

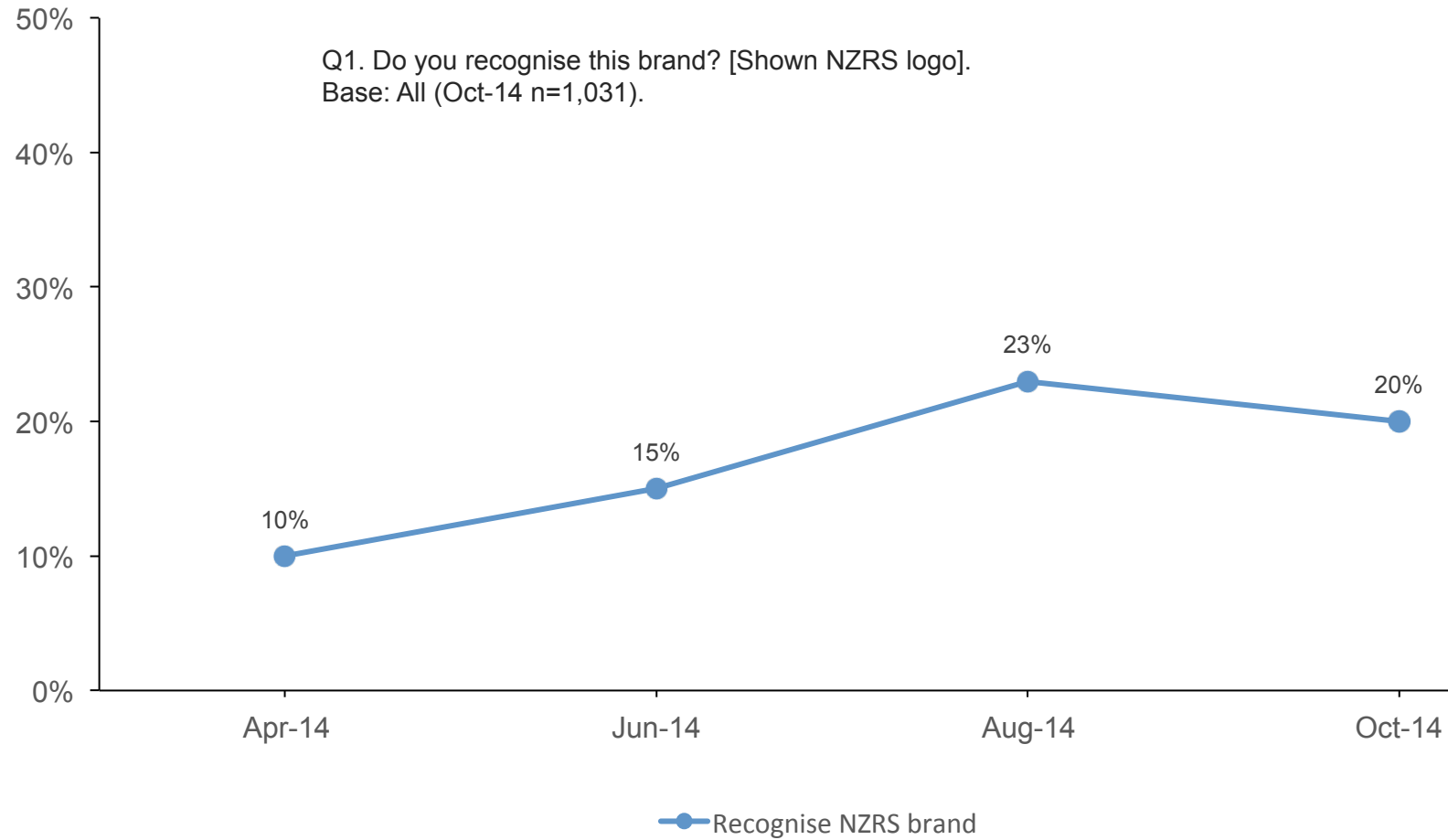
Research 2014



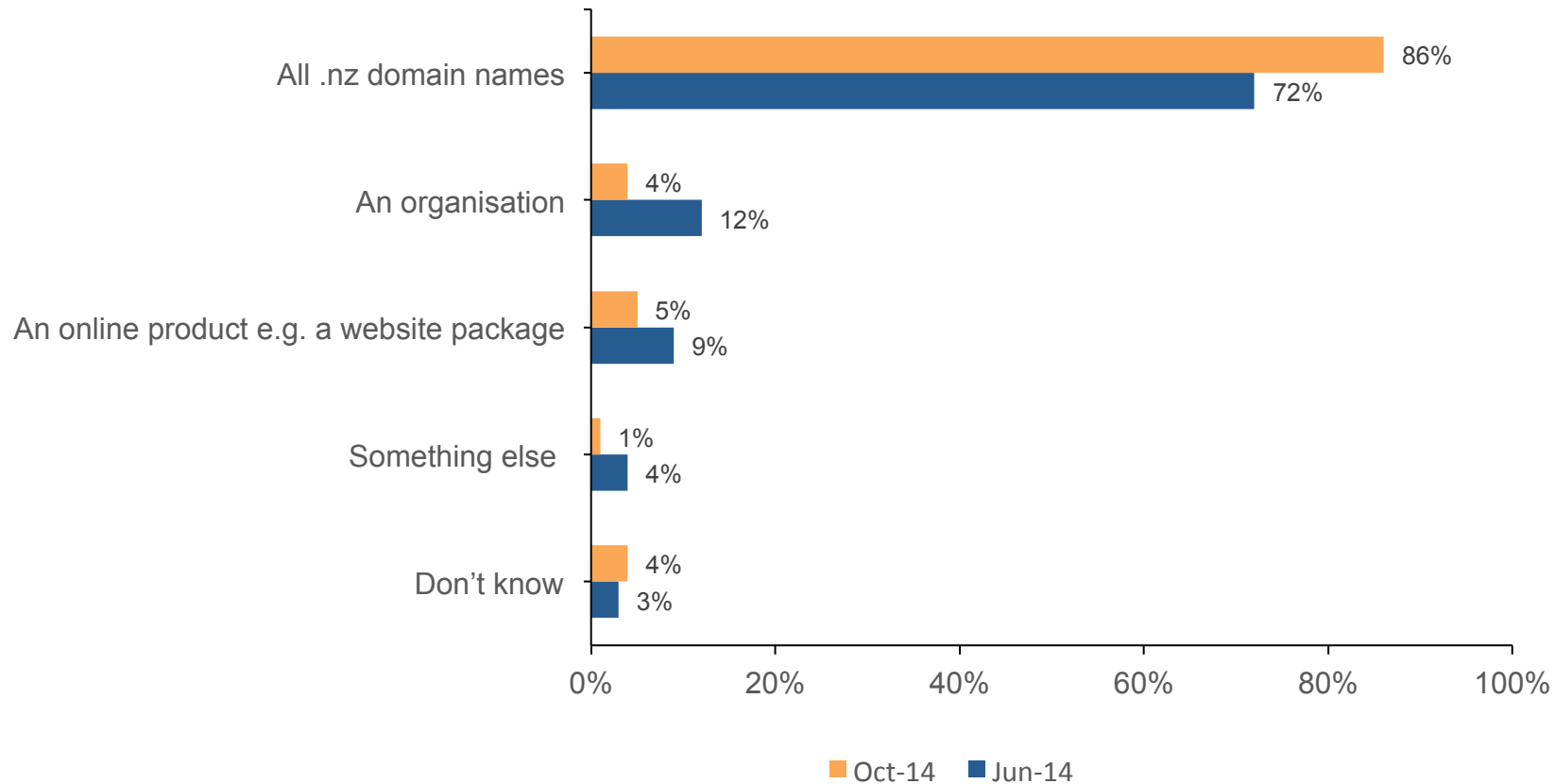
Brand Awareness



Awareness of .nz



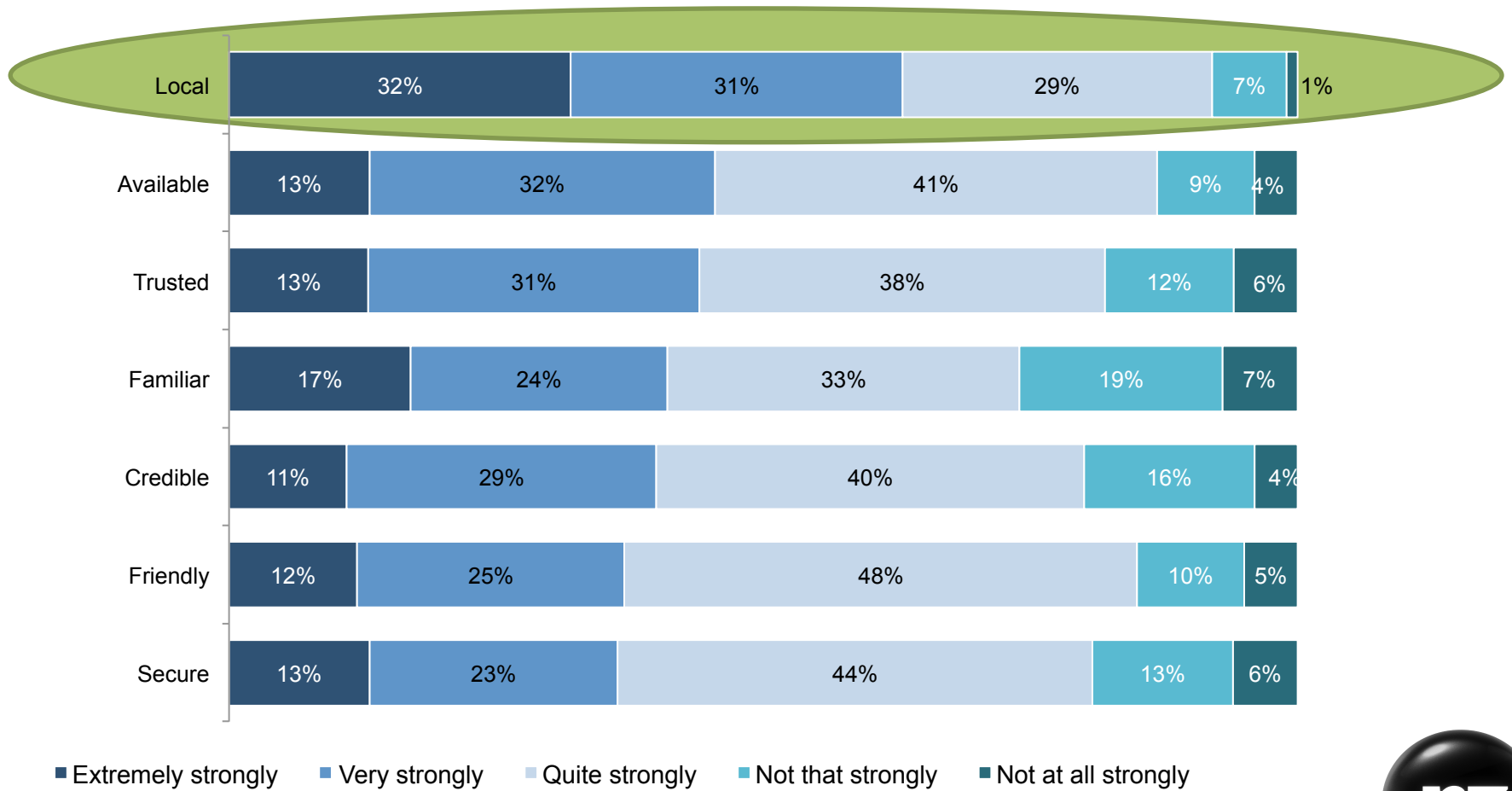
Knowledge of what .nz represents



Q2. What do you think this brand represents? [Shown NZRS logo].
Base: All aware of NZRS (Oct-14 n=223).



