

1.



- Windshift’s work has always focused on understanding the social backdrop to everyday consumer behaviour. Now this has crystallised into the Lay of the Land study.
- In 2018, the first annual update, we wanted to pinpoint the social values and expectations that have greatest impact on consumer decisions and preferences.
- This Mini Report provides an overview of key research findings from our online survey.
- For more information, or to provide feedback, please email contact@windshift.co.nz or call Jill Caldwell on +64 27 481 1340.

2.

THE LAY OF THE LAND

Based on 2017/2018 Research

- Patterns & Trends
 - Social, Technological, Economic, Demographic, Psychological
- Values & Expectations
- Similarities & Differences
- Based On
 - April-June 2017 national survey [n=1065] & qualitative study
 - Plus April 2018 national online survey [n=1032] of New Zealanders

WINDSHIFT.CO.NZ

This report covers the following topics

Patterns and Trends - mood & wellbeing, household economics, media & tech

- What makes people happy, who has confidence in the country's direction, how do we view our personal economic prospects, where do we get our news and entertainment?

Values and Expectations - social issues & expectations, personal values

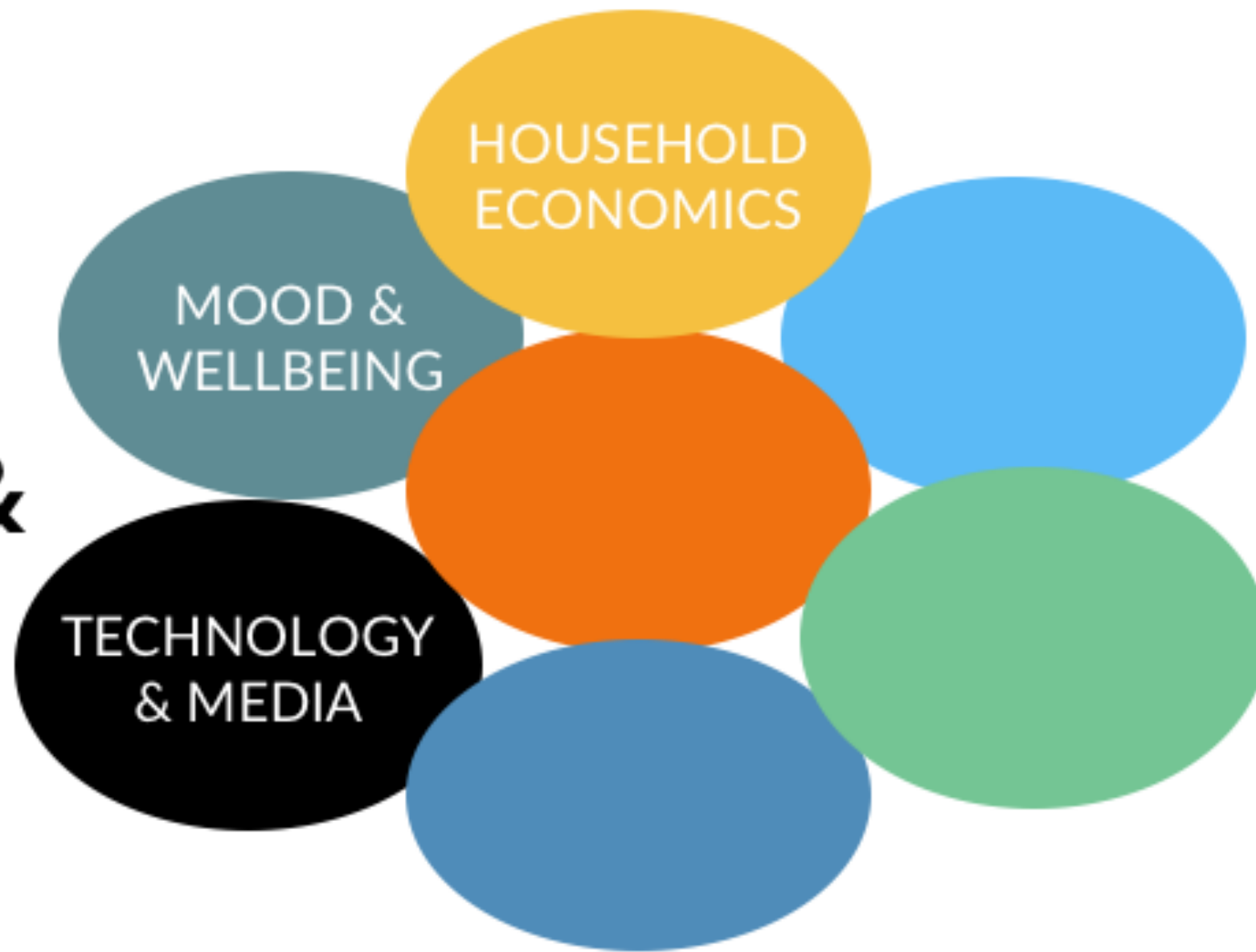
- Who do we think we are? What expectations do we have of technology, businesses & brands? How do we define our personality & identity?

