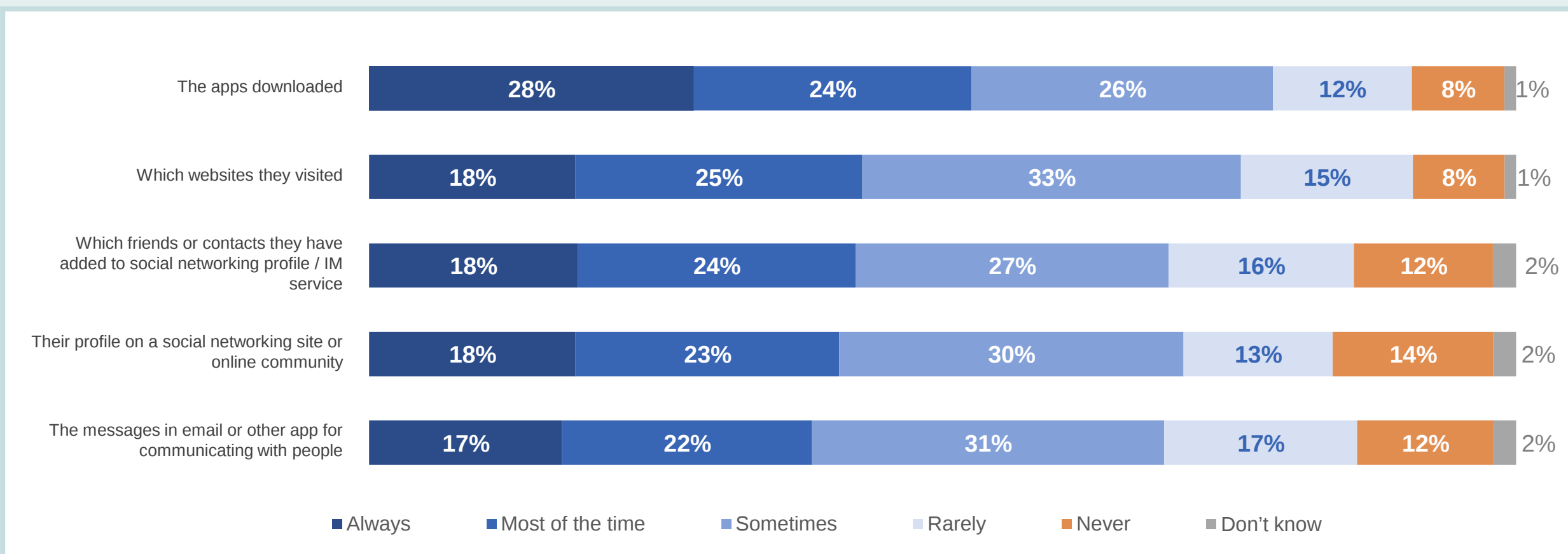


▲ ▼ Significantly higher / lower than average



Frequency of checking online activity

Most parents and caregivers are checking what their tamariki are doing online at least some of the time. Parents and caregivers most often check what apps have been downloaded.