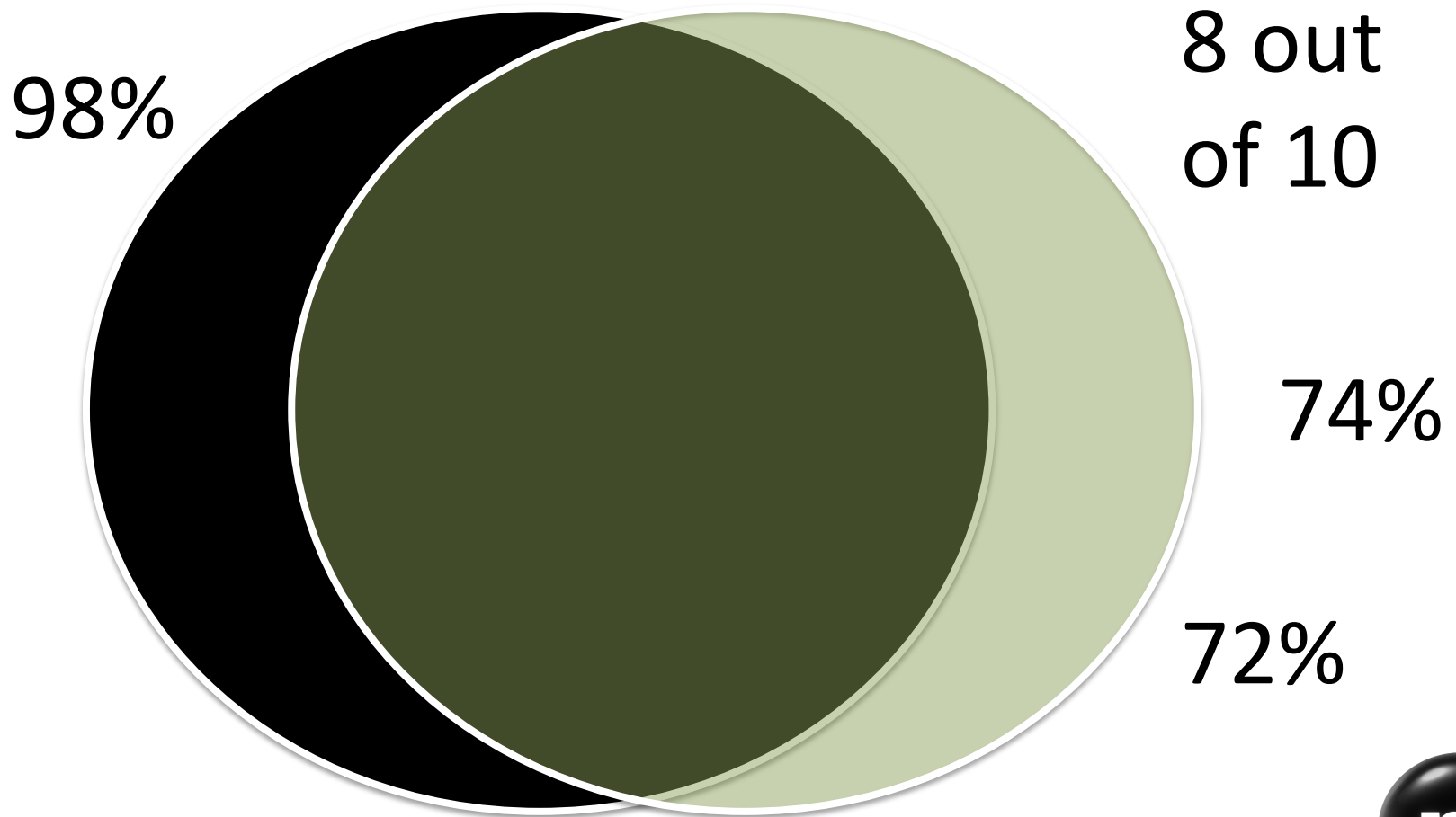
.nz strongly seen as local



Consumer Research

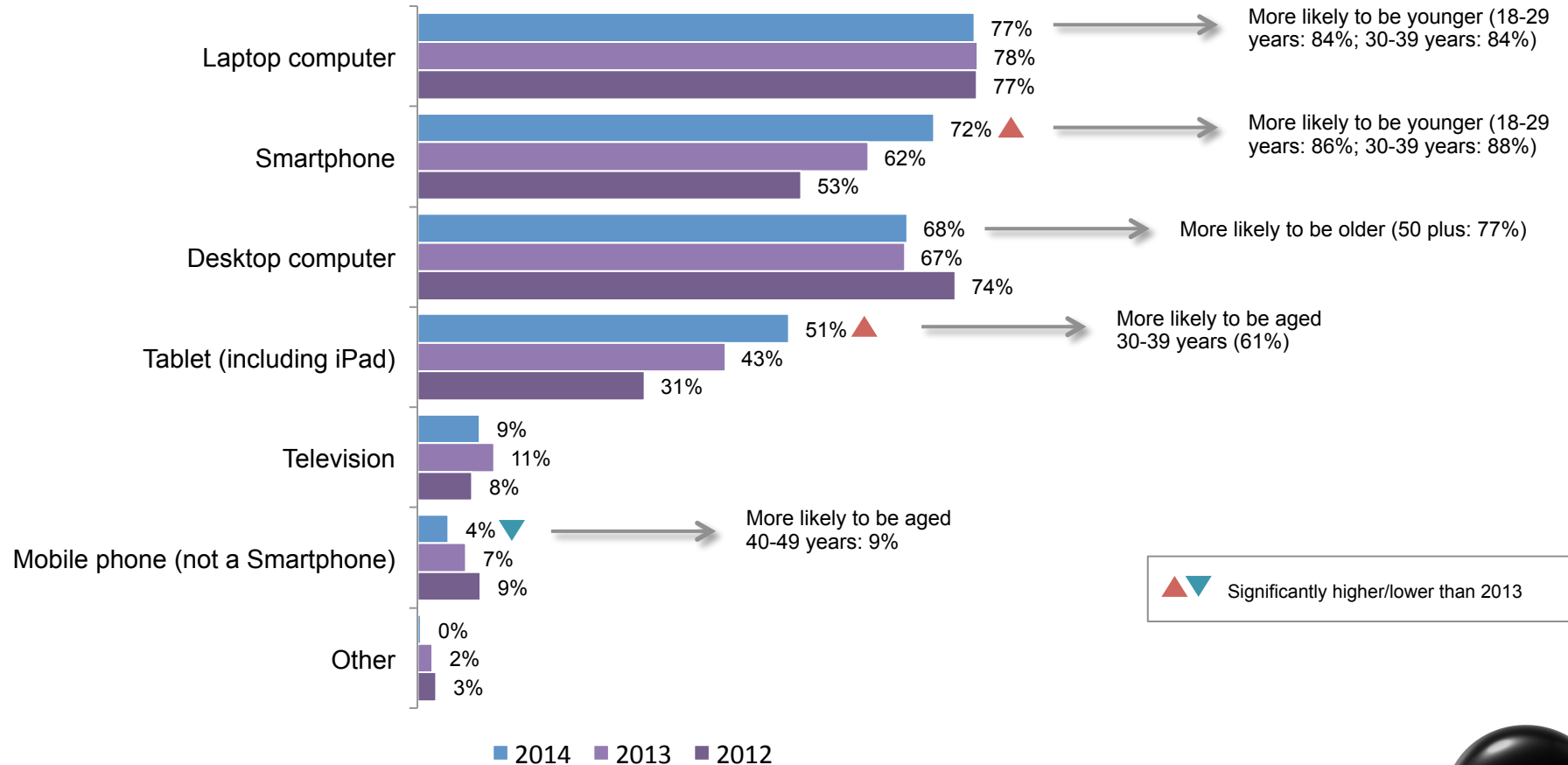


Consumer Use and Mobile



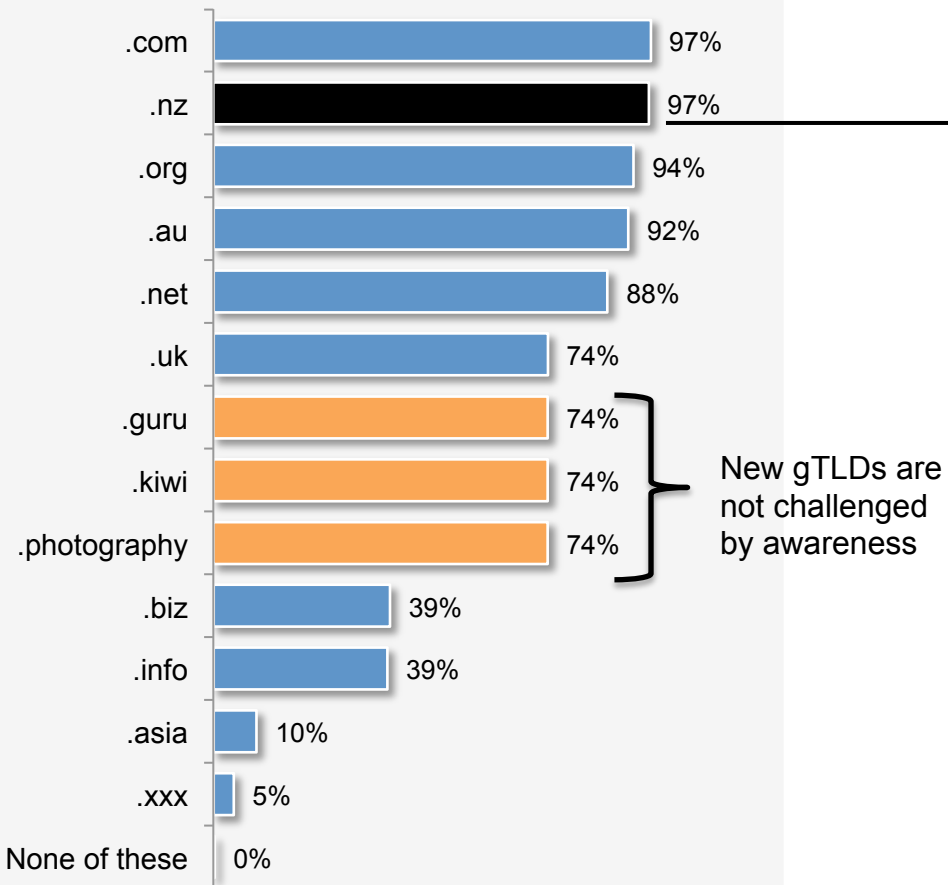
Accessing the internet in general via a Smartphone or Tablet has increased since last year. In fact, we know one in five people completed this online survey on a mobile device!

