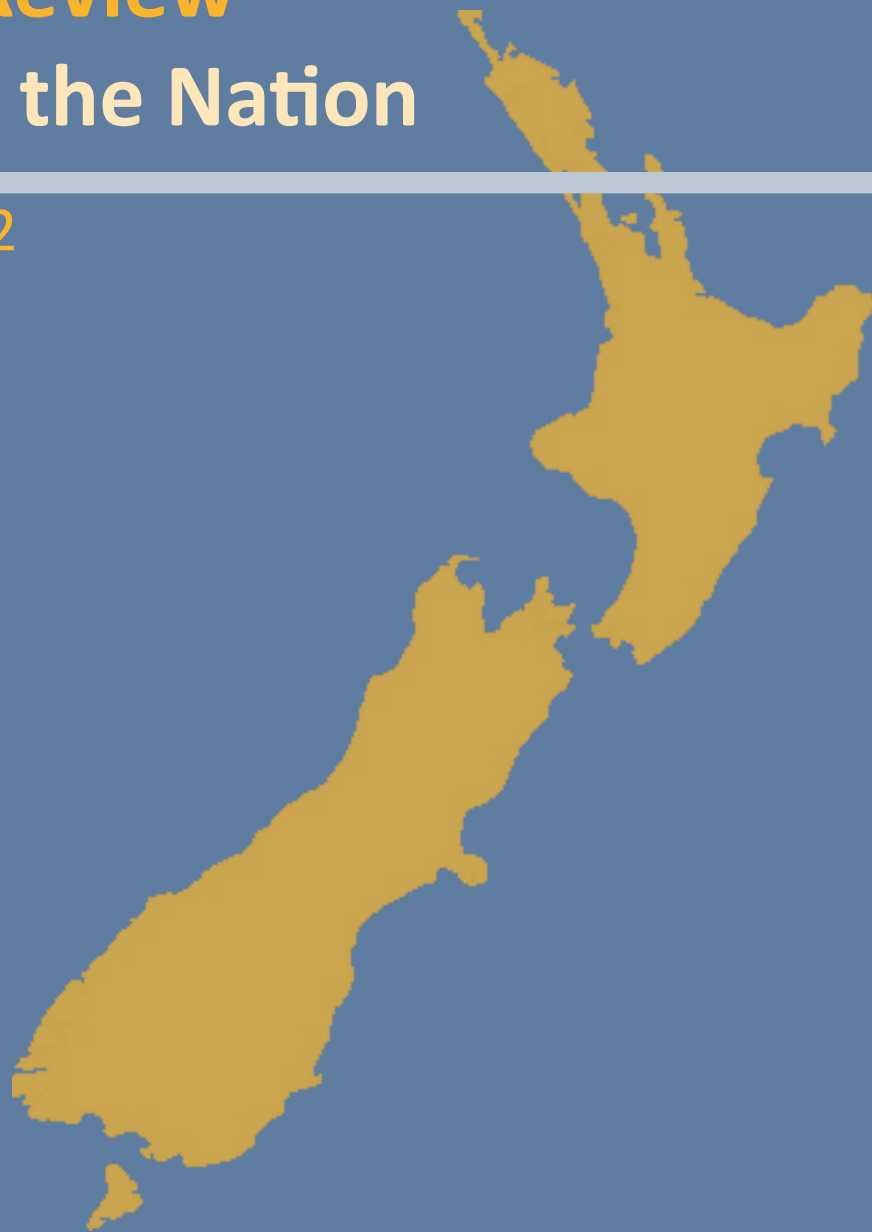


Issue No: 9

Annual Review

Mood of the Nation

January 2012



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UMR Research have been monitoring New Zealand's mood for over 20 years. The UMR nationwide omnibus survey started in 1991, and has been consistently updated ever since then every four weeks (and every fortnight since 2005). As well as looking at where things are at the moment, this year's special edition of Mood of the Nation looks at how things have changed over the last 20 years.

