

The background of the slide is a scenic photograph of a New Zealand landscape. It features a large, calm blue lake in the middle ground, surrounded by green rolling hills and distant mountains with patches of snow under a blue sky with light clouds. In the foreground, there's a grassy field with a wooden fence. Overlaid on the right side of the image is a solid blue map of New Zealand. A dotted white line starts from the top right and curves around the map, ending near the bottom right.

# PUBLIC PERCEPTION RESEARCH: CONSUMER RESULTS

A Colmar Brunton Report  
September 2017



The .nz registry service (NZRS) is the operator for the .nz domain space.

In 2012 NZRS first commissioned research to better understand perceptions of the .nz domain space among businesses and consumers.

This document reports results for the fifth wave of this survey.



Consistent with previous years the survey was conducted online using Colmar Brunton's consumer research panel. In total, 1,000 respondents took part.

The maximum margin of error for this sample size is  $\pm 3.1\%$  at the 95% confidence level. The data is weighted by age, gender and region to reflect the New Zealand population.



The survey was conducted between the 21 August and 3 September 2017.

- To understand perceptions of a .nz domain name in the New Zealand consumer market, in particular:
  - What do consumers understand about domain names?
  - What is important to consumers for searching and purchasing on the internet?
  - How does .nz compare in the market against perceptions of other domain names?





# Key outtakes

- The strengths of a .nz website are that it is trustworthy, reliable, secure and good value.
- Of all the .nz competitors, a .org website has the most similar profile - it is also trustworthy, reliable and secure, as well as knowledgeable.
- .nz continues to be the most looked at, trusted, and preferred website for searching for information, buying products, and reading news stories, however the long term trend for .com suggests they are slowly gaining ground in all areas.
- Providing visible and easily located contact details for an organisation is crucial for people who are wanting to purchase from a website. Without contact details the majority are unlikely to purchase.
- Accessing the internet via a mobile phone has increased since 2015 and is the most common device used. Correspondingly the importance of having a website that is compatible with a mobile has also increased.

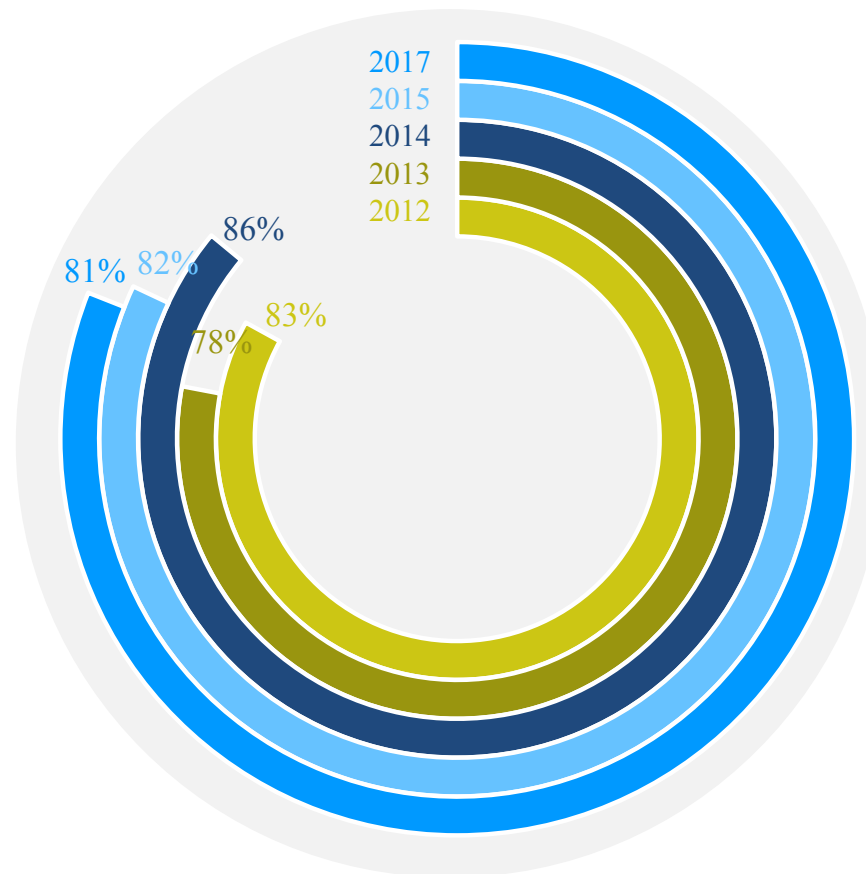


# Awareness of domain names

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Four out of five people are aware of what a domain name is, consistent with results from 2015



Males, who live in Auckland are most likely to know what a domain name is.

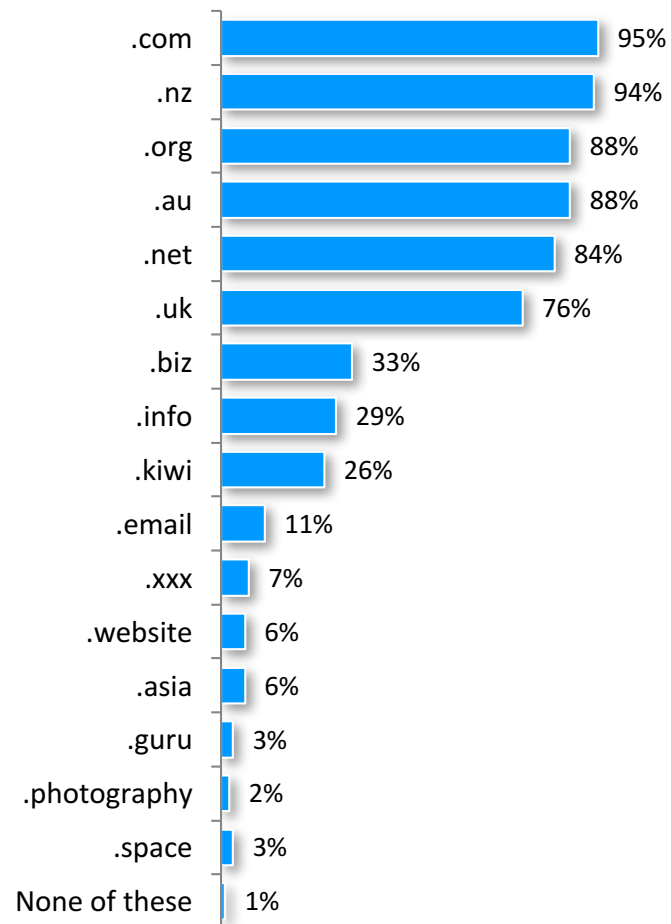
Females who live in the North Island outside of Auckland or Wellington are least likely to know what a domain name is.

Q1. Before we begin, can you tell us whether you know what a domain name is?  
Base: All respondents 2017 n=1,000; 2015 n=1,002; 2014 n=1,003; 2013 n=1,003; 2012 n=1,001

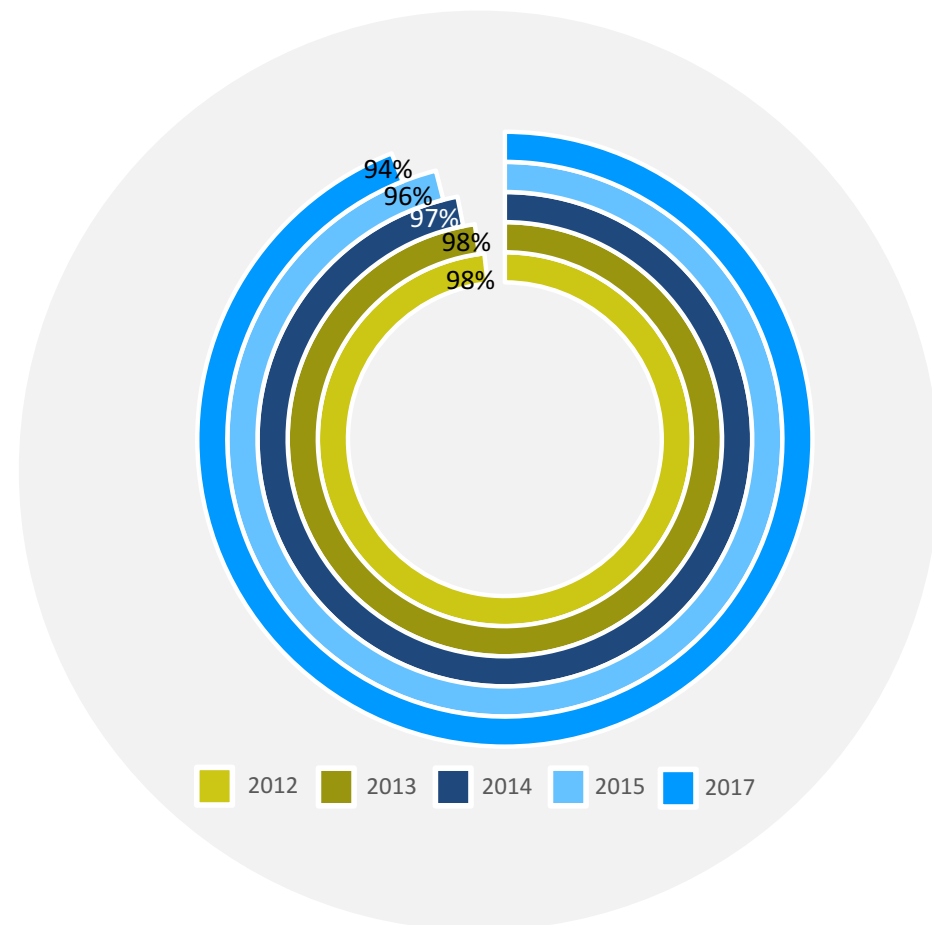


.com and .nz are the most commonly recognised domain names. Awareness of .nz remains stable over time

Awareness of top level domain names



Awareness of .nz

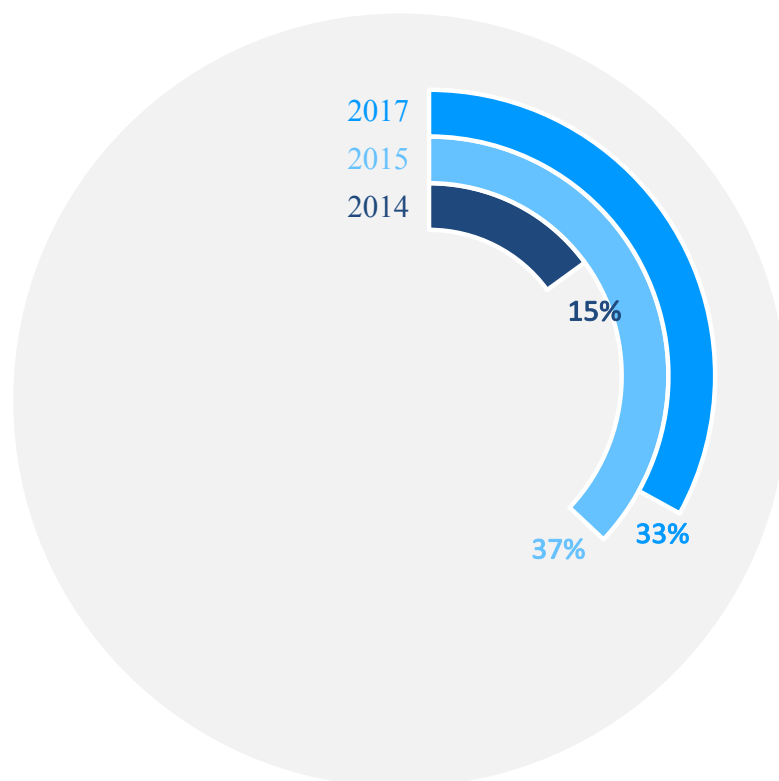


Q3. The 'top level' of a domain name is the last part of the name, for example the .nz in colmarbrunton.co.nz, or the .com in google.com. Please select the top level domain names that you have heard of from the list below.

