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Background and objectives

In 2017 InternetNZ and NZRS were consolidated into one organisation, InternetNZ. As a result of this the research requirements for both organisations were also consolidated into one.

Historically InternetNZ and NZRS have undertaken three regular research surveys, two of these with Colmar Brunton – the NZRS Business and the NZRS Consumer surveys conducted biennially, and the annual InternetNZ Perceptions of the Internet survey carried out in 2017 with UMR. In 2018 Colmar Brunton consolidated these surveys into one and this document presents the findings from this first all inclusive research project.

As for previous surveys we have focused on results for both business and consumers in New Zealand as well as providing a snapshot of general public perceptions. Our objectives for this research are to:

- Understand public perceptions of the Internet and perceptions of the market
- Understand how New Zealanders think about, and use the Internet, and identify any concerns
- Understand the domain name lifecycle and the specific market variables influencing .nz growth for both businesses and consumers
- Maintain consistency with previous years to ensure continuity of benchmarks and reporting
- Ensure InternetNZ has a programme of work and a marketing strategy that reflects New Zealanders perceptions and concerns
We spoke to a total of 1,859 people online - 858 consumers, 857 businesses, and 144 consumers who also manage or own a business.

Respondents were sourced from Colmar Brunton’s online business and consumer panels.

We used a combination of pre-survey quotas and post survey weighting to ensure results are representative of all New Zealanders.

- Business results are representative of all New Zealand businesses by business size, region and industry. Results are also weighted to a 40% : 60% split for businesses with a domain name : businesses without.
- Consumer results are representative of all New Zealanders by age, gender, and region.
- Where results are for all people (both business and consumers) the numbers are unweighted.

Fieldwork was conducted from 2nd to 29th October 2018.

The maximum margin of error on the total group n=1,859 is ±2.3%; on all consumers n=1,002 is ±3.1%; on all businesses n=1,001 is ±3.1% at the 95% confidence interval.
Key findings
Three things to take away…

1. Businesses have more positive perceptions of the value of social media to their business than consumers, suggesting a disconnect between the perception of value and the actual value to their business. Websites continue to be more favourably perceived than social media for most aspects of consumers purchase decisions.

2. .nz continues to be the most trusted website. Businesses choose a .nz domain name to reflect they are a NZ business and their pride in being a NZ business.

3. Awareness about how to purchase a domain name and set up a website is low among businesses who say they are likely to buy one. It needs to be as quick and easy as possible for these businesses to access information about how to set up a domain name.
Business opportunities for growth
Small businesses, in retail trade and manufacturing, who are based in the North Island outside of Wellington, are most likely to buy a domain name in the next 12 months.

Even businesses without an Internet presence recognise the benefits of a website, and those who are likely to buy a domain name say they would do it for the website address.

Key barriers among those likely to purchase are that they have not go around to it yet, however their lack of knowledge about how to do it is also a factor.
Here’s what we know about who is likely to buy a domain name...

12% of businesses without a domain name are extremely, very or quite likely to buy one in the next 12 months (3% are extremely or very likely). Of these the majority (86%) would likely purchase a .nz domain name over any other.

This equates to 6.6% of all NZ businesses are likely to buy a domain name in the next 12 months.

71% of businesses without a domain name who are likely to buy one are focused on growth within NZ, 3% are focused on growing internationally, and 5% would like to do both.

The majority are in these industries:

1. Retail trade (18%)
2. Manufacturing (12%)

These businesses are small: 65% are Sole traders 29% have 1-5 employees

23% of businesses without a domain name do not have any presence on the Internet.

A website helps consumers connect with a business: 14% Strongly agree, 70% Agree, 16% Neither nor, 0% Disagree, 0% Strongly disagree
A website is an effective tool to share information about my business: 14% Strongly agree, 61% Agree, 24% Neither nor, 1% Disagree, 1% Strongly disagree
A website gives me control over my content: 8% Strongly agree, 60% Agree, 30% Neither nor, 1% Disagree, 1% Strongly disagree
A website helps build business credibility: 6% Strongly agree, 54% Agree, 34% Neither nor, 7% Disagree, 1% Strongly disagree
A website increases sales: 4% Strongly agree, 48% Agree, 41% Neither nor, 6% Disagree, 1% Strongly disagree
A website helps drive customer loyalty: 2% Strongly agree, 34% Agree, 53% Neither nor, 10% Disagree, 0% Strongly disagree

Businesses who don’t have a domain name, and who don’t have a presence on the Internet still recognise the benefits of a website.

Base: Businesses without a domain name who are extremely, very or quite likely to buy one in the next 12 months n=67

Base: Businesses without a domain name who are extremely, very or quite likely to buy one in the next 12 months n=114
...and they are primarily in the North Island outside of Wellington.

Using what we know about the groups who don’t have domain names, (assuming a consistent regional distribution) we can calculate the approximate number of businesses in each region by industry who are likely to buy a domain name in the next 12 months...

89% of all NZ businesses have less than 5 employees
61% of businesses this size don’t have a domain name

3% of businesses this size who don’t already have a domain name are extremely or very likely to buy one in the next 12 months

18% of businesses likely to buy a domain name in the next 12 months are in retail trade
12% of businesses likely to buy a domain name in the next 12 months are in manufacturing

There are 192,378 businesses in Auckland
171,216 have less than 5 employees
104,442 don’t have a domain name
3,133 are likely to buy a domain name
564 are in retail trade
376 are in manufacturing

There are 138,039 businesses in the South Island
122,855 have less than 5 employees
74,942 don’t have a domain name
2,248 are likely to buy a domain name
405 are in retail trade
270 are in manufacturing
The responsibility for decisions about domain names rests with the CEO, MD or business owner, and they are most likely to buy one for the website or email address.