This report is based on findings from UMR's Omnibus surveys carried out between 1991 and 2011. The UMR Omnibus is a nationwide telephone survey using a sample size of 750 New Zealanders aged 18 or over. The margin of error for a 50% figure at the 95% confidence interval is +/- 3.6%. The Online Omnibus is a nationally representative online survey using a sample size of 1000 New Zealanders aged 18 or over. The margin of error for a 50% figure at the 95% confidence interval is +/- 3.1%.

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the mood



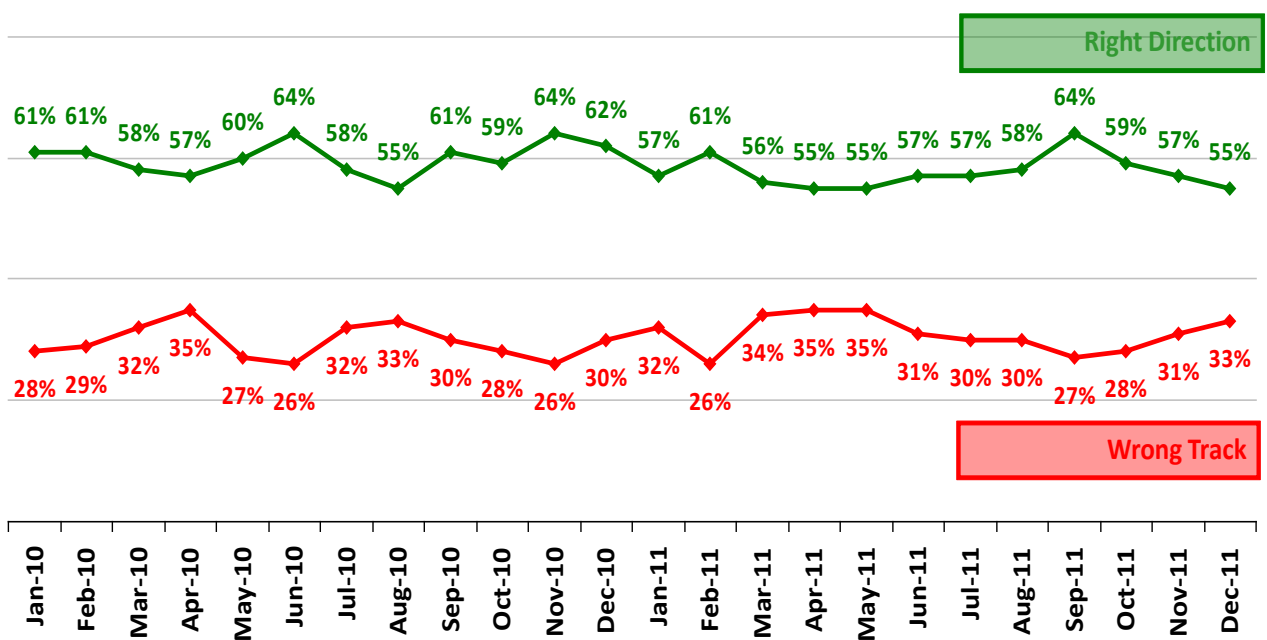
Every UMR omnibus has included a standard mood question – asking New Zealanders whether they feel things in New Zealand are generally heading in the right direction or if they are off on the wrong track. Although 2011’s mood was above the historical average, it was substantially down on the preceding two years, and would have been down further if it were not for an improvement around the time of the Rugby World Cup.

The proportion of New Zealanders who believed that things were heading in the right direction fluctuated between 55% and 64%.

The number believing New Zealand was on the right track rose 8% in the first poll after the start of the Rugby World Cup, held that peak throughout the RWC period, before dropping back down to where it started after the RWC finished.

The Mood

Generally speaking are things in New Zealand heading in the right direction or are they off on the wrong track?



