

# NAVIGATING THE **DIGITAL TRUST** LABYRINTH

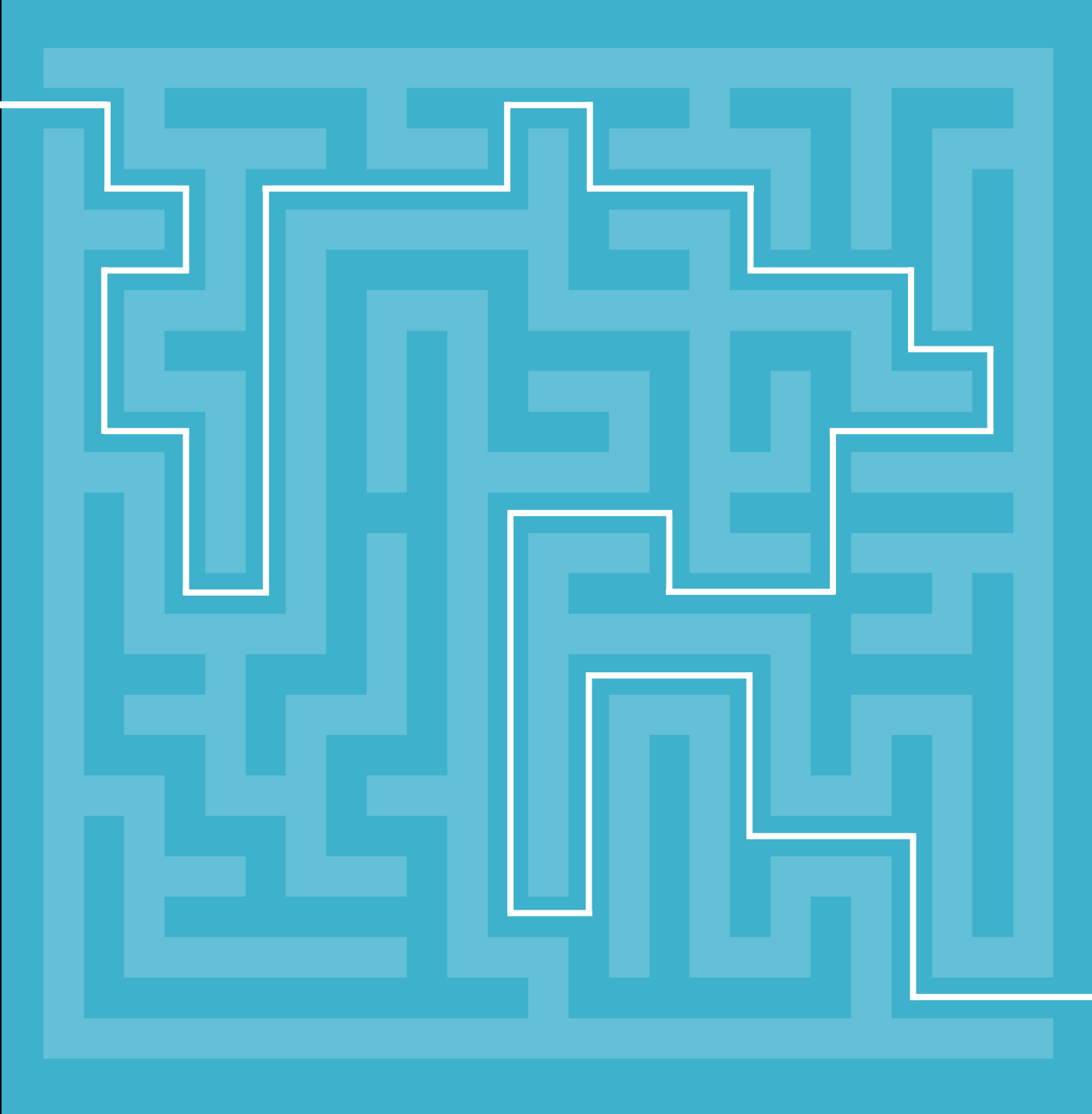
MARCH 2019

THE CHALLENGES IN MAINTAINING  
AND BUILDING CONSUMER TRUST  
WHILE NAVIGATING NEW ZEALAND'S  
DIGITAL LANDSCAPE



RESEARCH BY KANTAR TNS  
NEW ZEALAND. REPORT  
DESIGN BY COLMAR  
BRUNTON CREATIVE &  
MULTI-MEDIA TEAM

NAVIGATING THE  
**DIGITAL TRUST**  
LABYRINTH



SOURCE: KANTAR TNS  
NEW ZEALAND 2019

# WHAT PROPORTION OF NEW ZEALANDERS HAVE EVER DONE THE FOLLOWING BEHAVIOUR ONLINE?



Have watched an online video  
review of a product in the past?



Have tried to access  
the dark web?



Have watched a video of someone  
else playing a video game?



Have Googled themselves?



Have watched  
an unboxing video?







# EVENT OUTLINE

---

1

Overview of New Zealand's online population

2

Trust and Data Security

3

Platform and the role of Facebook

4

Digital Personalisation

5

Group Discussion

6

Voice Technology - a case study

7

Wrap up and Questions







**89%**  
OF NEW ZEALANDERS  
ARE ACTIVELY ONLINE



SOURCE: KANTAR TNS NEW ZEALAND 2019

MARKETING  
SPEND ONLINE  
**\$923M**

IN NEW ZEALAND IN 2017

SEARCH

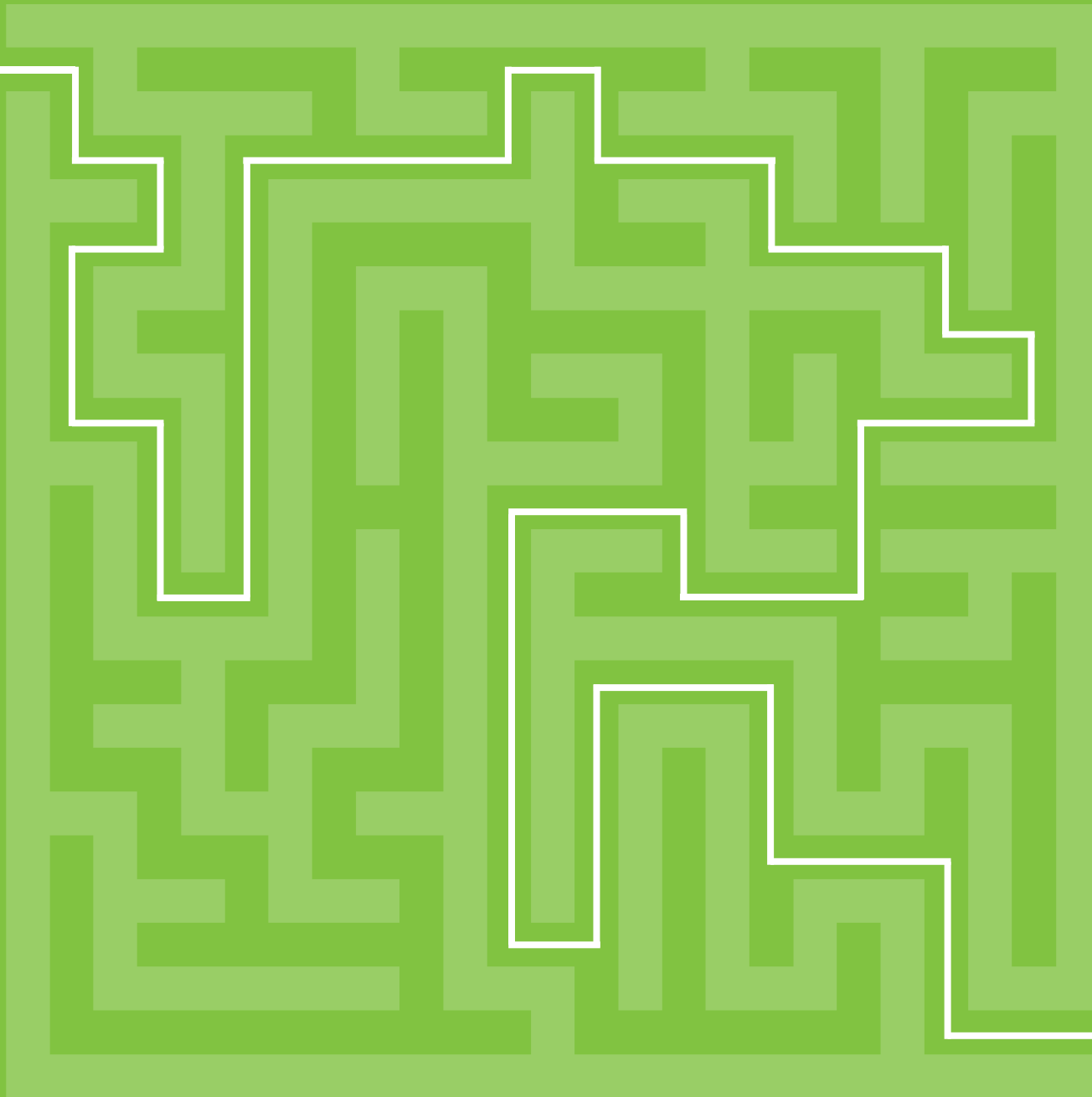
**59%**

**\$541M**



# NAVIGATING THE **DIGITAL TRUST** LABYRINTH

Understanding  
the  
New Zealand  
online  
population



SOURCE: KANTAR TNS  
NEW ZEALAND 2019



**New Zealand's online population is diverse**



LEVEL OF COMMITMENT TO  
ONLINE AS A CHANNEL OF CHOICE



HIGH

WORRY ABOUT THE AMOUNT  
OF TIME SPENT ONLINE



HIGH



LOW



LOW

SOURCE: KANTAR TNS NEW ZEALAND 2019





# HIGH ONLINE COMMITMENT

## Whole life online

- Communicate online more than in person
- Desensitised to shocking content
- Prefer online shopping
- Focused on the present
- Price sensitive