Devices use to access the internet



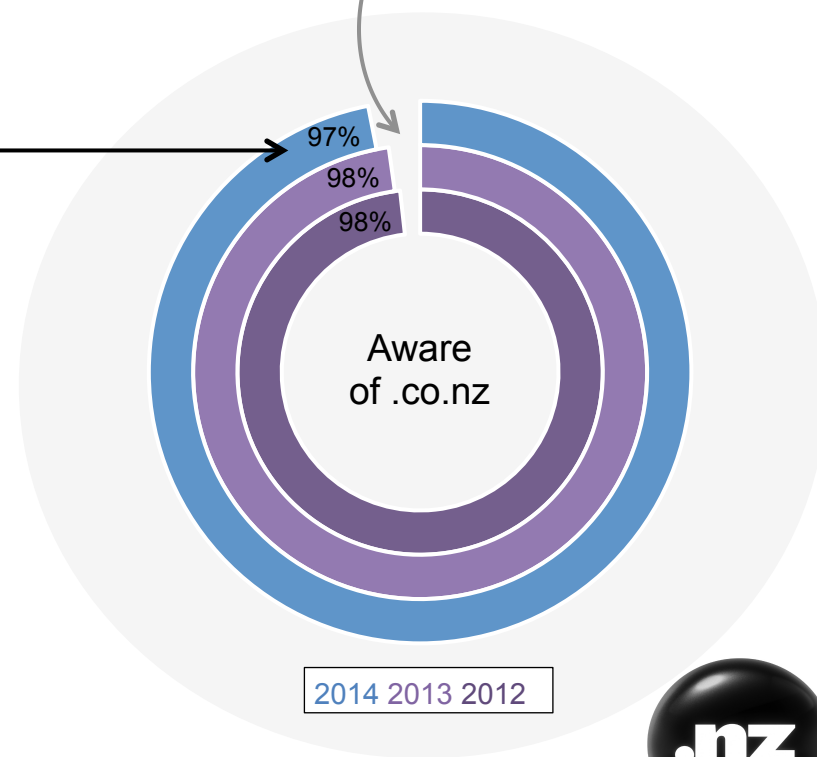
Consumer Awareness

Top level domains aware of

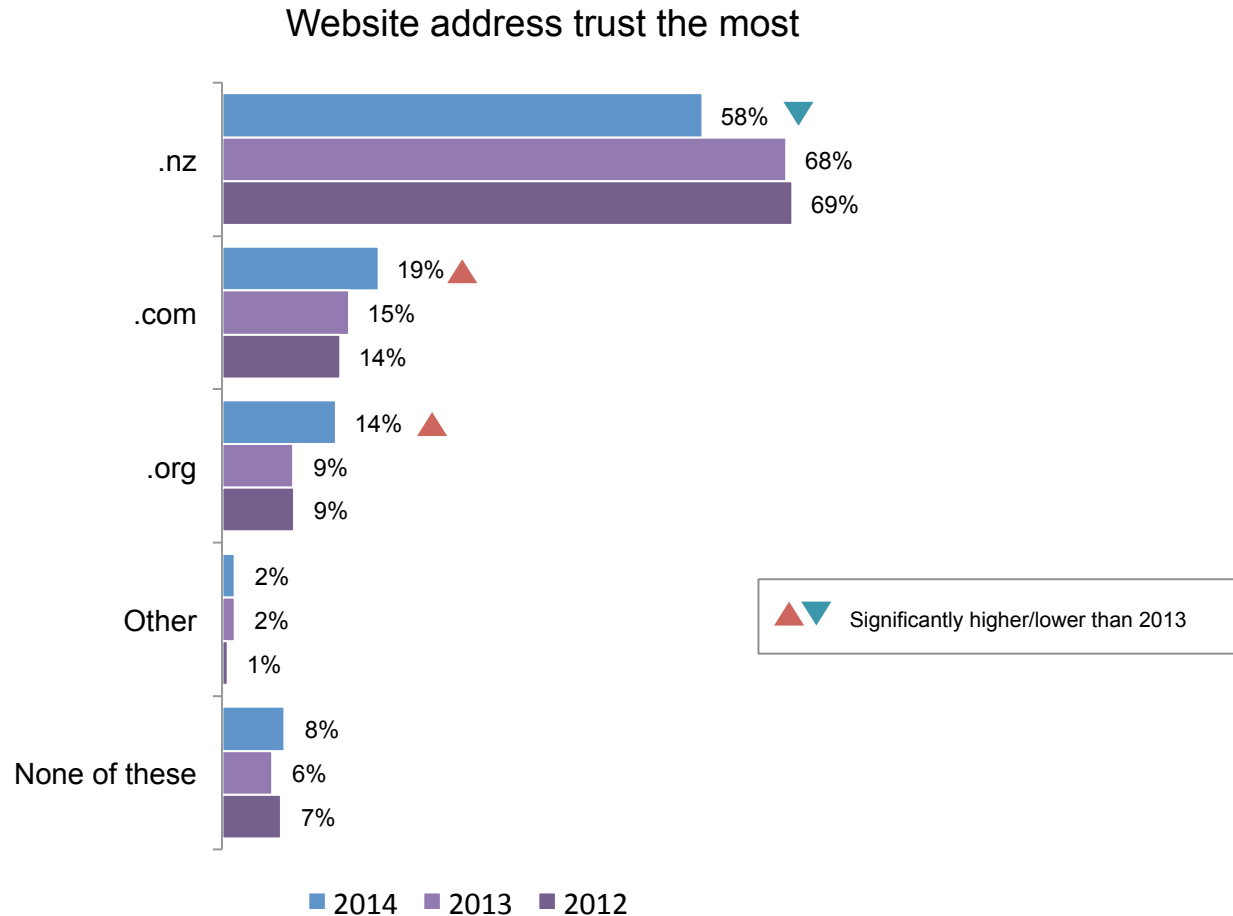


Those less likely to have heard of a.nz domain name are:

- Older people, 65 or over (93%)
- Identify as Asian (91%).



