

Where Are The Audiences - Children's Media Use 2025

QUALITATIVE REPORT

November 2025



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Key take outs

01

Three key components interact with each other in a child's media environment, which sets the context for their consumption choices and habits.

Children's content choices are rarely made in isolation. They are shaped by an eco-system of influences including caregivers, peers, and household dynamics that determine not just what they consume, but why, when and with whom. These influences shift over time, with caregivers playing an active role in the early years, while peer influence starts to dominate as children get older. These dynamics can dictate whether cultural content captures attention. Motivating children to engage with local and te reo Māori content means considering how the eco-system operates across shifting dynamics.

02

From playful learning to identity affirmation, children move through distinct stages of media engagement.

As children develop and mature, their needs and wants from media content shift and evolve. Broadly, this shift travels through four stages of media engagement:

1. **Playful learning** – passive viewing, repetition, and routine-based consumption.
2. **Emerging interactivity** – light interaction, growing autonomy, and social play.
3. **Identity formation** – growing content independence, peer influence, and self-exploration.
4. **Identity affirmation** – active participation, content creation, and cultural expression.

Currently, local content feels geared towards younger children, and options become more niche as they get older. By mapping local content to engagement stages, we can ensure local content remains relevant through their evolving needs and address any gaps.

03

Local and te reo Māori content is valued but faces competition.

Caregivers strongly support local and te reo Māori content for its cultural relevance, safety and alignment with kiwi family life. Yet this content still competes with high-budget overseas productions, gaming platforms, and influencer-driven media that often dominate children's choices. This is because these competitors are perceived to be better quality, accessible anywhere-anytime and have strong peer influence. Increasing engagement with local and te reo Māori content means investing in visibility, appeal and peer reinforcement to match the pull of overseas content.

04

Barriers to local content include discoverability, appeal, and social traction

Although local and te reo Māori content is valued, it often faces barriers. It's harder to find, less visible on popular platforms and seen as lower quality. Unlike 'overseas' content, it rarely has peer reinforcement and social validation that drive engagement, particularly for older Tamariki. These challenges are compounded by overseas 'content extensions' like merch, spin-offs and influencer hype that encourage off-screen engagement. Improving visibility and perceived quality through targeted recommendations and visible endorsements from trusted sources can help ensure local content doesn't remain on the margins despite its strong cultural appeal.

Introduction

Background, objectives, and approach.



Background

Exploring children's media content consumption journeys and the role of caregivers.

Understanding how children in Aotearoa New Zealand engage with media content is critical in an increasingly dynamic digital world.

This suggests that children aged 2 to 14 years are expected to be the most digitally immersed generation so far.

Understanding their content habits and consumption journeys creates opportunities for NZ On Air and Te Māngai Pāho to strengthen the visibility and relevance of local and te reo Māori content in spaces where Kiwi kids are most active.

Objectives of the research.

1. Qualitative discovery phase

Understand

- Content discoverability and consumption journeys for children aged 2 to 14 years old.
- Needs and motivations for each context.

Explore

- The role of the caregiver in shaping content/media decisions.

Identify

- Barriers and enablers for engaging with local and te reo Māori content.



2. Quantitative measurement phase

Overview of the qualitative approach.

1. Media diary	2. Diary analysis	3. In-home interviews
<ul style="list-style-type: none">To capture children's content consumption over a seven-day period.Completed by caregiver and/or child (dependent on child's age).SMS-based (with paper option when needed).	<ul style="list-style-type: none">Analyse and review reoccurring patterns of media consumption across children's age groups to identify overarching themes in 'typical' in-home content consumption.	<ul style="list-style-type: none">Part interview/part observation.Two hours in each home.Two researchers at each household.<ul style="list-style-type: none">One researcher interviewing the caregiver.The second researcher observing and engaging with the child.
To capture typical media experiences during each day.	To provide a framework for deeper discussions during the subsequent in-home interviews.	To understand needs and motivations for media content consumption.

Fieldwork took place from 2nd June – 9th July 2025

Fieldwork was conducted over five key locations:



n= 20 households.
40 participants.

Four paired interviews with 14-year olds were conducted via Microsoft Teams.

