

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. Each page contains one slide plus an explanation of the information it contains. [The report package also includes images of each slide for use in your own presentations or reports.]

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

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This report covers the following topics

Patterns and Trends [mood & wellbeing, household economics, media & technology]

- How happy are New Zealanders? 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]

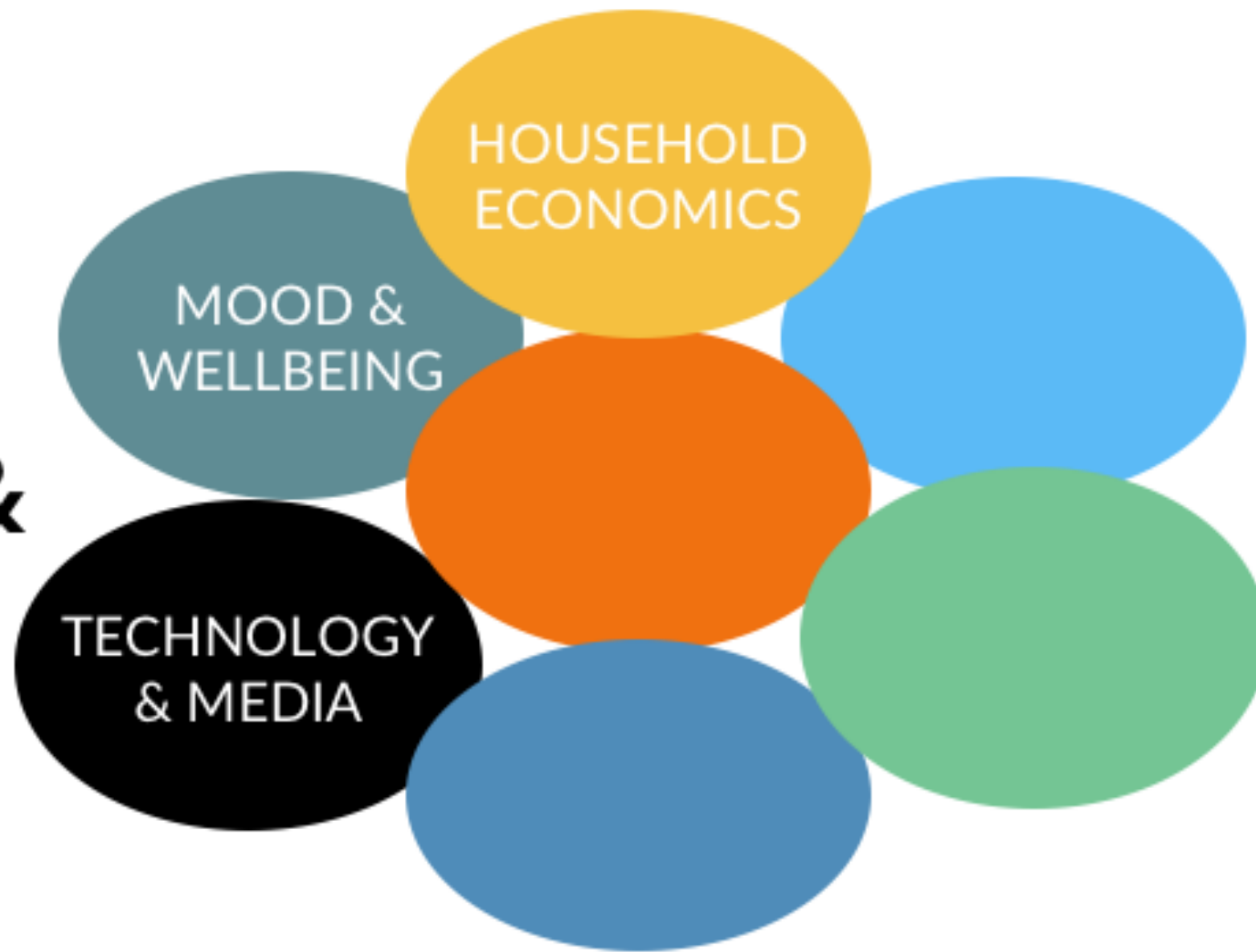
- What matters to us? Who do we think we are? What expectations do we have of technology, businesses & brands? How do we define our personality & identity?