Base: All respondents 2017 n=1,000; 2015 n=1,002; 2014 n=1,003; 2013 n=1,003; 2012 n=1,001



## One-third of people are aware that you can register shorter domain names...



Males, who own or manage a domain name are most likely to be aware that you can register shorter domain names.

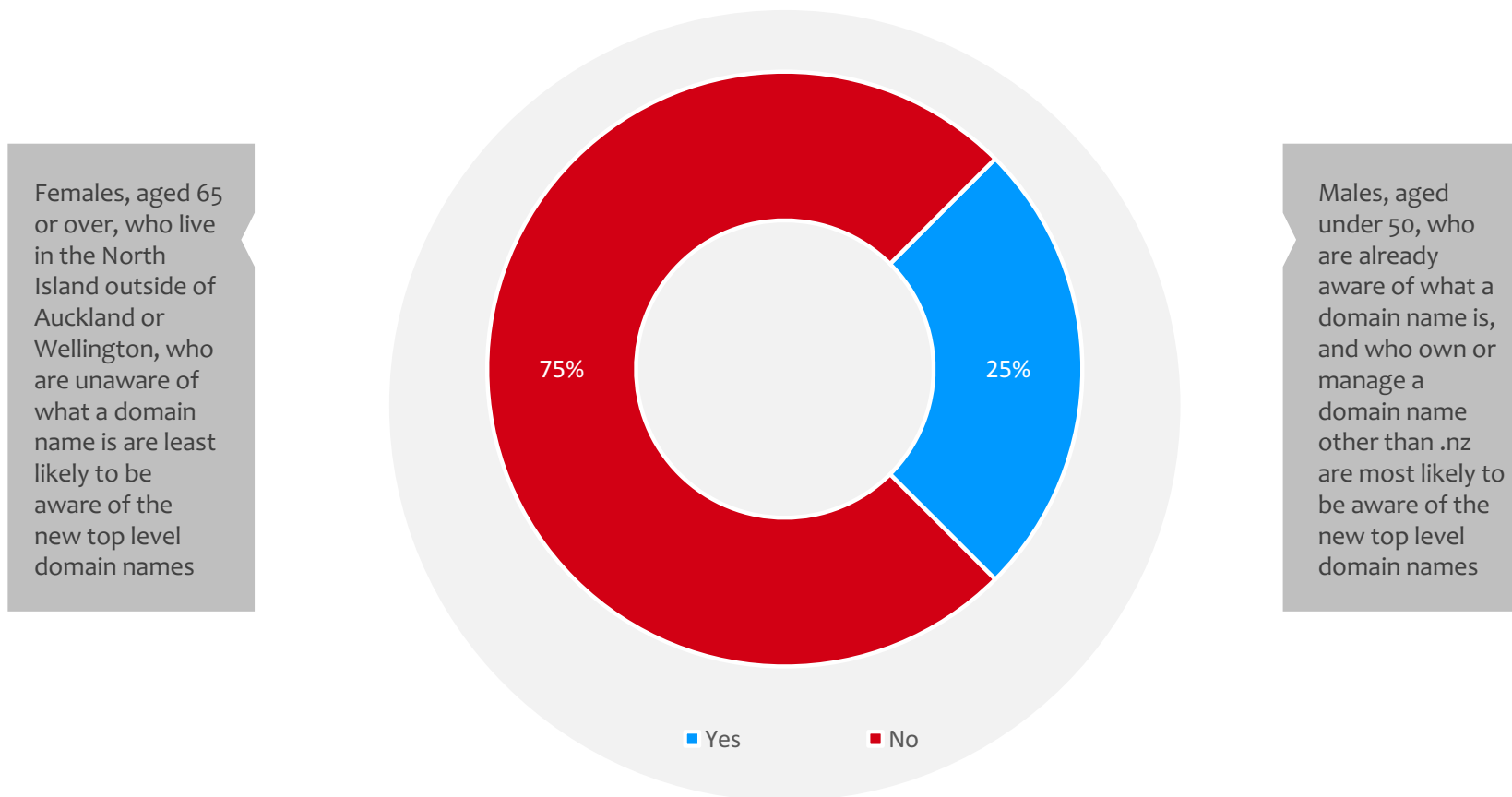
Females, who live in the North Island outside of Auckland or Wellington who don't know what a domain name is and don't own or manage one are more likely to be unaware of the shorter domain names

NOTE: Question wording change in 2017

Q37. Are you aware that you can now register shorter .nz domain names e.g. colmarbrunton.nz rather than colmarbrunton.co.nz?

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

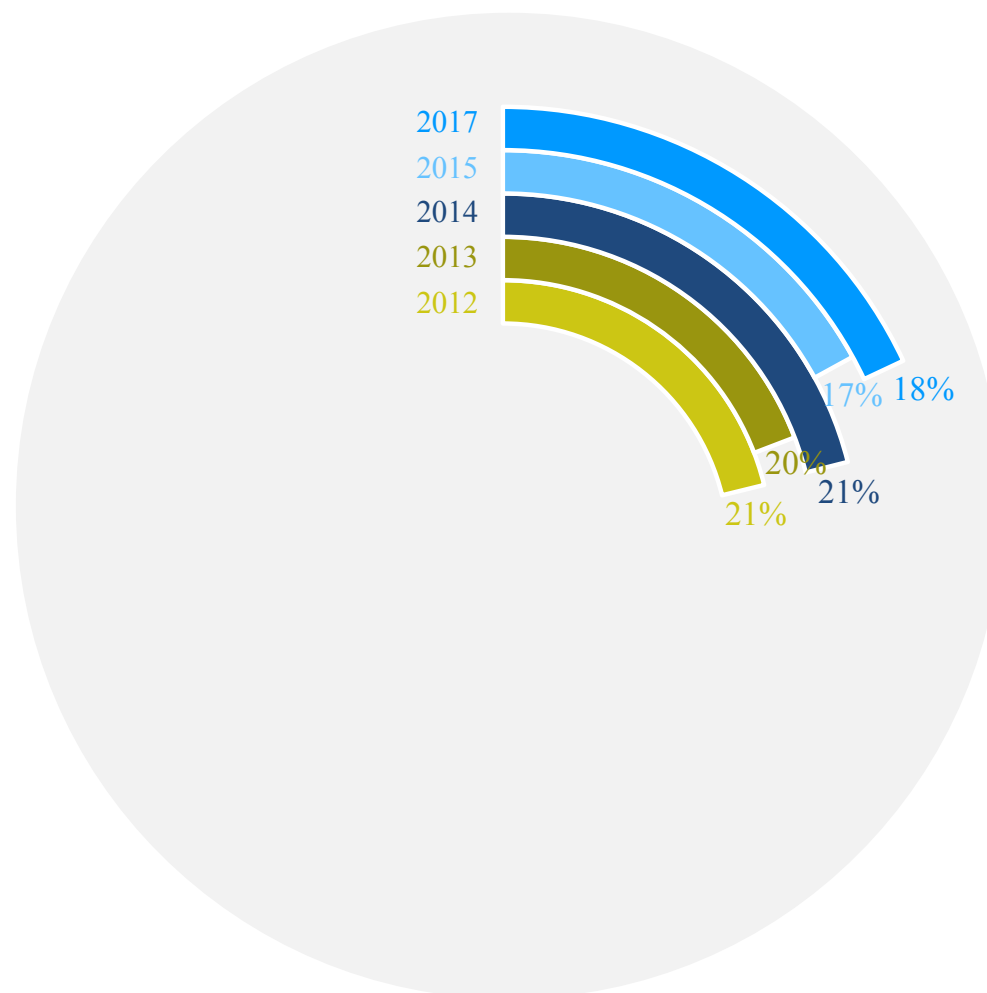
...and one quarter are aware of the new top level domain names launched in 2014



Q22. Since early 2014 hundreds of new top level domain names, for example .London, .sydney, .guru, .website, .xyz, etc., have been launched. Before you read this were you aware of it?  
Base: All respondents n=1,000



Personal domain name ownership has remained stable in the last five years with about one in five people owning or managing a personal domain name

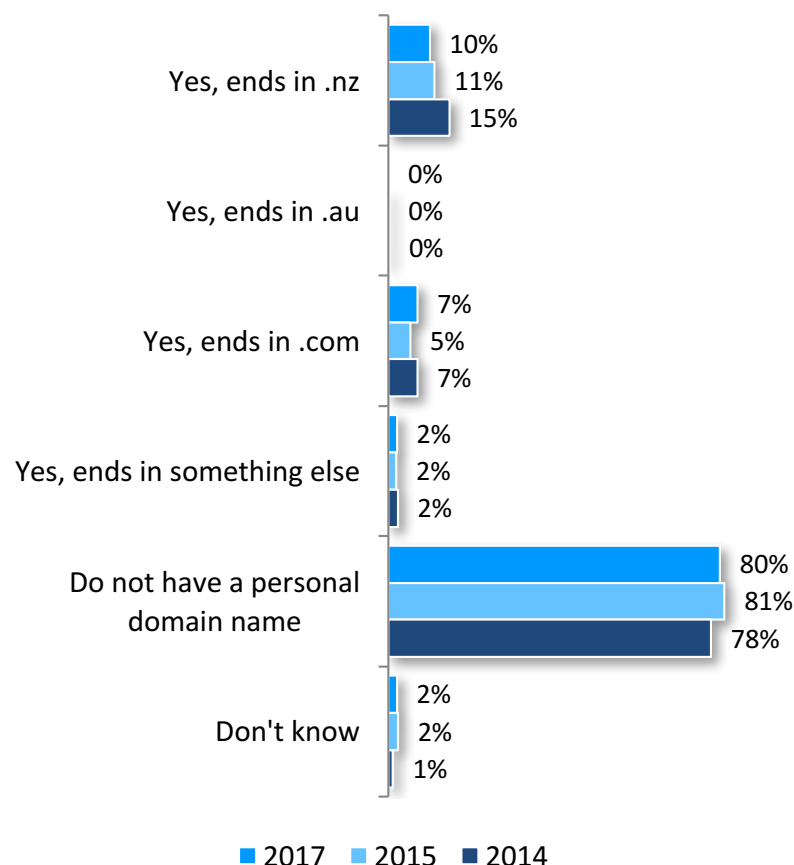


People who don't own their own domain name are more likely to be female, and live in the North Island outside of Auckland.

Q5. 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 name smith.co.nz or jonesfamily.com or any other words to denote your personal domain address.