HIGH



THE AVERAGE PERSON IS SERVED

1,700

BANNER ADS  
EACH MONTH





# LOW ONLINE COMMITMENT

## Offline preference

- Prioritise offline connections
- Prefer to shop in-store
- Conservative / traditional

LOW



HIGH

# WORRIERS

Wanting to reduce the amount of time they spend online

- Some can't break the habit
- Desire to be more productive online
- Concerned about others
- Sleep impacted by screen time



# NON-WORRIERS

Happy with the amount  
of time spent online

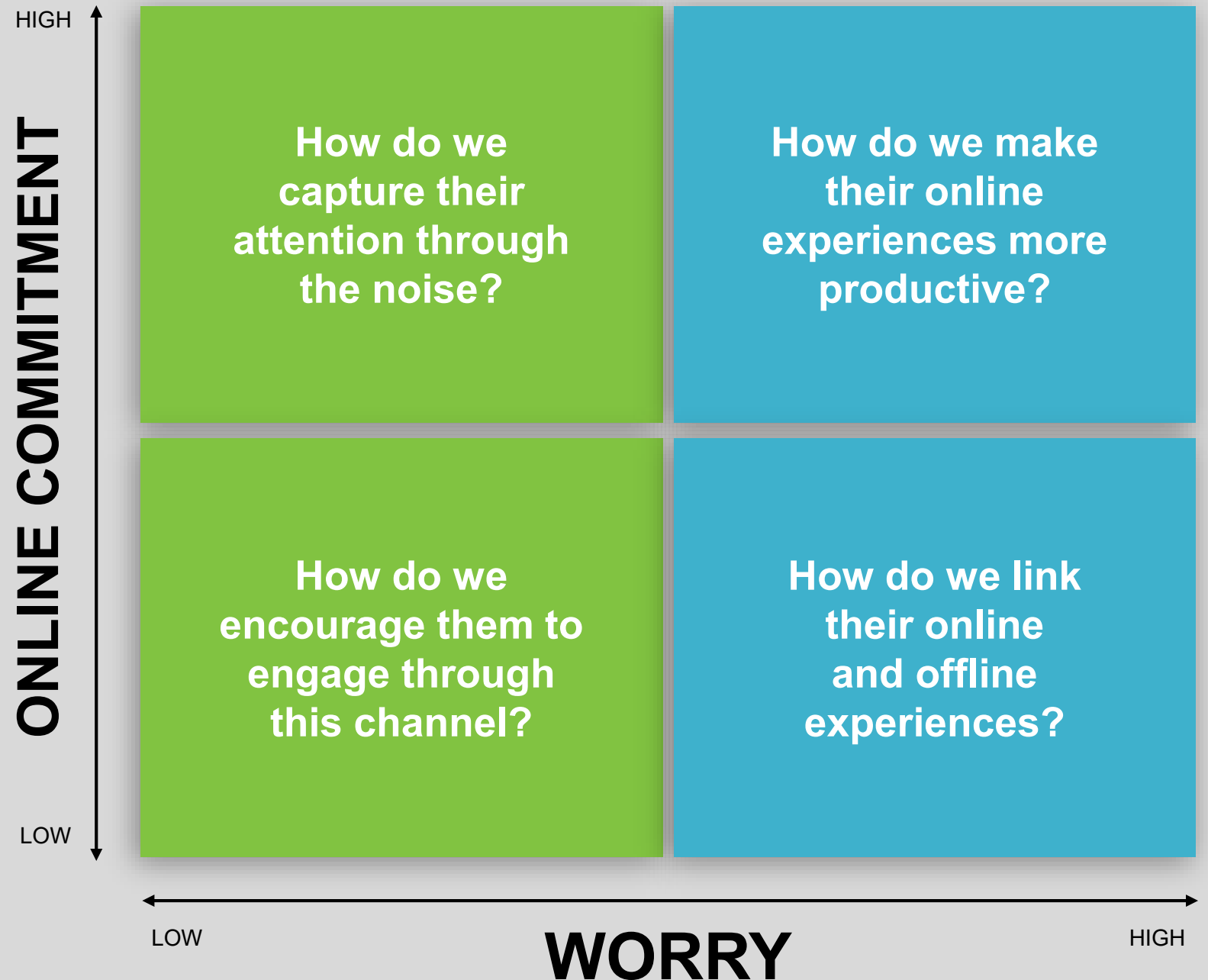
- Contributors but not followers
- More likely to be shocked online

LOW



SOURCE: KANTAR TNS NEW ZEALAND 2019

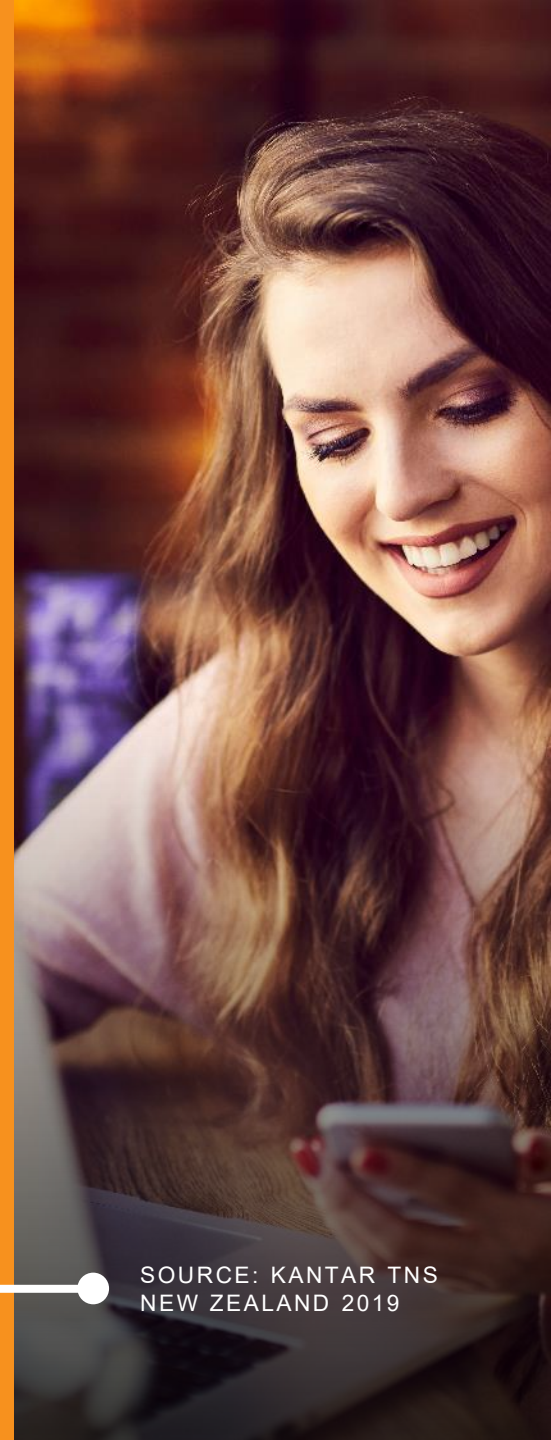
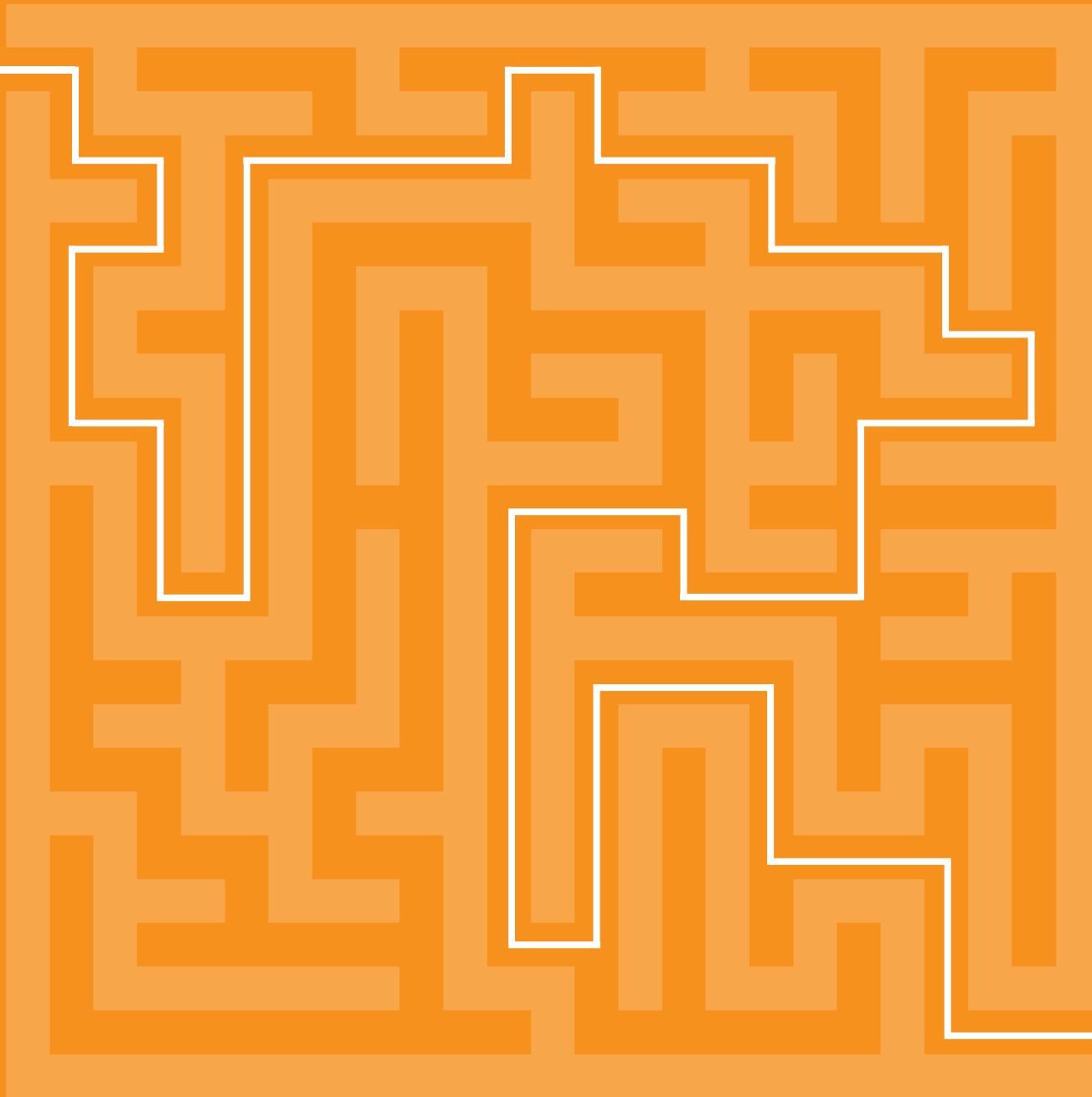
## APPROACHING THESE GROUPS