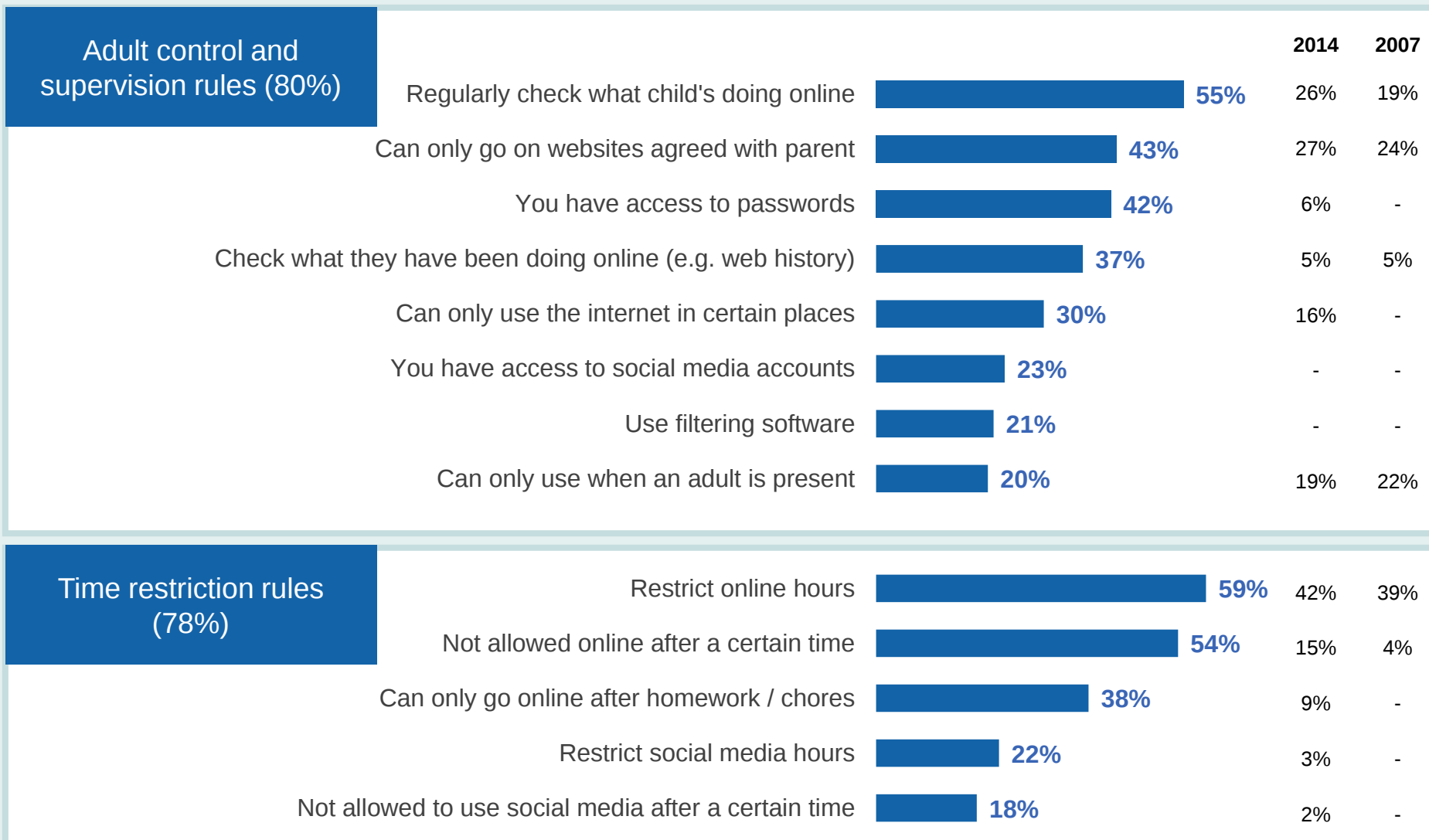


Parents' and caregivers' controls/rules for child using the internet

Ninety-three percent of parents and caregivers have rules in place about using the internet.

Common controls include regularly checking on what their child is doing, and restricting screen time.