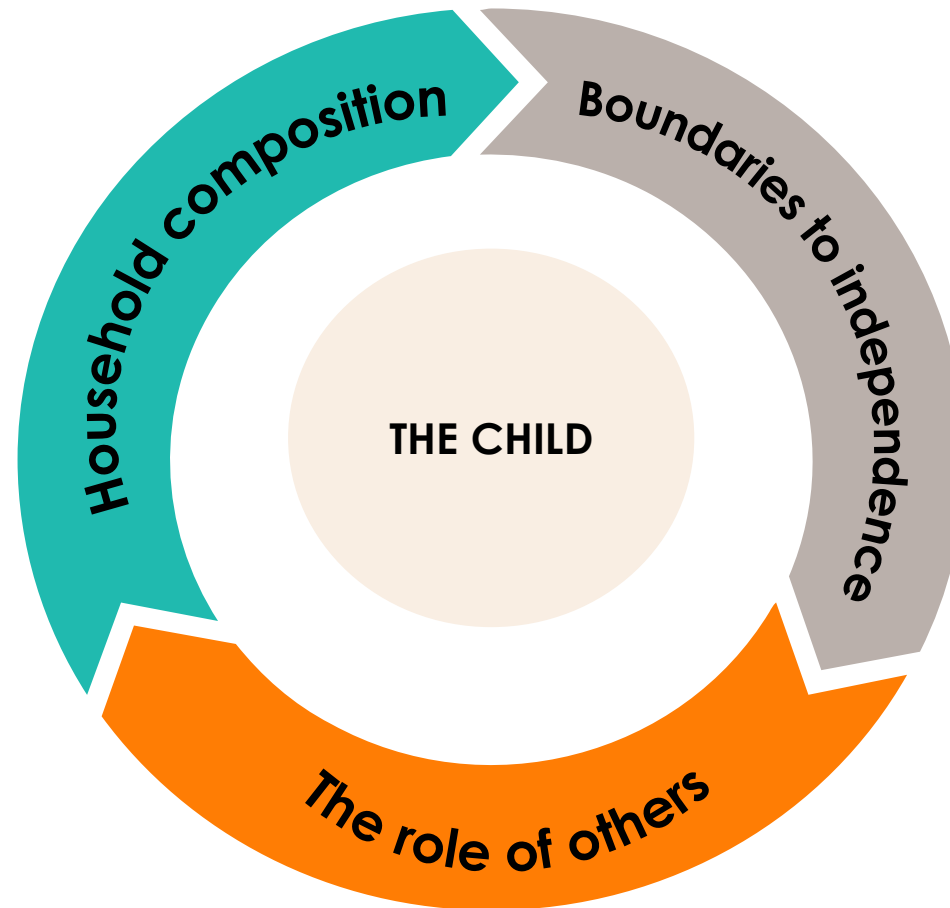
03

Children's media lives take place in a broad eco-system



The media eco-system.

Three key components interact with each other in a child's media environment, which sets the context for their consumption choices and habits.



1. Household composition: Family structure and household dynamics inform media experiences, especially in the child’s early years.



Single-parent, multi-generational, and sibling influences create different patterns of choice, control, and shared experiences.

SINGLE PARENT HOUSEHOLD	OLDER SIBLINGS AT HOME	MULTI-GENERATIONAL HOUSEHOLD
<p>In these households, children often consume media independently, exercising more personal choice with limited parental oversight.</p> <p>Household rules may also differ between parents, creating varied media boundaries across homes.</p>	<p>Media habits can be shaped by sibling dynamics, with younger children gravitating toward what older siblings watch.</p> <p>Younger siblings desire to adopt older siblings’ media preferences can be to feel included or gain approval.</p>	<p>Shared family media time is typically more organised and centred on the youngest child’s interests.</p>

In their own words...

“

Her dad is a lot stricter when it comes to the internet and what she watches. He doesn't really let her watch the shows she likes, like 'Stranger Things', so when she's here, we watch it together. I'm a bit more laidback with that stuff, mostly because we watch things together, so I'm always there.

Female caregiver, Christchurch, 11-year-old child

“

He got into gaming because his older brother plays it too. It's kind of the way that they stay connected with each other and I know some of his older cousins also play it with them. I often hear them yelling at each other over their game.

Female caregiver, Auckland, 13-year-old child

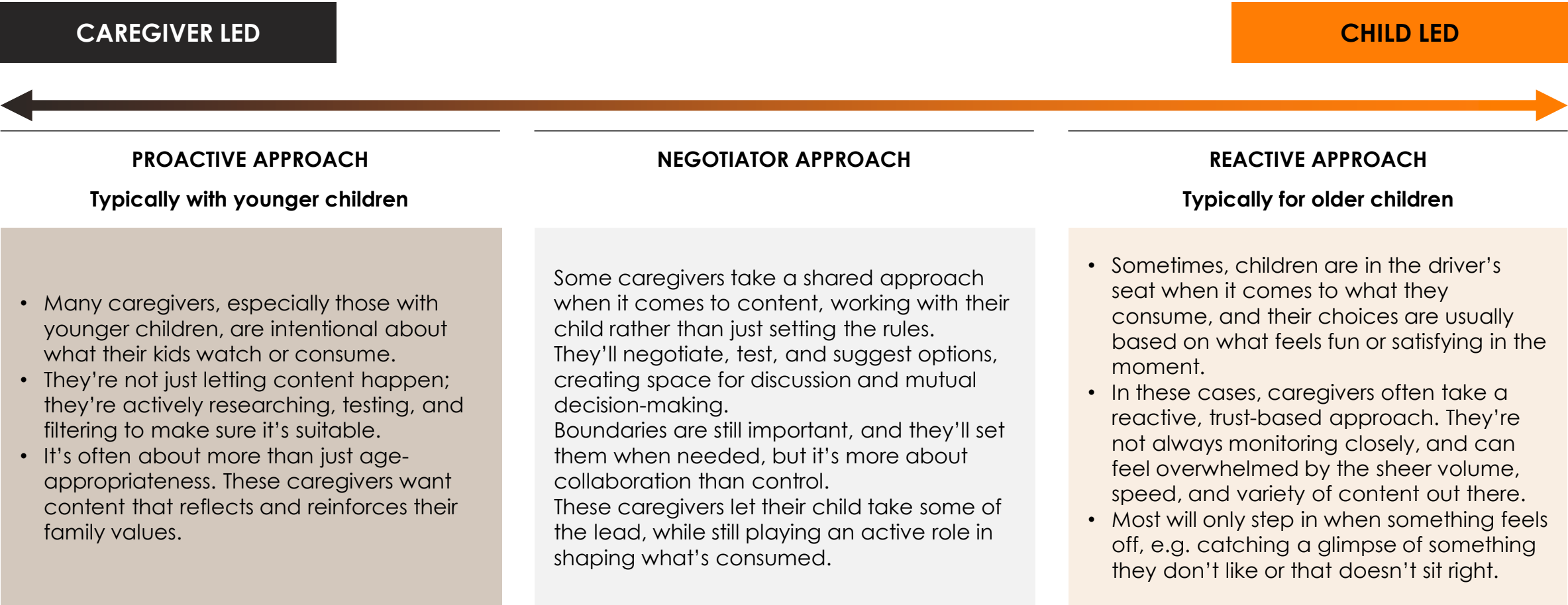
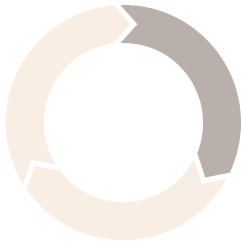
“

We're all homeschooled, except for our youngest siblings, they go to kindy. But usually when they get home, they get to choose what to put on the TV, otherwise they just cry. So, we end up watching more baby shows.