# NAVIGATING THE **DIGITAL TRUST** LABYRINTH

Trust and  
Security



SOURCE: KANTAR TNS  
NEW ZEALAND 2019

**The importance of  
brand trust is growing...**



**...due to ever-expanding choice**

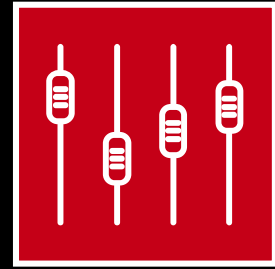




**Online  
security**



**Platform**



**Personalisation**

# SECURITY AND PRIVACY

---

ARE INCREASINGLY  
BECOMING AREAS  
OF **FOCUS**





2018

2,600,000,000

PERSONAL RECORDS STOLEN

7,850,000

EVERY DAY  
ON AVERAGE

T-Mobile

Saks  
Fifth  
Avenue

Google+

MARRIOTT

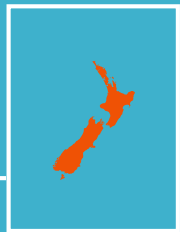
timehop

f

CATHAY PACIFIC

BRITISH AIRWAYS

**WHILE WE  
ARE REMOTE  
WE ARE STILL  
AT RISK**





# 46%

OF NEW ZEALANDERS  
ARE WORRIED HOW  
EASILY THEIR HOME  
NETWORK CAN BE  
**HACKED**



# What are consumers doing to protect themselves?

5/10

using anti-virus  
software



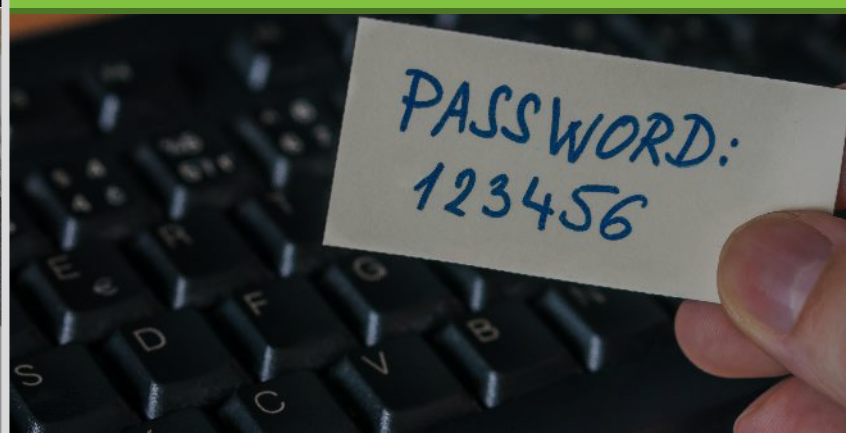
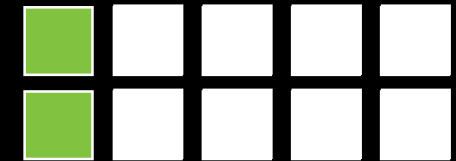
6/10

using same  
passwords for different  
sites and services



2/10

changing passwords  
regularly





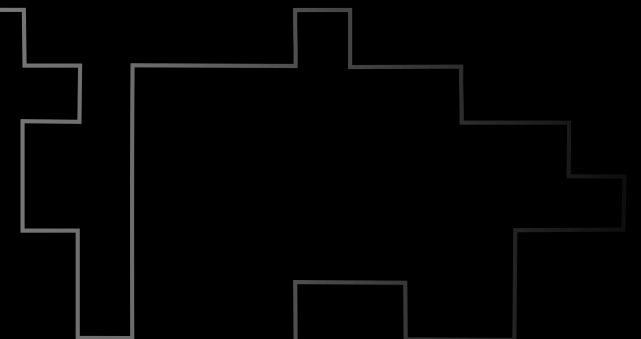


# What can brands do?

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# 50%

WOULD LIKE TO  
KNOW MORE  
ABOUT HOW THEY  
CAN **PROTECT**  
**THEMSELVES**  
ONLINE



SOURCE: KANTAR TNS NEW ZEALAND 2019

# 68%

OF NEW ZEALANDERS  
RECOGNISE THAT THEY  
SHOULD **CHANGE**  
**THEIR PASSWORDS**  
MORE OFTEN

# 47%

ADMIT THEY  
USE THE SAME  
PASSWORD  
FOR DIFFERENT  
SITES, EVEN  
THOUGH THEY  
KNOW THEY  
SHOULDN'T





“

*Why is it that Microsoft has decided what's best for ME? I survived this 66 years on this earth on my own. I even figured out how to drive. Now, like some 'Big Brother' of 1984 I am being looked down on. I liked my old password. Had it for well on 5 years. Even got it to a point where it was used for other accounts. Now this is all changed for my protection. I don't like it and I'm not sure how to stop this over concern for my wellbeing.*

”