Base: All, n=750, UMR Telephone Omnibus

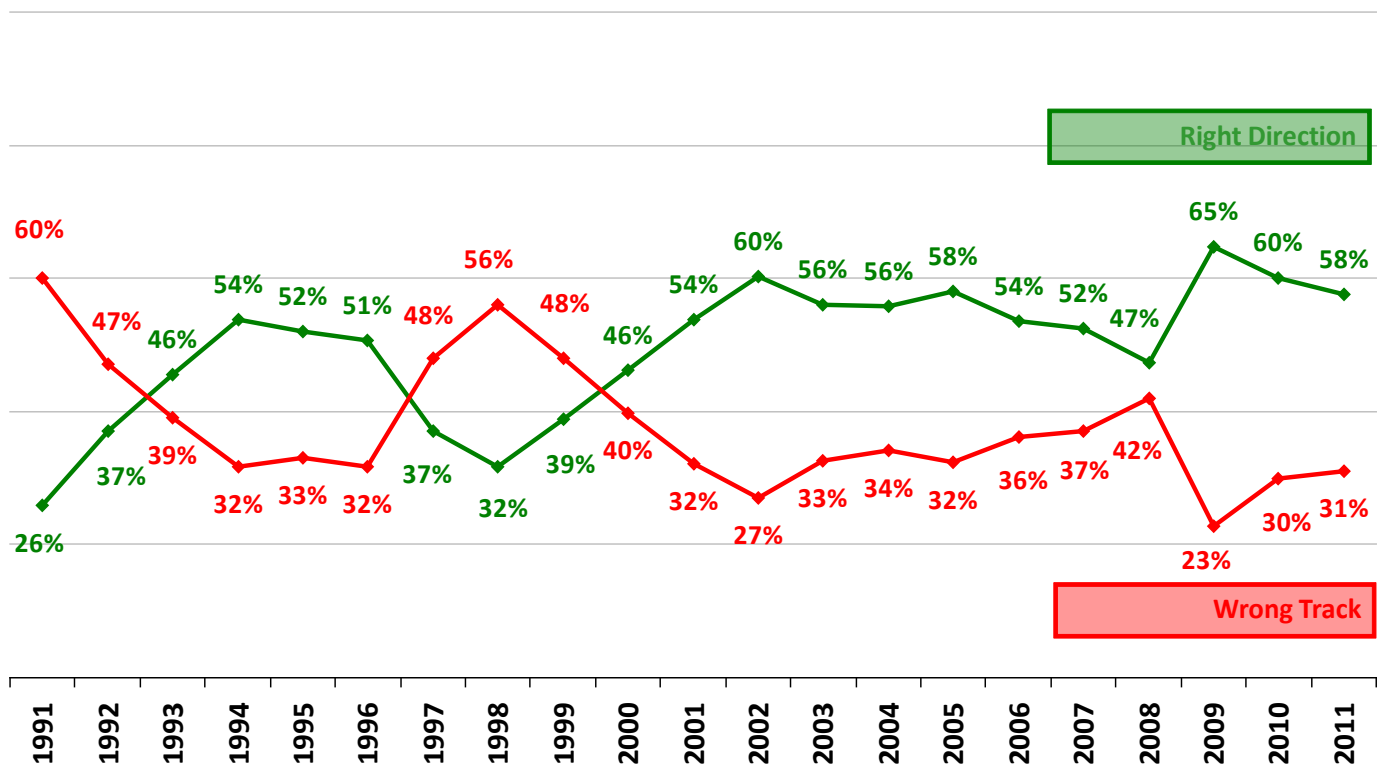
average annual mood

The annual average was 58%. This is down on the 2009 (65%) and 2010 (60%) results, although it is still well ahead of the average for 2008 (47%).

The most positive year of the last two decades was 2009, while the most negative was 1991 (when the average number believing New Zealand was heading in the right direction was 26%).

Average Annual Mood

Generally speaking are things in New Zealand heading in the right direction or are they off on the wrong track?





