

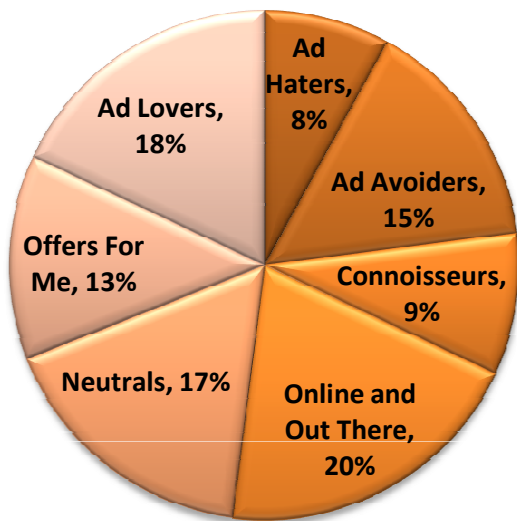
WHAT DO CONSUMERS THINK OF ADVERTISING?



ANZA & Nielsen investigate Kiwi consumer attitudes towards advertising

Nielsen Media investigated Consumer Segmentation in New Zealand to gain insight into the New Zealand advertising audience. The good news is that New Zealanders are clearly tolerant of advertising, with 18% of our population absolute lovers of all forms of advertising.

CONSUMER SEGMENTATION SUMMARY



Ad Haters	8%
Ad Avoiders	15%
Connoisseurs	9%
Online and Out There	20%
Neutrals	17%
Offers For Me	13%
Ad Lovers	18%

	TOLERATORS						
	AD HATERS	AD AVOIDERS	CONNOISSEURS	ONLINE AND OUT THERE	NEUTRALS	OFFERS FOR ME	AD LOVERS
HOW MANY	272,000	534,000	333,000	710,000	589,000	458,000	629,000
AGE	47% 50+	58% 50+	52% 25-49	54% under 25	74% 25-69	85% 25+	22% 15-24
GENDER	58% Male	54% Male	62% Male	47% Male	54% Male	30% Male	44% Male
AVERAGE INCOME	\$72,159	\$66,324	\$94,321	\$85,078	\$72,748	\$67,165	\$77,687

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AD HATERS (8% of the population)

Ad Haters are somewhat disgruntled with their lives, tending to work just to pay the bills rather than be fulfilled. The majority of ad haters are male and there is also an older age skew.

Ad Haters have little interest in new brands and are unlikely to decide what to buy from catalogues and brochures. They are a challenge marketers to reach. On a more positive note they are also the least likely to switch brands.

AD AVOIDERS (15% of the population)

Ad Avoiders hold strong traditional values and a belief that things are changing faster than they would like – especially technology. One in three ad avoiders are aged 50 – 69 and one in four owns their home mortgage free. There is a slight male skew for this segment. Ad Avoiders media usage is focused on their daily newspaper and television. They hold many traditional values. One in five Ad Avoiders live in provincial urban areas.

CONNOISSEURS (9% of the population)

Connoisseurs live up to their name and value quality ahead of price. This male skewed segment has the highest household income of all seven segments (\$94K). They like dining out and many say they indulge in treats and luxuries. This segment is generally tolerant of advertising, but not particularly enthusiastic. The Connoisseurs sit in the Tolerator set which could either become Ad Haters or Ad Lovers – handle with care, provide plenty of good information and treat them with respect.

ONLINE AND OUT THERE (20% of the population)

Young, online and mobile. The youngest segment, the Online and Out There individual is most likely to notice and remember outdoor advertising and engage online. The gender balance is fairly even. Some associate higher prices with better quality, indulge in treats and luxuries and can be tempted by appealing packaging. Another Tolerator set, this group could also move up or down the continuum.

NEUTRALS (17% of the population)

Almost half don't think New Zealand is as good as it used to be. There is a slight male skew to this segment. Three quarters of them are aged 25 – 69. Very few Neutrals say they often buy new brands./ They show almost no interest in fashion or spending lots of money on clothes. Many will try to buy New Zealand made products as often as possible. Similar numbers prefer to buy environmentally friendly products. These are people from across the spectrum whose common link is relative neutrality towards media and advertising. This Tolerator group absorb the most advertising and would engage with pro-New Zealand products or messages.

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OFFERS FOR ME (13% of the population)

The Offers for Me segment are most positive about direct mail. One to one communications is often where they choose their advertising engagement. Many say they often use coupons for discounts. This may be influenced by their relatively low household income. They like offers they value them as a consumer. The Offers for Me segment are less technologically engaged than some other segments, this is typical of many segments with an older skew. This group is open to trial and will value messages they are relevant.

AD LOVERS (18% of the population)

Ad Lovers are keen shoppers, twice as likely to buy a new brand. As their name suggests the Ad Lovers are positive about advertising and media as a whole. The Ad Lovers were positive about all variables included in the segmentation analysis. Many see themselves as loyal to their favourite brands. However they are more than twice as likely as all people to say they often buy new brands. Most Ad Lovers freely admit they enjoy shopping, quality is important to them. Everyone loves an Ad Lover and they're open to most forms of advertising – again to do well with this group, relevancy is still important.

		TOTAL POPULATION	AD HATERS (8%)	AD AVOIDERS (15%)	CONNOISSEURS (9%)	ONLINE AND OUT THERE (20%)	NEUTRALS (17%)	OFFERS FOR ME (13%)	AD LOVERS (18%)
OUTDOOR	Vert %	40	25	20	49	47	37	37	56
TV	Vert %	40	38	44	32	39	37	44	43
DAILY PAPER	Vert %	32	37	36	36	23	34	39	31
MAGAZINES	Vert %	42	34	32	43	43	43	47	49
RADIO	Vert %	40	33	38	40	35	41	44	46
INTERNET	Vert %	40	34	30	53	48	38	31	45
CINEMA	Vert %	10	9	7	12	15	9	7	10