Base: All respondents 2017 n=1,000; 2015 n=1,002; 2014 n=1,003; 2013 n=1,003; 2012 n=1,001

A .nz domain name continues to be the most popular, followed by a .com. The majority of people own or manage their own domain name for the email or website address



72% for the email address  
*stable over time*  
74% in 2015, 72% in 2014



42% for the website address  
*decreasing over time*  
43% in 2015 down from 48% in 2014



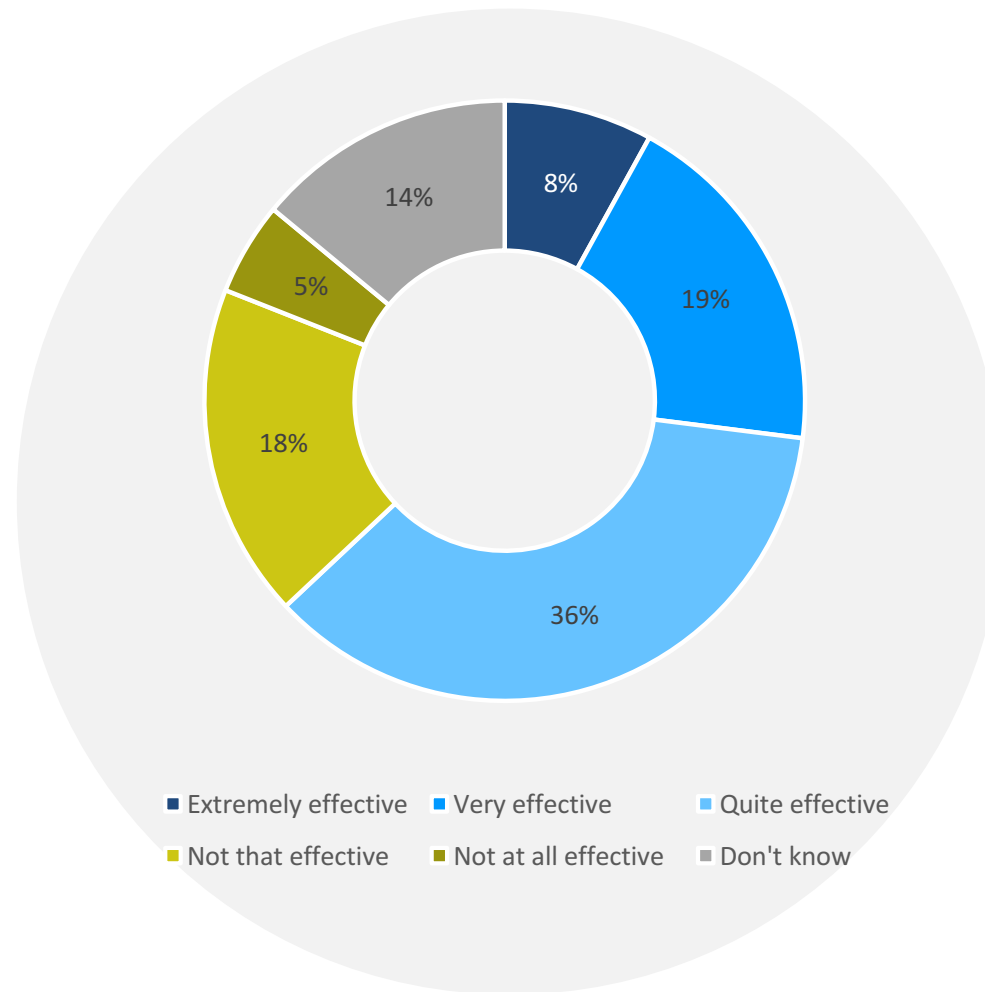
15% to protect or preserve the name  
*decreasing over time*  
20% in 2015 down from 25% in 2014



3% have another reason



## Using a domain name in print advertising is effective for nearly two-thirds of people



Q44. How effective is the use of a domain name in print advertising for you?  
Base: All respondents n=1,000

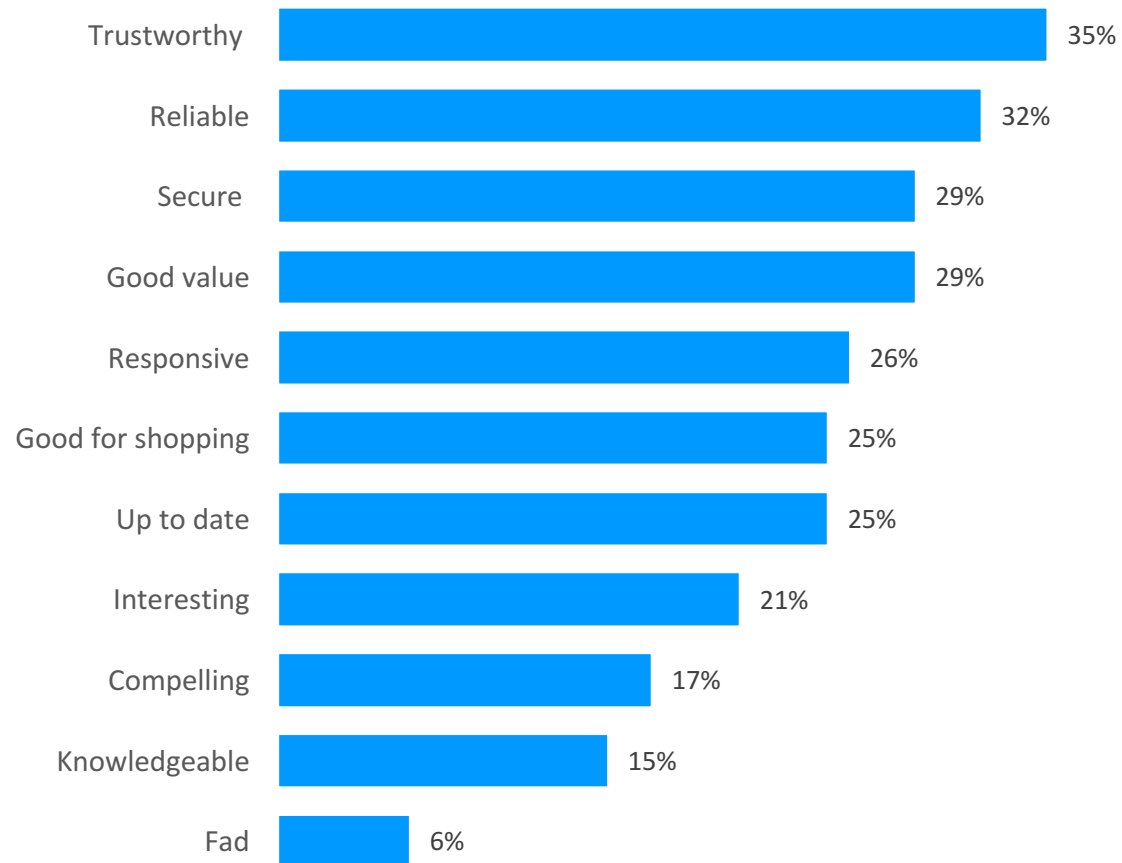
# Perceptions of domain names

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Of the words we tested a .nz website address has the strongest associations with trustworthy and reliable



Q33. Below is a list of words. For each word, please indicate which website address it best describes.  
Base: All respondents 2017 n=1,000

## What is a brand image profile?

Brand Image Profiles are used to understand the relative strengths and weaknesses of a brands image. In order to accurately understand this, they remove two important skews from the image data:

1. Brand size or familiarity effect – some brands will naturally be endorsed more across the board due to brand size and familiarity
2. Statement effect – some statements will naturally be more applicable to all brands than others

A brand strength or weakness is identified as +/- 5.



In comparison to other websites .nz is trustworthy, reliable, secure and good value. A .com website is good for shopping, a .org website is also trustworthy, reliable and secure as well as knowledgable, and a .kiwi website is a fad. A .au website does not have any brand strengths defined by the words we tested



Q33. Below is a list of words. For each word, please indicated which website address it best describes.  
Base: All respondents aware of each website

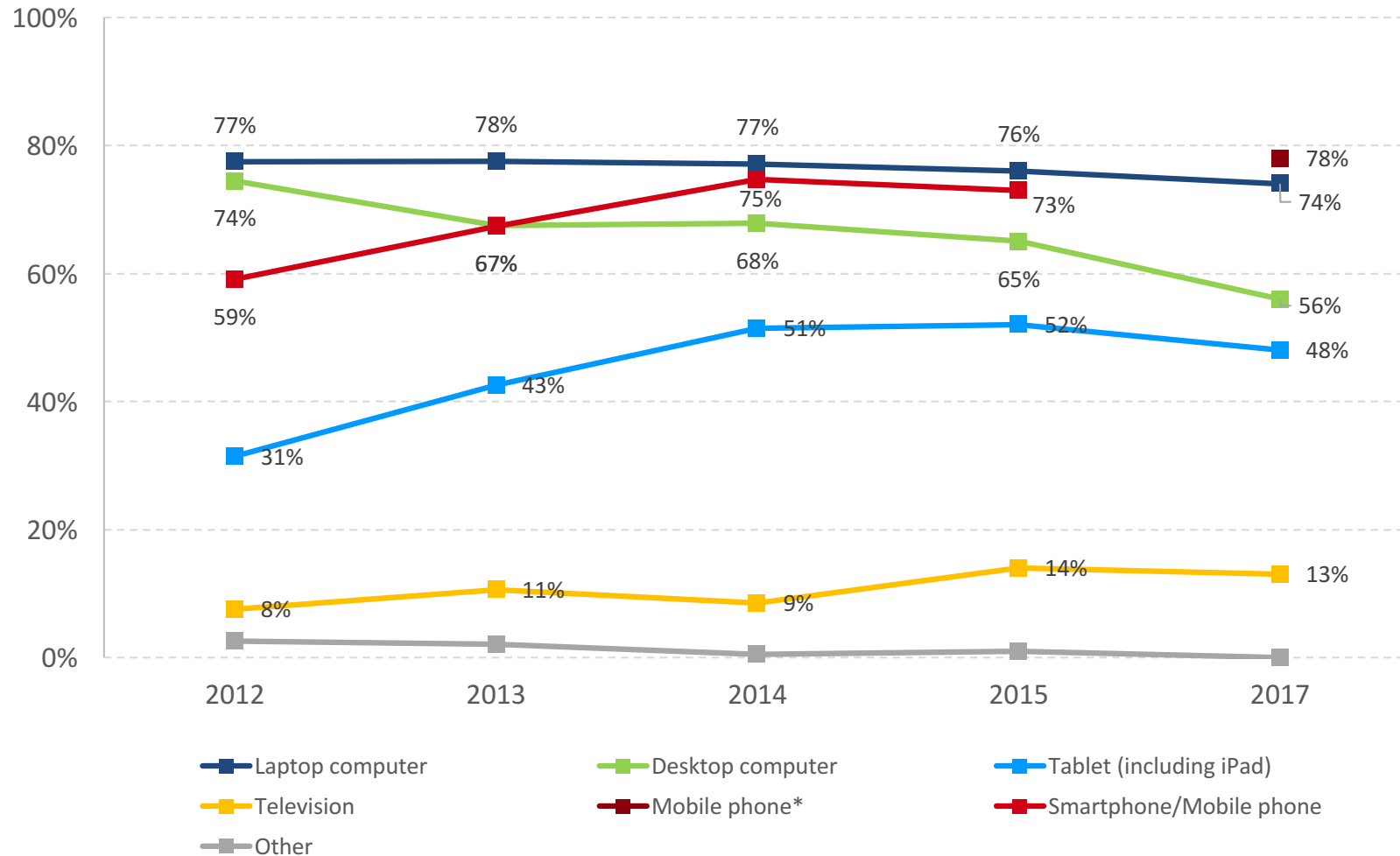


# Using the internet

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A mobile phone is the most commonly used device for accessing the internet, followed by a laptop computer. Access using a desktop has decreased from 2015