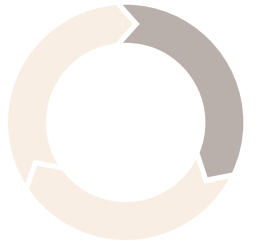
Male child, Auckland, 9 years old

2. Boundaries to independence: Caregivers are typically the first gatekeepers, guiding and monitoring early content choices.

Parental rules and supervision are strongest in the early years, which evolves as the child matures into increasing autonomy and independence.



2. Boundaries to independence: A disconnect often exists between what parents think their children consume and what children actually experience.



The youth lens...

- Young people are aware that some content isn't considered appropriate for them...
-but that doesn't always stop them from watching or engaging with it anyway.
- Often, caregivers don't realise what's being consumed, especially when it flies under the radar.



When I go to my friend's house, we play Fortnite, which I'm not allowed to play at home. But my friend's mum lets me play.

Male child, Christchurch, 12 years old

The parent lens...

- Many caregivers say they trust their child's viewing habits, regardless of age.
- When children are younger, that trust is often reinforced by proximity, with content being consumed within earshot, offering an added layer of reassurance.
- Interestingly, tech-based parental controls aren't as common as we might expect. When they are used, they tend to show up more in gaming than in general media.



We're trying our best... and we're all learning, but it can be hard to keep up.

Male caregiver, Hawke's bay, 14-year-old child

3. Role of others: As children age, influence shifts from caregivers to peers.

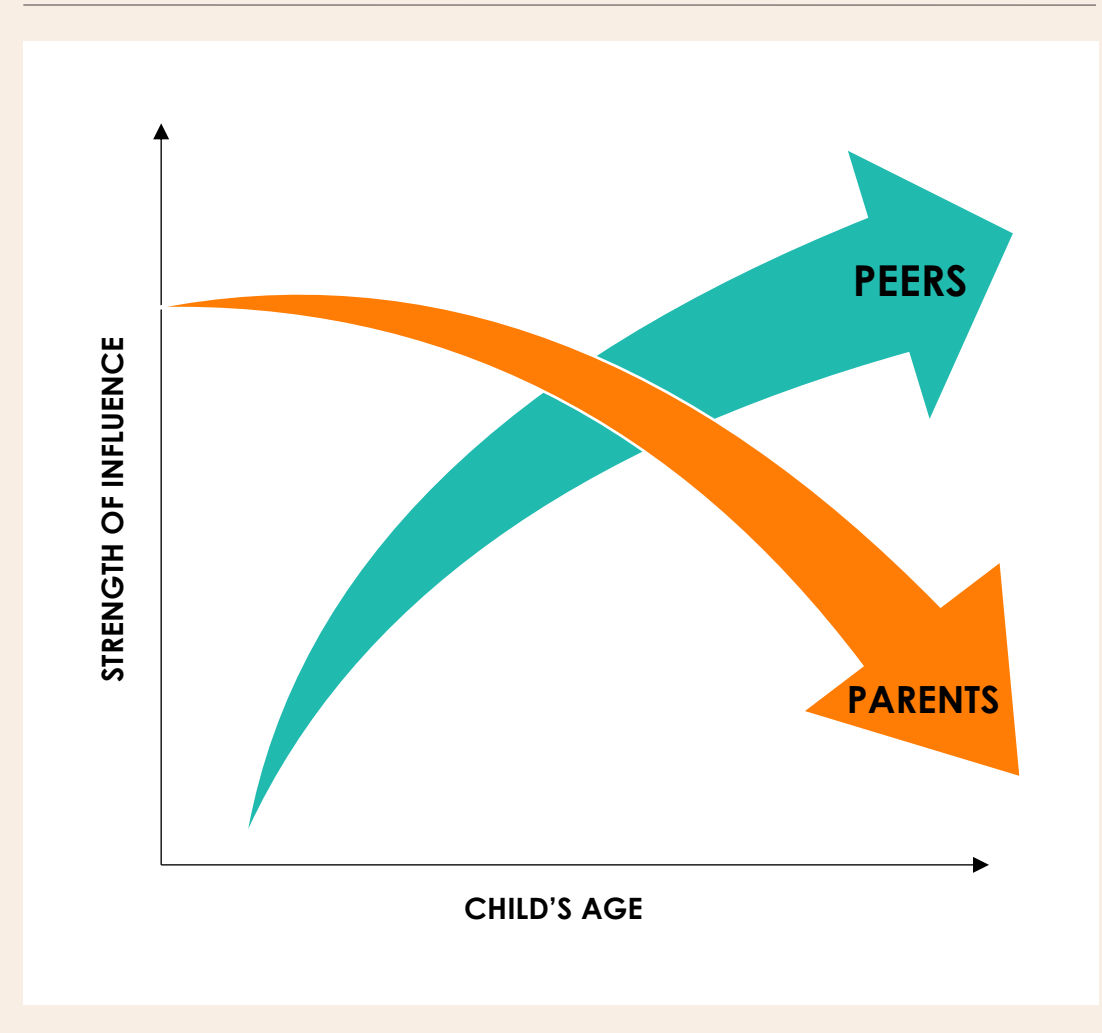


Caregivers initially have a strong influence on their child's media choices and discoverability. But, as the child ages, the caregiver influence lessens, and peers take over.



Some of my friends have started kapa haka and now I want to learn how to Siva, like watching them learn has made me want to learn my culture. They get really into it and train lots for their competitions, so it would be cool to be able to go to Polyfest as an actual performer.