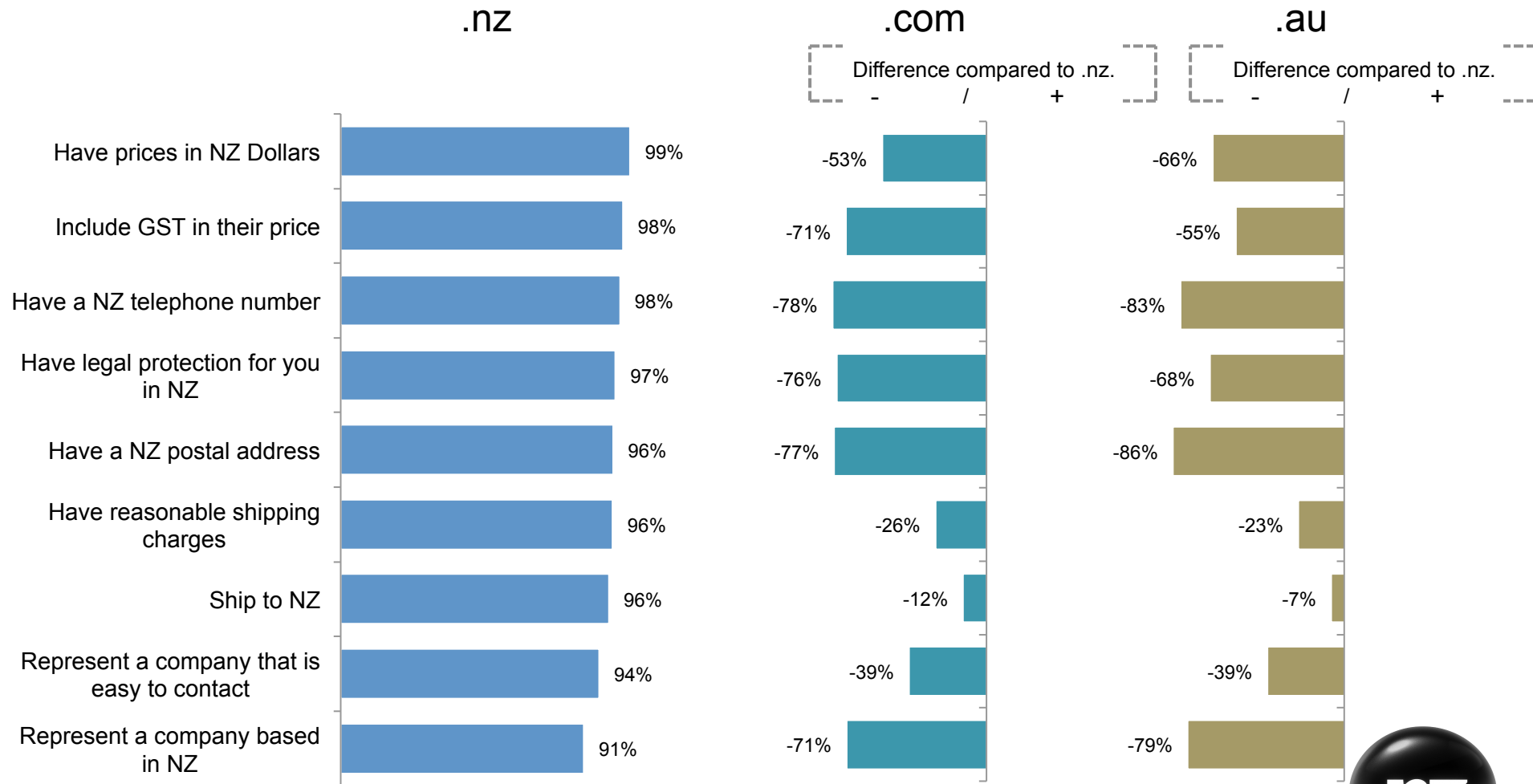
Consumer – Trust based on TLD



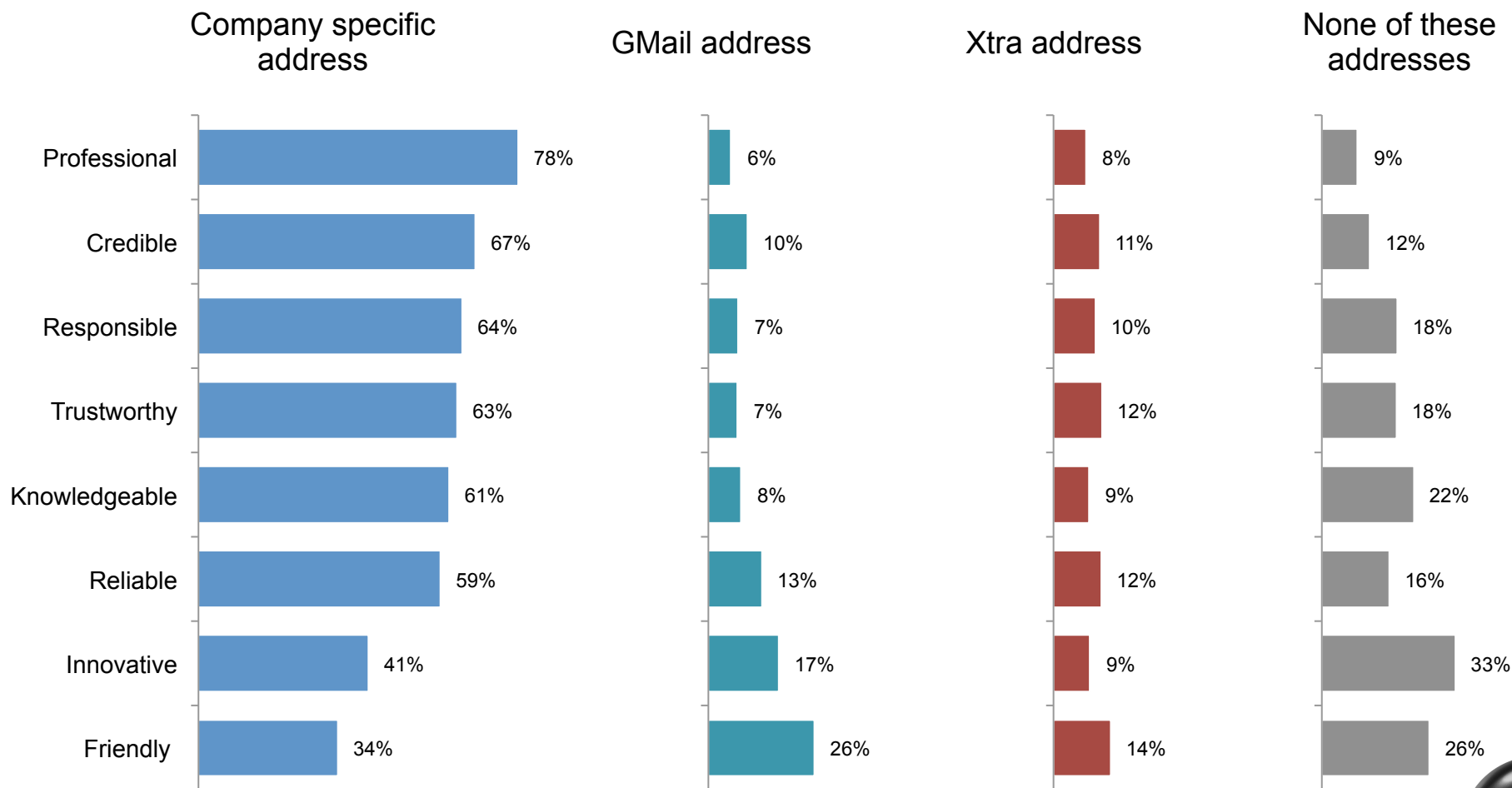
Although New Zealanders' are still most likely to trust a .nz website, levels have decreased compared to the last two years.



Consumer – Website expectations



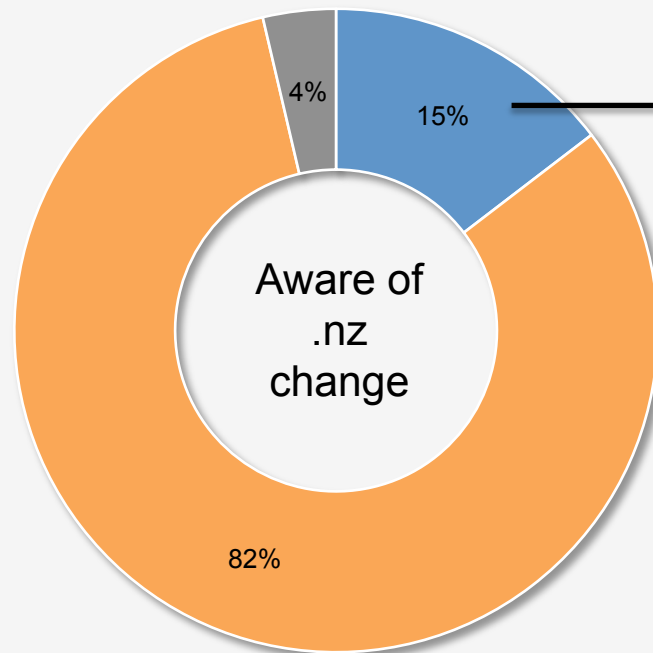
Consumer – Email perceptions



A company specific email address is essential to be seen as business-like.

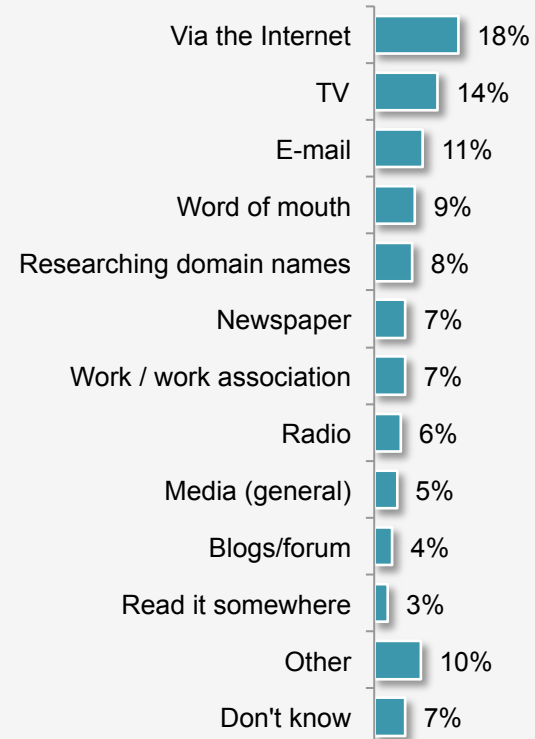


Consumer - .nz launch awareness



■ Yes ■ No ■ Don't know

How found out about change



Fifteen percent of online consumers were aware of the shorter .nz domain name change at the start of Sept 2014



Business Research



Some quick highlights

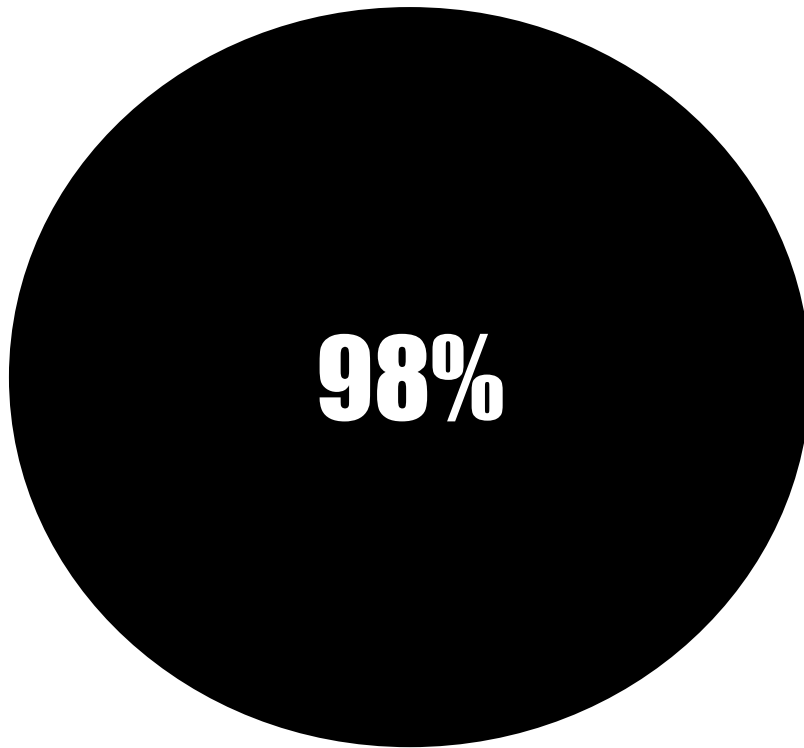
98% conduct some sort of
business online