Similarities & Differences - demographics, social tribes

- Exploring the differences between city and country, men and women, older and younger people: what we have in common, where we differ, what drives differences between us

3.

PATTERNS & TRENDS



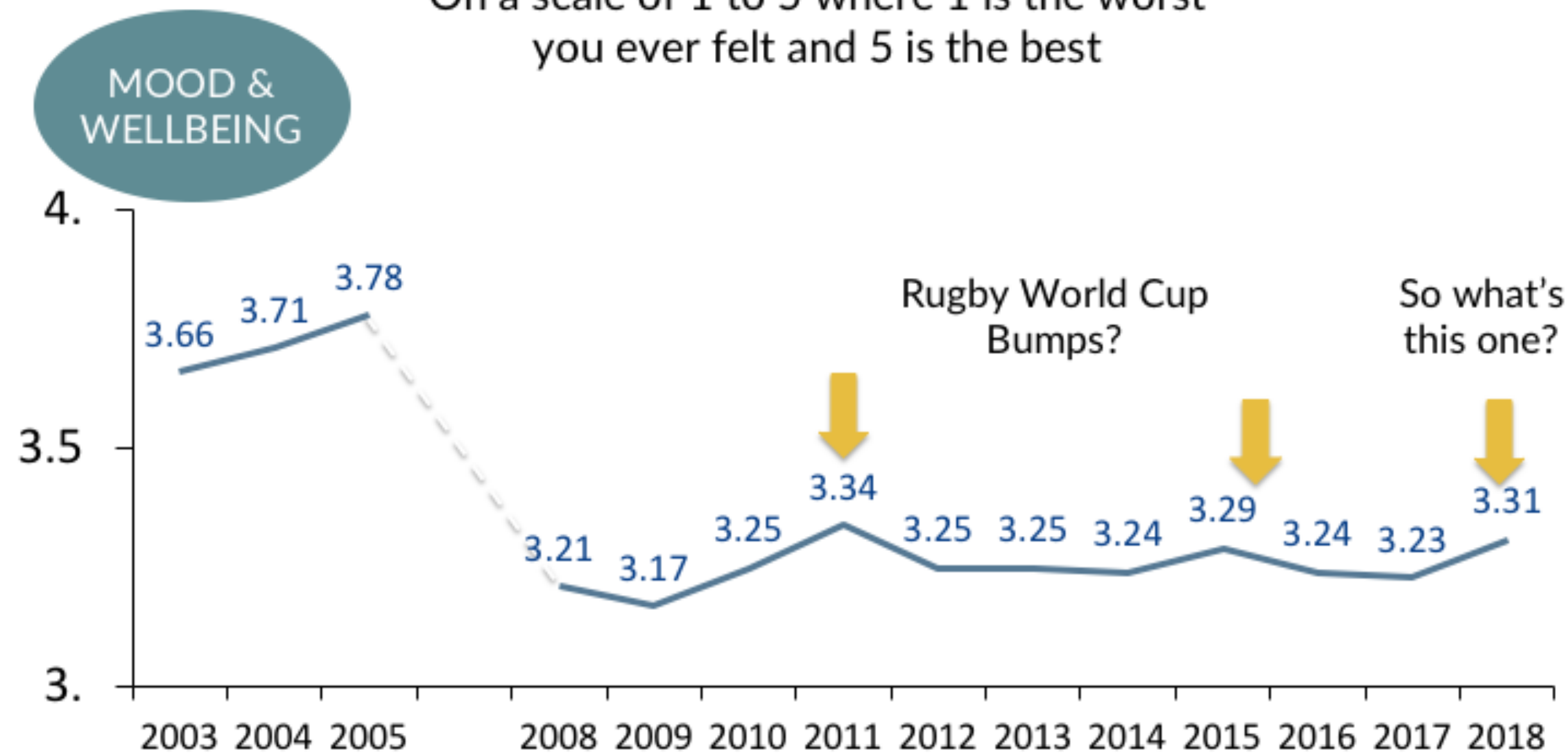
WINDSHIFT.CO.NZ

- The key patterns and trends we follow relate to three aspects of life - each of which fundamentally reflects people's expectations.
- Mood & Wellbeing - we have an 'inside view' - asking people to compare their current mood to other times in their lives - and an 'outside view' - asking them about their view of New Zealand.
- Household Economics - if we understand people's perspectives on the stability and prosperity of their jobs and workplaces, we can gauge how confident they might be about spending or trying new things.
- Media Patterns - we are tracking the gradual move from offline to online media, mainly to monitor the broader effects it has on marketing and branding.

4.

AVERAGE MOOD RATING

On a scale of 1 to 5 where 1 is the worst you ever felt and 5 is the best



- 2017 was Year 9 of the 'new normal' - the mood pattern that has largely persisted since the 2008 Global Financial Crisis.
- But 2018 shows another bump similar to those of 2011 and 2015. We have diagnosed these two as being possibly Rugby World Cup-related, though the 2011 rating is from June of that year [the RWC was in New Zealand in September].
- The 2018 bump may well be related to the change of government or to some perceived change in job prospects.