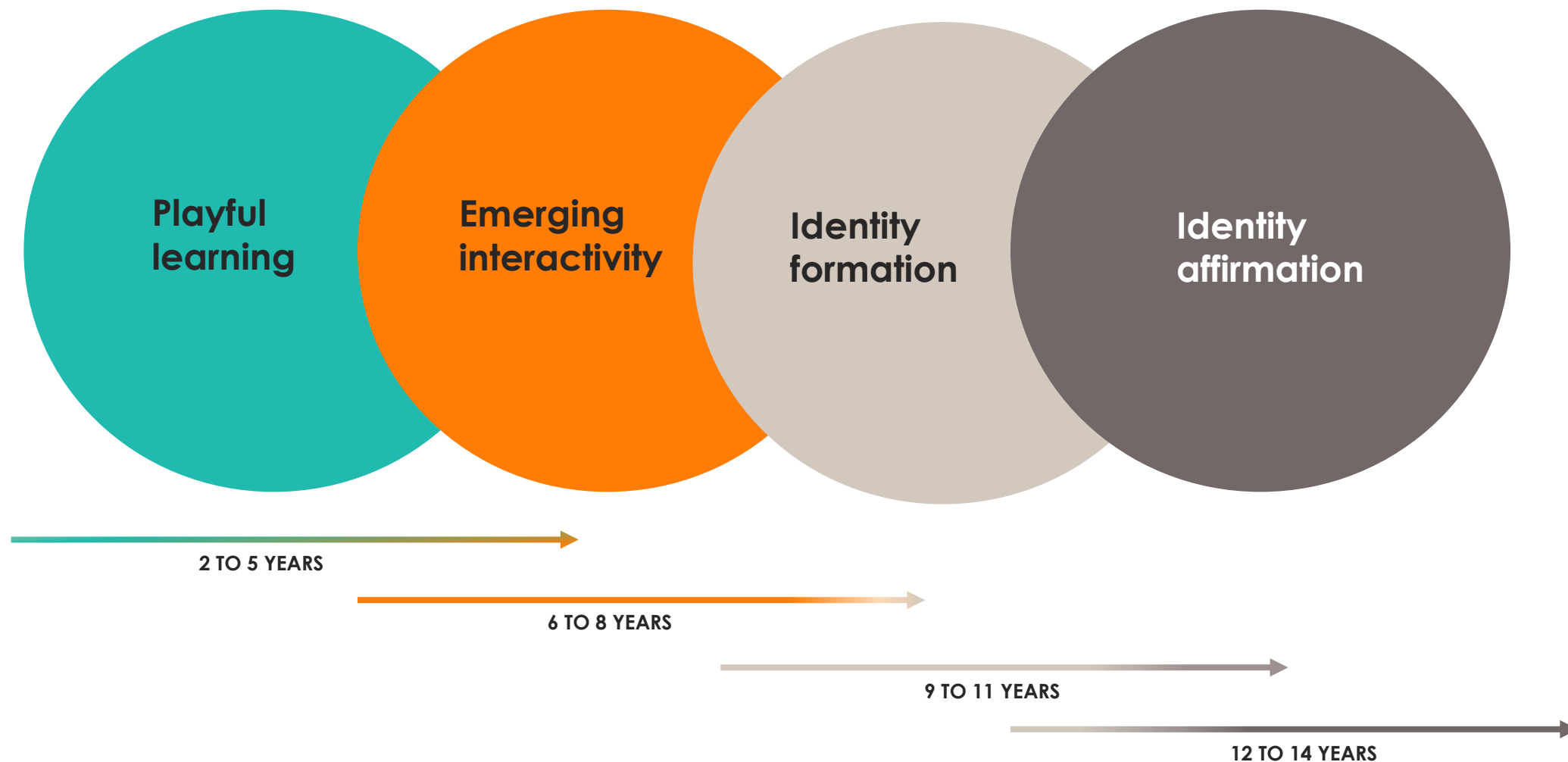
Female child, Wellington, 13 years old



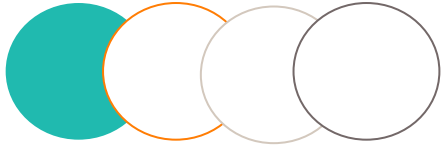
As children get older,
their media
engagement needs
and motivations
begin to shift.



From playful learning to identity affirmation, children move through distinct stages of media engagement.



Playful learning



Playful learning typically includes pre-school aged children who passively engage with content. They're more likely to sit back and enjoy rather than interact, and tend to repeat watch their favourite shows, returning to the same content over and over.

Content is often consumed around daily routines and in short bursts (e.g. while breakfast is being made or during wind-down time).

Caregivers use media content not just for entertainment, but also as a helpful tool – whether it's to keep children occupied or to encourage everyday tasks like brushing teeth.

WHAT THEY WANT

For children, entertainment is key. They gravitate toward content that's fun, silly, and makes them giggle. They often have a need for content that is familiar, that they know and have seen before.

Caregivers also want playful content that keeps children happily occupied. However, they also see media consumption as a chance to reinforce values or support learning along the way.

THE ROLE OF OTHERS

While children won't watch content they don't enjoy, caregivers still shape what's on offer and play a key role in introducing and guiding what is watched.

WHAT APPEALS

To children:

- Cartoons, bright, colourful
- Friendly, fun tone
- Sing along to songs
- Easy-to-follow storylines
- Familiar characters and formats.

Emerging interactivity



Typically primary school-aged children, those in emerging interactivity still enjoy passive viewing, but are beginning to include light interaction. This might be exploring simple games and engaging with interactive shows like 'What Now'.

They're shifting toward richer animation and starting to use content to connect with others, whether through play or shared experiences. Content becomes a way to socialise and exercise early autonomy in their consumption choices.

WHAT THEY WANT

Children look for content that feels lighthearted and somewhat familiar, but also offers opportunities to interact, whether through small challenges, prompts, or formats that make them feel part of the experience.

THE ROLE OF OTHERS

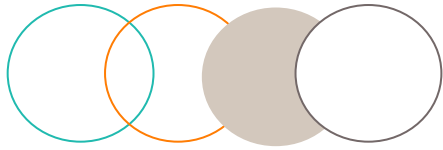
Caregivers still set the rules around what is watched and when. But children are starting to discover and choose content themselves (watching once they have parental approval).

WHAT APPEALS

To children:

- Short form content
- Fun and goofy, targeted to their age group
- Animation
- Simple games (e.g. Roblox, Minecraft)
- Emergence of gaming streamers
- Music videos.

Identity formation



Identity formation typically includes tweens who are becoming more socially self-aware, and are using media to help them explore identity and belonging.