2 out of 10 businesses use social
media

4 out of 10 businesses have a
website

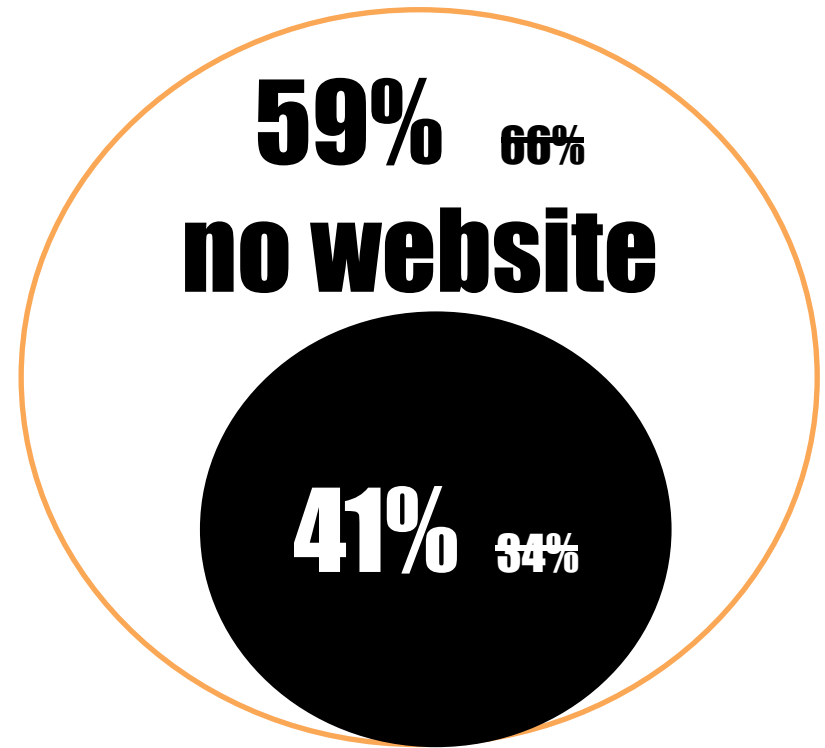


Businesses are^{still} missing an opportunity



...of consumers search the
Internet for Products
and Services

Source: .nz Colmar Brunton Survey 2013



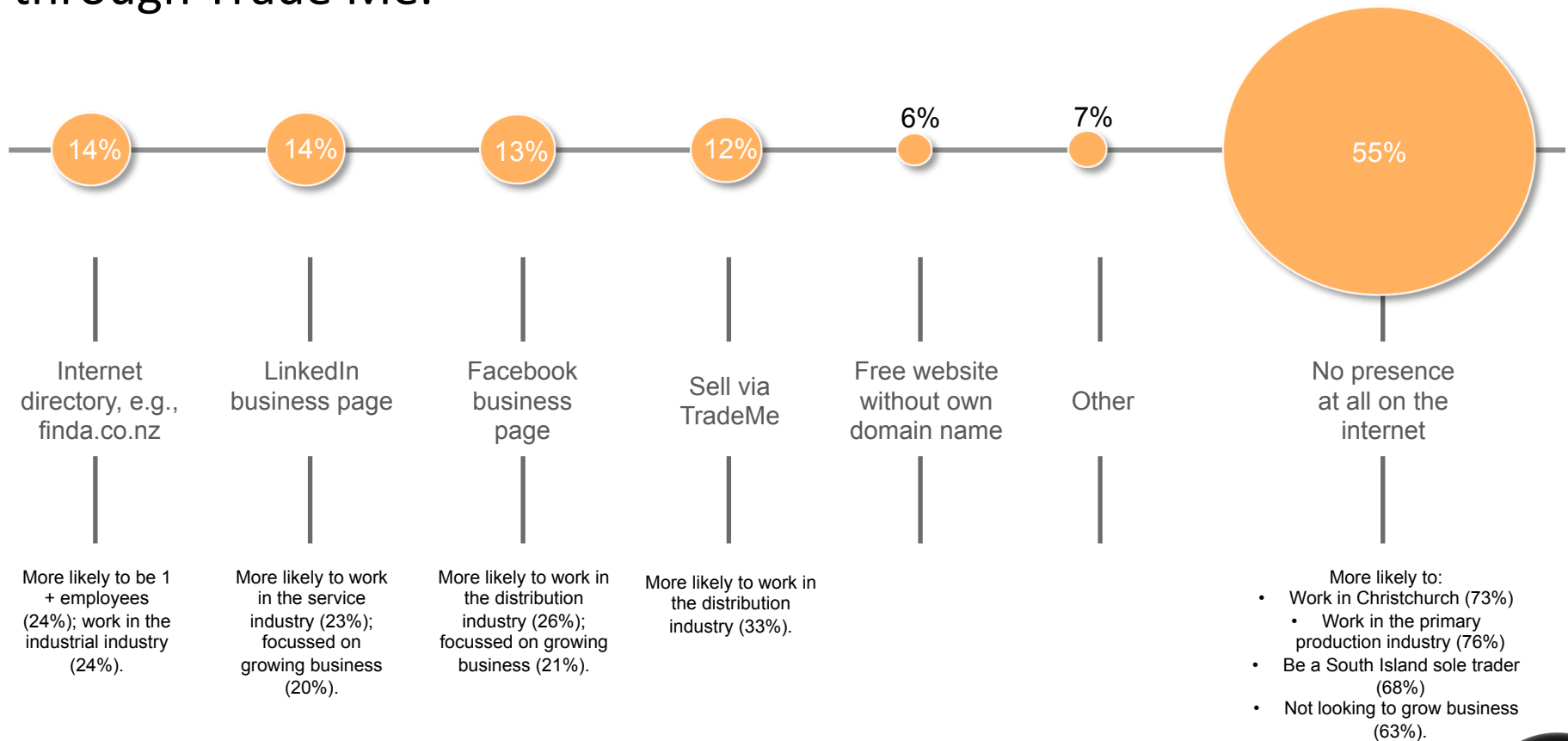
...of businesses with a website

Source: MYOB Business Monitor, Feb 2014

Internet Access:

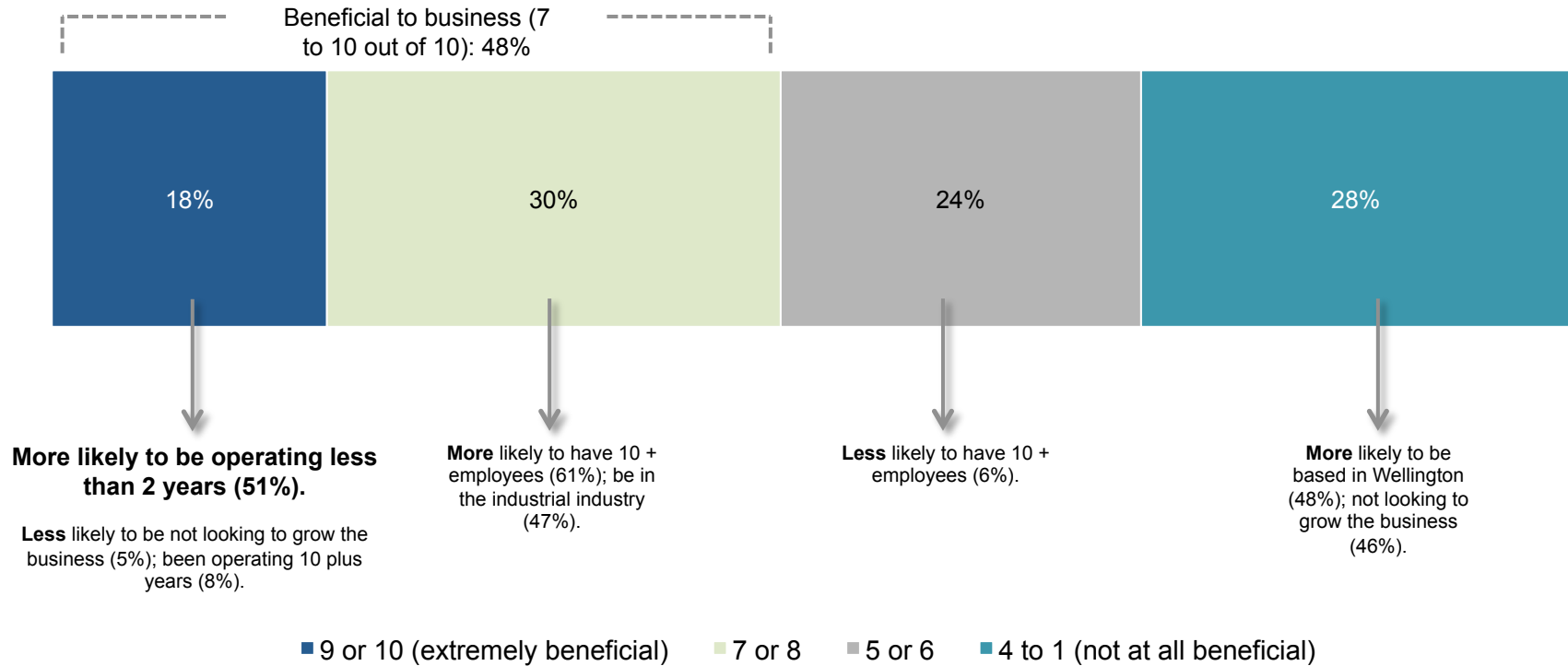


Over half of businesses without a domain name don't have any internet presence at all. Of those that do, some use an internet directory site, social media business pages, or sell products or services through Trade Me.