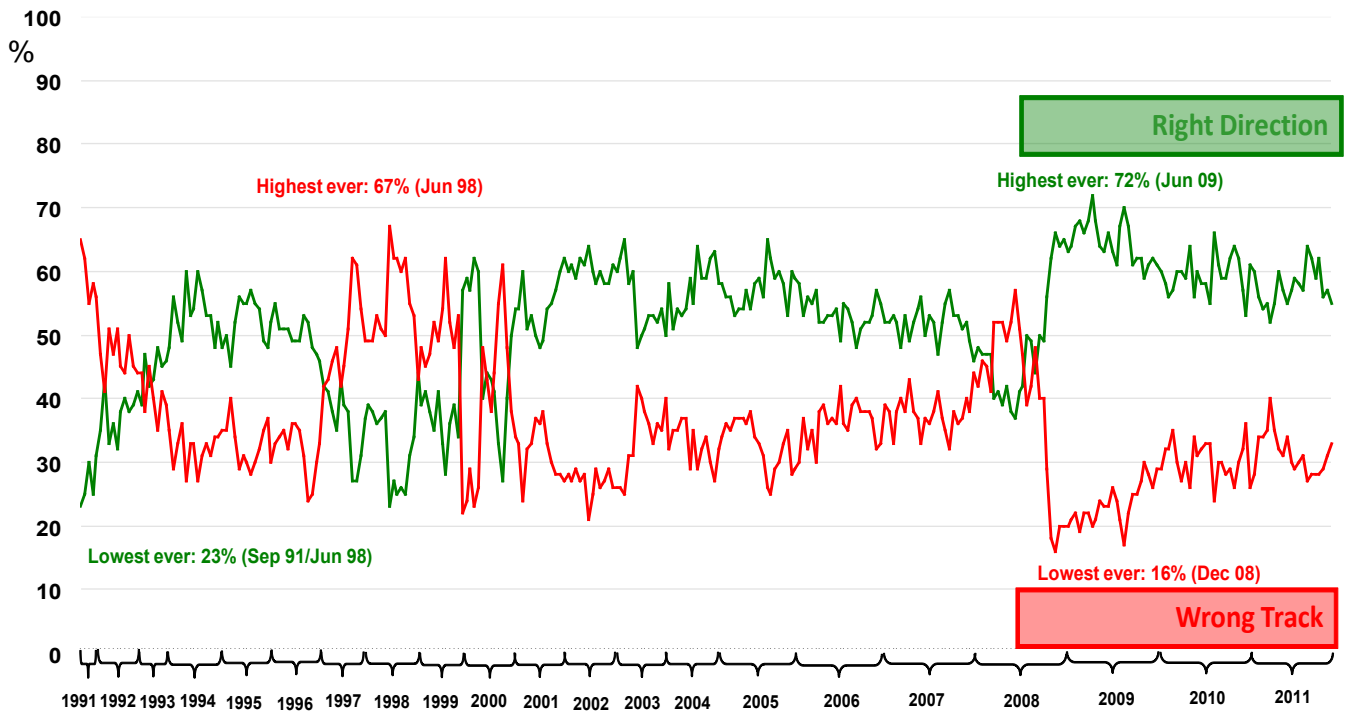
the mood - 20 year tracking

The highest proportion of New Zealanders believing that the country was headed in the right direction is 72% (June 2009), while the lowest is 23% (September 1991 and June 1998).

There is evidence of a 'summer boost', with mood improving in the first poll of the year on fourteen out of twenty occasions. On the other hand, four of the six occasions when the mood has gone down in the first poll of the year have happened since 2006.