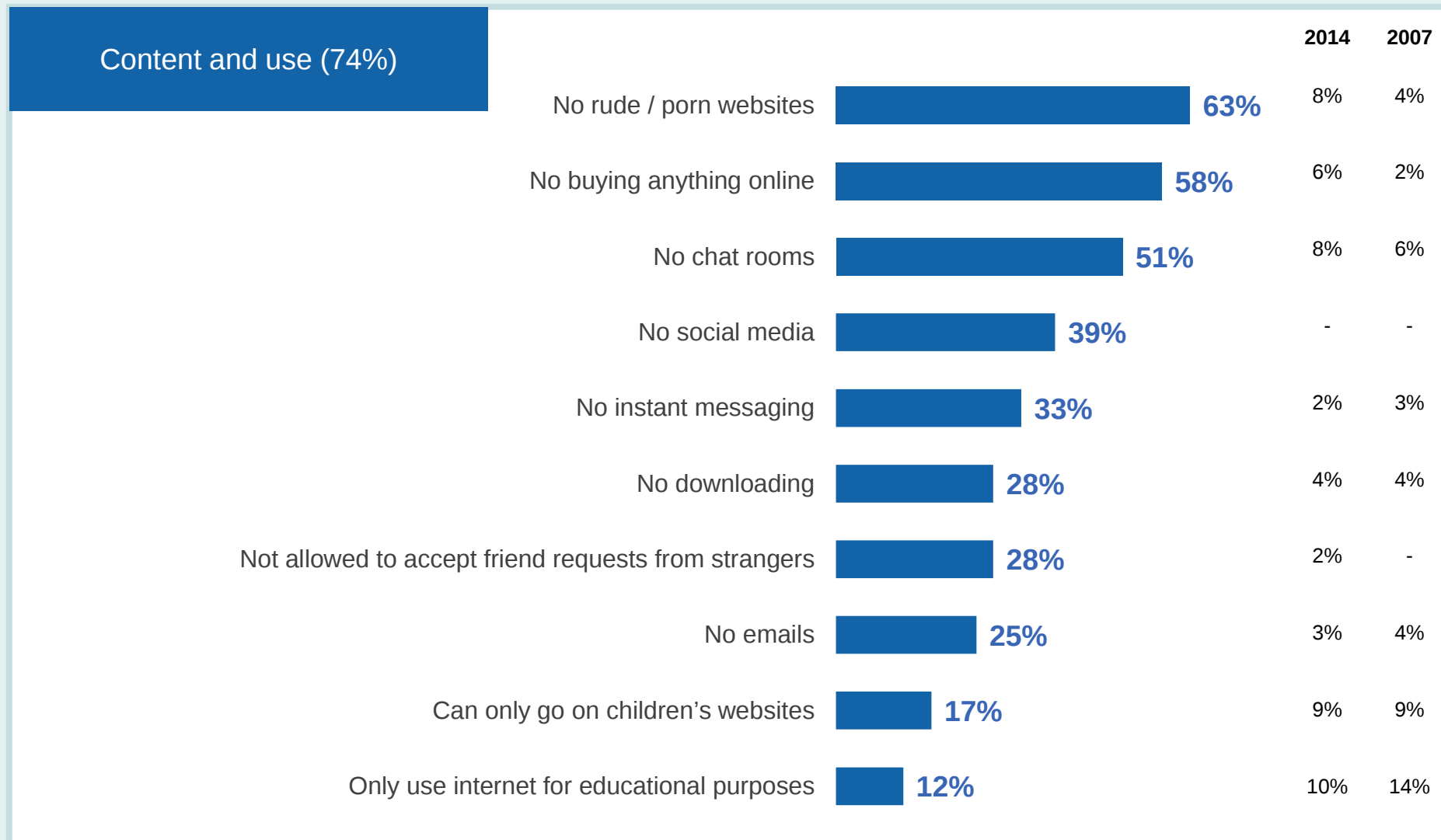
Parents are utilising a greater range of controls compared to 2014.