Media becomes a tool for social connection, with growing awareness of what peers are watching and sharing. They're starting to use content to explore what they like and enjoy, and figure out where they fit.

WHAT THEY WANT

Children are seeking peer connection and wanting to establish a sense of identity and where they belong. Their autonomy of choice continues to grow, and they want freedom to explore content that feels relevant to their interest and identity.

There is also a desire to consume content to improve their abilities in specific tasks or actions (e.g. gaming, applying make-up).

THE ROLE OF OTHERS

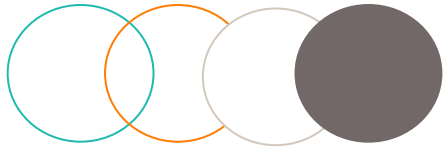
What peers watch is increasing influential. While children are starting to consume content more independently, caregivers remain loosely involved. They are often within earshot, monitoring what is being chosen.

WHAT APPEALS

To children:

- Gaming streamers and influencers
- Media and content trends
- Big-personality characters (e.g. Mr Beast)
- Game creation via Minecraft and Roblox.

Identity affirmation



Identity affirmation is made up of teenagers who are beginning to put themselves out there. They post content, interact directly with others, and seek validation through what they share and consume.

Media content is highly social and expressive, often spanning multiple platforms and devices at once. While they can stay engaged for long periods, their attention is drawn to short-form content that is fresh and relatable.

WHAT THEY WANT

This is a stage of active participation, where media isn't just consumed, but is a space for being seen, heard, and understood.

These teenagers seek affirmation and reassurance of who they are and their place in the world.

THE ROLE OF OTHERS

Teens are mostly consuming content solo, with caregivers stepping back into a high-trust role. There is minimal monitoring.

WHAT APPEALS

To teens:

- Creating, curating, critiquing
- Influencers, daily vloggers, twitch streamers
- Online communities (via TikTok, Twitch, Snapchat, Instagram)
- A mix of local and overseas music, typically through Spotify.

Six distinct media moments

These are different micro-contexts of children's media engagement that sit across the engagement stages.

- 1 Prep time
- 2 Distraction duty
- 3 Tuning out
- 4 Discovering me
- 5 Engagement rich
- 6 Family time

1. Prep time

NEEDS THIS MOMENT MEETS

- To occupy the children while parents/caregivers get the household ready for the day.

TYPICAL CONTEXT

- Breakfast time.
- Children are sitting together at dining table while they eat their breakfast.

PREFERRED CONTENT AND PLATFORMS

- Tends to be a mixture of cartoons and short clips/reels on YouTube and Disney+.

Alex and her younger brothers usually have breakfast together while their mum, Vanessa, gets ready for work and manages household tasks like feeding the pets and packing lunches.

During this time, the kids watch cartoons on TV, with Alex controlling the remote. Tablets are allowed occasionally as a reward for good behavior, but Vanessa prefers avoiding them in the morning because they lead to deep engagement and make transitions harder.

Cartoons and short clips work well because they create natural breaks, making it easier for Vanessa to interrupt without conflict.

This routine has become a practical family ritual, helping the kids wake up gradually and giving Vanessa 20 to 30 minutes to prepare for the day. The kids have even learned to predict their screen time: Usually one full SpongeBob episode or a few short YouTube clips, depending on how long Mum takes to get ready.

2. Distraction duty

NEEDS THIS MOMENT MEETS

- Helpful distraction while parents/caregivers complete after-work tasks.
- Helps the children settle after a busy day at school, particularly for younger children.

TYPICAL CONTEXT

- Children have freshly arrived home from school.
- Dinner is being prepped.

PREFERRED CONTENT AND PLATFORMS

- Tends to be YouTube, but occasionally streaming sites that offer animated and cartoon programmes.

Mia comes home after a full day of school and sports practice, tired but still with energy.

While dinner is being prepared, her parents put on her favourite show, usually Bluey or something on YouTube Kids, to keep her entertained.

This has become part of the evening routine and a way to create calm during the busiest time of day. For Mia, it's a chance to relax and enjoy winding down while snacking before dinner.

From her parents' perspective, this moment is essential. It gives them space to focus on cooking, tidying up, and managing household tasks without constant interruptions. It's a practical solution that balances Mia's need for downtime with their need to get things done.

This routine typically lasts for a few episodes, just enough to keep everyone happy until dinner is ready. For the family, it's less about screen time and more about creating a smooth transition from the chaos of after-school activities to a calmer evening.

3. Tuning out

NEEDS THIS MOMENT MEETS

- Creating space for children to escape, disengage and recharge through content that feels personal and on their terms.
- Disconnect from the outside world.

TYPICAL CONTEXT

- After chores are completed.
- Typically, after dinner.

PREFERRED CONTENT AND PLATFORMS

- Mainly through YouTube – exploring recommended watches.
- Scrolling through social media platforms.
- Occasionally using gaming platforms.

After dinner and chores, the house settles down. For 12-year-old Jayden, this is personal time and a chance to disconnect and recharge.

Jayden usually finds a spot in the living room or his bedroom with the door open, close enough for parents to hear if needed. Phone in hand, Jayden dives into exploring content, his go-to is normally YouTube and whatever comes up as recommended. He's really into skateboarding and gaming, so often he's exploring content associated with things he likes to do in his free time.

For Jayden's parents, this moment is important too. They're happy for Jayden to have independence and explore interests, as long as it's within earshot. It's about trust and balance and giving him freedom while maintaining a level of control.

They see this downtime as healthy, a way for Jayden to decompress after a busy day and engage with content that feels personal and relevant. This routine is fluid and self-directed, lasting anywhere from 30 minutes to an hour. It's a digital escape that helps Jayden reset before the next day.

4. Discovering me

NEEDS THIS MOMENT MEETS

- An opportunity to explore and understand what makes me, me.
- To self express and shape a sense of belonging.

TYPICAL CONTEXT

- At home in bedroom.
- After school and on the weekends.