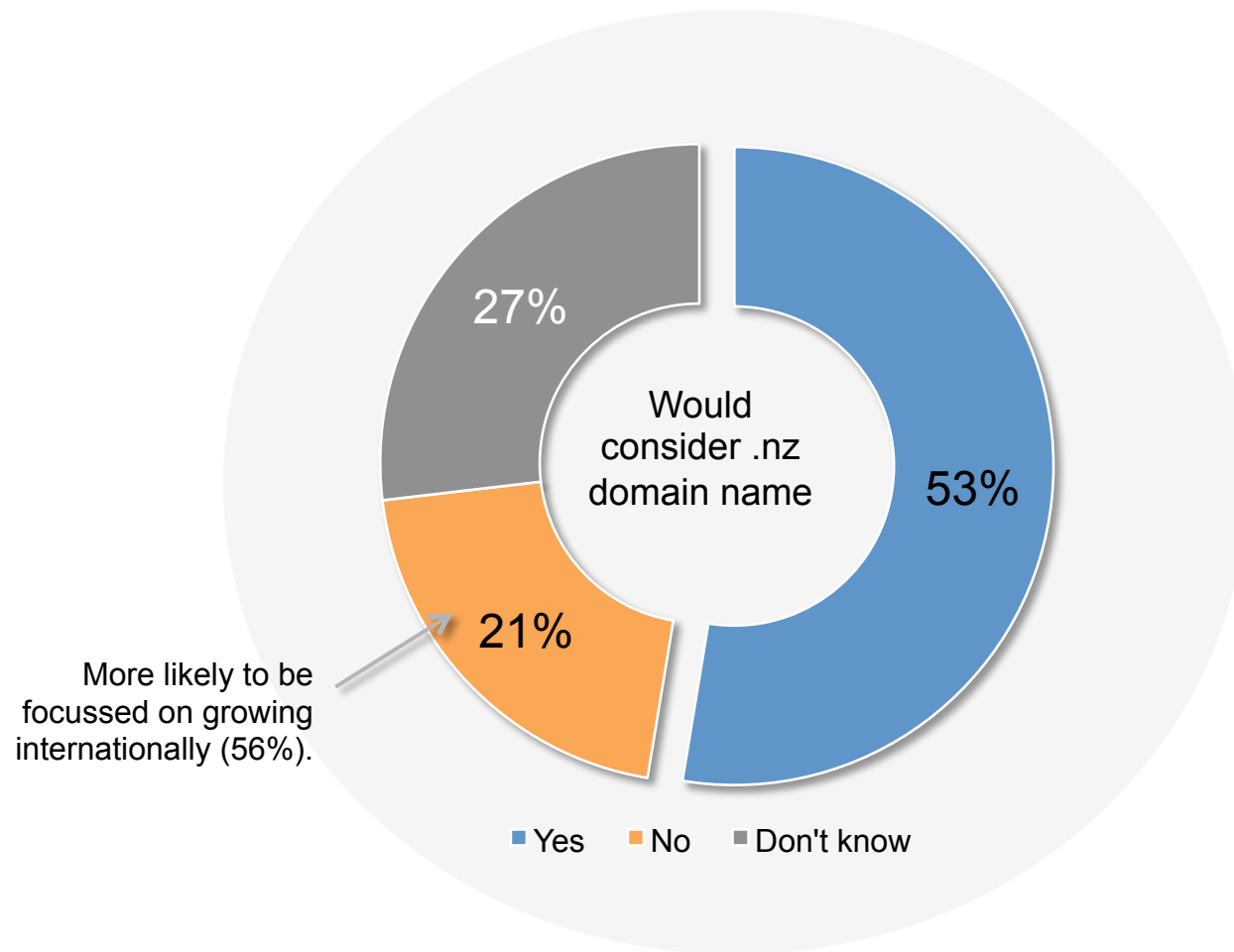


Social Media

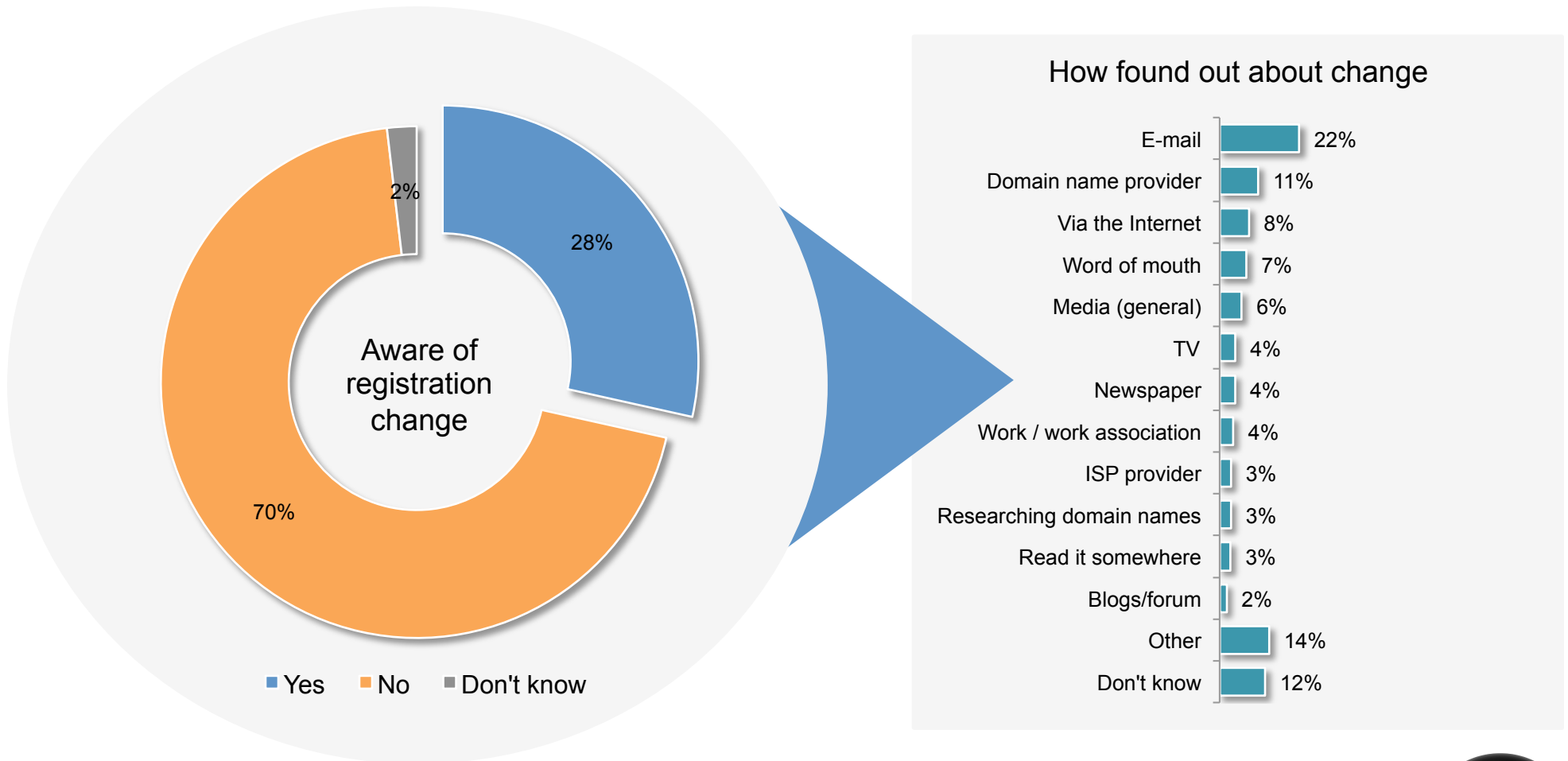
How beneficial social media is to business



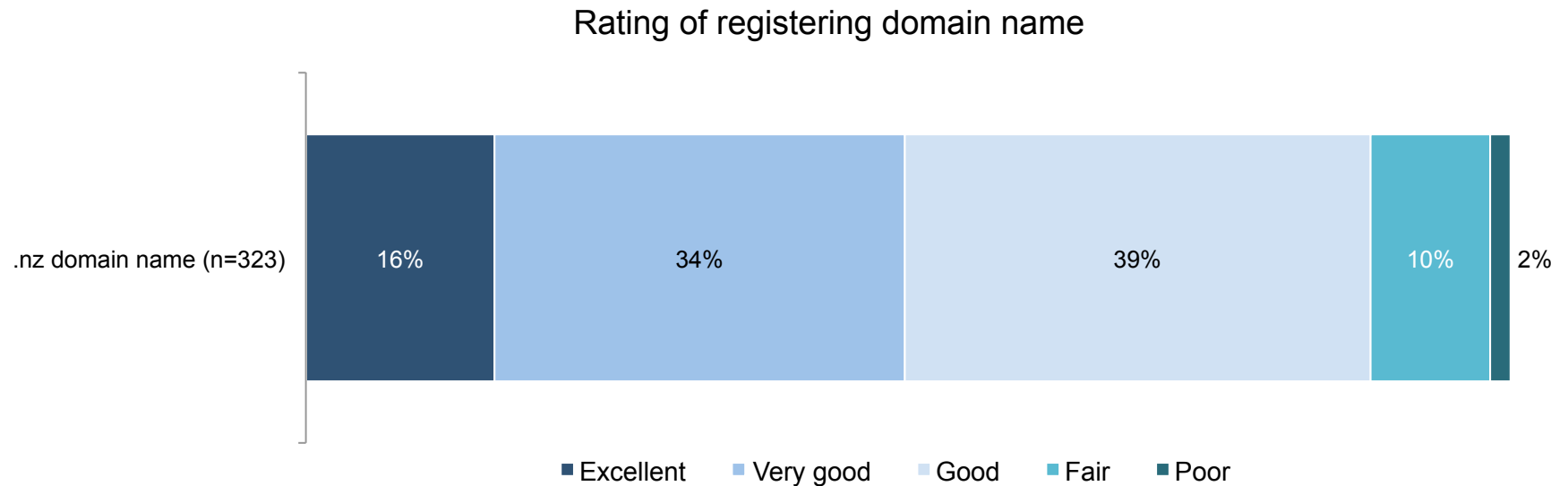
Over half of businesses with a non .nz domain name would consider a .nz version in the future.



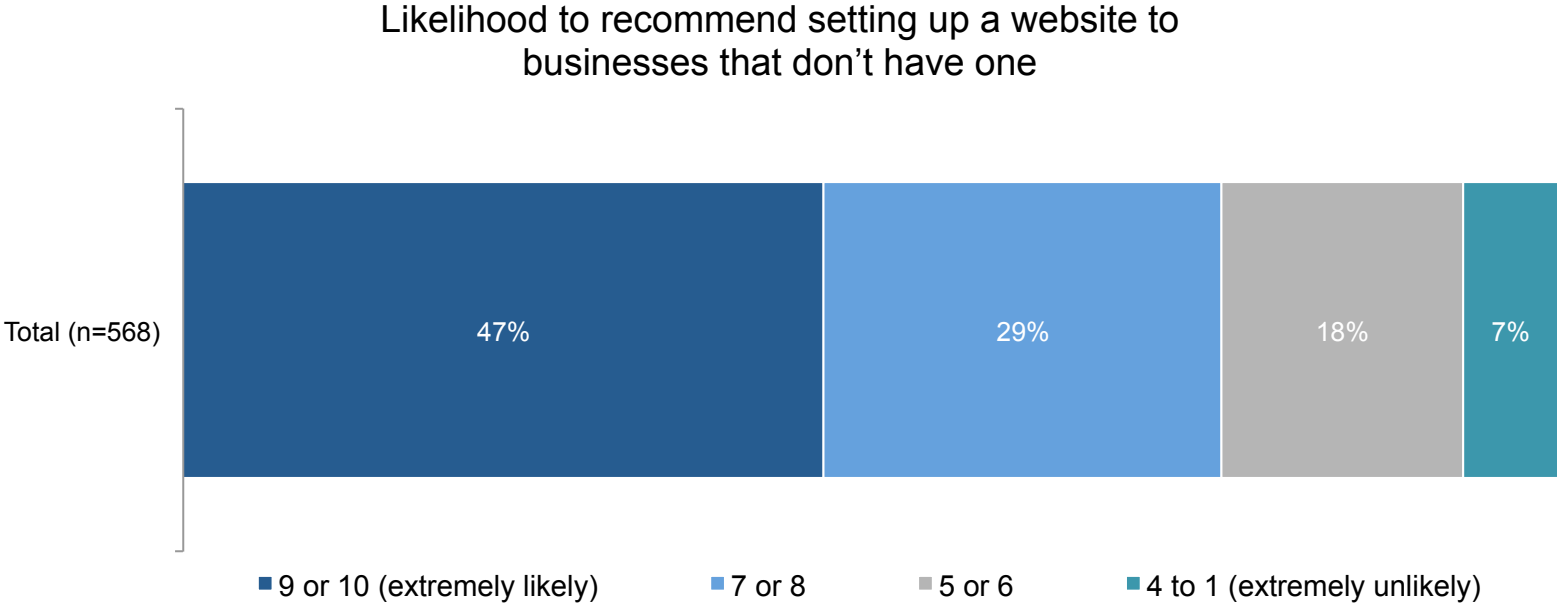
Nearly three in ten businesses with a domain name know of the upcoming shorter .nz change...