Similarities & Differences [demographics, social tribes]

- Exploring the differences between city and country, men and women, older and younger people. What do we have in common? Where do we differ? What drives the differences between us?

3.

PATTERNS & TRENDS



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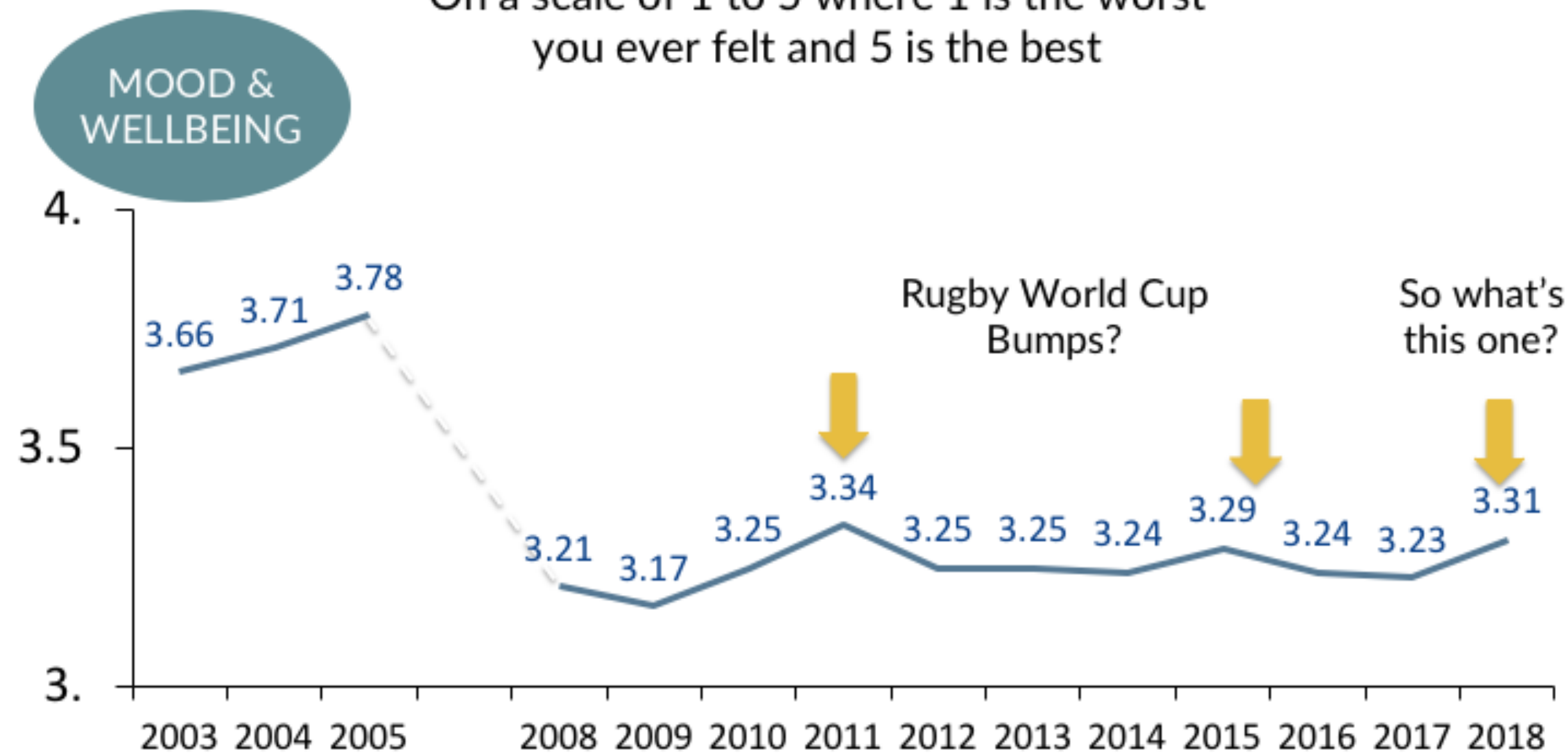
The key patterns and trends we follow relate to three aspects of life - each of which fundamentally reflects people's expectations.

- 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.