PREFERRED CONTENT AND PLATFORMS

- A mix of overseas content.
- Typically exploring through social media platforms, scrolling through reels and curated content.
- Occasionally local content via similar channels.

After dinner, 14-year-old Aria retreats to her room for some quiet time. This is her space to think, scroll, and explore who she is becoming.

Phone in hand, she opens Instagram and TikTok, diving into reels that feel relatable, like '[out]fit' inspiration, dance trends, and creators who share stories that resonate. Earlier that day, Aria heard from friends about a popular influencer everyone's raving about, so she decides to check them out. Their content feels cool and relatable with relationship tips, confidence advice, and cultural references that make Aria feel seen.

Sometimes it's overseas influencers with bold aesthetics; other times, it's local voices that reflect her culture and values. For Aria, this isn't just 'doom scrolling' on TikTok, it's about exploring what's out there and how she fits into it all. She's looking for role models, ideas, and communities that align with her interests and aspirations.

Her parents understand this need for independence and give her space, knowing this time helps her recharge and build confidence. It's a moment of autonomy, shaping her sense of self in a way that feels authentic and on her terms.

5. Engaged enrichment

NEEDS THIS MOMENT MEETS

- To learn and/or reinforce education or family values, while still providing the child with elements of entertainment.

TYPICAL CONTEXT

- Purposeful watching.
- With parent or caregiver.

PREFERRED CONTENT AND PLATFORMS

- Tends to be local content (via TVNZ+ on demand or YouTube).
- Short episodes.
- Shows like *Kiri and Lou*, *Who Will I Be Today*, *Kea Kids News*.

It's late afternoon, and 4-year-old Lily is curled up on the couch with her favorite blanket, ready for some screen time.

To Lily, it's just cartoons and bright colors, funny characters, and catchy songs that make her happy. For her mum, though, this moment is intentional. She scrolls through streaming options, usually starting with TVNZ+ OnDemand, which feels safer and offers more educational shows.

She picks something fun but balanced with family values like kindness, sharing, and empathy. Knowing Lily loves animated stories, her mum chooses programs like *Kiri and Lou* or short educational clips that weave in simple life lessons. While Lily laughs at the characters, her mum feels reassured this isn't just passive entertainment, it's reinforcing positive behaviors and beliefs at an age when they matter most. It's a careful balance of fun and purpose, giving Lily enjoyment while supporting learning in a natural way.

For her mum, this moment is about shaping early understanding while keeping things light and engaging. For Lily, it's simply her favorite cartoon time, a happy ritual that fits seamlessly into her day.

6. Family time

NEEDS THIS MOMENT MEETS

- Bonding and connection
- Quality time together
- A moment the whole whānau can enjoy.

TYPICAL CONTEXT

- Family home
- Weekend night in

PREFERRED CONTENT AND PLATFORMS

- Typically, movies and series
- Light-hearted, funny – something everyone agrees on
- Age appropriate for all
- Streaming services (e.g. Netflix, Amazon Prime, Disney+).

The Tui family is a household of six, with their tamariki ranging from 10 to 17 years old. Every weekend, they have a tradition of sitting together in the lounge to watch a movie.

It's a way to slow down after a busy week and spend time as a family. The hardest part is choosing what to watch, negotiations can take a while, and the younger kids usually get the final say because they're the hardest to please.

Most often, the choice ends up being a Disney movie, which is appropriate for the younger ones but still enjoyable for everyone. Sometimes Mum and Dad mix things up by introducing something nostalgic, like the original Power Rangers, which sparks conversations and laughter.

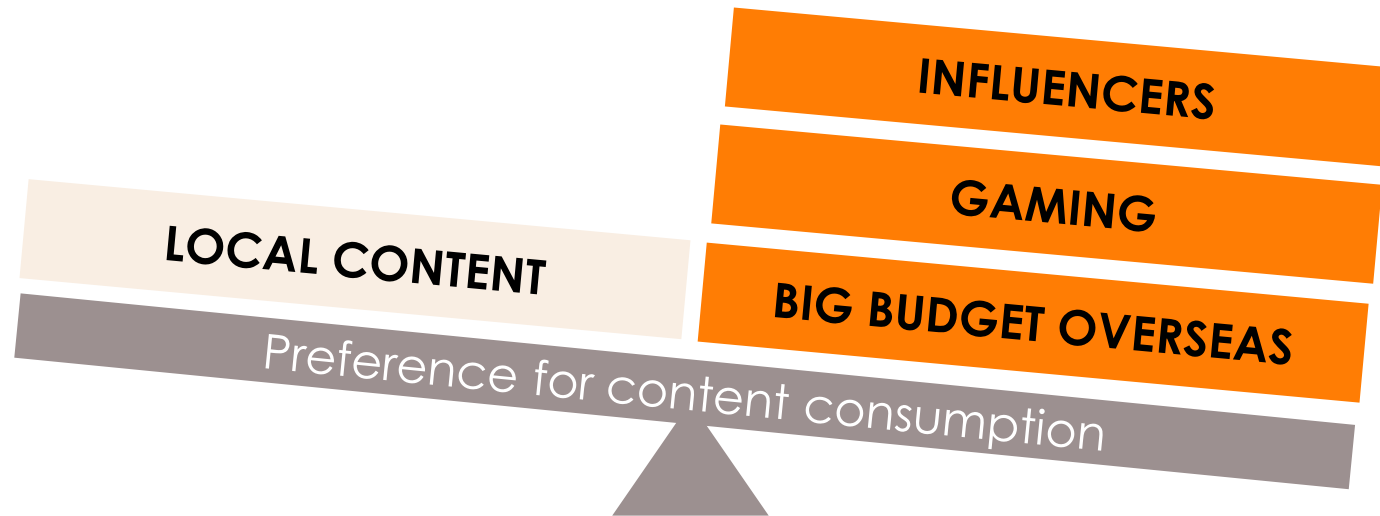
For the parents, this time is about keeping the older kids connected to their younger siblings and maintaining a sense of family togetherness. For the kids, it's a chance to relax and share something fun. This ritual has become an anchor for the family and a simple way to bond, laugh, and reconnect before the week ahead.