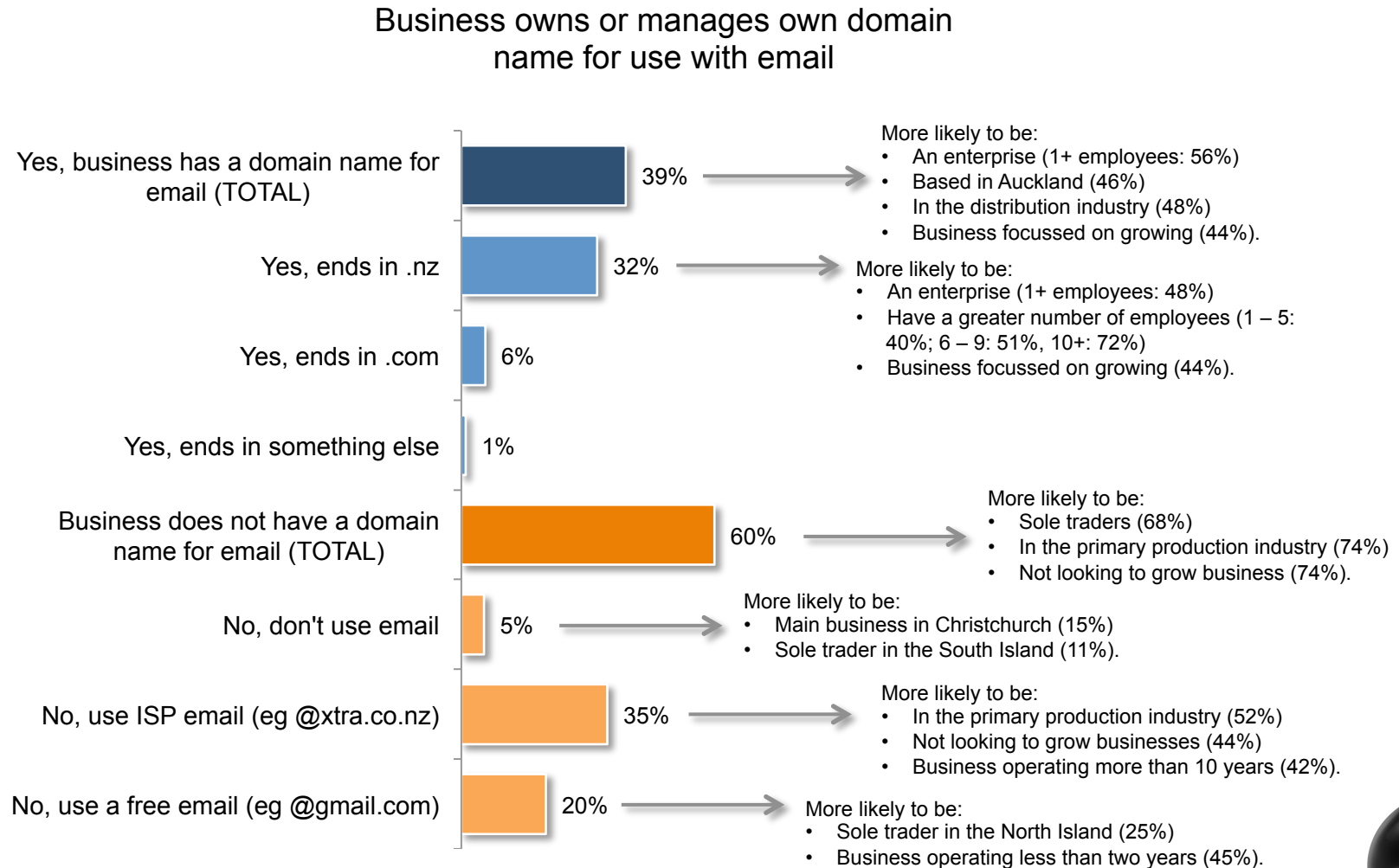
Half of businesses with a .nz domain name rate their registration experience as excellent or very good.



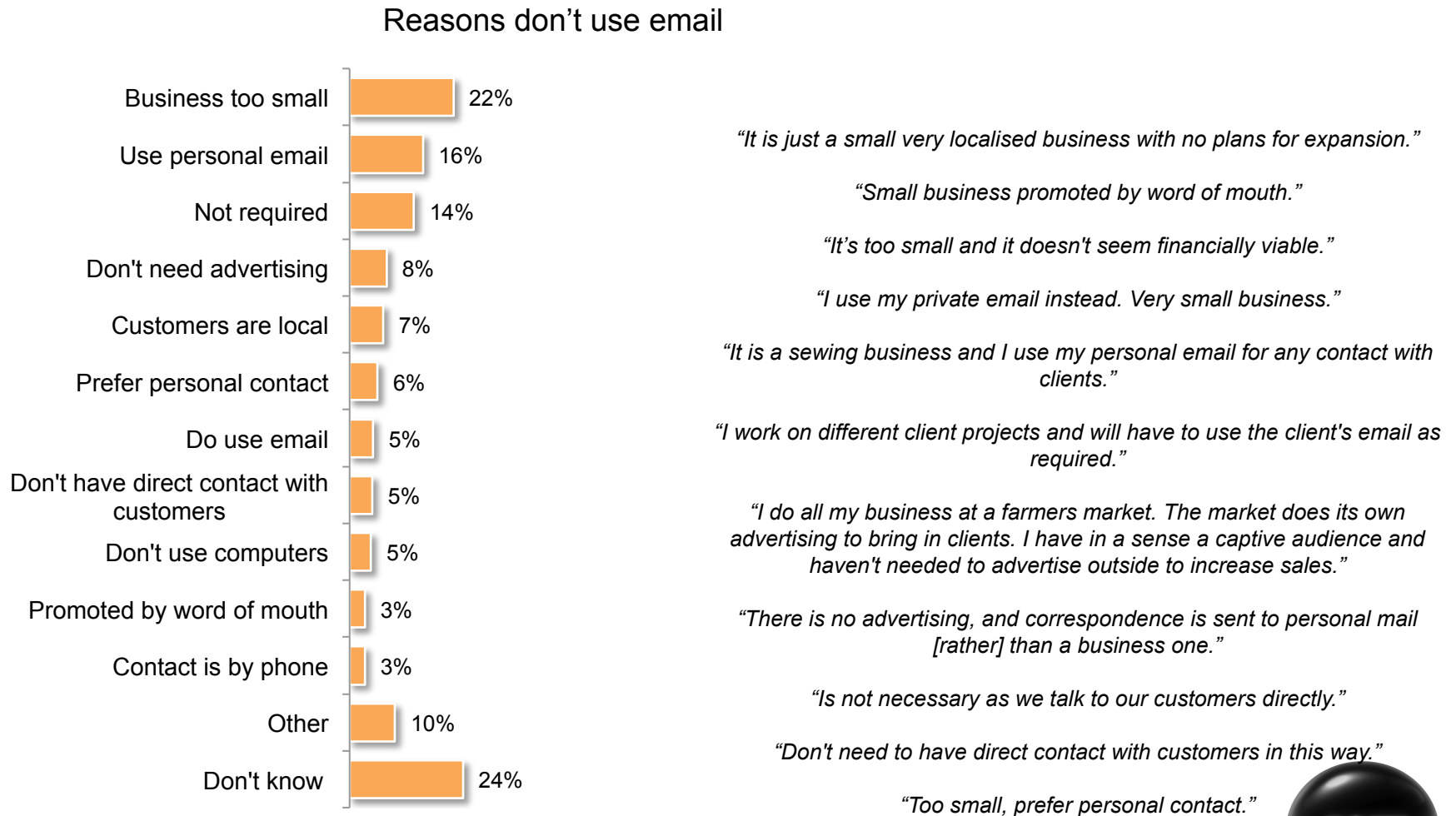
Three quarters of businesses with a website would recommend setting up a site to businesses that don't currently have one.



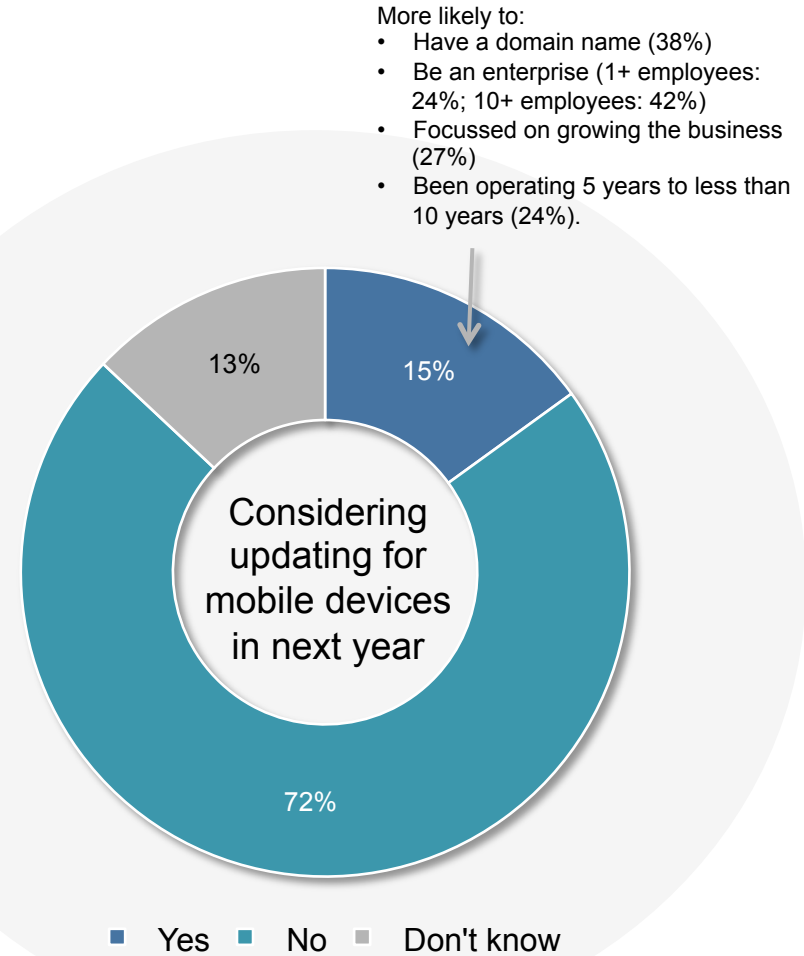
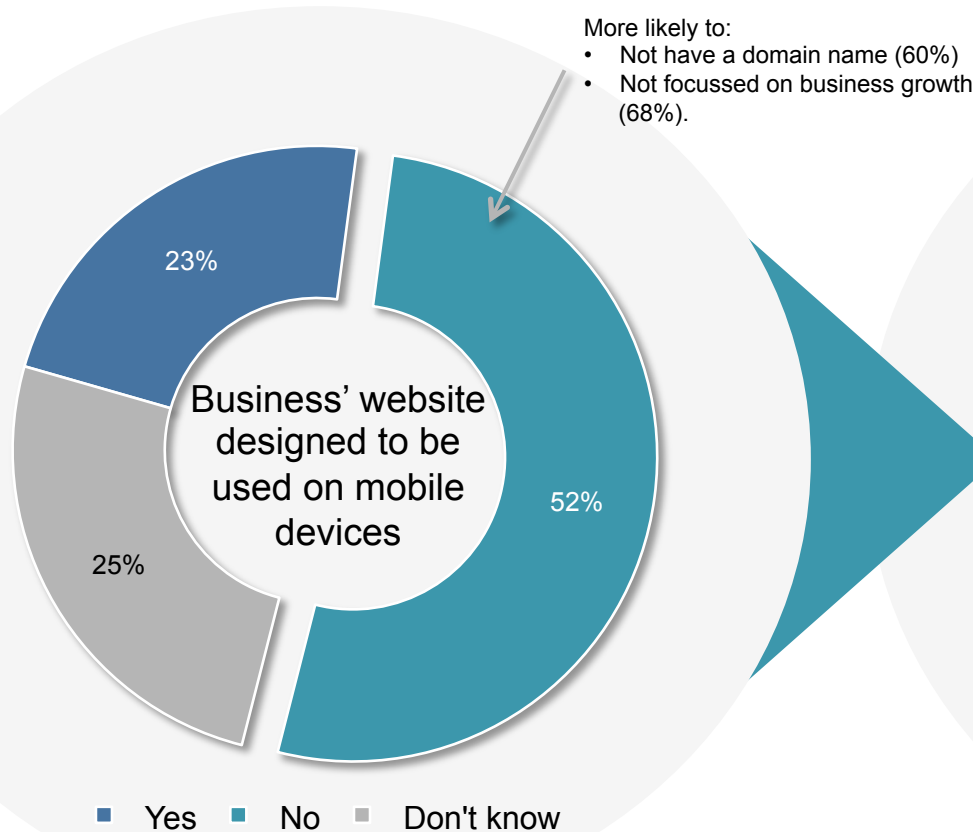
Sole traders are less likely to have their own domain name for use with email.