**Responsibility for domain name decisions**

- CEO, MD or Owner: 75%
- Web designer: 1%
- IT manager: 1%
- Independent web designer: 2%
- Independent web design agency: 2%
- Independent IT company: 1%
- Employee responsible for marketing: 1%
- Employee responsible for advertising: 2%
- Another employee of your business: 1%
- Someone else: 3%
- None of these: 13%

**Reasons a business would buy a domain name**

- For a website address: 30%
- For the email address: 28%
- To protect or preserve the name: 21%
- For a marketing campaign website address: 13%
- Other: 3%
- Don't know: 35%

Q9. Who in your business, is ultimately responsible for making decisions about your business’s domain name (for example to buy a .nz domain name)? Q28. For what reasons would your business buy its own domain name?

Base: All businesses n=1,001; Businesses without a domain name n=379
Among those who are likely to get a domain name the barriers mostly reflect they have just not got around to it yet, or they are looking into it.

- Businesses with a domain name: 39.9%
- Not got around to it yet: 1.31%
- Business is too small: 0.90%
- Are looking into it: 0.84%
- Use free email and this works fine: 0.70%
- Don’t know how to set one up: 0.63%
- Use social media instead: 0.42%
- Nature of business doesn’t require one: 0.35%
- Too expensive to set up and maintain: 0.35%
- In process of setting one up: 0.35%
- Not thought about it: 0.28%
- Business comes from word of mouth: 0.21%
- Under contract from a larger company: 0.21%
- Too much time to set up and maintain: 0.14%
- Businesses with a domain name and likely to buy one: 46.6%

Q22. What are the main reasons your business does not currently own a domain name?
Base: All businesses n=1,001
The impact of social media
In a nutshell

1. Social media use is slowly increasing over time.
   While social media is not cannibalising website and domain name use, business perceptions of the benefits of social media are positive and also increasing over time.

2. 2018 is the first year we have measured the percentage of businesses who don’t have a website and just use social media – 8% of all businesses in 2018.

3. Consumer perceptions of social media are not as favourable as businesses. Consumers rate business websites significantly higher than social media pages on measures that are important to their purchase decision.
   There is a disconnect between how businesses rate the benefits of social media and how consumers perceive businesses on social media.

The number of businesses using social media is increasing over time, however the reasons for use are shifting from being predominantly about keeping customers up to date to a more even split with interactive reasons - generating leads, directing customers to a website and receiving feedback.

Q13. Does your business use social media? If so, please indicate below all of the reasons you use social media, if your business doesn’t use social media please select the option at the end of the list. Note: Question wording change in 2017

Base: Businesses who use social media 2018 n=535; 2017 n=549; 2015 n=324; 2014 n=303
So, who uses social media....

<table>
<thead>
<tr>
<th>Year</th>
<th>% of businesses who use social media</th>
<th>% of businesses who use social media and own a domain name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>43%</td>
<td>67%</td>
</tr>
<tr>
<td>2017</td>
<td>41%</td>
<td>65%</td>
</tr>
<tr>
<td>2015</td>
<td>24%</td>
<td>69%</td>
</tr>
<tr>
<td>2014</td>
<td>23%</td>
<td></td>
</tr>
</tbody>
</table>

8% of businesses say that social media is their main presence online.

24% of businesses who use social media as their main presence online still own a domain name. It is most likely to end in .nz.

This equates to nearly 2% of NZ businesses who own a domain name but mainly use social media and not a website.

Business who say that social media is their main presence online:

- Have less than 20 employees: 48%
- The majority have been in business more than 10 years: 56%
- They are focussed on growing either just in NZ (56%) or NZ and internationally (77%): 77%
- Mostly in retail trade and Manufacturing: 14%
Nearly one third of businesses who use social media say it is extremely beneficial to their business. This number is increasing over time.

Q14. How beneficial, or not, do you think social media is to your business? Please use a scale of 1 to 10, where one means not at all beneficial, it’s a waste of time, and ten means it’s extremely beneficial and definitely worth the time.

Base: Businesses who use social media (excl don’t know) 2018 n=528; 2017 n=540; 2015 n=316; 2014 n=298
Consumer perceptions of businesses who are on social media are less favourable than business perceptions of themselves. Perceptions of websites are overwhelmingly more positive among consumers. Social media pages are predominantly convenient for consumers, but this is still at half the incidence as for websites.

Q48. When you are looking for a business online, are the following words more relevant to businesses who promote themselves using a website, or a social media page?

Base: Consumers who are not businesses as well n=858
Has use of .nz changed over time?
In a nutshell

1. The incidence of .nz domain name registration has declined slightly over time.

2. Businesses choose a .nz domain name to reflect they are a NZ business and their pride in being a NZ business. One in five businesses think consumers look for and trust a .nz domain name.

3. Businesses are using alternative domain names as they are cheaper than .nz, or they reflect their international presence. Consideration to use the .nz version of their domain name in the future is declining over time.
Q6. Does your business own or manage its own domain name for use with a website? For example Colmar Brunton has its own domain name colmarbrunton.co.nz.

Base: All businesses 2018 n=1,001; 2017 n=1,100; 2015 n=1,101; 2014 n=1,100

The incidence of .nz domain name ownership is declining slightly over time.
The incidence of multiple registrations has remained stable from 2015, over three-quarters of businesses register one version of their domain name. Businesses register a .nz domain name to reflect they are a NZ business, they are proud of it and they want to show the world. One in five businesses think .nz is what customers look for and trust.