05

Local and te reo Māori content is highly valued by caregivers, but faces strong competition.



Big budget overseas production, gaming, and influencers often outweigh preference for local content.



Big budget overseas production

- ✓ High quality
- ✓ Frequent, regular release of new content.
- ✓ Lots of variety so appeals to everyone.

Gaming

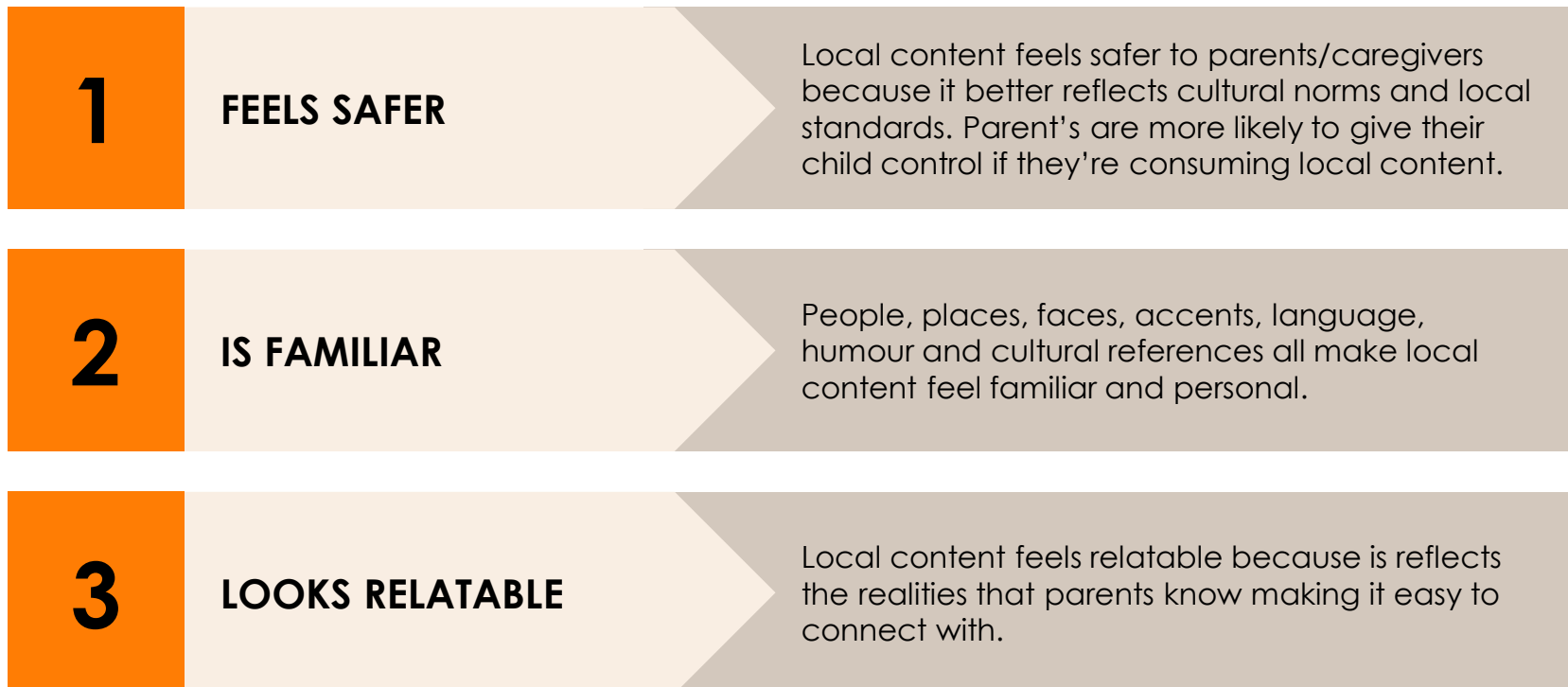
- ✓ Interactive – able to socialise with mates.
- ✓ Competitive elements, particularly favoured by teens.

Influencers

- ✓ Cool and trendy amongst teens, feels like 'being in the know'
- ✓ Creates a sense of belonging, particularly for older children.

In this context, caregivers are strong supporters of their children consuming local content.

Parents/caregivers are more receptive to local content because...



Local content such as:

- Suzy's World
- What Now
- Breakfast shows
- Whale Rider
- Shortland Street
- Laughing Samoan's
- Polyfest
- Kapa Haka (secondary and Te Matatini).

When it comes to Te Reo Māori content, **non-Māori parents and caregivers** tend to prefer it woven throughout, rather than presented in full-immersion.

Non-Māori parents and caregivers value their children learning and engaging with Te Reo Māori. However, most prefer it sprinkled throughout familiar local shows/content instead of full immersion, which can be hard to follow without strong reo skills or exposure.

They see value because:

- **It is an important part of being a New Zealander.**
 - Parents recognise that exposure can help children understand and appreciate what makes New Zealand unique.
- **It encourages children to value and connect with different cultures.**
 - Helps children navigate and understand New Zealand's multicultural society with respect and empathy.
- **The right thing to do.**
 - Signals a commitment to language revitalisation.
 - Sense of responsibility as a New Zealander.



It's important for him to respect Māori culture and that he continues to be open to learning and embracing it. It's part of being a New Zealander.

Female caregiver, Whangārei, 14-year-old child

Shortland Street do a nice job with it. They'll speak a few words in te reo in a sentence, and you can join the dots after a while. It's a good way to learn.

Female caregiver, Auckland, 4-year-old child

She learns and speaks it at school, so we encourage her to practice at home and help us learn.

Female caregiver, Whangārei, 10-year-old child

I don't think he'd be into it if it was full blown. He wouldn't be able to understand any of it.

Female caregiver, Auckland, 13-year-old child

Ka pū te ruha, ka hao te rangatahi

When the old net is cast aside, the new net goes fishing.