Parents' and caregivers' controls/rules for child using the internet

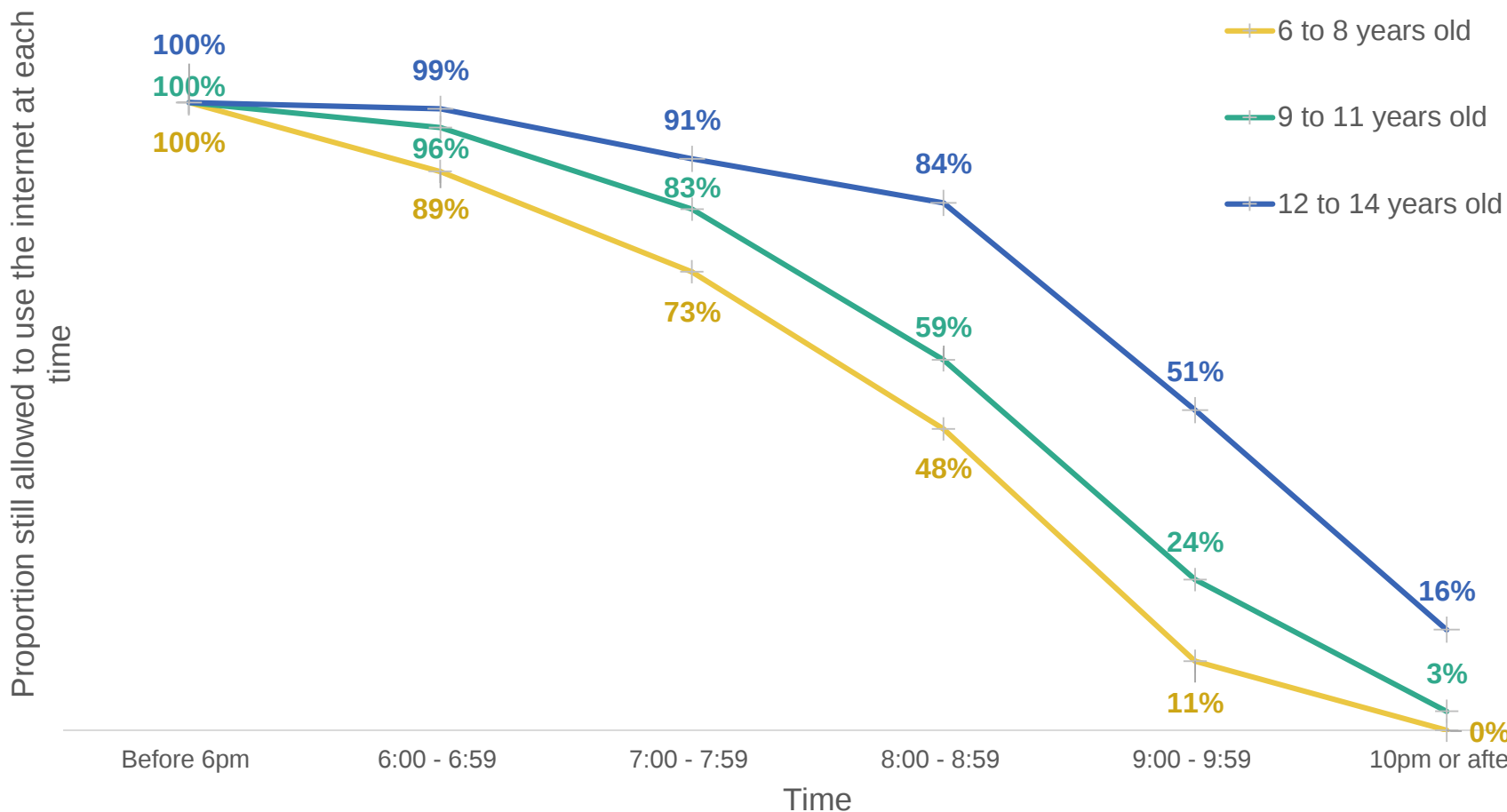
Many also have rules around what online activities are acceptable, such as no porn, no buying anything online and no chatrooms.





Curfew for using the internet

Most children who have a curfew are still allowed to go online up until 8pm. Most six to nine year olds are not using the internet beyond 9pm with most 12 to 14 year olds' internet use finished before 10pm.





FOR FURTHER INFORMATION PLEASE CONTACT

Edward Langley and Katelynn Fuller

Colmar Brunton, a Kantar Company
Level 9, 101 Lambton Quay
Wellington 6011
Phone (04) 913 3000
www.colmarbrunton.co.nz