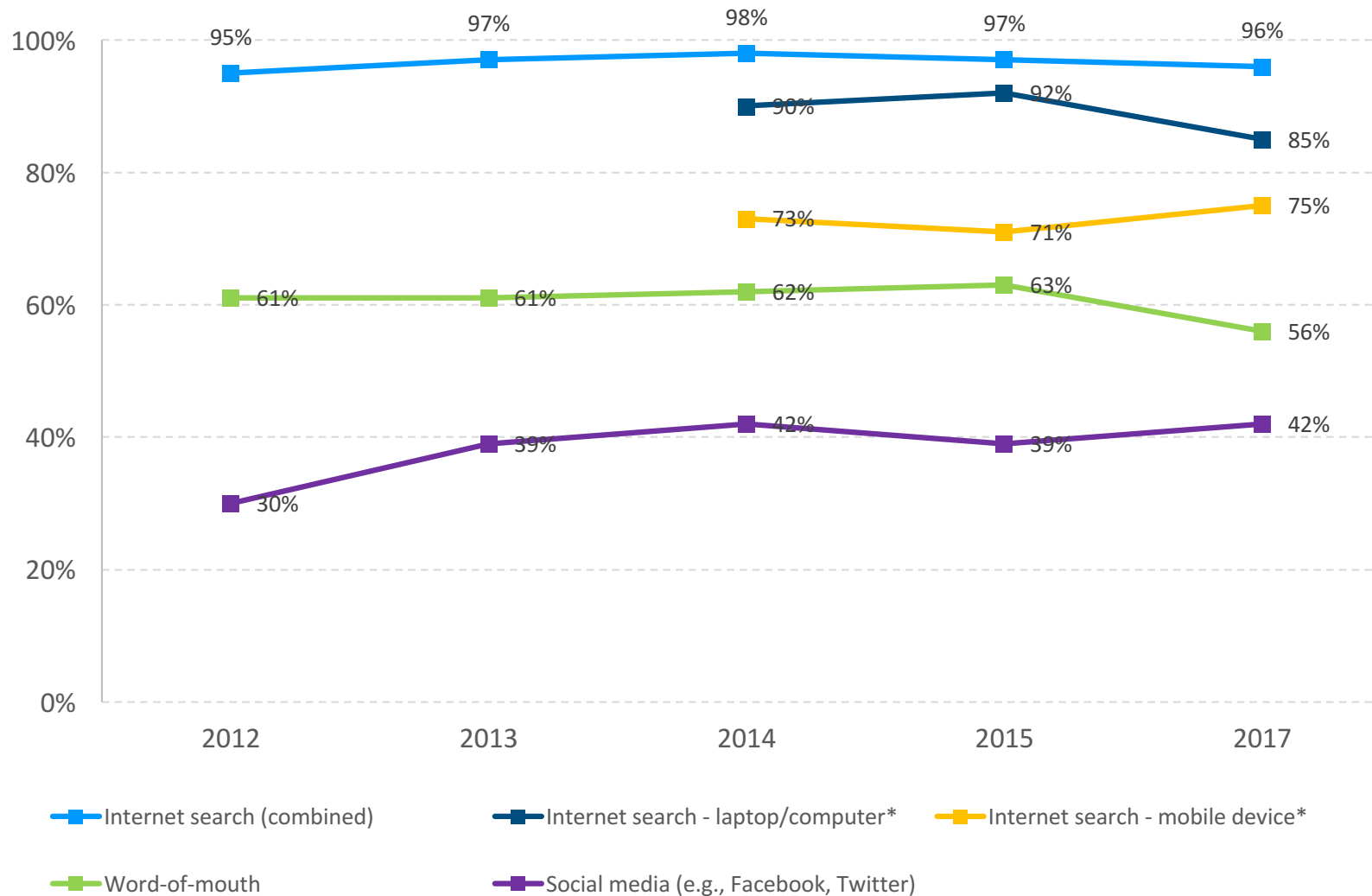
\*new code in 2017

Q23. Which devices do you use to access the internet?

Base: All respondents 2017 n=1,000; 2015 n=1,002; 2014 n=1,003; 2013 n=1,003; 2012 n=1,001

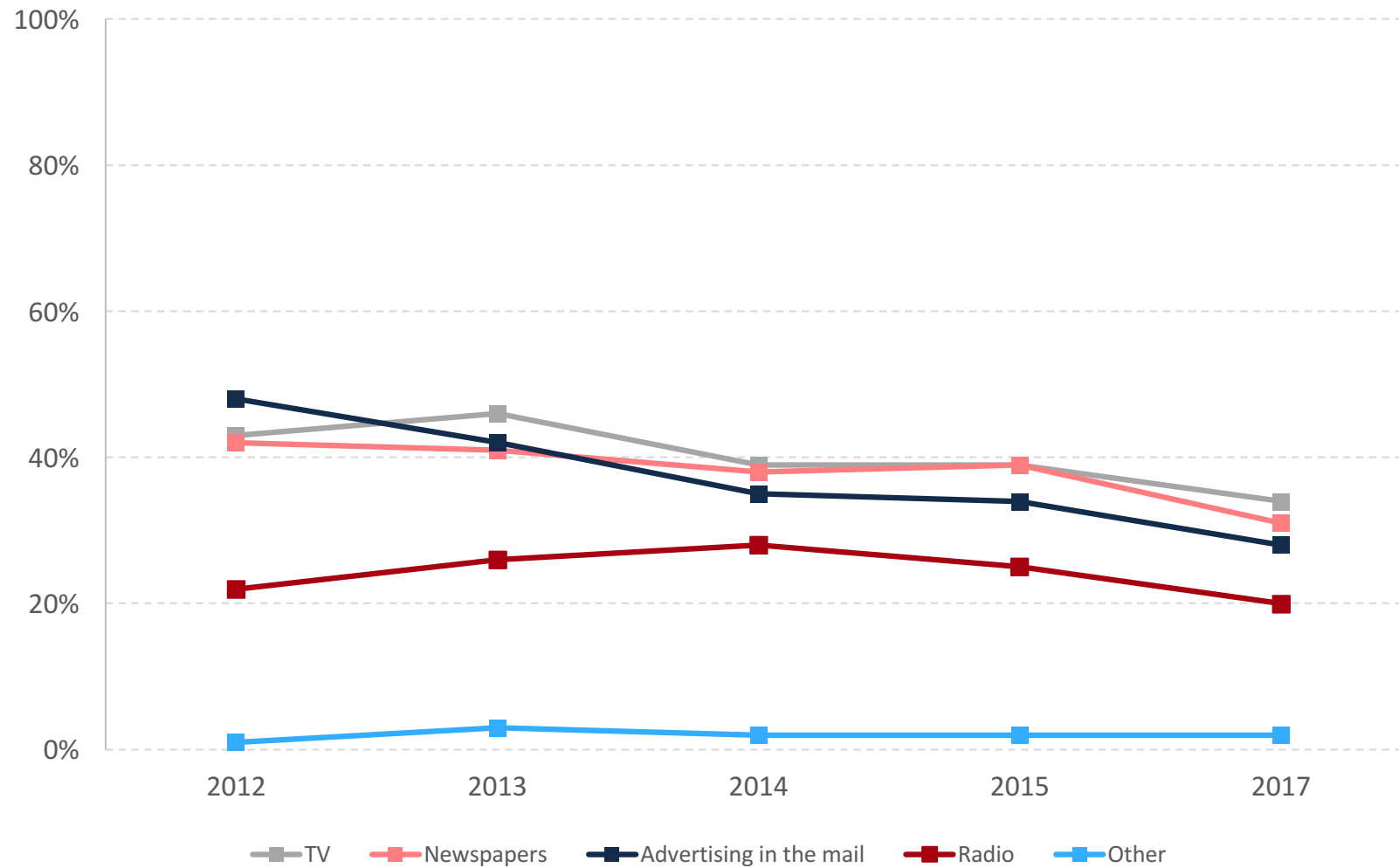


Internet search using a mobile device or via social media have both become more popular when searching for information, products or services, while word of mouth and using a laptop have declined



Q9. Which of the following resources do you currently rely on when you're searching for information, products or services?  
Base: All respondents 2017 n=1,000; 2015 n=1,002; 2014 n=1,003; 2013 n=1,003; 2012 n=1,001. \*not asked in 2012/2013

All off the less well used channels have also declined slightly since 2015



Q9. Which of the following resources do you currently rely on when you're searching for information, products or services?

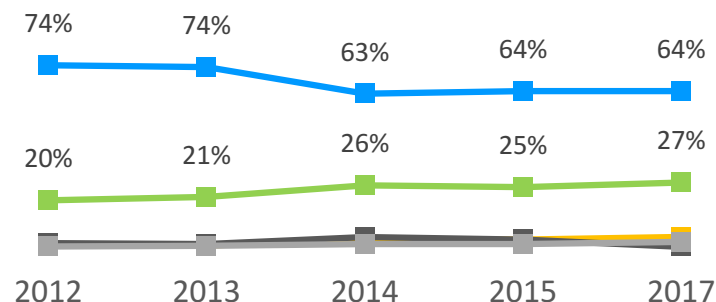
Base: All respondents 2017 n=1,000; 2015 n=1,002; 2014 n=1,003; 2013 n=1,003; 2012 n=1,001

.nz is the website that people look at first, trust the most and prefer to use when searching for information about products and services. The long term trend for .com shows an increase across all three measures against a slight decrease for .nz

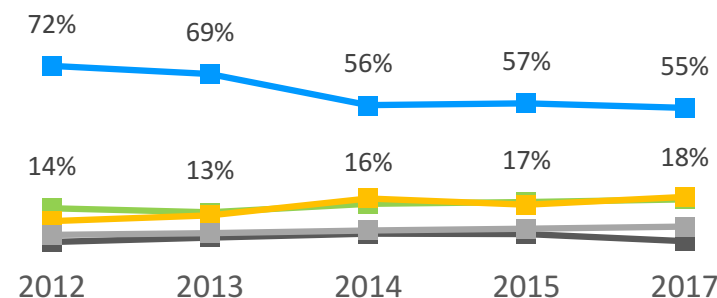
When searching for information about products and services, the domain that New Zealanders...



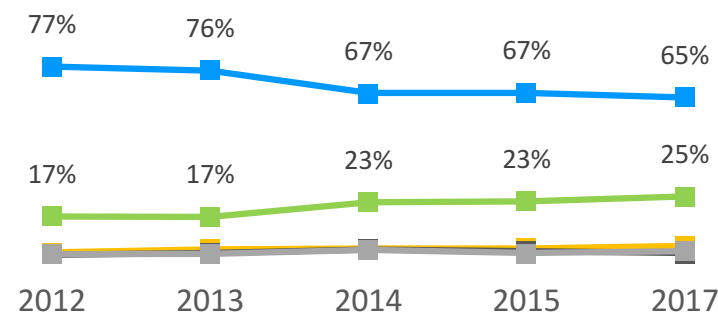
Look at first



Trust the most



Prefer to use



Q10. Imagine you were searching the internet for information products and services. Assuming the information that appeared in your browser from all the websites was similar, which website would you...

Base: All respondents (excl don't know) 2017 n=1,000; 2015 n=1,002; 2014 n=1,003; 2013 n=1,003; 2012 n=1,001

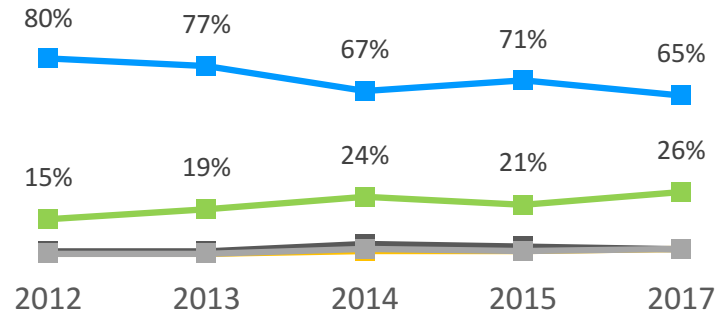


.nz is also the overwhelmingly popular domain for buying products and services online, however a slight increase for .com against a decrease for .nz is also seen here

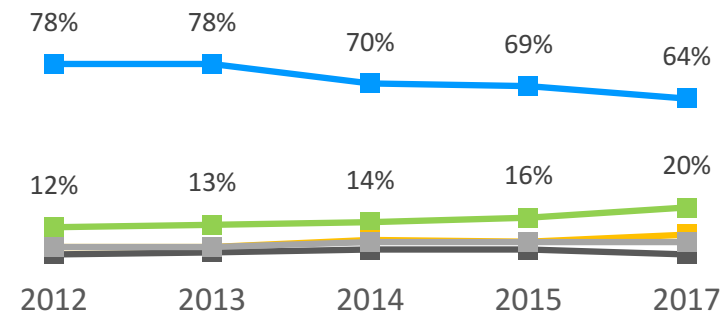
When buying products and services online, the domain that New Zealanders...