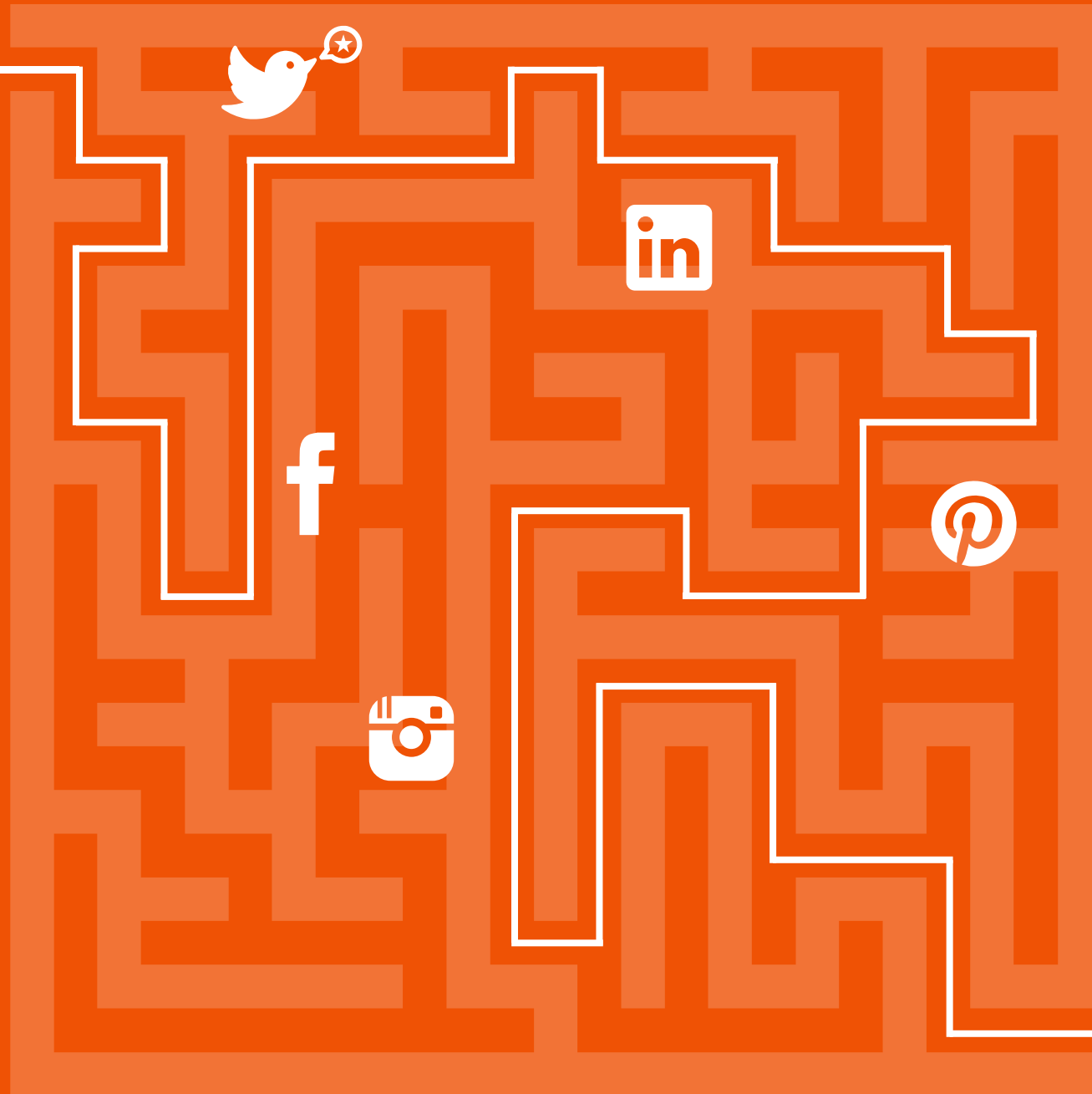
**CHECK YOUR SMOKE ALARMS  
THIS DAYLIGHT SAVING.**

**WORKING SMOKE ALARMS SAVE LIVES.**



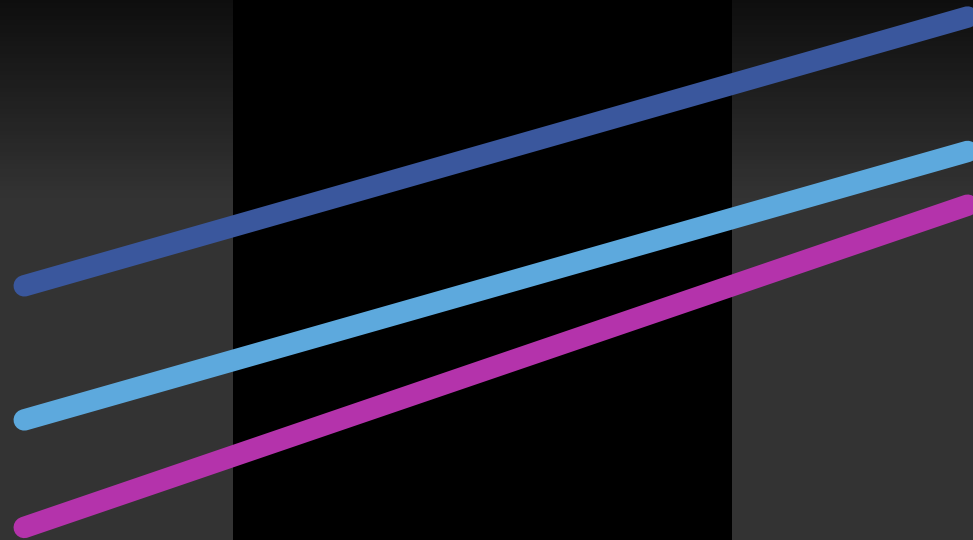
# NAVIGATING THE **DIGITAL TRUST** LABYRINTH

Digital  
Platforms



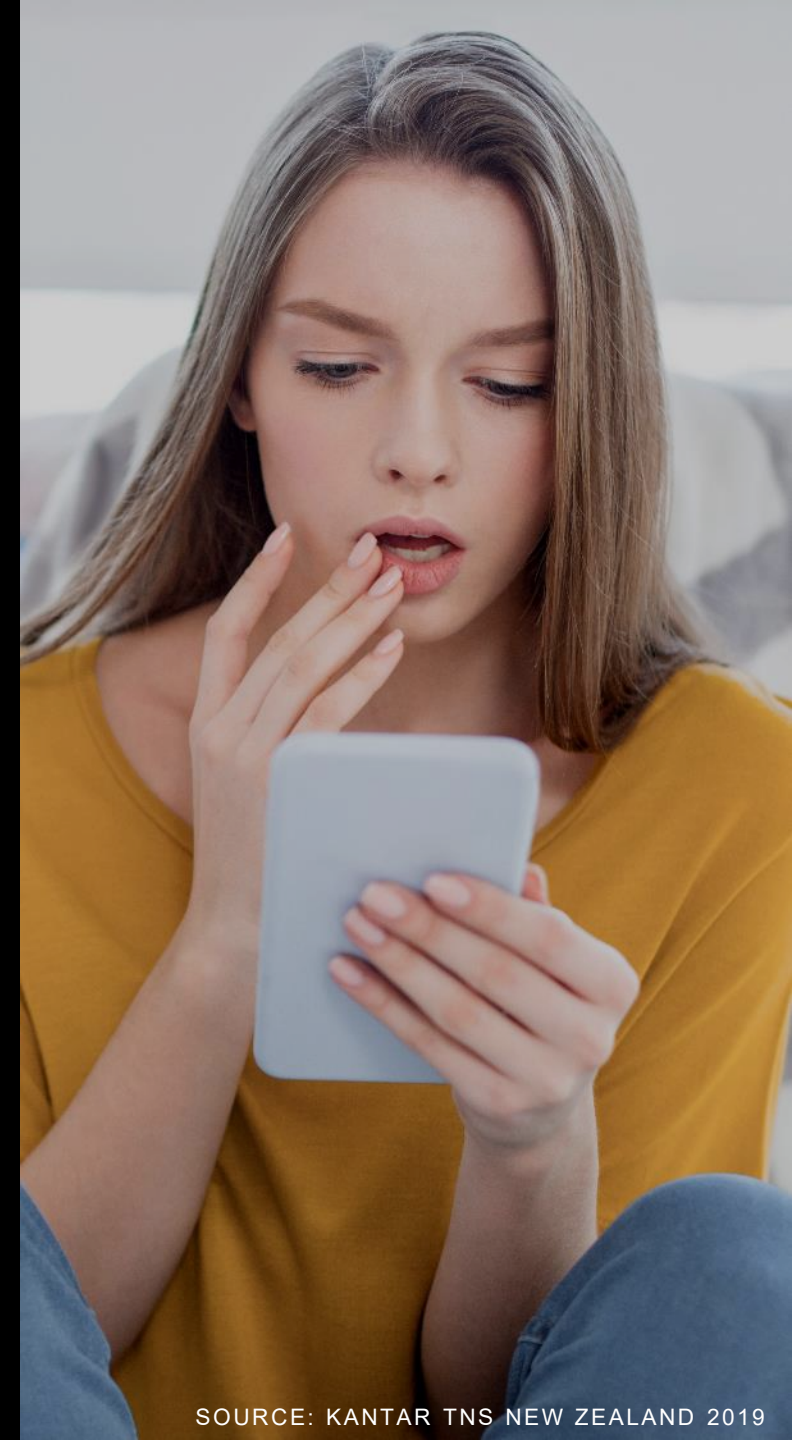
SOURCE: KANTAR TNS  
NEW ZEALAND 2019

# LEVEL OF DISTRUST



2014

2016





ONLY  
**19%**

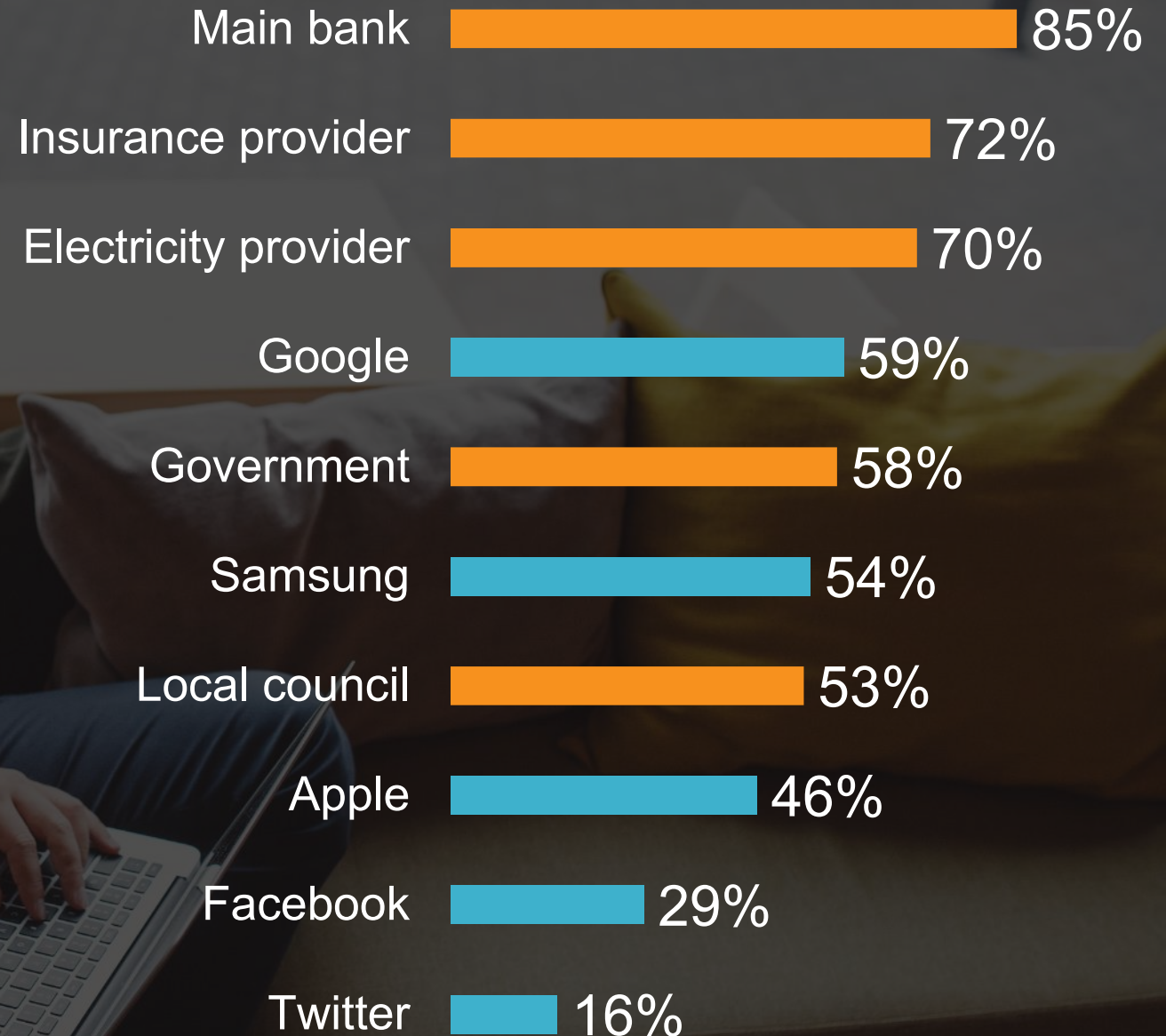
OF NEW ZEALANDERS  
TRUST THE  
INFORMATION THEY  
READ ONLINE



SOURCE: KANTAR TNS NEW ZEALAND 2019



## PROPORTION OF NEW ZEALAND CONSUMERS TRUSTING EACH BRAND





ADVERTISEMENT

Experience the South Island  
by train, ferry and coach

[Find out more](#)