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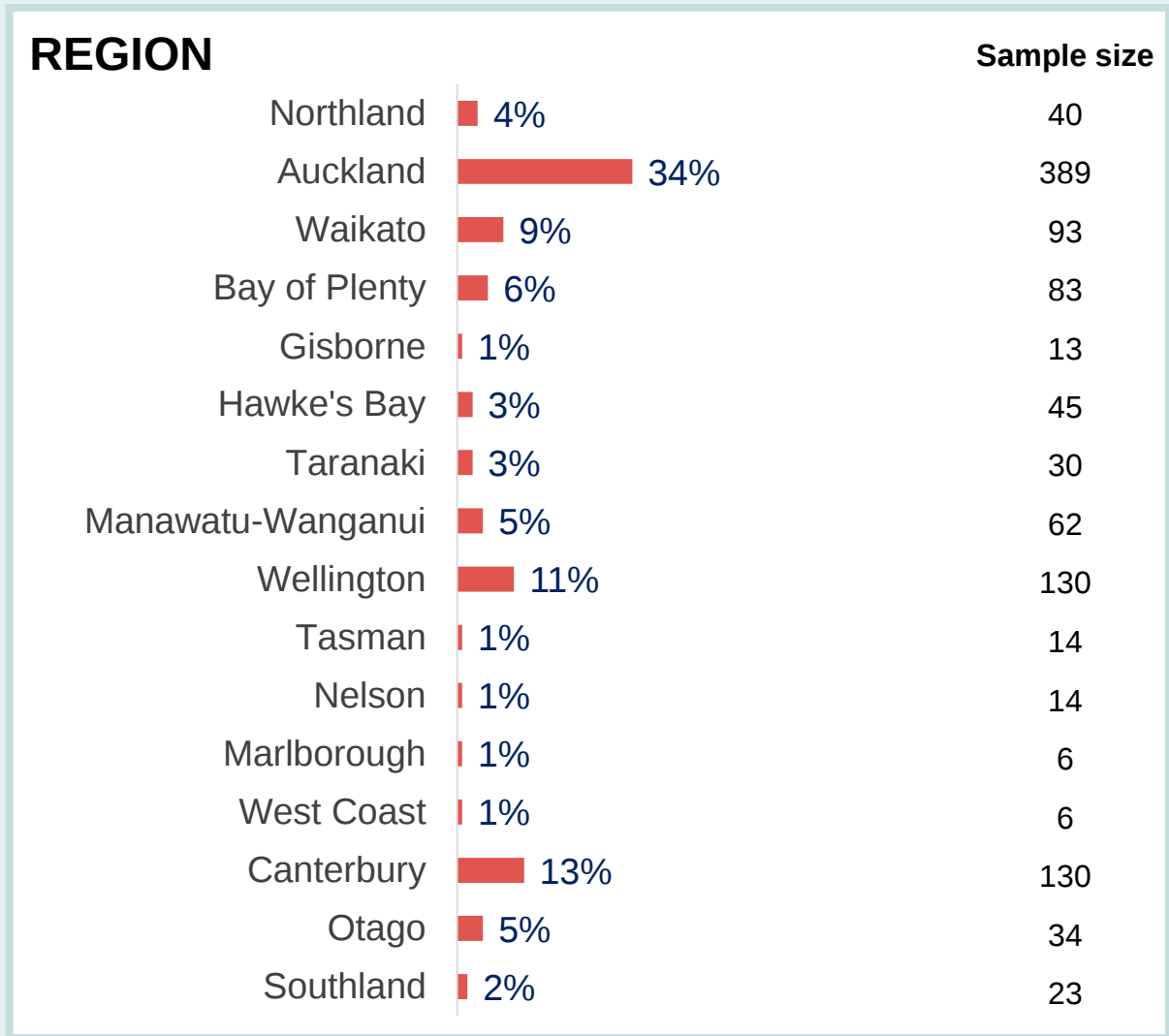
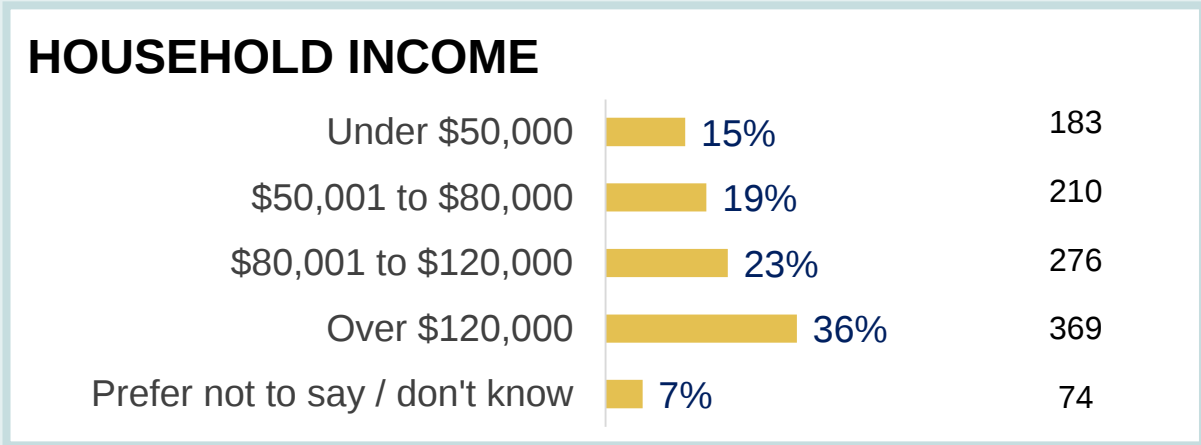
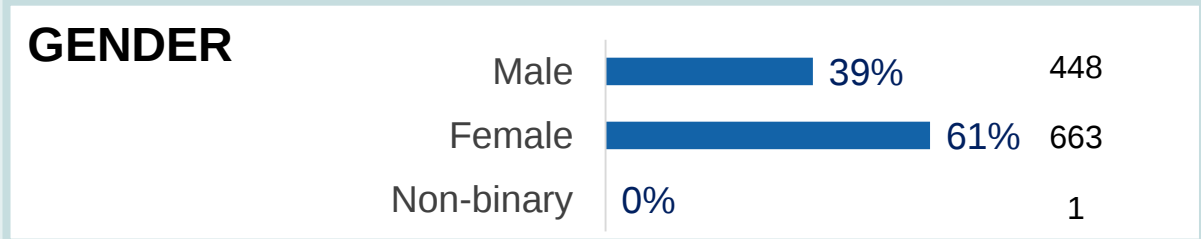
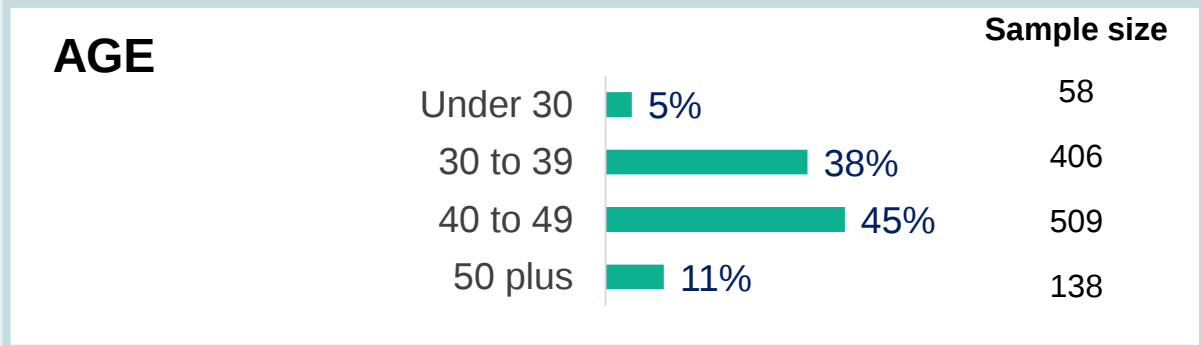