**Number of versions registered**

<table>
<thead>
<tr>
<th>Version</th>
<th>2018 (%)</th>
<th>2017 (%)</th>
<th>2015 (%)</th>
<th>2014 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>One version</td>
<td>77</td>
<td>78</td>
<td>75</td>
<td>86</td>
</tr>
<tr>
<td>Multiple versions</td>
<td>16</td>
<td>17</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Don't know</td>
<td>7</td>
<td>5</td>
<td>7</td>
<td>6</td>
</tr>
</tbody>
</table>

**Reasons for registering .nz**

- I am a New Zealand business: 60% (2018), 76% (2017), 78% (2015)
- I am proud to be a New Zealand business: 45% (2018), 29% (2017), 40% (2015)
- I want to show the world I am a New Zealand business: 22% (2018), 43% (2017), 18% (2015)
- It's quicker to purchase and set up: 8% (2018), 8% (2017), 8% (2015)
- It's easier to purchase: 6% (2018), 6% (2017), 6% (2015)
- Other: 5% (2018), 6% (2017), 5% (2015)
- Don't know: 4% (2018), 3% (2017), 5% (2015)

Base: Businesses with a .nz domain name 2018 n=472; 2017 n=511; 2015 n=379; 2014 n=492
Businesses choose to use a domain name other than .nz because....

.nz was more expensive

“.nz was more expensive than .com.”

“Because .com was more universal and cheaper.”

“Least expensive option.”

“It was free.”

“Cheap”

They have an international business

“Because I am an online business with clients outside of New Zealand”

“Because our business is a global business. Using a .nz domain name would make it appear more parochial.”

“International business is higher than local business.”

“Despite being an NZ oriented site, there is an international aspect and .com was seen as more appropriate.”

“So it is easier to find, and I want an international web presence. Some of my sales are in the USA and Europe.”

“Used to have both .co.nz and .com but then switched to just .com as its easier for international clients.”

“We have a number of domain names including .co.nz and .nz, but our primary is .com.”

Q18. Why has your business chosen to use a domain name other than one that ends with .nz?
Base: Businesses with a domain name other than .nz n=142
Consideration for using .nz in the future has declined over time.

The number of businesses who would consider using .nz in the future has declined over time…

- **2018**: 46%
- **2017**: 60%
- **2015**: 53%
- **2014**: 53%

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Q19. Would your business consider using the .nz version of your business’s domain name in the future (assuming that it is available)?

Base: Businesses with a domain name other than .nz 2018 n=142; 2017 n=145; 2015 n=123; 2014 n=95
Trust and security
In a nutshell

1. .nz is perceived as the most trustworthy and secure website address.
   .org is the only website address to see an increase in the perceptions of trust and it is now perceived as more trustworthy than .com.

2. The requirement to have NZ contact details, or content which is regularly maintained are less important considerations to determine trustworthiness in 2018 than in 2017.
.nz has the most positive associations with trustworthy and secure. .com is good for shopping and .org is knowledgeable. .kiwi is seen as a fad and .au doesn’t distinguish on any of these aspects.

<table>
<thead>
<tr>
<th></th>
<th>.nz website</th>
<th>.com website</th>
<th>.au website</th>
<th>.org website</th>
<th>.kiwi website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trustworthy</td>
<td>21</td>
<td>-13</td>
<td>-1</td>
<td>13</td>
<td>-2</td>
</tr>
<tr>
<td>Secure</td>
<td>19</td>
<td>-6</td>
<td>0</td>
<td>15</td>
<td>-2</td>
</tr>
<tr>
<td>Responsive</td>
<td>11</td>
<td>8</td>
<td>-1</td>
<td>0</td>
<td>-1</td>
</tr>
<tr>
<td>Good value</td>
<td>11</td>
<td>4</td>
<td>0</td>
<td>-6</td>
<td>0</td>
</tr>
<tr>
<td>Reliable</td>
<td>10</td>
<td>-5</td>
<td>0</td>
<td>7</td>
<td>-2</td>
</tr>
<tr>
<td>Good for shopping</td>
<td>8</td>
<td>20</td>
<td>3</td>
<td>-9</td>
<td>-2</td>
</tr>
<tr>
<td>Up to date</td>
<td>-2</td>
<td>12</td>
<td>0</td>
<td>-1</td>
<td>-2</td>
</tr>
<tr>
<td>Compelling</td>
<td>-9</td>
<td>-2</td>
<td>0</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Knowledgeable</td>
<td>-10</td>
<td>11</td>
<td>-1</td>
<td>19</td>
<td>-2</td>
</tr>
<tr>
<td>Interesting</td>
<td>-19</td>
<td>-2</td>
<td>0</td>
<td>-3</td>
<td>9</td>
</tr>
<tr>
<td>Fad</td>
<td>-27</td>
<td>-20</td>
<td>1</td>
<td>-10</td>
<td>54</td>
</tr>
</tbody>
</table>

Q43. Below is a list of words. For each word please indicate which website address it best describes.
Base: Consumers who are not businesses as well (excl none of these) 2018 n=858
The incidence of consumers filtering search results to only show NZ sites has increased since last year, however those who look for .nz domain names has declined.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Look for .nz domain names</td>
<td>82%</td>
<td>89%</td>
<td>89%</td>
<td>78%</td>
<td>72%</td>
<td>68%</td>
</tr>
<tr>
<td>Filter results to show only NZ sites</td>
<td>78%</td>
<td>79%</td>
<td>73%</td>
<td>70%</td>
<td>62%</td>
<td>56%</td>
</tr>
<tr>
<td>Type .nz to show only NZ sites</td>
<td>71%</td>
<td>79%</td>
<td>74%</td>
<td>71%</td>
<td>69%</td>
<td>69%</td>
</tr>
</tbody>
</table>

How often do it

All the time 21%                                        Filter results to show only NZ sites
Sometimes 47%                                            14%
Not often 21%                                           19%
Never 11%                                               19%

Type .nz to show only NZ sites

18%                                        53%                                           17%
18%                                        53%                                           17%
.org is the only website address ending to show an increase in consumer trust since 2017 and is now perceived as more trustworthy than .com.