## People still flock to Facebook, despite blunders and apologies

Levi Sumagaysay • 12:46, Jan 31 2019



Click to play full video



Facebook Soars After Earnings and Revenue Beat Expectations

Despite being plagued with scandals and calls for big changes, Facebook reported record fourth-quarter profit and said that its user base

## Facebook has been paying teens \$20 a month for access to all of their personal data

SECTIONS

WATCHLIST

MarketWatch

Special Report:



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## Opinion: Facebook had a bad year? Not judging by its bottom line

Published: Feb 2, 2019 10:36 a.m. ET



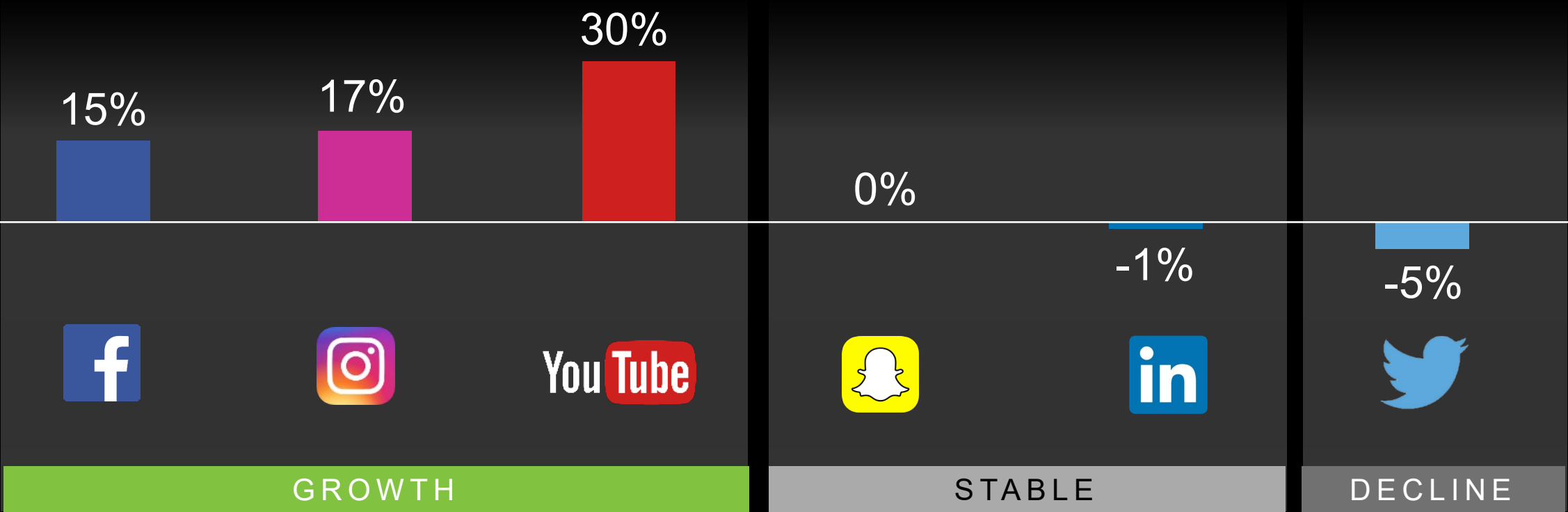
Aa

Facebook shows off record earnings at the end of a year when it grew profit and revenue by more than a third despite a series of controversies





NET GROWTH (USAGE LEVELS)





“

*I find that the information you submit to certain webpages is saved somehow and then you start getting advertising and promotional things which makes me think that it's no longer a secure place to work.*

”

“

*I don't really trust Facebook these days – there's a lot of scams out there and fake ads.*

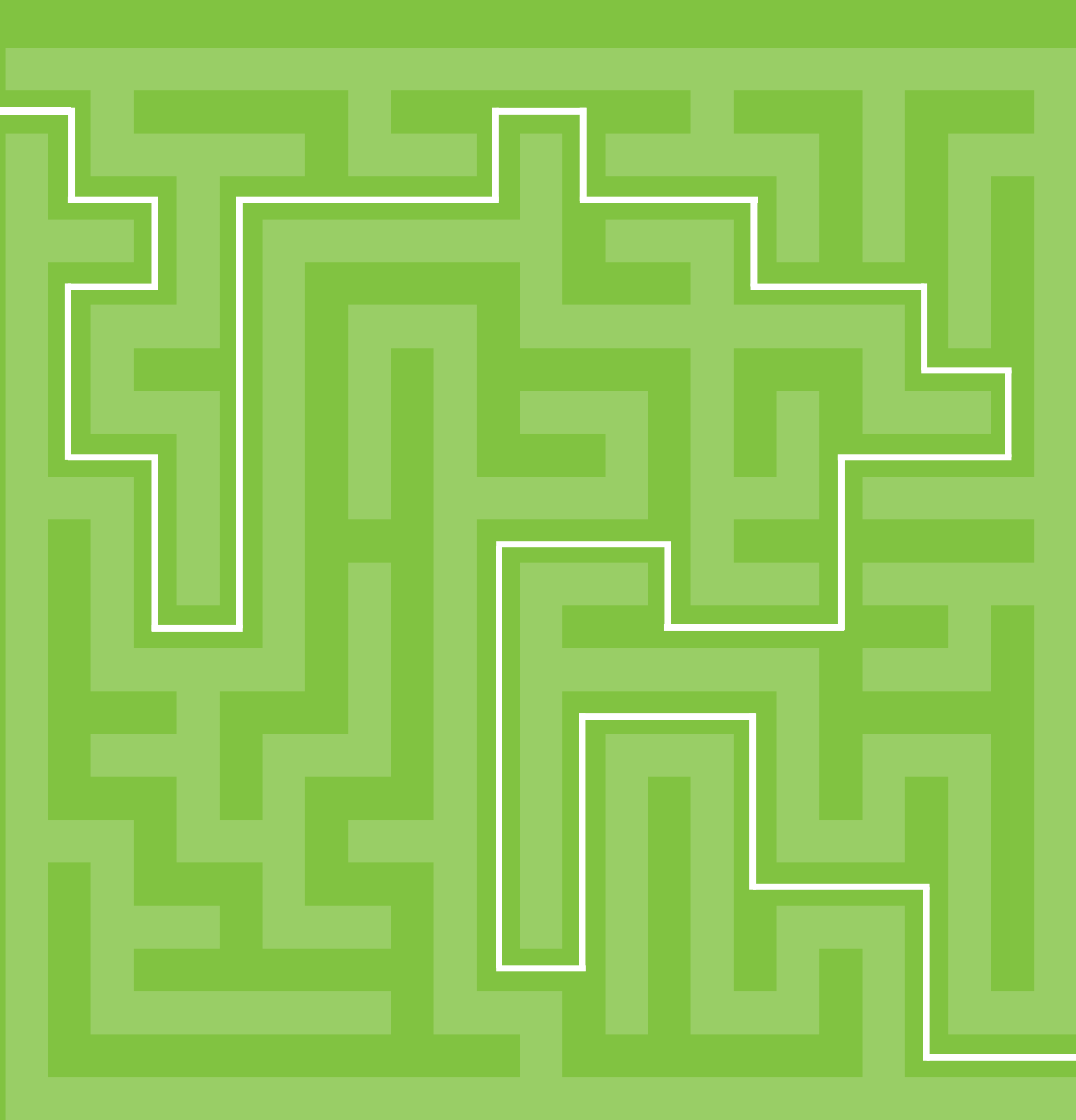
”

facebook



# NAVIGATING THE **DIGITAL TRUST** LABYRINTH

Personalisation



SOURCE: KANTAR TNS  
NEW ZEALAND 2019

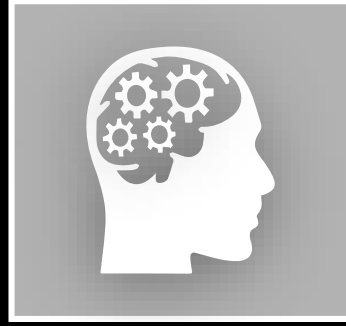


**WE ARE MORE  
SCEPTICAL AND  
SAVVY NOW**



SOURCE: KANTAR TNS NEW ZEALAND 2019

WE MAKE AROUND  
**35,000**  
DECISIONS EACH DAY...