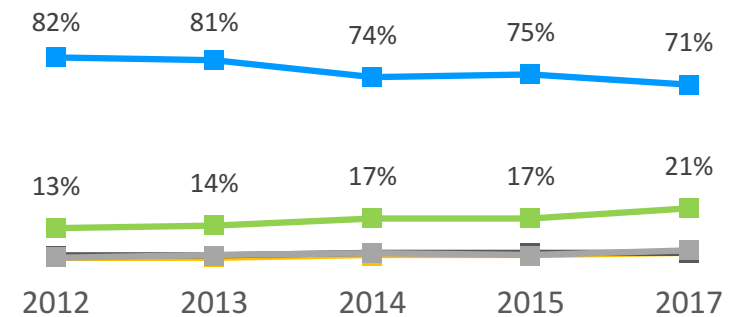
Look at first



Trust the most



Prefer to use



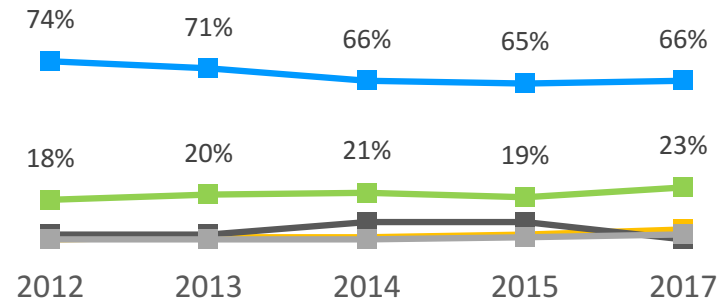
Q11. Now imagine that you want to buy a product or service, which website would you...  
Base: All respondents (excl don't know) 2017 n=1,000; 2015 n=1,002; 2014 n=1,003; 2013 n=1,003; 2012 n=1,001

Perceptions of websites for reading news stories are similar to perceptions for searching and buying. There is also an increase for .org for trust the most

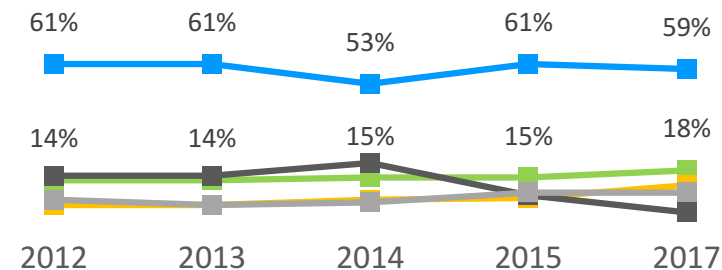
When reading news stories online, the domain that New Zealanders...



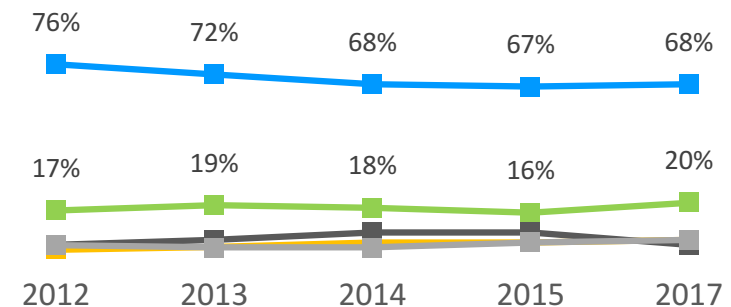
Look at first



Trust the most



Prefer to use



Q12. And now imagine that you wanted to read news stories, which website would you...  
Base: All respondents (excl don't know) 2017 n=1,000; 2015 n=1,002; 2014 n=1,003; 2013 n=1,003; 2012 n=1,001

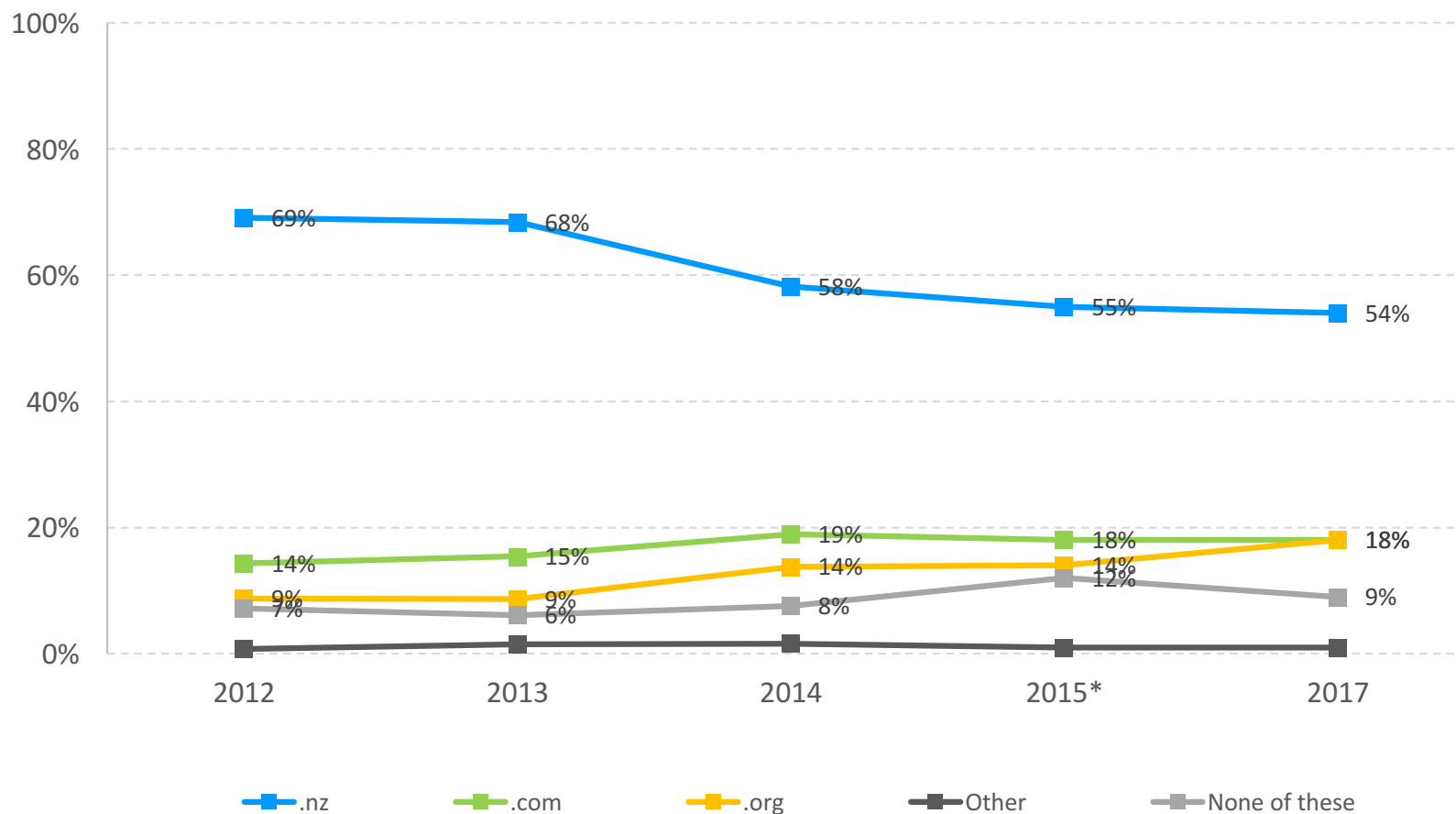




Trust of .nz



.nz is the website over half of people trust the most, however this is declining over time. .org has increased since 2015 and is now at the same level as .com








\*NOTE: question wording changed slightly in 2015

Q13. Thinking generally about websites and assuming the content was very similar, which type of website address do you trust the most?

Base: All respondents 2017 n=1,000; 2015 n=1,002; 2014 n=1,003; 2013 n=1,003; 2012 n=1,001

The padlock is the most popular characteristic for judging if a website is trustworthy, followed by NZ contact details and content which is regularly maintained or updated

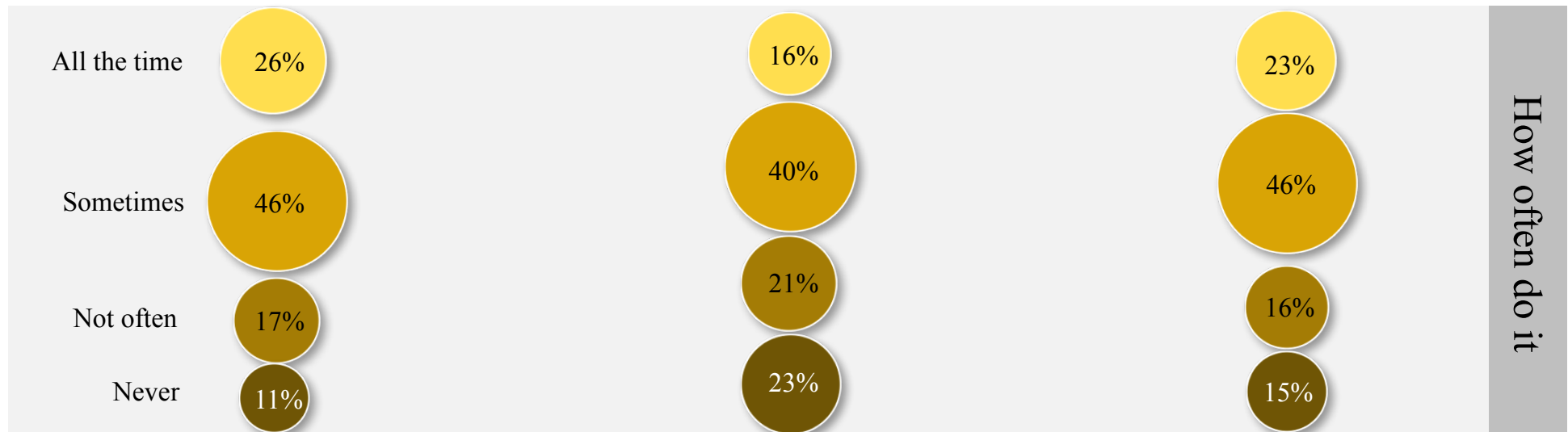
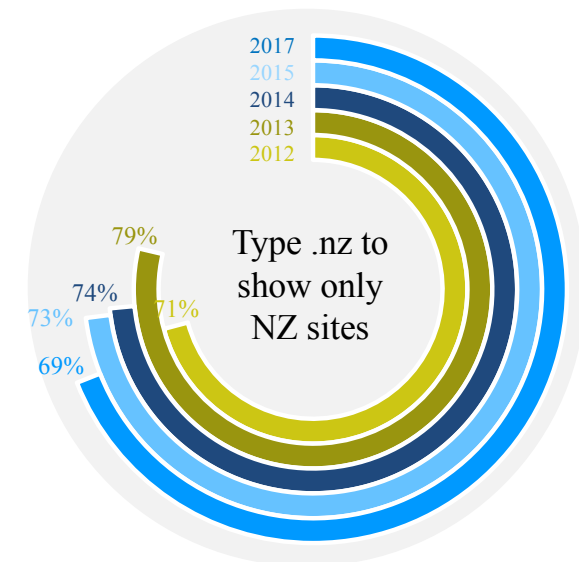
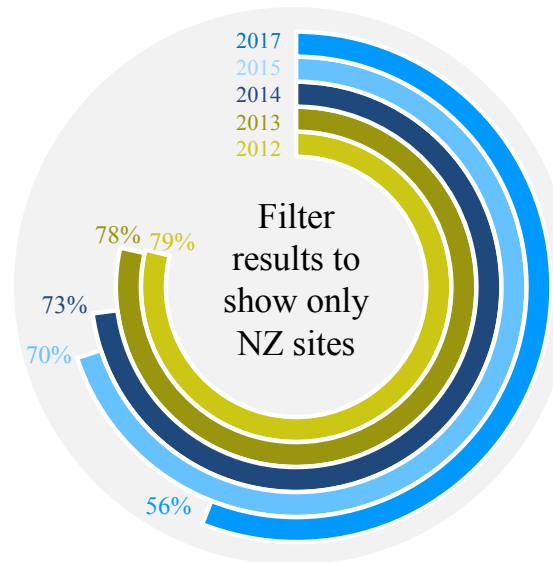
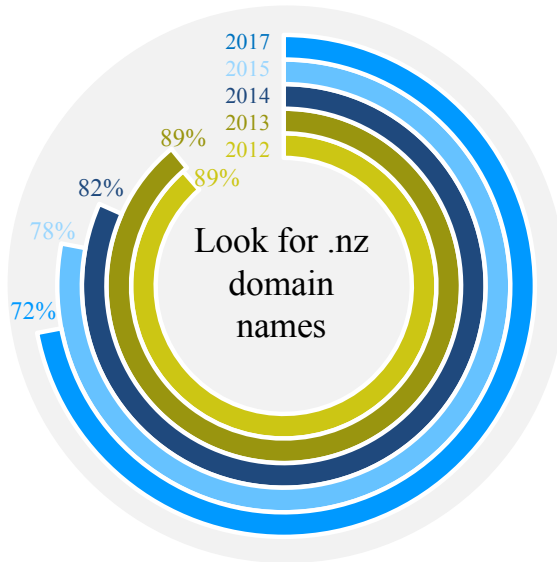
		2017	2015
	A secure website (denoted by a small padlock symbol in your browser or by https://):	68%	
	If it has New Zealand contact details:	63%	
	Content which is regularly maintained/updated:	52%	44%
<b>http:</b>	The domain name itself:	28%	
	A well designed website:	34%	31%
	Referral from a friend:	32%	29%