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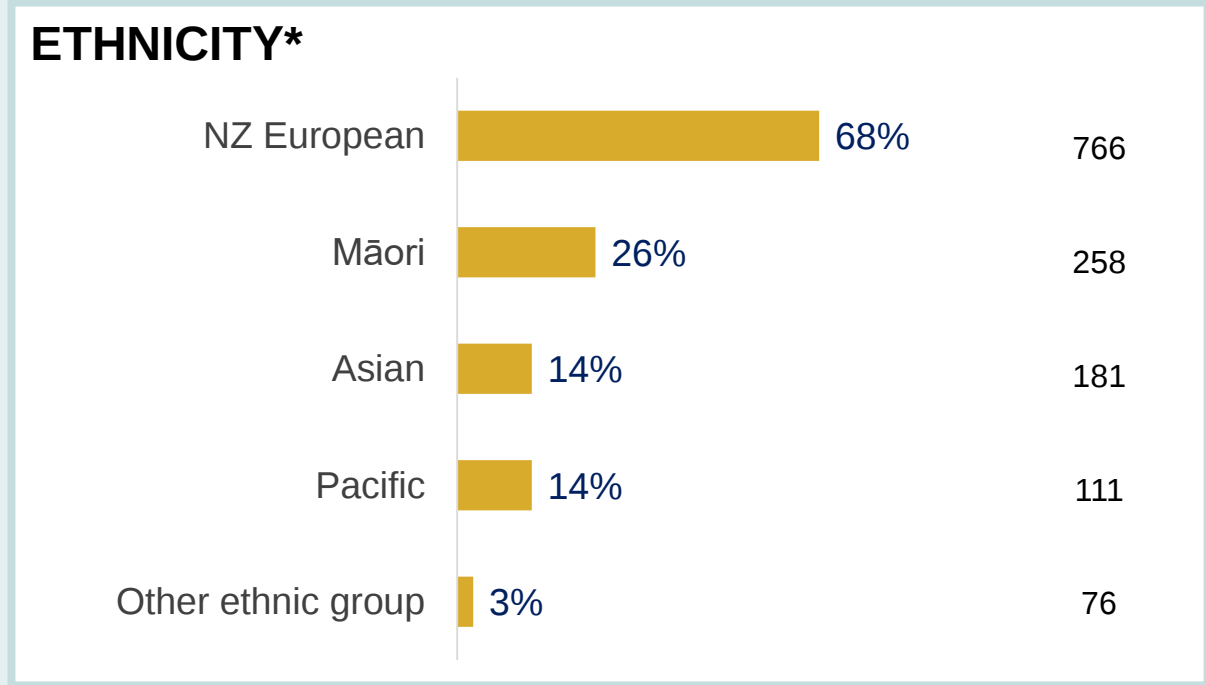
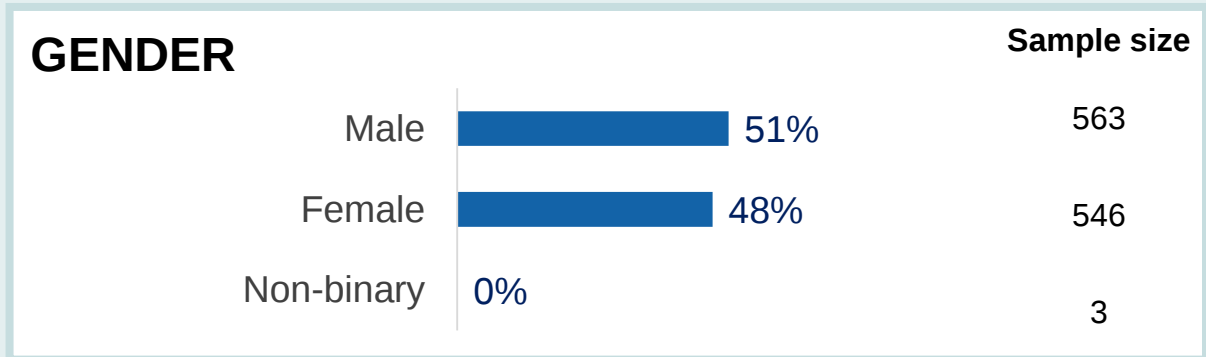
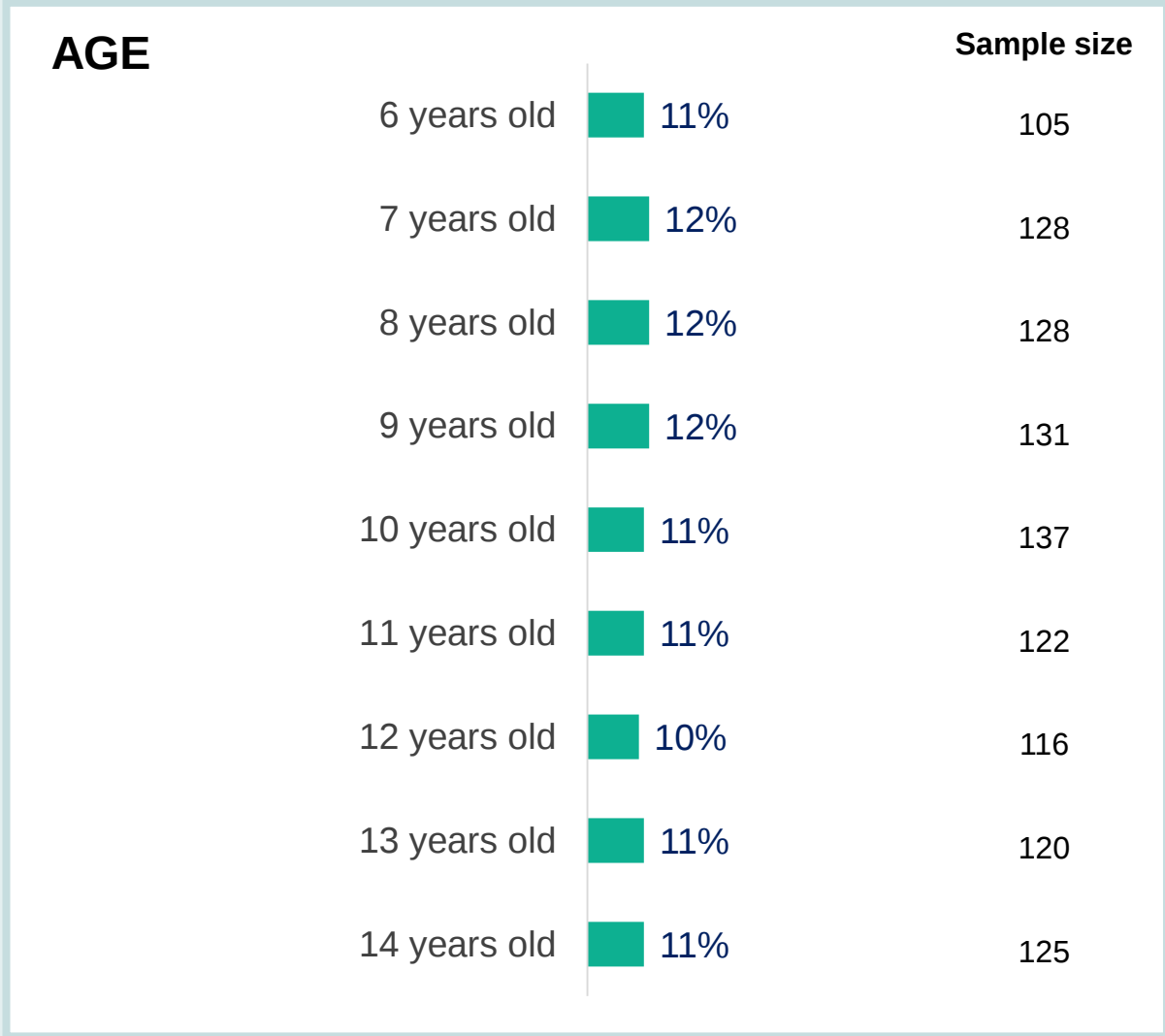


Appendix

Sample profile – parents and caregivers



Sample profile - children



NOTE: % represents the weighted proportion (nationally representative of the Census). n is unweighted sample size
*Participants were able to select multiple ethnicities, therefore percentages sum to more than 100% (121%)
Source: S4. Is [CHILD]...? | S3. How old is [CHILD]? | S5. Which ethnic group does [CHILD] belong to?