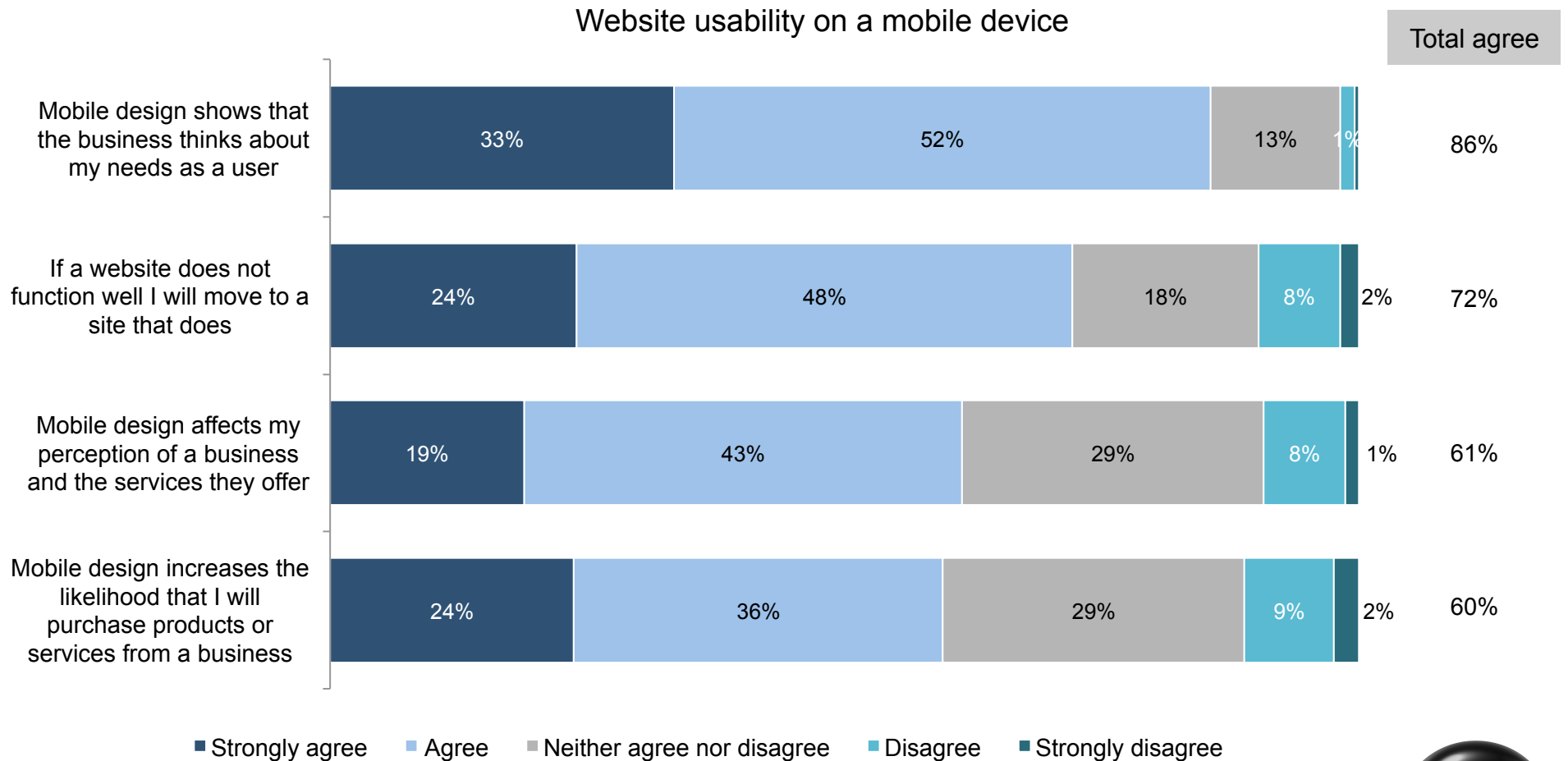
In general businesses don't have email addresses as they view themselves as being too small, or because they use their personal email address instead.



Only one in five of business' websites are designed to be used on mobile devices; a further 15% are considering designing for mobile use in the next 12 months.

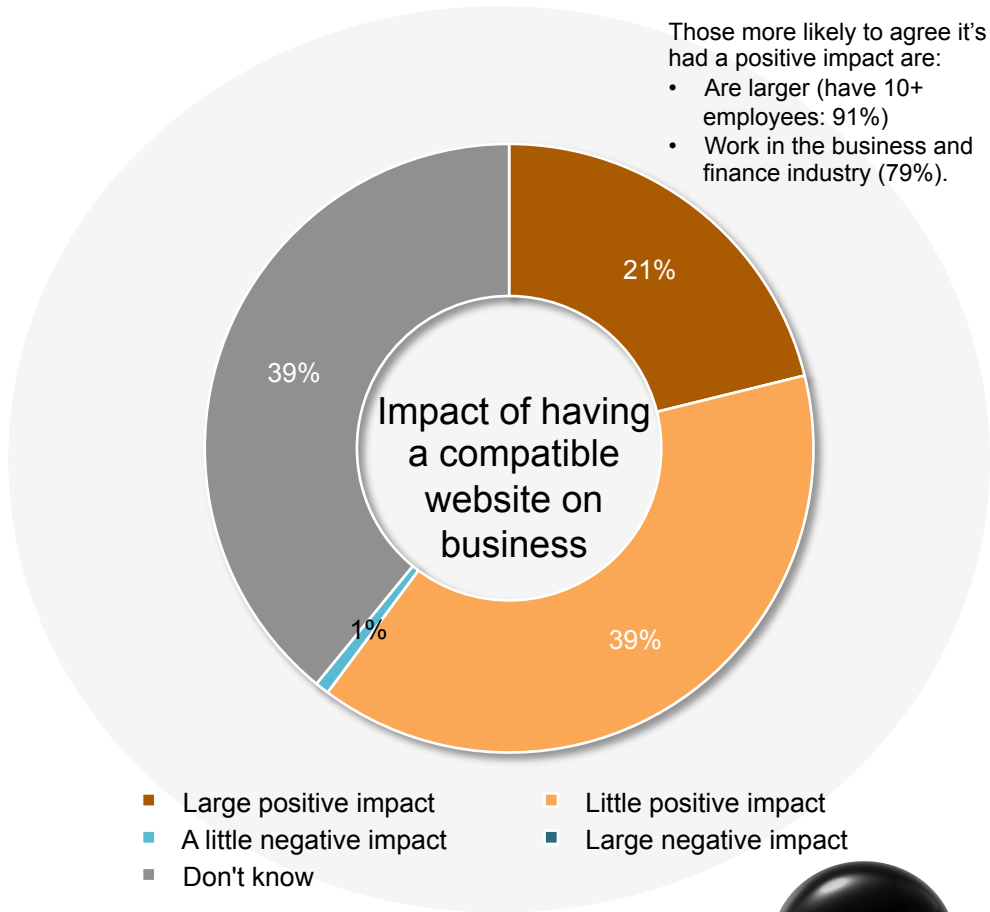
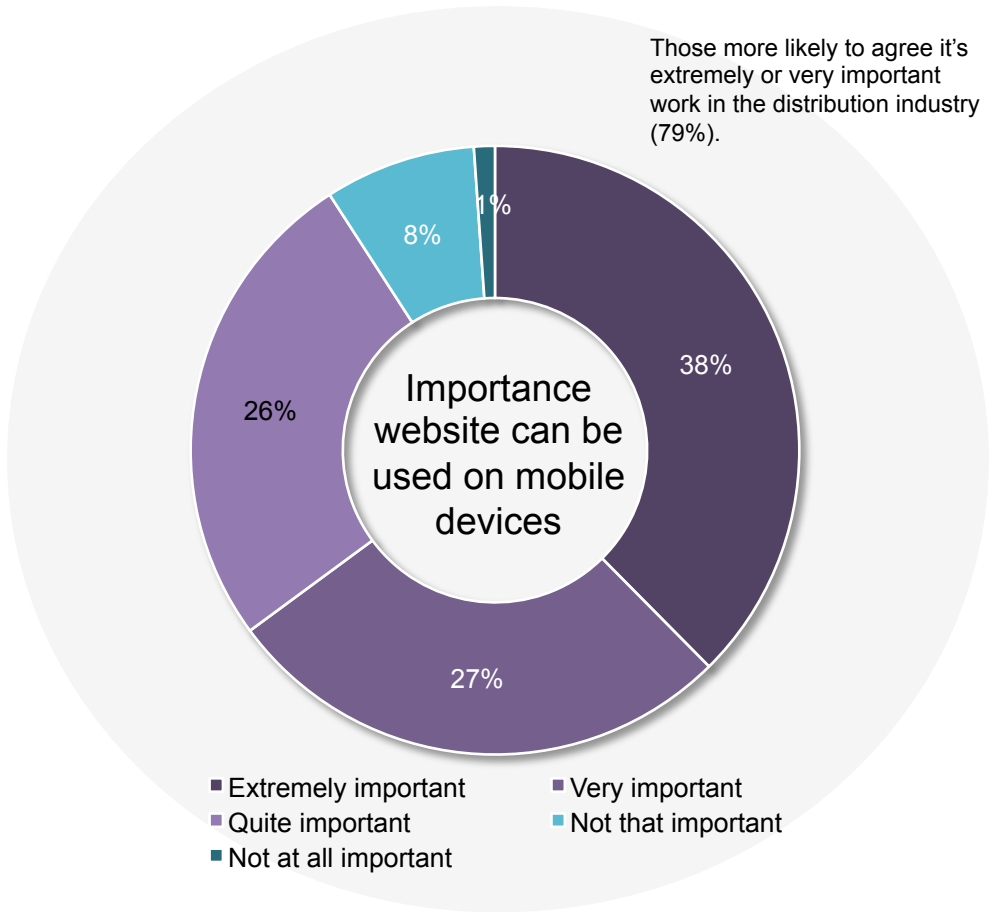


Mobile device users will take action over a poorly designed website – seven in ten say they will move to a different site if the original one doesn't function properly.



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 (2014 n=799). Excluding Don't Knows.

Over six in ten businesses who have a website designed to be used on mobile devices think it's extremely or very important it's able to be used this way.



Summary

- We are still seeing a significant gap between consumer expectations and business behaviours.
- There is an opportunity to educate and encourage more businesses online with domain, website and email, and when they do there are opportunities for value add.
- This process will become harder and more expensive over time (more on that later today)



Questions?