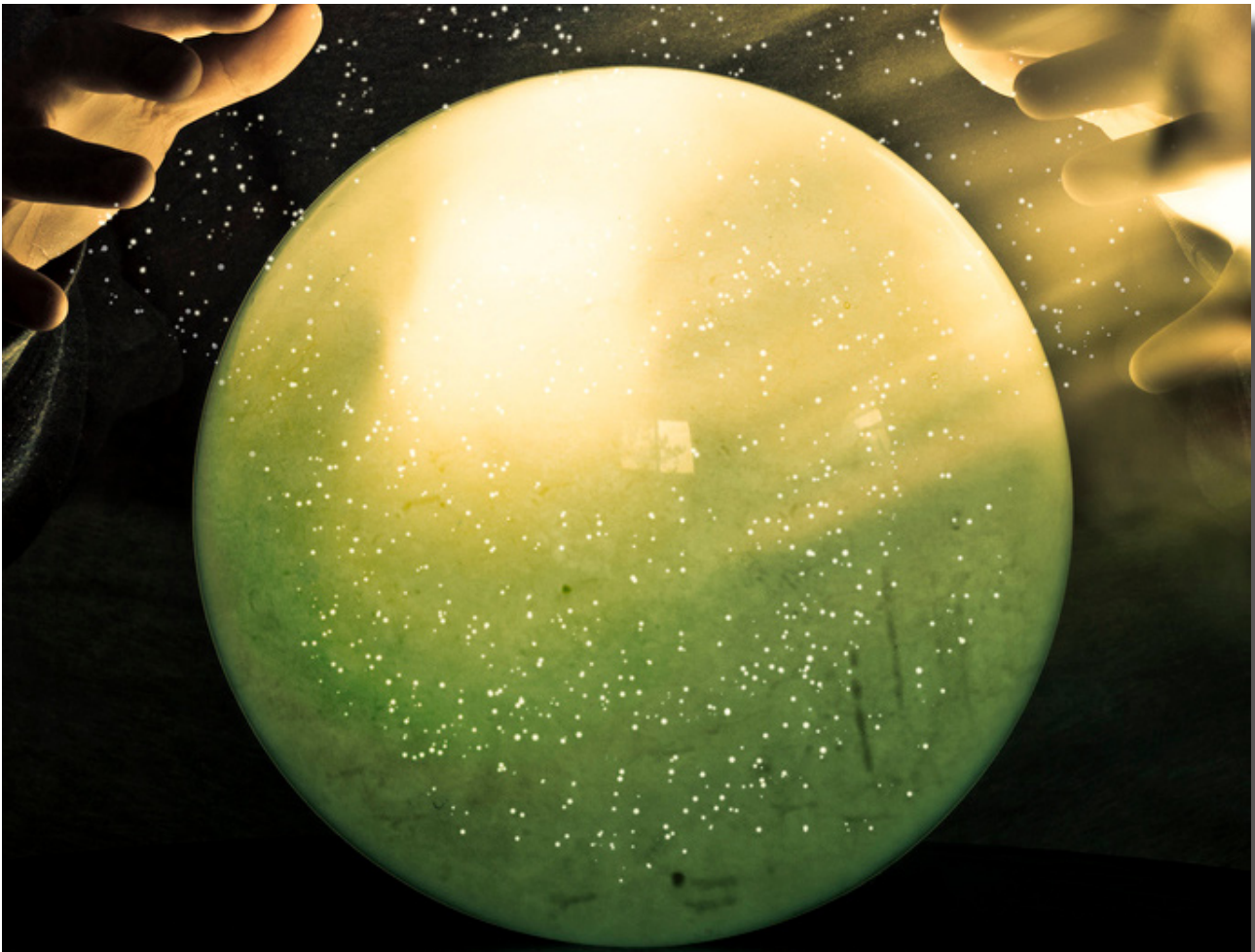
The Mood – 20 year tracking

Generally speaking are things in New Zealand heading in the right direction or are they off on the wrong track?