Whereas parents and caregivers of Tamariki Māori value te reo Māori content for cultural connection and identity reinforcement.

Parents and caregivers who whakapapa Māori view te reo Māori content as a **powerful tool for cultural reconnection and reclaiming their native tongue**. Many see it as a way to bring reo back into the home, encouraging Tamariki to watch and learn while also enjoying content that entertains them.

They see value because:

- **An inherent part of identity and hononga to te ao Māori**
 - Te reo is a living expression of whakapapa and cultural connection, therefore engaging with such content helps to affirm who they are.
- **A tool for revitalisation within the home**
 - Consuming te reo Māori content is seen as practical and easy way to bring reo back into everyday life, making home the space where revitalisation thrives.
- **Builds a sense of identity and belonging (generationally)**
 - For whānau reconnecting after generational language loss, te reo Māori content offers a way to grow confidence and belonging, letting them move forward at their own pace.

In their own words...



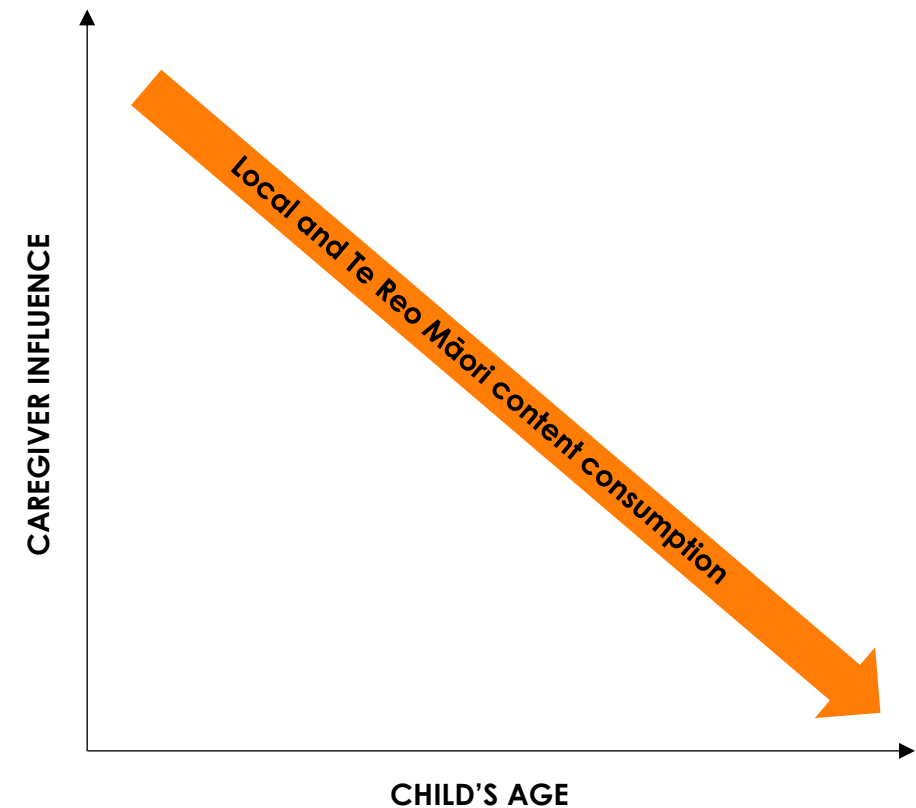
My mum, who was Māori, passed away when I was young, so I never got the opportunity to know about my culture or where I come from. Because of that, it's really important for me as their mum to make sure my kids have a better chance of knowing who they are and where they come from. And they've both shown quite an interest, which is awesome, so I encourage them as much as I can.

Female caregiver, Whangārei, 10-year-old child

Given that caregivers strongly influence younger children's consumption choices, they are more likely to engage with local and te reo Māori content.

When caregivers champion homegrown content, it opens the door for local and te reo Māori content to be embedded into everyday family routines. This early engagement helps shape consumption journeys from a young age but also fosters a sense of connection to local content when they're still young.

Over time, they gradually disengage...



Barriers to local and te reo Māori content include discoverability, perceived lack of quality, and lack of social validation.

Accessibility

Ease of access:

- Local content is rarely available on preferred streaming platforms.

Low discoverability:

- Even when available, local content often lacks strong visibility and algorithmic support, compared to overseas content.
- For Te Reo Māori content there is a lack of exposure in mainstream settings, making it harder to discover organically.

Appeal

Local content is perceived to lack quality:

- An assumption exists that local content is lower-budget or less polished than overseas-made content.
- Older Tamariki in particular feel local content is less attractive and therefore less 'cool'.

Slower release pace:

- Overseas content is often released in frequent episodes or seasons, while local content tends to have longer gaps, reducing momentum for children.

Social validation

Lack of peer reinforcement and validation:

- If friends and peers are not engaging in local content, it feels less socially relevant and attractive.
- Reo content isn't widely discussed or shared in mainstream social circles, therefore tends to stay within its niche.

Competitive noise

Oversaturation of content made outside of New Zealand:

- Internationally-made productions dominate not only through content, but by creating entire eco-systems, with merch, spin-offs, YouTube interviews, and influencer hype that encourage their audience to continue engaging with their content outside of traditional consumption.

Addressing these barriers requires stronger platform visibility, consistent quality and strategies that connect local content to wider cultural spaces.

Accessibility	Appeal	Social validation	Competitive noise
If local and Te Reo Māori content remains hard to access and discover, it will continue to be overlooked. This means efforts to grow engagement must focus on improving platform presence, algorithmic support, and mainstream visibility.	To shift perceptions and boost engagement, local content must be seen as high-quality and consistently delivered, especially for older Tamariki who quickly disengage when content feels less polished or lacks momentum.	When local and reo content lacks peer reinforcement and mainstream social visibility, it risks being sidelined as niche or irrelevant. Content must be designed for shareability and social traction.	International content dominates through expansive ecosystems such as merch, spin-offs, influencers, that keep audiences engaged beyond the screen. To stay competitive, local content needs strategies that extend engagement into these wider cultural and social spaces.