**Q46. Thinking generally about websites and assuming the content was very similar, which type of website address do you trust the most?**

*NOTE: question wording changed slightly in 2015*

Base: Consumers who are not businesses 2018 n=858; All consumers 2017 n=1,000; 2015 n=1,002; 2014 n=1,003; 2013 n=1,003; 2012 n=1,001
The requirement to have NZ contact details, or content which is regularly maintained is less important in 2018 than in 2017

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>2018</th>
<th>2017</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>A secure website</td>
<td>65%</td>
<td>68%</td>
<td></td>
</tr>
<tr>
<td>If it has New Zealand contact details:</td>
<td>50%</td>
<td>63%</td>
<td></td>
</tr>
<tr>
<td>Content which is regularly maintained/updated</td>
<td>44%</td>
<td>52%</td>
<td>44%</td>
</tr>
<tr>
<td>The domain name itself:</td>
<td>27%</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>A well designed website:</td>
<td>32%</td>
<td>34%</td>
<td>31%</td>
</tr>
<tr>
<td>Referral from a friend:</td>
<td>31%</td>
<td>32%</td>
<td>29%</td>
</tr>
</tbody>
</table>
Business name email addresses have more positive associations across the board than generic email addresses. Generic addresses are most strongly associated with being approachable, however this is still half the incidence of business addresses. On average a quarter of consumers think neither address applies to any of the words we tested.

<table>
<thead>
<tr>
<th></th>
<th>Businessname Email</th>
<th>Generic Email</th>
<th>Neither</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional</td>
<td>79%</td>
<td>8%</td>
<td>13%</td>
</tr>
<tr>
<td>Credible</td>
<td>70%</td>
<td>9%</td>
<td>21%</td>
</tr>
<tr>
<td>Knowledgeable</td>
<td>64%</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Trustworthy</td>
<td>64%</td>
<td>11%</td>
<td>25%</td>
</tr>
<tr>
<td>Reliable</td>
<td>64%</td>
<td>13%</td>
<td>23%</td>
</tr>
<tr>
<td>Responsive</td>
<td>61%</td>
<td>14%</td>
<td>25%</td>
</tr>
<tr>
<td>Approachable</td>
<td>55%</td>
<td>22%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Q45. Thinking about the perceptions of business email addresses, which of the following words do you associate with a business email address (e.g. person@businessname.com), compared to a generic email address (e.g. person@gmail.com)?

Base: Consumers who are not businesses as well 2018 n=858
How do New Zealanders use the Internet?
Internet use is heaviest at home. On average consumers access the Internet from home 6.6 times a week.

Half of New Zealanders are concerned about security and control. Key concerns about the Internet reflect threats to young children, both the information they are exposed to and potential bullying. Other concerns are predominately focused on security and online crime.

Despite this nine out of ten people think the benefits of the Internet outweigh the drawbacks.
Nearly everyone accesses the Internet from home, and four out of five access it at work. Just over half access public wifi once a month or more often.

Q34. How often do you access the Internet in each of the following places?
Base: All people n=1,859

Average weekly use

- At home
  - 93% Once a day or more often
  - 4% Two or three times a week
  - 7% Once a week
  - 12% Two or three times a month
  - 2% Once a month
  - 17% Less than once a month
  - 4% Never
  - Average weekly use: 6.64

- At work
  - 71% Once a day or more often
  - 7% Two or three times a week
  - 2% Once a week
  - 12% Two or three times a month
  - 2% Once a month
  - 4% Less than once a month
  - 17% Never
  - Average weekly use: 6.23

- Using public wifi
  - 10% Once a day or more often
  - 12% Two or three times a week
  - 12% Once a week
  - 10% Two or three times a month
  - 8% Once a month
  - 27% Less than once a month
  - 21% Never
  - Average weekly use: 1.55

InternetNZ
Access to information is the key benefit of the Internet for all people.

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to information</td>
<td>83%</td>
</tr>
<tr>
<td>Easy to communicate with friends and family</td>
<td>76%</td>
</tr>
<tr>
<td>Online shopping</td>
<td>68%</td>
</tr>
<tr>
<td>Can work from home</td>
<td>65%</td>
</tr>
<tr>
<td>Easier access to goods and services</td>
<td>65%</td>
</tr>
<tr>
<td>Review of products and services</td>
<td>62%</td>
</tr>
<tr>
<td>Saves time</td>
<td>58%</td>
</tr>
<tr>
<td>Anyone can access information</td>
<td>54%</td>
</tr>
<tr>
<td>Use less paper</td>
<td>49%</td>
</tr>
<tr>
<td>Connects communities of people</td>
<td>49%</td>
</tr>
<tr>
<td>Cloud storage</td>
<td>39%</td>
</tr>
<tr>
<td>Online forums provide a wide range of views</td>
<td>31%</td>
</tr>
<tr>
<td>Discussion forums</td>
<td>27%</td>
</tr>
<tr>
<td>Meet new people online</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
</tr>
</tbody>
</table>

Results from 2017 are not strictly comparable – the UMR survey was conducted over the phone and responses were verbatim rather than selected from a pre determined list…

…however, the top two benefits in 2017 were very similar:

1. Access to information
2. Easy to communicate with friends and family

Other reasons in the top 5 include:

3. Connects communities of people
4. Saves time
5. Online shopping

Q35. Which of the below do you think are the key benefits of the Internet? Please think about the key social benefits, regardless of whether or not you personally use the Internet for this reason.

Base: All people n=1,859
The biggest concern people have about the Internet is the threat it poses to young children - both access to inappropriate content and cyber bullying. Threats to security complete the other primary concerns – personal data and privacy, online crime and identity theft are concerns for over half of people.