Base: All, n=750, UMR Telephone Omnibus

expectations



expectations for the year ahead

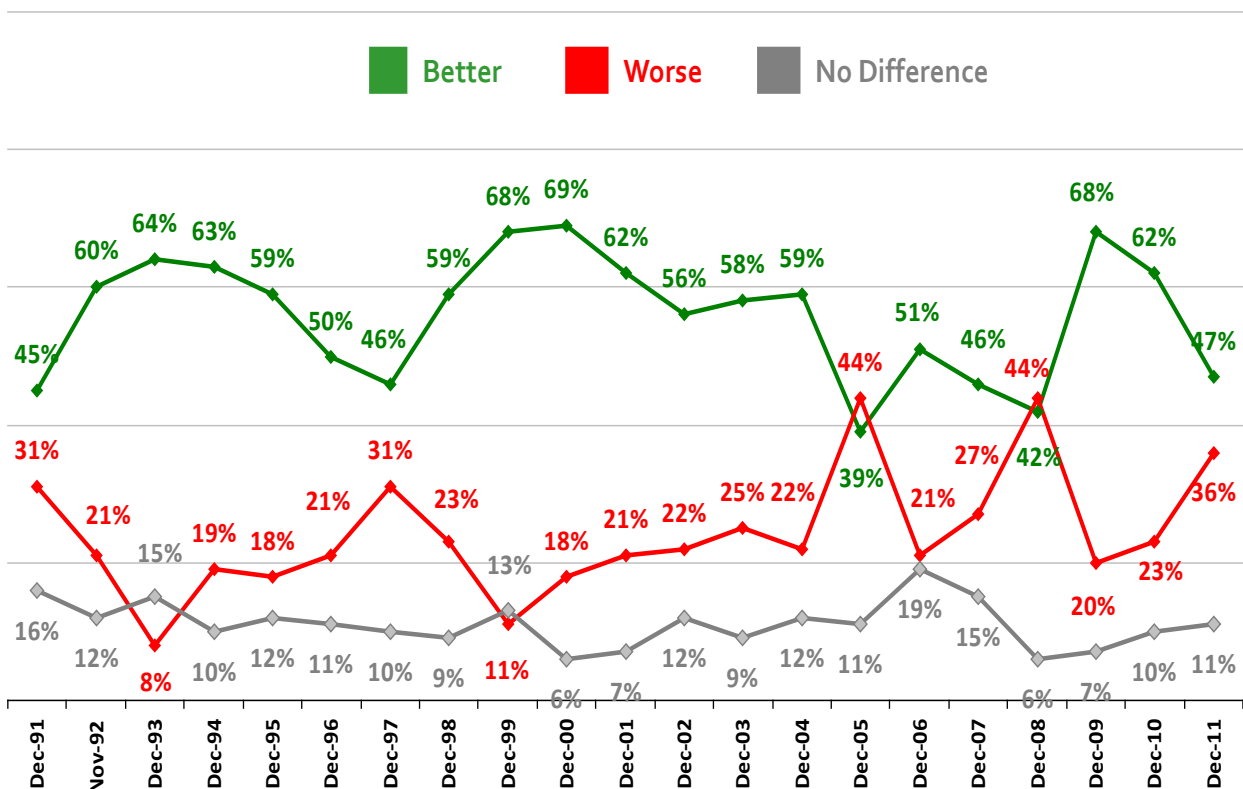
The final survey of the year also asks people whether or not they believe the year ahead will be better for New Zealand than the current year. This is just as much a measure about how people feel about the year that has just been as about their hopes for the future – while it generally follows the mood, some years when the mood has been negative New Zealanders have been relatively likely to expect the following year to be better (perhaps ‘things are so bad they must get better’).

47% of New Zealanders think that 2012 will be better for New Zealand than 2011, a marked deterioration compared with the 2009 (68%) and 2010 (62%) results.

Optimists have exceeded pessimists on this question on 18 of the 20 years. The two exceptions are 2005 and 2008.

Expectations For The Year Ahead

Overall do you think that 2011 will be a better or worse year for New Zealand than 2010?