...SO WE WANT  
BRANDS TO HELP  
US TO SIMPLIFY  
THE PROCESS





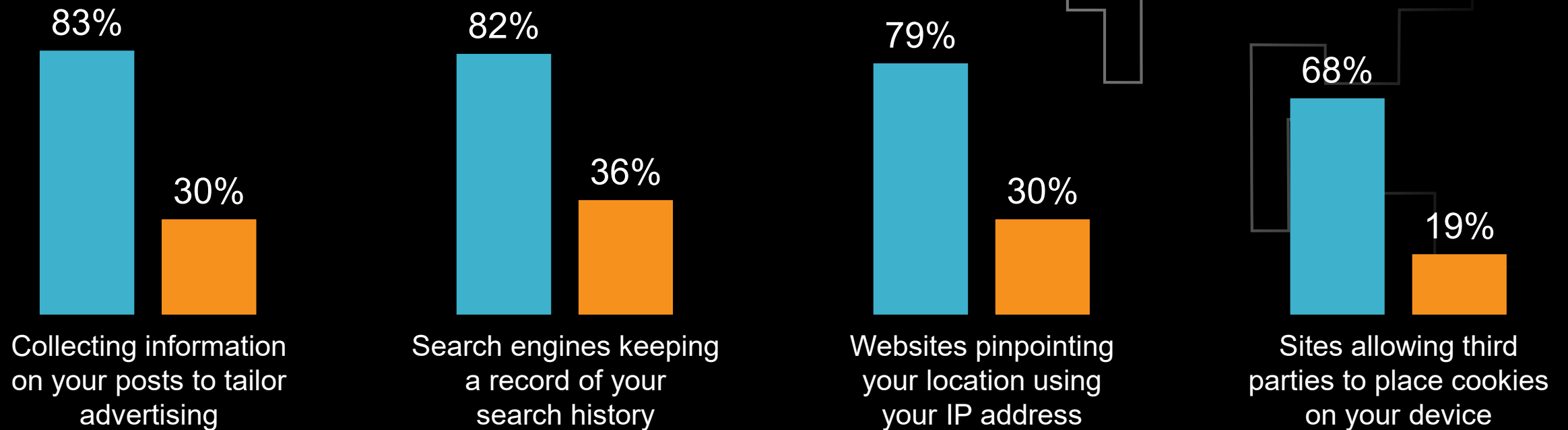
**41%**

of New Zealanders are looking to  
use the internet **more productively**

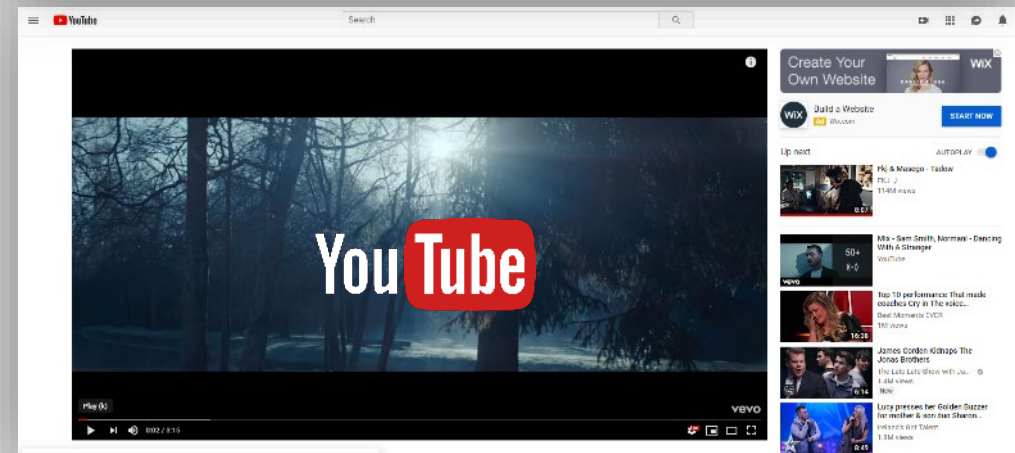
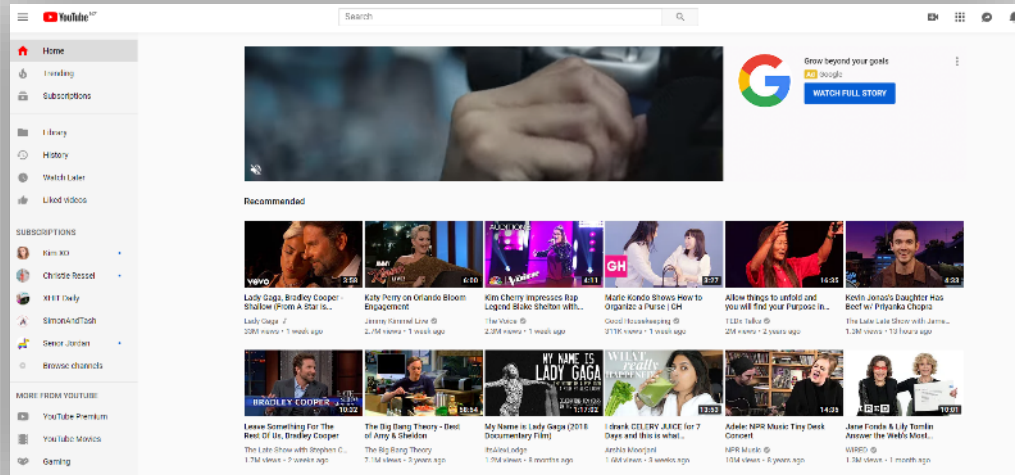


# AWARENESS AND ACCEPTANCE OF ONLINE ACTIVITY

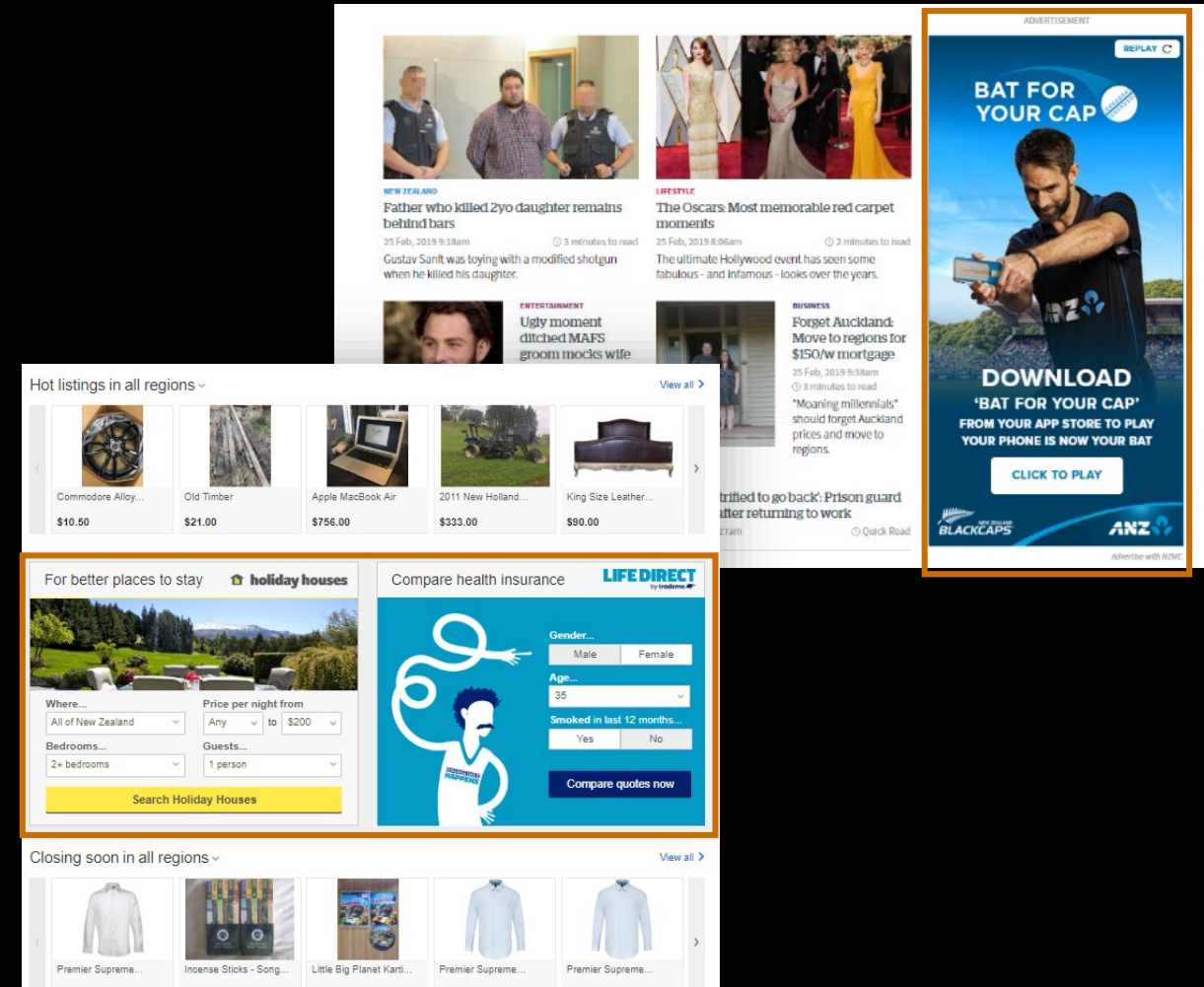
 Aware that this can happen  
 Happy for this to happen



# PERCEPTIONS OF IRRELEVANCE



# OVER-PERSONALISATION





**PERSONALISATION  
CAN BE MORE  
EFFECTIVE IN A  
SOFTER FORM**

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## QUESTIONS

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1

HOW MUCH WOULD YOU  
SELL YOUR OWN  
PERSONAL DATA FOR?

2

HOW DO YOUR  
CUSTOMERS PERCEIVE  
YOUR ONLINE PRESENCE?