NOTE: Question wording change in 2017

Q15. What characteristics do you use to judge whether a website is trustworthy?

Base: All respondents 2017 n=1,000; 2015 n=1,002

People are more likely to look for .nz domain names, or to type .nz to only show NZ sites, than they are to filter results to show only .nz sites, however the incidence of all of these is declining over time



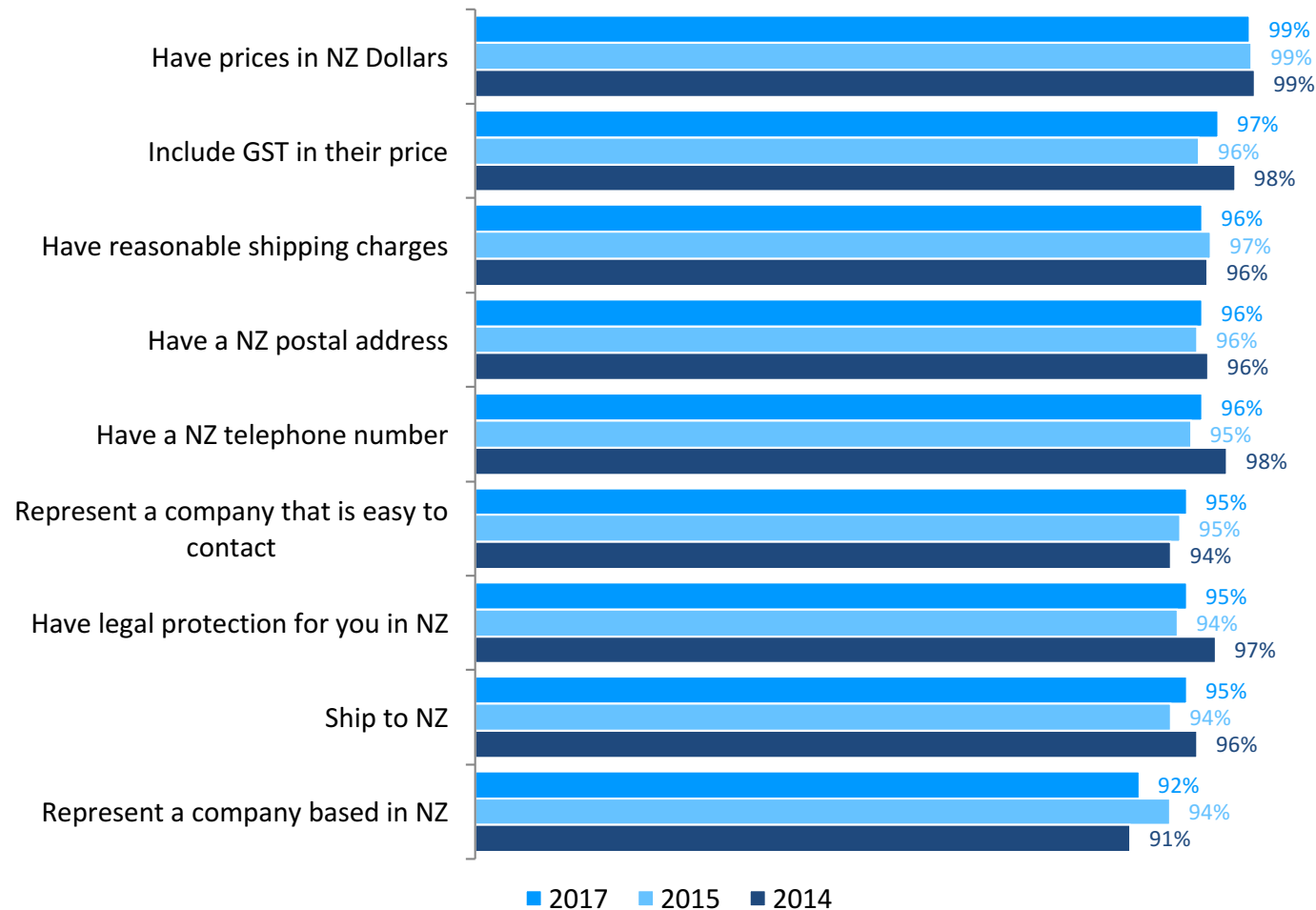
NOTE: Question structure change in 2017

Q40. When you search for information on the internet, how often, if at all, do you do the following things?

Base: All respondents (excl don't know) 2017 n=1,000; 2015 n=1,002; 2014 n=1,003; 2013 n=1,003; 2012 n=1,001



## Expectations of websites for people who are buying products or services have not changed much since 2014



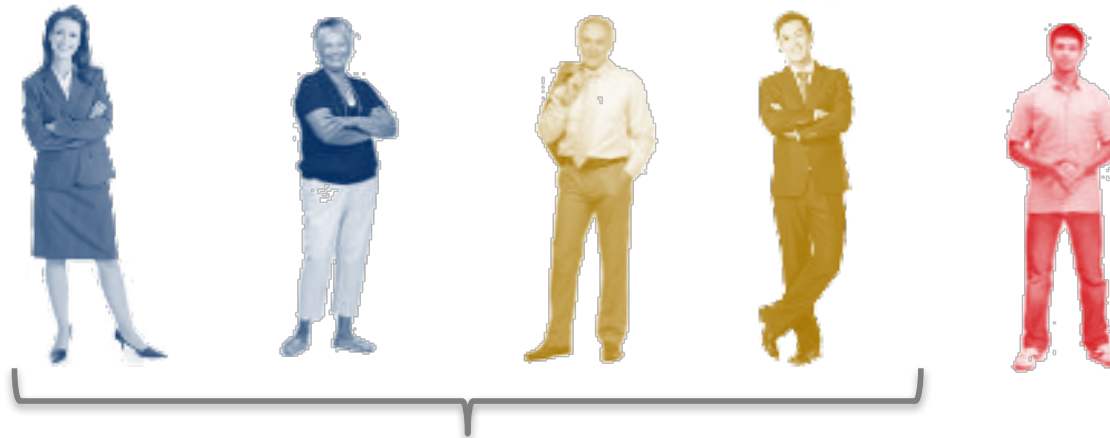
Q17. Imagine that you were buying products or services from a website whose domain name ends with .nz. Do you think that the website would...?  
Base: 2017 All respondents (excl don't know) n≈1,000. 2015 Respondents asked about .nz (excl don't know) n≈331



Providing  
contact details  
and business  
emails



Four out of five people look for the contact details of an organisation all or some of the time when they are planning on dealing with them. The overwhelming majority of people will not purchase when they cannot find the contact details



Two out of five people (43%) look for the contact details of an organisation they are planning on dealing with or buying from all the time. Another two out of five (41%) look for the contact details sometimes. One person (14%) doesn't often or never looks. If the website does not provide contact details...

Females, who live in Auckland are most likely to search for contact details all the time.

Females, aged 65 or over are most **unlikely** to continue with a purchase if they can't find contact details, while males aged under 50 are most likely to continue with a purchase.