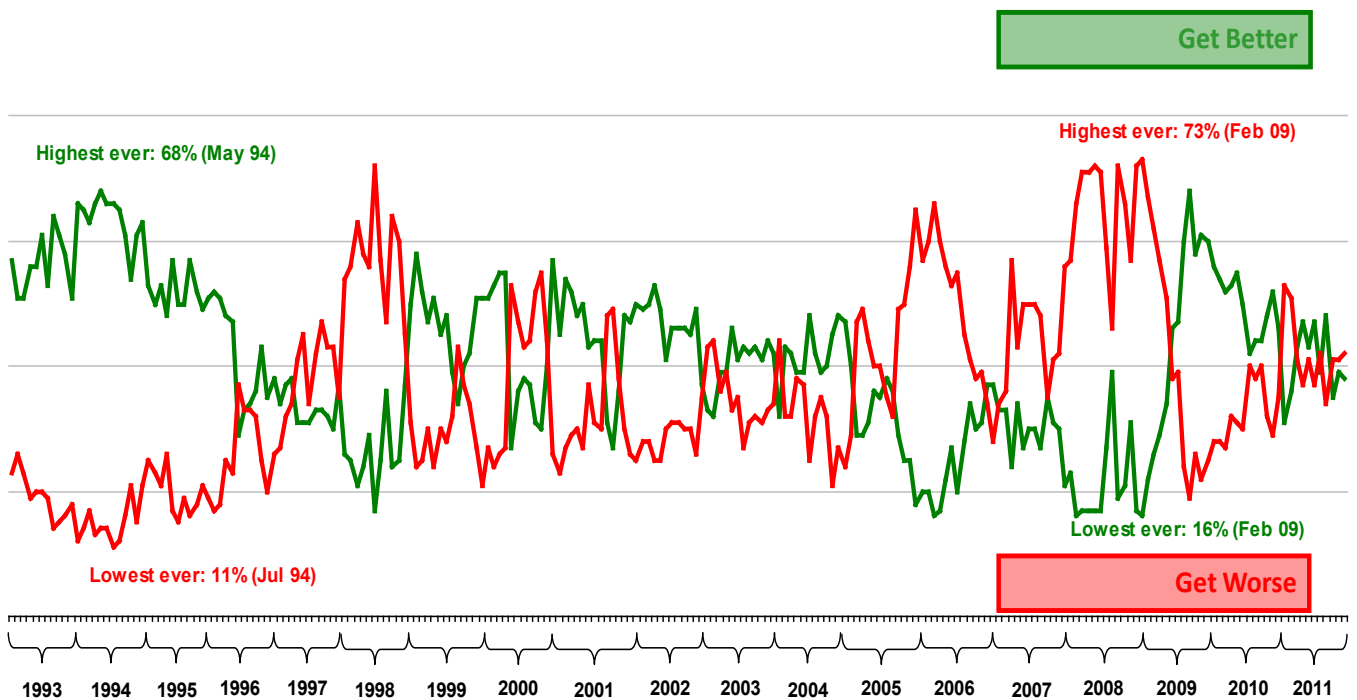
expectations for the economy

UMR began monitoring economic expectations in 1993. After a largely optimistic year in 2010, economic expectations slipped into negative territory throughout most of 2011.

The most optimistic year since tracking began was 1994, and the most pessimistic was not surprisingly 2008.

Expectations For The Economy – Long term tracking

Do you expect the following to get better or worse in the year ahead? - *The Economy* -