<table>
<thead>
<tr>
<th>Concern</th>
<th>Extremely concerned</th>
<th>Very concerned</th>
<th>A little bit concerned</th>
<th>Not very concerned</th>
<th>Not at all concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young children can access inappropriate content</td>
<td>33%</td>
<td>38%</td>
<td>21%</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>The security of personal data</td>
<td>31%</td>
<td>34%</td>
<td>29%</td>
<td>6%</td>
<td>1%</td>
</tr>
<tr>
<td>Cyber bullying</td>
<td>29%</td>
<td>35%</td>
<td>22%</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td>Online crime</td>
<td>27%</td>
<td>36%</td>
<td>29%</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>Identity theft</td>
<td>27%</td>
<td>35%</td>
<td>29%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Threats to privacy (location tracking etc)</td>
<td>26%</td>
<td>35%</td>
<td>30%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>People becoming socially or physically isolated from each other</td>
<td>16%</td>
<td>29%</td>
<td>37%</td>
<td>15%</td>
<td>3%</td>
</tr>
<tr>
<td>Slow internet speed in NZ</td>
<td>15%</td>
<td>27%</td>
<td>33%</td>
<td>21%</td>
<td>3%</td>
</tr>
<tr>
<td>Access is poor in remote areas</td>
<td>13%</td>
<td>29%</td>
<td>37%</td>
<td>16%</td>
<td>4%</td>
</tr>
<tr>
<td>Information is misleading or wrong</td>
<td>13%</td>
<td>29%</td>
<td>44%</td>
<td>12%</td>
<td>1%</td>
</tr>
<tr>
<td>Cost of internet access</td>
<td>10%</td>
<td>23%</td>
<td>40%</td>
<td>25%</td>
<td>3%</td>
</tr>
<tr>
<td>People will lose the ability to think independently</td>
<td>11%</td>
<td>22%</td>
<td>35%</td>
<td>25%</td>
<td>6%</td>
</tr>
<tr>
<td>Illegal downloading of copywrited material</td>
<td>11%</td>
<td>21%</td>
<td>34%</td>
<td>27%</td>
<td>8%</td>
</tr>
<tr>
<td>Distracting and a waste of time</td>
<td>9%</td>
<td>21%</td>
<td>41%</td>
<td>24%</td>
<td>6%</td>
</tr>
<tr>
<td>People from low socia-economic backgrounds may have…</td>
<td>6%</td>
<td>22%</td>
<td>42%</td>
<td>23%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Similar to the previous slide results are not strictly comparable – the 2017 results are verbatim and not on a scale, and the response group for this particular question included people without Internet access…

…however, the top benefit in 2017 is very similar (Young children can access inappropriate content is new in 2018):

1. The security of personal data
2. Threats to privacy
3. Information is misleading or wrong
4. Online crime
5. Too much screen time for young children
Despite security and privacy concerns, nine out of ten people think the positive aspects of the Internet outweigh the negative, this is consistent over time.

Results from 2017 and 2016 are not strictly comparable – the UMR survey was conducted over the phone and the sample group included New Zealanders without Internet access.

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>88%</td>
<td>89%</td>
</tr>
<tr>
<td>No</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Approximately half of all people are concerned about security and control...

**Concern about control**
- Extremely concerned: 11%
- Very concerned: 2%
- A little bit concerned: 17%
- Not very concerned: 41%
- Not at all concerned: 29%

**Concern about security**
- Extremely concerned: 10%
- Very concerned: 1%
- A little bit concerned: 20%
- Not very concerned: 39%
- Not at all concerned: 30%

Q38. How concerned are you about the control you have over your personal information when you put it on the Internet? Q39. How concerned are you about the security of your own personal details when you use them on the Internet?
Base: All people (excluding those who don’t use personal details on the Internet) n=1,859
…and half say this concern has increased over time. The majority are less likely to use their personal details online as a result of increased concern.

Q40. How has your level of concern changed over the last 12 months? Q41. Has this affected how you use your personal details online?

Base: Q40 All people n=1,859; Q41 People whose level of concern has increased (excl don’t know) n=796; People whose level of concern has decreased (excl don’t know) n=41
One in 25 people don’t use any of the security precautions we asked about. The majority use a pin or password on their devices and half regularly update and back up their content.

UMR results from 2017 are not strictly comparable – the UMR survey was conducted over the phone and the sample group included New Zealanders without Internet access. The question structure was also different, people answered Yes, No or Don’t know to each security option.

**Q42. Which of the following security precautions do you take with your own devices?**

- **Base: All people n=1,859**

<table>
<thead>
<tr>
<th>Security Precaution</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use a pin or password on any or all devices</td>
<td>80%</td>
</tr>
<tr>
<td>Regularly update the software</td>
<td>74%</td>
</tr>
<tr>
<td>Regularly back up the content</td>
<td>50%</td>
</tr>
<tr>
<td>Use two factor or multi factor authentication on any or all accounts</td>
<td>36%</td>
</tr>
<tr>
<td>None of these</td>
<td>4%</td>
</tr>
</tbody>
</table>
Businesses and domain names
In a nutshell

1. The majority of businesses have positive attitudes towards websites, regardless of whether or not they have a domain name.

2. Most businesses who don’t have a domain name but say they are likely to get one just haven’t got around to it yet. Primary reasons for this are lack of information about how to do it, and lack of time to do it.

3. Half of businesses who say they are likely to get a domain name don’t know how to purchase one or set up a website.
Most businesses have positive attitudes towards websites, regardless of whether or not they have a domain name for their own business. They are most likely to think a website helps consumers connect with them, and least likely to think it helps drive loyalty.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neither nor</th>
<th>Disagree</th>
<th>Strongly disagree</th>
<th>Business with a domain name (%)</th>
<th>Business without a domain name (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A website helps consumers connect with a business</td>
<td>25%</td>
<td>61%</td>
<td>12%</td>
<td>1%</td>
<td></td>
<td>92</td>
<td>83</td>
</tr>
<tr>
<td>A website is an effective tool to share information about my business</td>
<td>25%</td>
<td>54%</td>
<td>16%</td>
<td>2%</td>
<td></td>
<td>90</td>
<td>72</td>
</tr>
<tr>
<td>A website gives me control over my content</td>
<td>20%</td>
<td>53%</td>
<td>22%</td>
<td>4%</td>
<td></td>
<td>86</td>
<td>65</td>
</tr>
<tr>
<td>A website helps build business credibility</td>
<td>19%</td>
<td>52%</td>
<td>23%</td>
<td>6%</td>
<td></td>
<td>83</td>
<td>62</td>
</tr>
<tr>
<td>A website increases sales</td>
<td>16%</td>
<td>47%</td>
<td>32%</td>
<td>4%</td>
<td></td>
<td>70</td>
<td>57</td>
</tr>
<tr>
<td>A website helps drive customer loyalty</td>
<td>10%</td>
<td>40%</td>
<td>39%</td>
<td>9%</td>
<td></td>
<td>57</td>
<td>45</td>
</tr>
</tbody>
</table>