**87%**

are **unlikely** to purchase travel or accommodation

**87%**

are **unlikely** to purchase items valued over \$100

**71%**

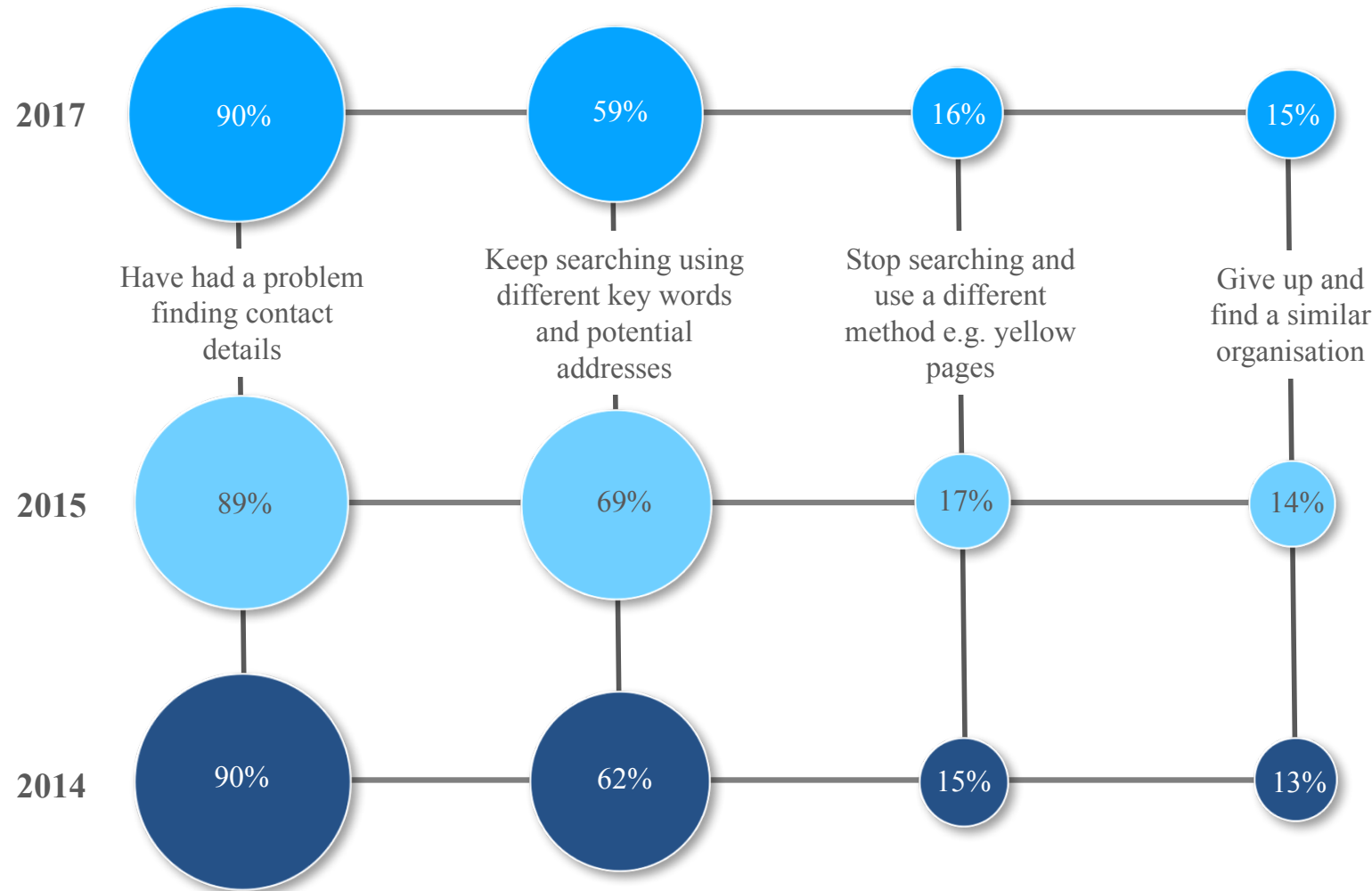
are **unlikely** to purchase items valued less than \$100

Q41. How often do you look for the contact details of an organisation that you are planning on dealing with or buying from on their website? Q42. How likely are you to use a website that did not provide contact details to purchase each of the following?

Base: All respondents n=1,000



Nine out of 10 people have had a problem finding contact details for an organisation on the internet. Over one in six people stop searching or give up and find a different organisation



Younger people (18-29) are more likely to keep searching for the organisation using different options.

Females, aged 65 or over are most likely to stop searching and use a different method.

Q34. If you are searching for contact details for a specific organisation on the internet but cannot find them or their website, which of the following best describes what you do?  
Base: All respondents 2017 n=1,000; 2015 n=1,002; 2014 n=1,003

## One third of people have heard of WHOIS

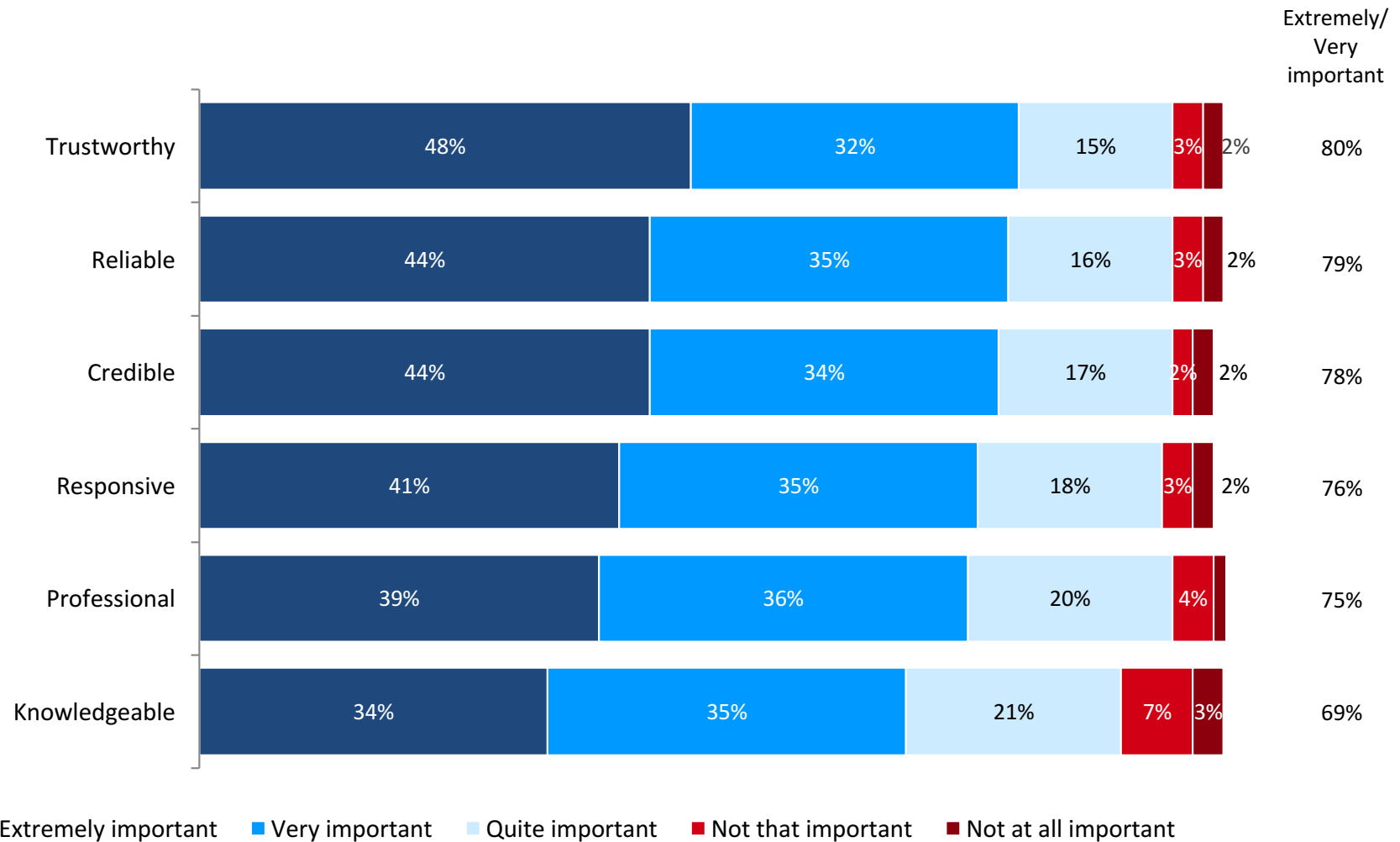


One out of 10 people have used WHOIS to find details of a domain name, two out of 10 people have not, and the remaining seven have not heard of WHOIS

Males, aged 30-49 who own or manage their own domain name are most likely to have used WHOIS

Females, aged 50-64 who aren't aware of what a domain name is (and are therefore also less likely to own or manage one) are less likely to have heard of WHOIS

It is most important to people that a business email address is trustworthy, followed by reliable and credible, however there is not much differentiation between the attributes - they are all important to consumers



Q36. How important is it to you that a business email address is each of the words below?

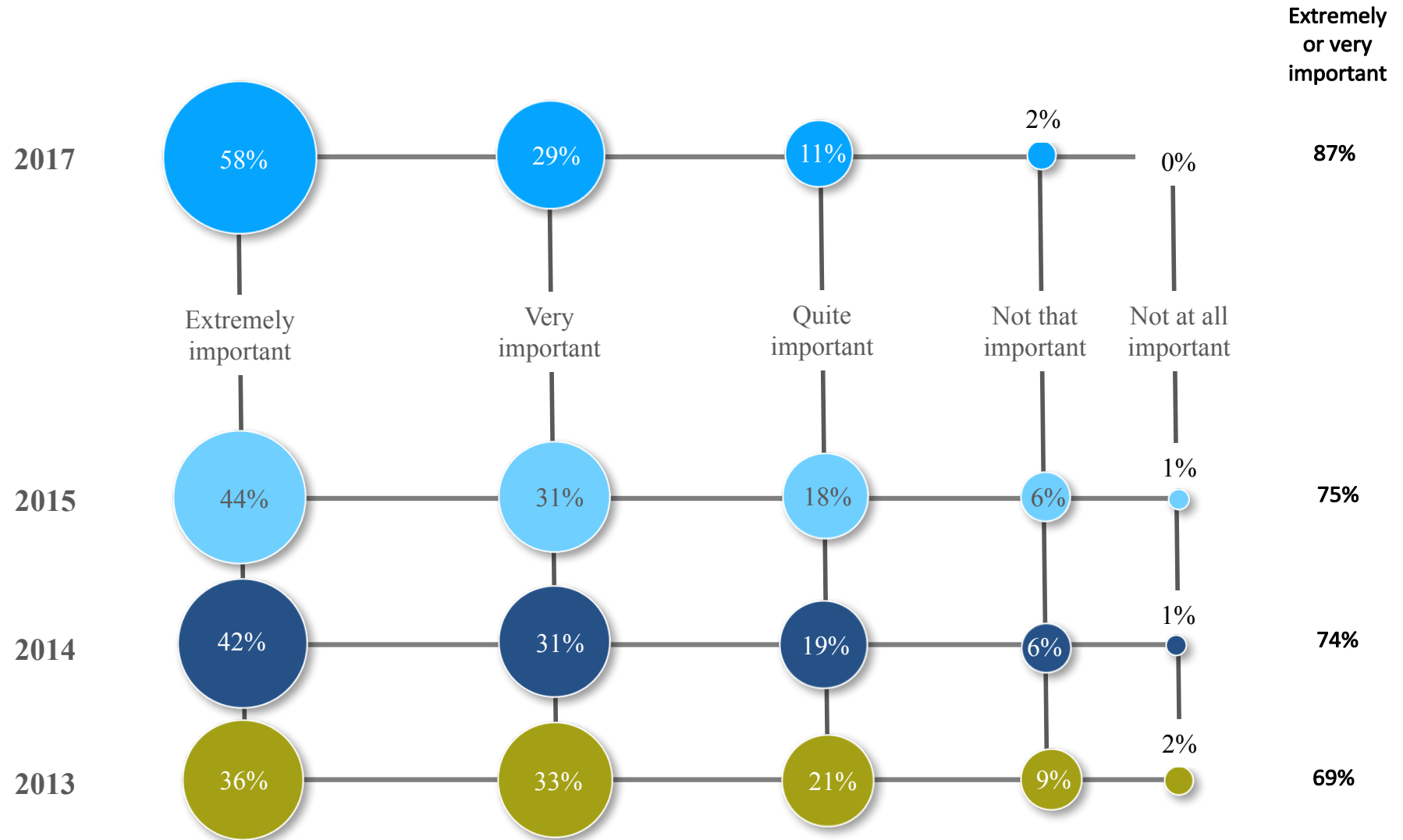
Base: All respondents (excluding don't know) n≈1,000





# Mobile compatibility

With the increase in internet access via a mobile the importance of having a compatible website is also increasing. Nearly nine out of 10 people say it is extremely or very important to them