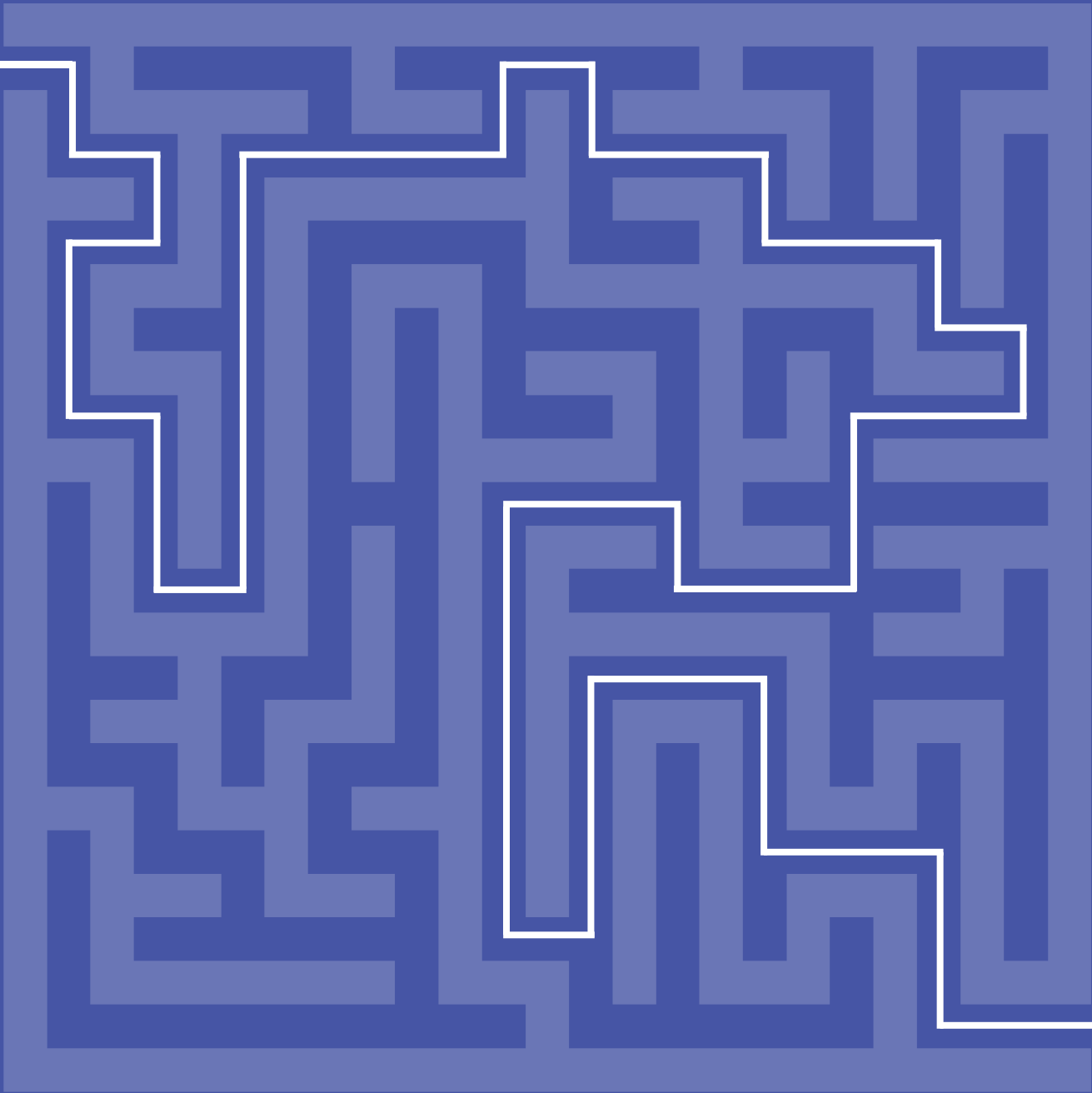
3

HOW MUCH IS TOO MUCH  
PERSONALISATION?



NAVIGATING THE  
DIGITAL TRUST  
LABYRINTH

Voice



SOURCE: KANTAR TNS  
NEW ZEALAND 2019

The image is a composite of two photographs. The left side shows a small, round, grey smart speaker with a white fabric grille, resting on a piece of light-colored wood. A white cable is visible behind it. The right side shows a black, cylindrical Amazon Echo smart speaker with a perforated grille, sitting on a light-colored wooden surface. The Amazon logo is visible at the bottom of the device. In the center, a white rectangular box contains the text 'VOICE ACTIVATED ASSISTANTS IN HOME' in bold, black, sans-serif capital letters.

# **VOICE ACTIVATED ASSISTANTS IN HOME**



# 1 in 6

in the US own a voice  
activated smart speaker

# 1 billion

voice searches per month

# 50%

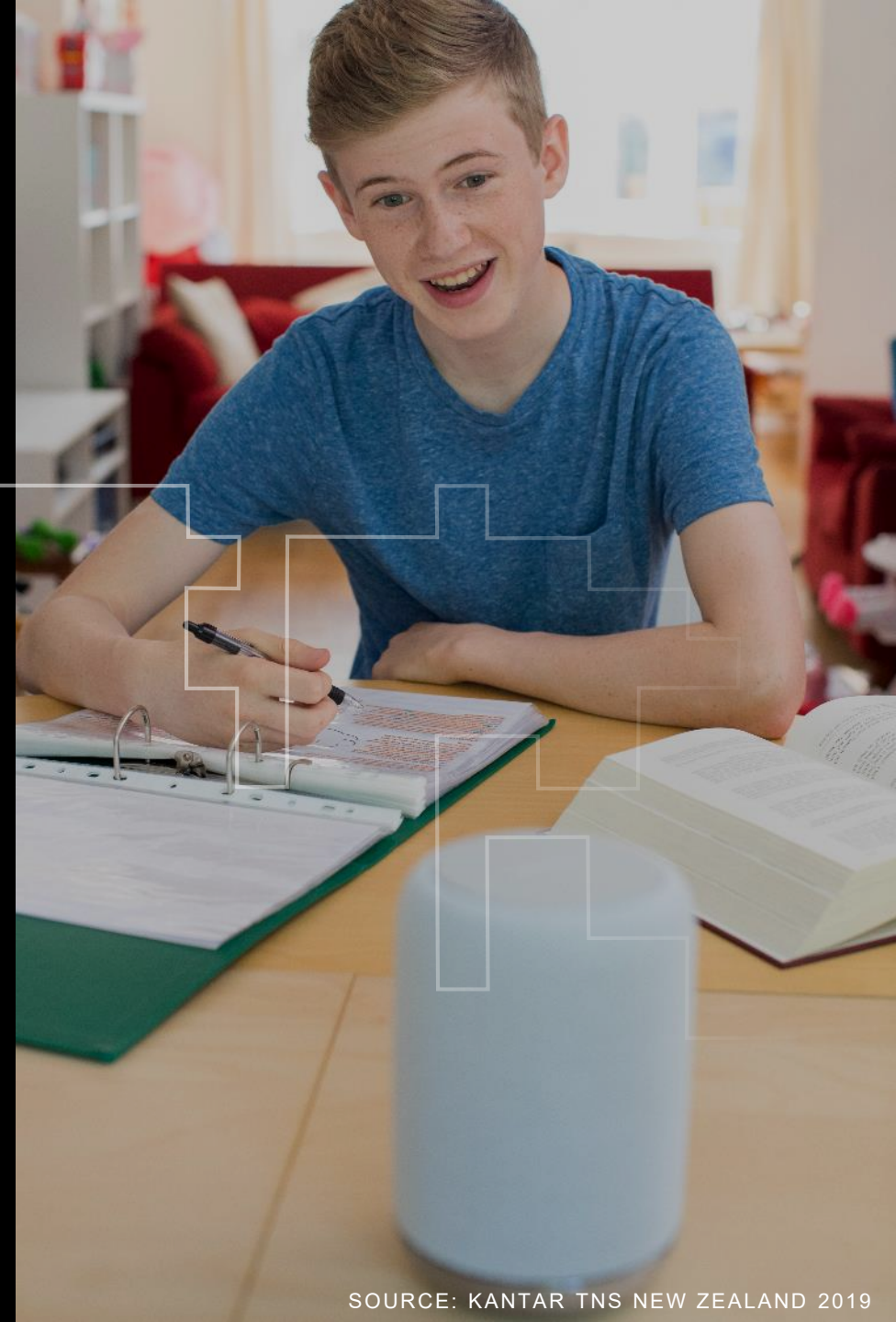
estimated proportion of  
searches carried out  
using voice by 2020