Q15. Below is a set of statements about business attitudes towards websites. Using the scale provided, please indicate how much you agree or disagree with each statement. Base: All businesses (excl don’t know) n≈1,001
Awareness of what a domain name is remains stable among businesses since 2012.

Awareness of what a domain name is is highest among businesses who have one (95%), however is still high (83%) among businesses who don’t.

Awareness is highest for businesses with 10-49 employees in the Service, Business and Finance industries.
Businesses primarily own a domain name for the website and the email address, and two-thirds of people who completed the survey on behalf of their business were involved with the registration.

Q20. For what reasons does your business own a domain name?
Q21. Were you involved with registering the domain name your business currently uses?

Base: Businesses with a domain name n=594

Reasons businesses own a domain name
- For a business website address: 67%
- For the email address: 56%
- To protect or preserve the name: 36%
- For a marketing campaign website address: 17%
- Other: 2%
- Don’t know: 3%

Involved with registration
- Yes: 67%
- No: 31%
- Don’t know: 3%
Businesses without a domain name are most likely to think the nature of their business doesn’t require one. Businesses who are likely to get a domain name say they just haven’t got around to it yet, or they are looking into it. The biggest barriers for businesses likely to get one is they don’t know how to set one up.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature of business doesn’t require one</td>
<td>8%</td>
<td>20%</td>
<td>38%</td>
<td>46%</td>
<td>40%</td>
<td>36%</td>
<td>34%</td>
<td>45%</td>
</tr>
<tr>
<td>Business is too small</td>
<td>5%</td>
<td>7%</td>
<td>6%</td>
<td>4%</td>
<td>15%</td>
<td>15%</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>Use free email, e.g., Gmail, extra, etc., and this works fine</td>
<td>28%</td>
<td>28%</td>
<td>26%</td>
<td>25%</td>
<td>17%</td>
<td>17%</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>Business comes from word of mouth</td>
<td>3%</td>
<td>6%</td>
<td>12%</td>
<td>19%</td>
<td>17%</td>
<td>23%</td>
<td>19%</td>
<td>26%</td>
</tr>
<tr>
<td>Too expensive to set up &amp; maintain</td>
<td>6%</td>
<td>9%</td>
<td>9%</td>
<td>16%</td>
<td>5%</td>
<td>9%</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>Not got around to it yet</td>
<td>3%</td>
<td>11%</td>
<td>13%</td>
<td>19%</td>
<td>7%</td>
<td>13%</td>
<td>16%</td>
<td>23%</td>
</tr>
<tr>
<td>Not thought about it</td>
<td>3%</td>
<td>5%</td>
<td>9%</td>
<td>16%</td>
<td>5%</td>
<td>9%</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>Don’t know how to set one up</td>
<td>4%</td>
<td>9%</td>
<td>9%</td>
<td>16%</td>
<td>4%</td>
<td>9%</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>We use a social media platform instead</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Takes too much time to set up &amp; maintain</td>
<td>8%</td>
<td>6%</td>
<td>6%</td>
<td>3%</td>
<td>5%</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Under contract from a larger company</td>
<td>8%</td>
<td>4%</td>
<td>5%</td>
<td>5%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Are looking into it</td>
<td>2%</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
<td>2%</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>In process of setting one up</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Businesses who say the nature of their business doesn’t require a domain name mostly rely on referrals, or they don’t have the capacity to take on more work. Among those who haven’t got around to it yet, it is mostly the lack of information about how to do it, and/or the time to do it.

<table>
<thead>
<tr>
<th>Nature of business doesn’t require one</th>
<th>Business is too small</th>
<th>Use free email, e.g., Gmail, extra, etc., and this works fine</th>
<th>Business comes from word of mouth</th>
<th>Too expensive to set up &amp; maintain</th>
<th>Not got around to it yet</th>
<th>Not thought about it</th>
<th>Don’t know how to set one up</th>
<th>We use a social media platform instead</th>
<th>Takes too much time to set up &amp; maintain</th>
<th>Under contract from a larger company</th>
<th>Are looking into it</th>
<th>In process of setting one up</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>40%</td>
<td>36%</td>
<td>34%</td>
<td>46%</td>
<td>17%</td>
<td>12%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>539%</td>
</tr>
</tbody>
</table>

Q22. What are the main reasons your business does not currently own a domain name? Q23. What is it about the nature of your business that means you don’t require a domain name?
Q24. What could be done to help you get around to registering a domain name?