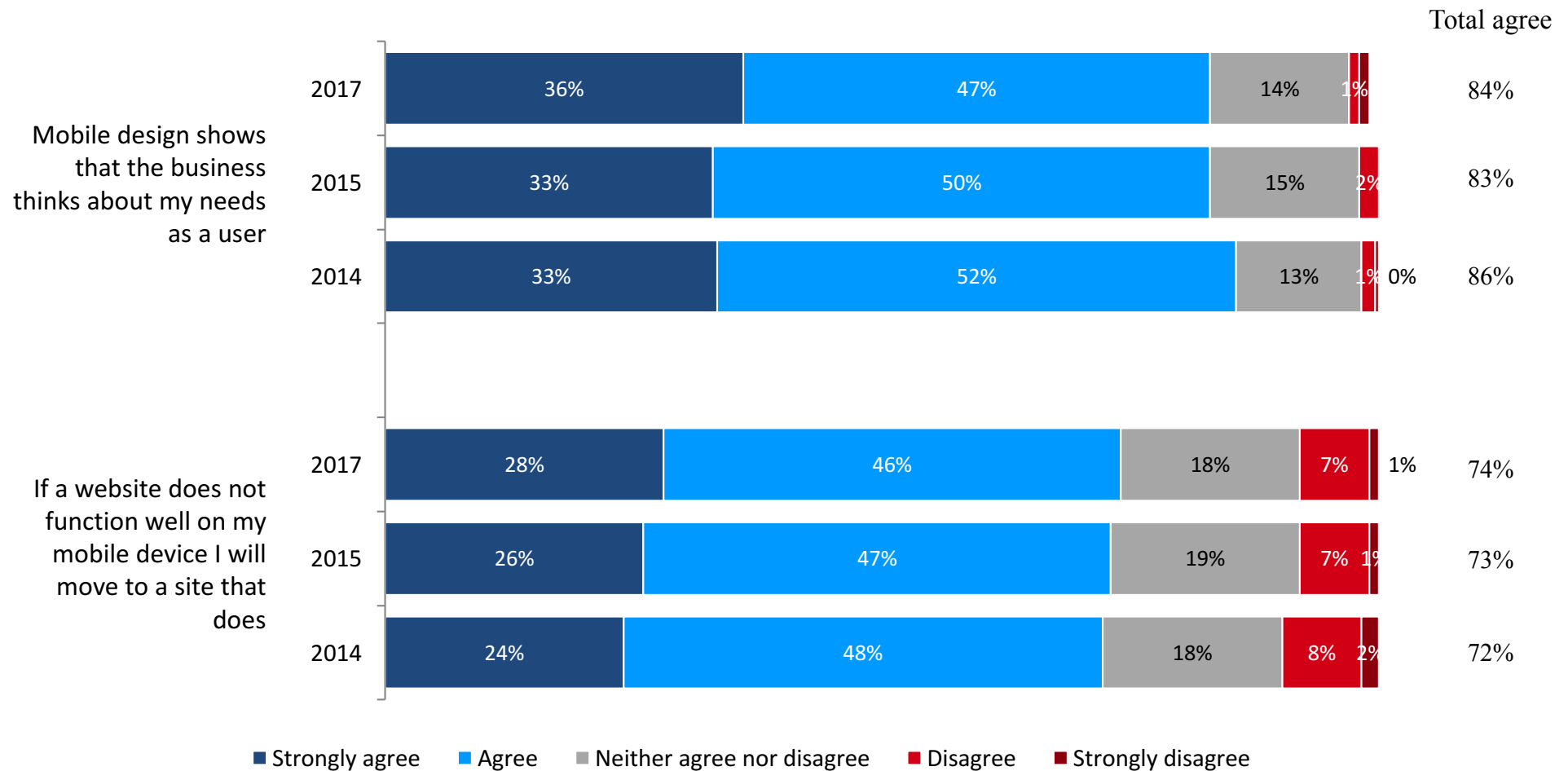


Q31. Thinking now about the websites you visit using your mobile phone, ipad, or tablet. How important is it to you that these websites are designed to be used on mobile devices as well as computers or laptops?

Base: All those who access the internet via a mobile phone or tablet (excl don't know) 2017 n=824; 2015 n=814; 2014 n=792; 2013 n=748

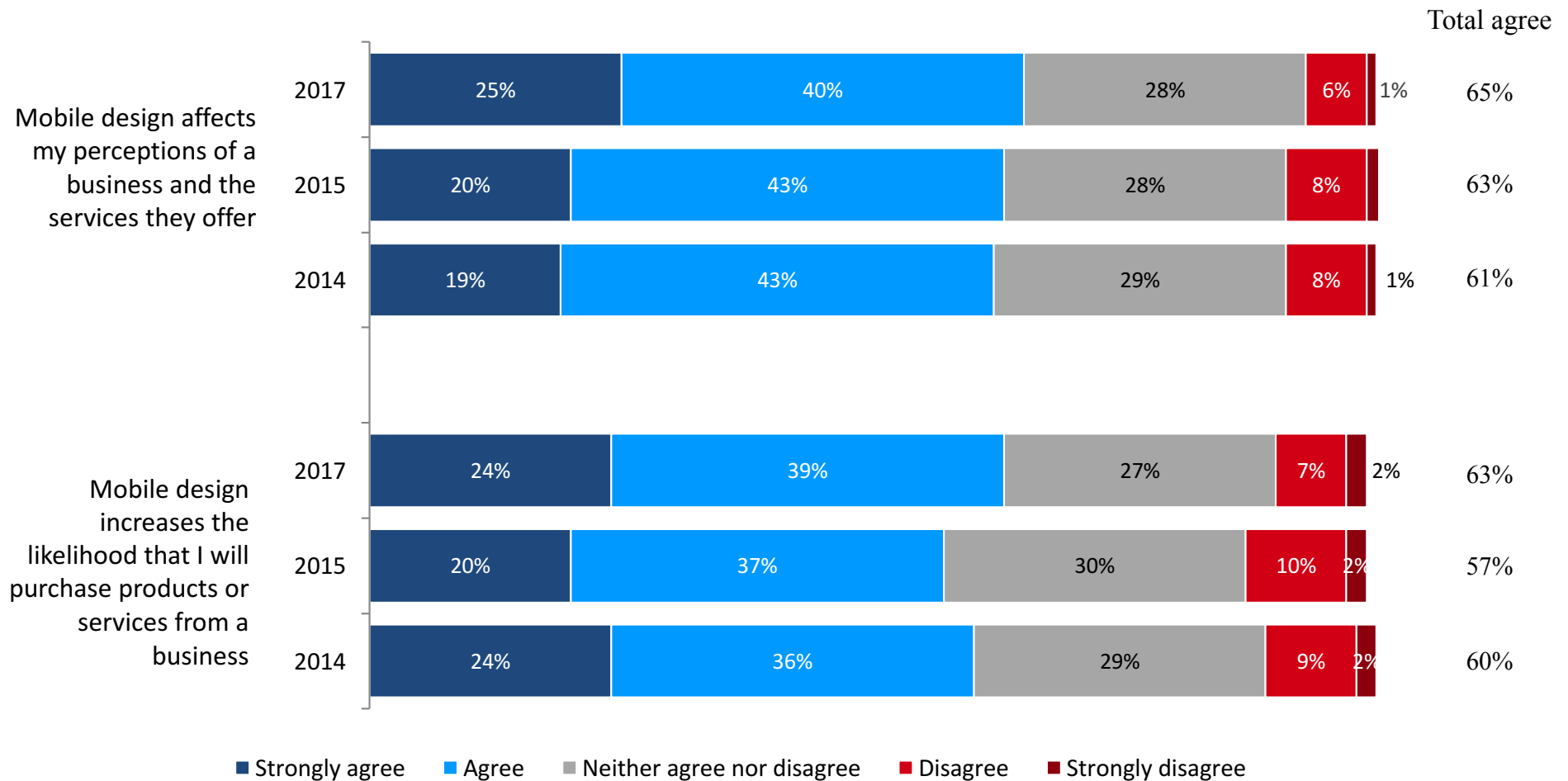


# Three-quarters of people will move to a website that functions well on their mobile phone, ipad or tablet...




Q32. How strongly do you agree or disagree with the following statements about website usability on your mobile phone, ipad or tablet?  
Base: All those who access the internet via a mobile phone or tablet (excl don't know) 2017 n=824; 2015 n=814; 2014 n=799

...and two-thirds are more likely to purchase from a business with a mobile device compatible design



Q32. How strongly do you agree or disagree with the following statements about website usability on your mobile phone, ipad or tablet?  
Base: All those who access the internet via a mobile phone or tablet (excl don't know) 2017 n=824; 2015 n=814; 2014 n=799





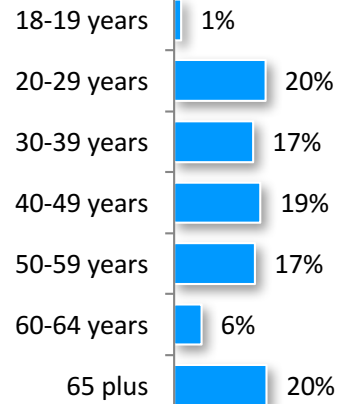
# Consumer demographic information

## Respondent profile n=1,000

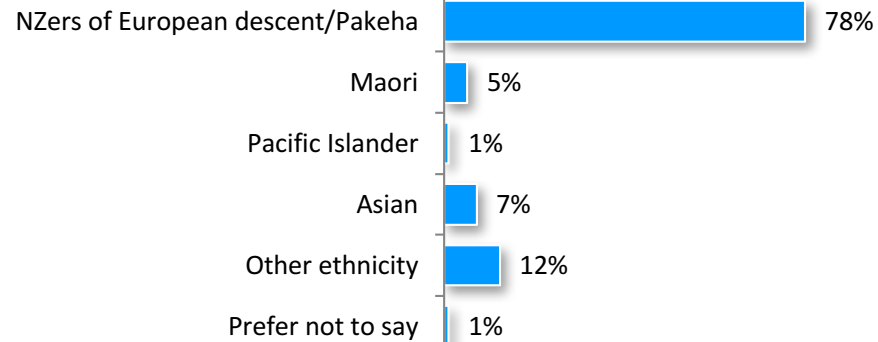
### Gender



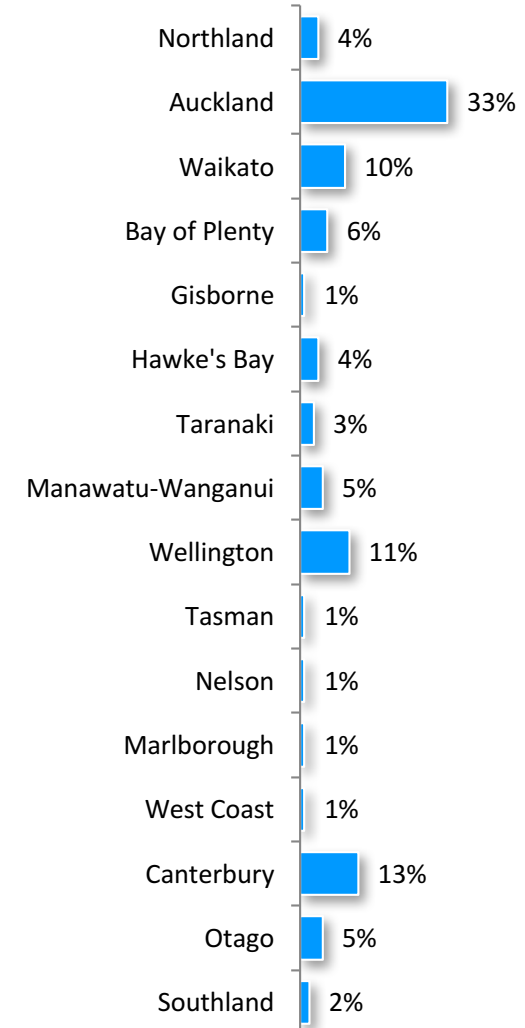
### Age



### Ethnicity



### Region where currently live





For further information please contact:

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[www.nzrs.net.nz](http://www.nzrs.net.nz)