# VOICE TECHNOLOGY GROWTH IS RAPID

5%

of Australians over  
12 years old have  
a smart speaker  
in their home







# 43%

**NEW ZEALANDERS ARE  
INTERESTED IN USING VOICE  
ASSISTANTS IN THE FUTURE**

# 37%

**NEW ZEALANDERS ARE  
SPECIFICALLY INTERESTED  
IN PURCHASING ONE**





# 61%

**WILL WANT TO SEE IT  
WORKING FIRST BEFORE  
MAKING A PURCHASE**

# 28%

**ARE EXCITED  
BY A FUTURE  
INVOLVING VOICE  
TECHNOLOGY**





# VOICE TECH AND SECURITY





# PERSONALISATION & VOICE ASSISTANTS

Only **10%**

WOULD BE HAPPY FOR A  
VOICE-ACTIVATED ASSISTANT  
TO USE AI TO TELL THEM  
SOMETHING BASED ON  
**PREVIOUS ACTIONS**



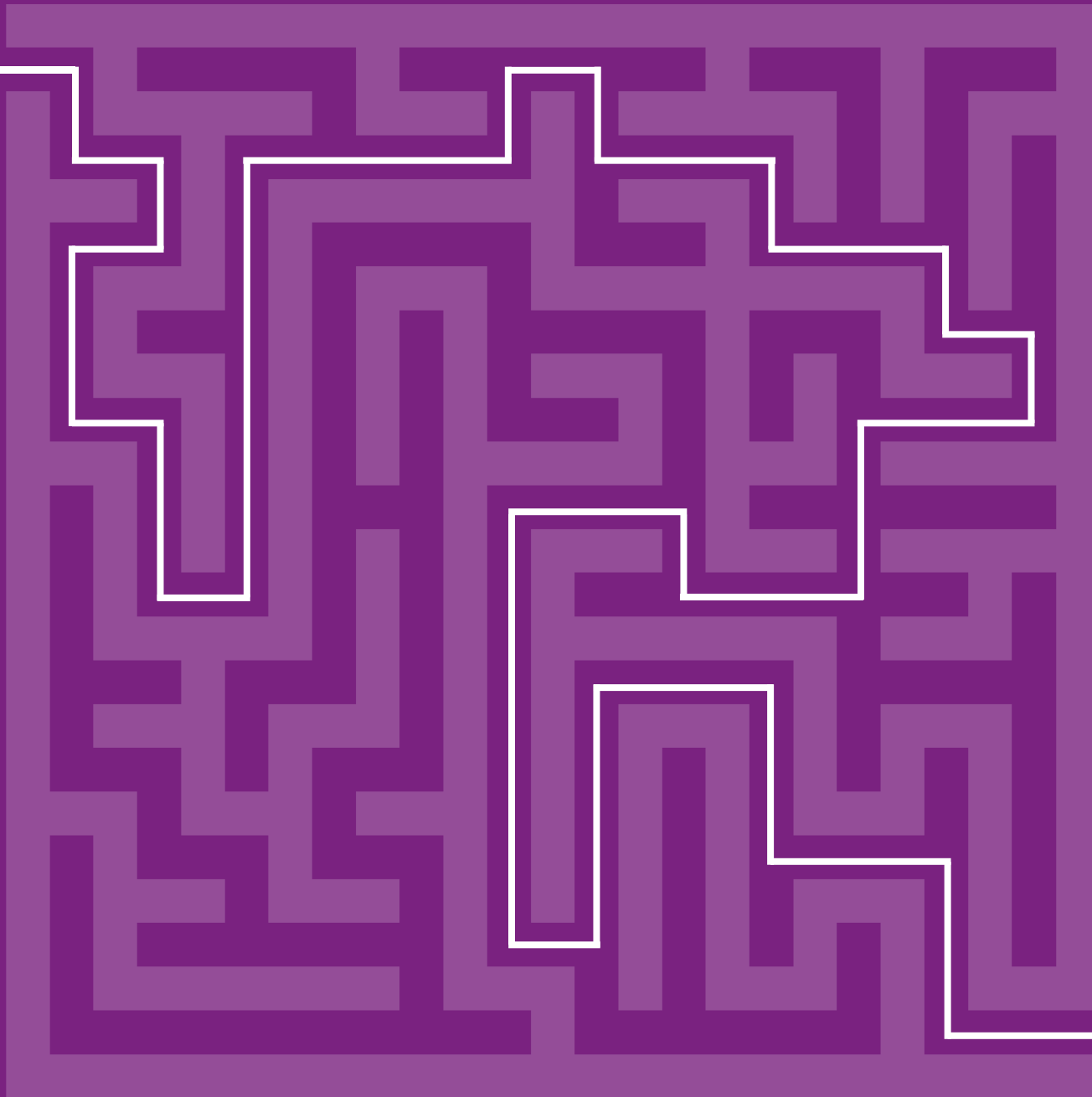
A young boy with light brown hair, wearing a green and black t-shirt, is leaning over a white table, pointing at a black smartphone. An older man with glasses, wearing a dark blue sweater, is standing behind him, looking at the phone with a smile. The phone is standing upright on the table, and a bright blue light is visible at the bottom of the screen. The background shows a window with a view of greenery and a staircase with a white railing.

**WHAT  
DOES THIS  
MEAN?**











# NAVIGATING THE **DIGITAL TRUST** LABYRINTH

Summing up



SOURCE: KANTAR TNS  
NEW ZEALAND 2019

# Navigating the Digital Labyrinth – data available

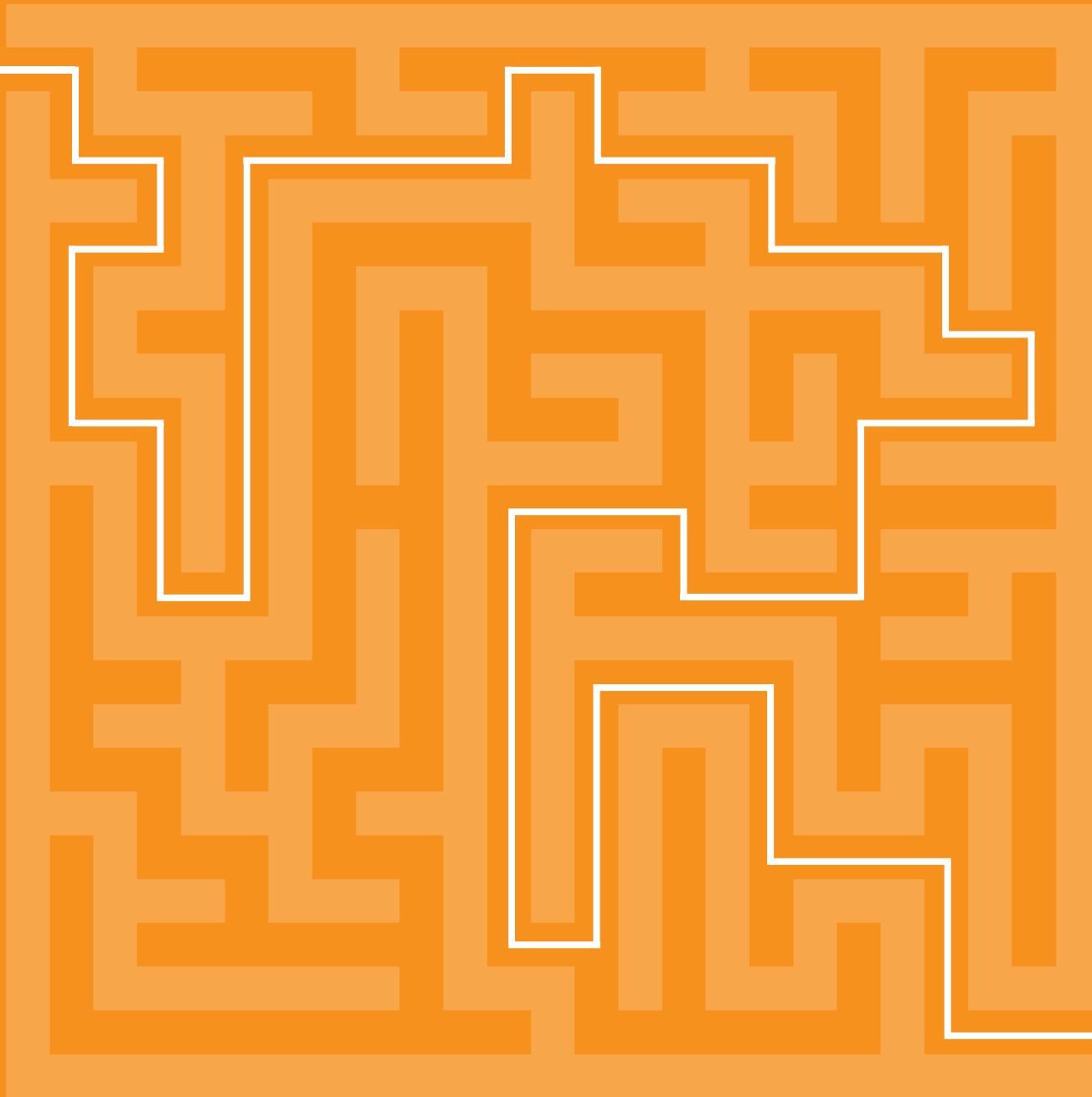
 <b>GENERAL ATTITUDES AND BEHAVIOURS</b> <ul style="list-style-type: none"><li>▪ Brand choice</li><li>▪ Lifestyle</li><li>▪ Environmentalism</li><li>▪ Shopping</li><li>▪ Finances</li></ul>	 <b>INTERNET USE</b> <ul style="list-style-type: none"><li>▪ Connectedness</li><li>▪ Early adoption</li><li>▪ Devices used</li><li>▪ Social media use</li><li>▪ Activities undertaken</li></ul>	 <b>TRUST IN BRANDS</b> <ul style="list-style-type: none"><li>▪ Current trust in brands</li><li>▪ Change over time</li></ul>	 <b>DIGITAL SECURITY - BEHAVIOUR AND ATTITUDES</b> <ul style="list-style-type: none"><li>▪ Security consciousness</li><li>▪ Knowledge</li><li>▪ Secure actions undertaken</li><li>▪ Barriers to uptake</li><li>▪ Attitude to data mining</li></ul>
 <b>VOICE TECHNOLOGY</b> <ul style="list-style-type: none"><li>▪ Previous experience with voice</li><li>▪ Awareness of services</li><li>▪ Interest in future use</li><li>▪ Barriers to uptake</li><li>▪ Anticipated reasons for use</li></ul>	 <b>E-TRAVEL</b> <ul style="list-style-type: none"><li>▪ Ownership of electric vehicles</li><li>▪ Barriers to uptake</li><li>▪ Reaction to e-scooters</li><li>▪ Use of app-based services</li><li>▪ Interest in drone delivery</li></ul>	 <b>THE INTERNET AND HEALTH</b> <ul style="list-style-type: none"><li>▪ Health goals</li><li>▪ Use of health related apps</li><li>▪ Effectiveness of apps</li><li>▪ Impact of screentime on sleep</li></ul>	 <b>ATTITUDES TO ONLINE ADVERTISING</b> <ul style="list-style-type: none"><li>▪ Most enjoyable formats</li><li>▪ Most impactful formats</li><li>▪ Use of ad blocking software</li><li>▪ Connecting with brands online</li><li>▪ Following influencers online</li></ul>

**Plus: The ability to look at the results for users of a range of specific brands across multiple sectors**



# NAVIGATING THE **DIGITAL TRUST** LABYRINTH

Questions



SOURCE: KANTAR TNS  
NEW ZEALAND 2019

Thank you!

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MARCH 2019



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