Base: Businesses without a domain name 2018 n=379
Businesses without a domain name recognise the benefits of websites, but largely think they don’t apply to their own situations. Similar to previous results, the biggest hurdle for businesses who say they are likely to purchase a domain name is that they don’t know how to set one up.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Likely to purchase a domain name</th>
<th>Unlikely to purchase a domain name</th>
</tr>
</thead>
<tbody>
<tr>
<td>A web presence is important to other organisations but not mine</td>
<td>20%</td>
<td>63%</td>
</tr>
<tr>
<td>I don't know how to set up a website</td>
<td>55%</td>
<td>55%</td>
</tr>
<tr>
<td>There is no value for my business in having a website</td>
<td>14%</td>
<td>56%</td>
</tr>
<tr>
<td>A website adds nothing to my business</td>
<td>10%</td>
<td>51%</td>
</tr>
<tr>
<td>A website is too much hassle to maintain</td>
<td>21%</td>
<td>40%</td>
</tr>
<tr>
<td>People don't look for business services like mine online</td>
<td>13%</td>
<td>41%</td>
</tr>
</tbody>
</table>

Q25. Below is a set of statements about business attitudes towards websites. Using the scale provided, please indicate how much you agree or disagree with each statement.
Base: Businesses without a domain name (excl don’t know) n≈379
Among businesses who don’t have a domain name only one in seven know exactly how to purchase one. Reasons for wanting one are predominantly for the website or the email address, however one third don’t know why they would buy one.
Businesses who are likely to purchase a domain name are more inclined to know how to purchase one, and they are more interested in a domain name for a website address, or a marketing campaign than businesses who don’t intend to purchase.

Q29. How likely is your business to purchase a domain name in the next 12 months? Q27. If your business was to consider buying a domain name, do you know how to purchase one? Q28. For what reasons would your business buy its own domain name?

Base: Businesses without a domain name n=379; Businesses likely to purchase a domain name in the next 12 months
Consumers and domain names
The incidence of consumer domain name ownership remains stable since 2015 with the most common domain name being .nz

Q32. Do you own or manage your own personal domain name? By personal domain name we mean a website for personal purposes (not business, not speculation). For example, using a family smith.co.nz, smith.nz, or jonesfamily.com, or any other words to denote your personal domain address

Base: All consumers 2018 n=1,002; 2017 n=1,000; 2015 n=1,002; 2014 n=1,003

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes (Total)</td>
<td>18%</td>
<td>18%</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>Yes, it ends in .nz</td>
<td>10%</td>
<td>10%</td>
<td>11%</td>
<td>15%</td>
</tr>
<tr>
<td>Yes, it ends in .au</td>
<td>6%</td>
<td>7%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Yes, it ends in .com</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Yes, it ends in something else</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>No</td>
<td>79%</td>
<td>80%</td>
<td>81%</td>
<td>78%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Most people understand what a domain name is, however some people think it is specific to business use. And others are a bit more confused….

The name of a website

"It is used for a website. People or organisations buy a domain name to use it."

"It's like a title of a location but in terms of the Internet. So a domain is a place in the Internet and a domain name is the name of that place."

"The name given to a website address."

"The name for a web address that a bunch of addresses are attached to. Can be used for web pages, business websites etc."

"Yes - It's part of the URL (Internet address) that tells you who or what owns the page you are looking at."

"Yes, a domain name is your website address which is managed for a domain company whom you pay your annual fee for your web address for in order to keep ownership."

"You buy one and can use it as the web address for a website."

"It is a name for a hosted website."

An Internet address for a business

"Internet address for business address emails."

"An Internet address of a company or business."

"An Internet address for a business."

"It's a key word for a business website."

"Name registered to a business for as web address."

"The business name on a website, part of the www address."

"The name used on the Internet to register your business."

"Yes. It describe its a business, educational institute or a govt organisation."

But some people are confused….

"A location on the Internet that indicates your general business e.g. govt or Maori."

"A sequence at the end of an Internet address that specifies a domain of authority or control within the Internet realm."

"Group of computers with same name in same place."

"An area of territory owned or controlled by a particular ruler or government."

"It's a main name like a boss or the head or the control centre."

"A computer domain?"

"A domain is for example where your business runs, its domain is the area it covers or works in."

"A personal name for a brand or company."

"A place with trees, flowers, open grounds with special features."

"A place/park that anyone can use to relax."
Two thirds of consumers own domain names for the email address, the incidence of which has declined over the last few years.

<table>
<thead>
<tr>
<th>Reason</th>
<th>2018</th>
<th>2017</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>For the email address</td>
<td>62%</td>
<td>72%</td>
<td>74%</td>
<td>72%</td>
</tr>
<tr>
<td>For the website address</td>
<td>32%</td>
<td>42%</td>
<td>43%</td>
<td>48%</td>
</tr>
<tr>
<td>To protect or preserve the name</td>
<td>19%</td>
<td>15%</td>
<td>20%</td>
<td>25%</td>
</tr>
<tr>
<td>Have another reason</td>
<td>4%</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The registration process
Just over half of people who were involved in the registration process for either their business or personal domain name can recall the organisation they used. They were most likely to have chosen it based on a referral from a friend.

Q53. Can you recall the organisation you used to register your domain name? Q54. Why did you choose this organisation to register your domain name?

Base: Businesses and consumers who were involved in the registration process n=208

Recall of registration organisation

- Yes: 56%
- No: 44%

Reasons for choosing registration organisation

- A referral from a friend: 27%
- Online search: 21%
- No reason it was a random choice: 10%
- Online advertising: 7%
- I liked the name: 7%
- I contacted a few and they were the first to get back to me: 3%
- Can't remember: 24%
Two thirds of people thought the registration process was straightforward and the time it took was reasonable. Over one in ten people didn’t understand the process to set up a domain name and didn’t know where to go to register one.
A small group of people didn’t get enough information to understand the process, but overwhelmingly the experience was positive and people had enough information.

Q56. Do you feel that the organisation provided you with enough information to understand the registration process? Q57. Overall how would you rate your experience registering your domain name?

Base: Businesses and consumers involved in registering their domain name n=208

- **Did you get enough information to understand the process?**
  - Yes: 70%
  - No: 16%
  - Don’t know: 14%

- **Experience with registration**
  - Excellent: 10%
  - Very good: 24%
  - Good: 43%
  - Fair: 15%
  - Poor: 2%
  - Don’t know: 7%
The majority of people are aware of the renewal process and the majority will use the same organisation.

**Are you aware of the renewal process?**

- Yes: 43%
- No: 26%
- Don't know: 15%
- My registration is not yet up for renewal yet: 16%

**Will you use the same organisation to renew?**

- Definitely: 33%
- Maybe: 55%
- No – I'll contact someone else: 3%
- No – I'm not planning on renewing: 9%

Q58. Did this organisation outline the renewal process for when your initial registration term expires? Q59. Will you contact the same organisation to renew your domain name when your current time expires?

Base: Businesses and consumers involved in registering their domain name n=208
Flexible working
Half of people have the ability to work from home, and two thirds of those do it sometimes or all the time.

Q49. Does the type of work that you do allow you to work from home, as well as from your workplace?

Q50. Do you work remotely from home?

<table>
<thead>
<tr>
<th>Answer</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes - I do it all the time</td>
<td>13%</td>
</tr>
<tr>
<td>Yes - I do it sometimes</td>
<td>56%</td>
</tr>
<tr>
<td>Yes - I've done it once or twice</td>
<td>21%</td>
</tr>
<tr>
<td>No - I've never worked remotely from home</td>
<td>11%</td>
</tr>
</tbody>
</table>

Base: Q49 Consumers who access the Internet at work n=594; Q50 Consumers who are able to work from home n=290
Half of people who have the ability to work from home would like to do it more often, but they mostly have too many face to face meetings. One in five say their Internet speed isn’t fast enough.

Would you like to work from home more often?

- Yes: 54%
- No: 39%
- Don’t know: 7%

Those who would like to work from home more often:

- I have too many face to face meetings I need to be at work: 38%
- My employer doesn’t offer flexible working options: 29%
- My internet speed isn’t fast enough: 21%
- I don’t have space to work at home: 14%
- My laptop or mobile phone isn’t good enough: 13%
- My employer doesn’t offer the technological support for me to work from home: 13%
- Other: 12%

Q51. Would you like to work from home more frequently than you currently do? Q52. Which of the below are barriers for you working from home more often?

Base: Q51 Consumers who are able to work from home n=290; Q52. Consumers who would like to work from home more often n=154
Internet provision
Four out of five people were involved in choosing the Internet provider for their home, they are most likely to have fibre, and they mostly source information about Internet providers on the Internet. One in ten people have heard of the National Broadband Map.
Awareness of InternetNZ
One in five people are aware of Internet NZ and the majority of those have an accurate understanding of what InternetNZ does. They are most likely to have become aware of InternetNZ through traditional media news articles.

**Awareness of InternetNZ**
- **8%** Don't know
- **22%** Yes
- **70%** No

**Understanding of the role of InternetNZ**
- Controls, allocates and administers domain names: 17%
- Provides protection and security for the internet: 9%
- Promotes the internet in NZ: 6%
- Internet advocacy and lobby group: 6%
- Provide information and advice about the internet: 5%
- Internet watchdog: 5%
- Monitors and controls the internet: 4%
- Ensures access to quality reliable internet: 2%
- Educate people on internet safety: 2%
- Other: 5%
- None: 2%
- Don't know: 47%

**How you heard about InternetNZ?**
- In a news article on TV, online or radio: 26%
- Advertising on the internet: 8%
- Social media: 7%
- From a friend: 6%
- At an industry event: 5%
- When I registered a domain name: 4%
- Can't remember: 43%
Business demographics
Business respondent profile

Number of employees:
- Sole trader: 70%
- 1-5 employees: 19%
- 6-9 employees: 4%
- 10-19 employees: 3%
- 20-49 employees: 2%
- 50-99 employees: 1%
- 100+ employees: 1%
- Don't know: 1%

Age of business:
- Less than 2 years: 21%
- More than 2 but less than 5 years: 13%
- More than 5 but less than 10 years: 18%
- More than 10 years: 48%
- Don't know: 1%

Region:
- Auckland: 30%
- Christchurch: 10%
- Dunedin: 2%
- Gisborne: 1%
- Hamilton: 3%
- Invercargill: 1%
- Napier/Hastings: 4%
- Nelson: 3%
- New Plymouth: 1%
- Palmerston North: 1%
- Rotorua: 1%
- Tauranga: 3%
- Wanganui: 1%
- Wellington: 10%
- Whangarei: 2%
- Other town or city Nth Is: 11%
- Other town or city Sth Is: 7%
- Rural area Nth Is: 5%
- Rural area Sth Is: 5%

Industry:
- Agriculture, Forestry & Fishing: 8%
- Mining: 4%
- Manufacturing: 10%
- Electricity, Gas, Water & Waste: 5%
- Construction: 5%
- Wholesale Trade: 5%
- Retail Trade: 14%
- Accommodation & Food: 3%
- Transport, Postal & Warehouse: 3%
- Information Media & Telecomm: 8%
- Financial & Insurance Services: 1%
- Rental, Hiring & Real Estate: 4%
- Professional, Scientific &…: 8%
- Administrative & Support…: 6%
- Public Administration & Safety: 6%
- Education & Training: 8%
- Health Care & Social…: 4%
- Arts & Recreation Services: 5%
- Other: 13%

Base: All businesses n=1,001
Consumer demographics
Consumer respondent profile

**Gender**
- Male: 48%
- Female: 52%

**Age**
- 18-19 years: 3%
- 20-29 years: 18%
- 30-39 years: 16%
- 40-49 years: 19%
- 50-59 years: 17%
- 60-64 years: 6%
- 65 plus: 20%

**Manage or own a business**
- Yes: 14%
- No: 86%

**Region**
- Northland: 4%
- Auckland: 33%
- Waikato: 10%
- Bay of Plenty: 6%
- Gisborne: 1%
- Hawke's Bay: 4%
- Taranaki: 3%
- Manawatu-Wanganui: 5%
- Wellington: 11%
- Tasman: 1%
- Nelson: 1%
- Marlborough: 1%
- West Coast: 1%
- Canterbury: 13%
- Otago: 5%
- Southland: 2%

Base: All consumers n=1,000
For more information please contact:
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