Base: All, n=750, UMR Telephone Omnibus

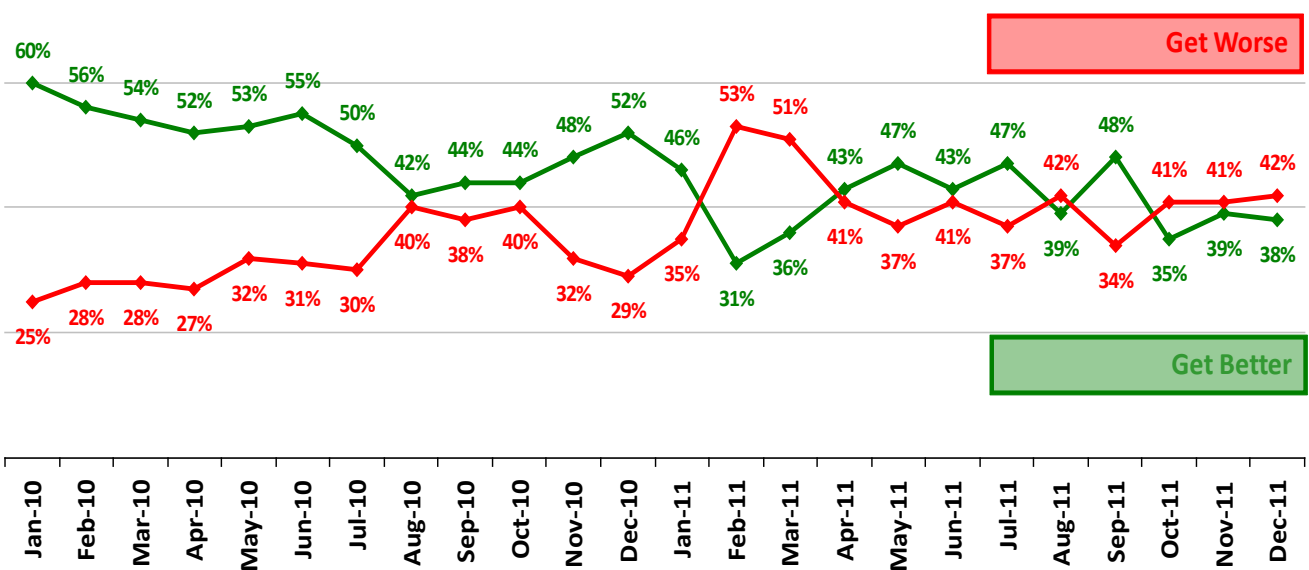
expectations for the economy

The slip into net-negative territory relates to both the global economic situation and the Christchurch earthquake. The first survey after the February quake showed a big negative movement, but optimists outnumbered pessimists from April to July. The ongoing European crisis is likely to be reflected in the last three surveys of the year, when expectations slipped back into net negative territory.

In December 2011, 38% thought that the economy would get better in the year ahead and 42% believed it would get worse.

Expectations For The Economy

Do you expect the following to get better or worse in the year ahead? - *The Economy* -



Base: All, n=750, UMR Telephone Omnibus



expectations for living standards

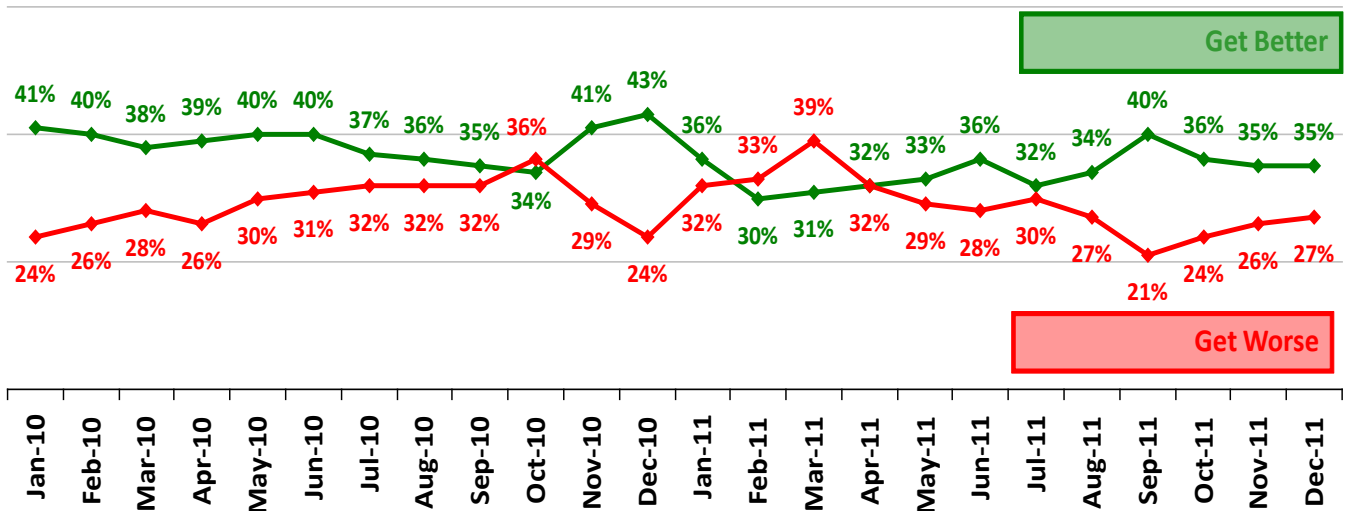
Alongside economic expectations, UMR have also been measuring standard of living expectations since 1993. Although economic expectations are now in negative territory, New Zealanders who expect their standard of living to improve in the year ahead outnumber those who think that their standard of living will get worse.

In December 2011, 35% thought that their standard of living would improve in the year ahead and 27% believe it will get worse.

Pessimists seldom outnumber optimists on this measure, although this did happen once in 2011 (in March).

Expectations For Living Standards

Do you expect the following to get better or worse in the year ahead? - You or your family's standard of living -



Base: All, n=750, UMR Telephone Omnibus



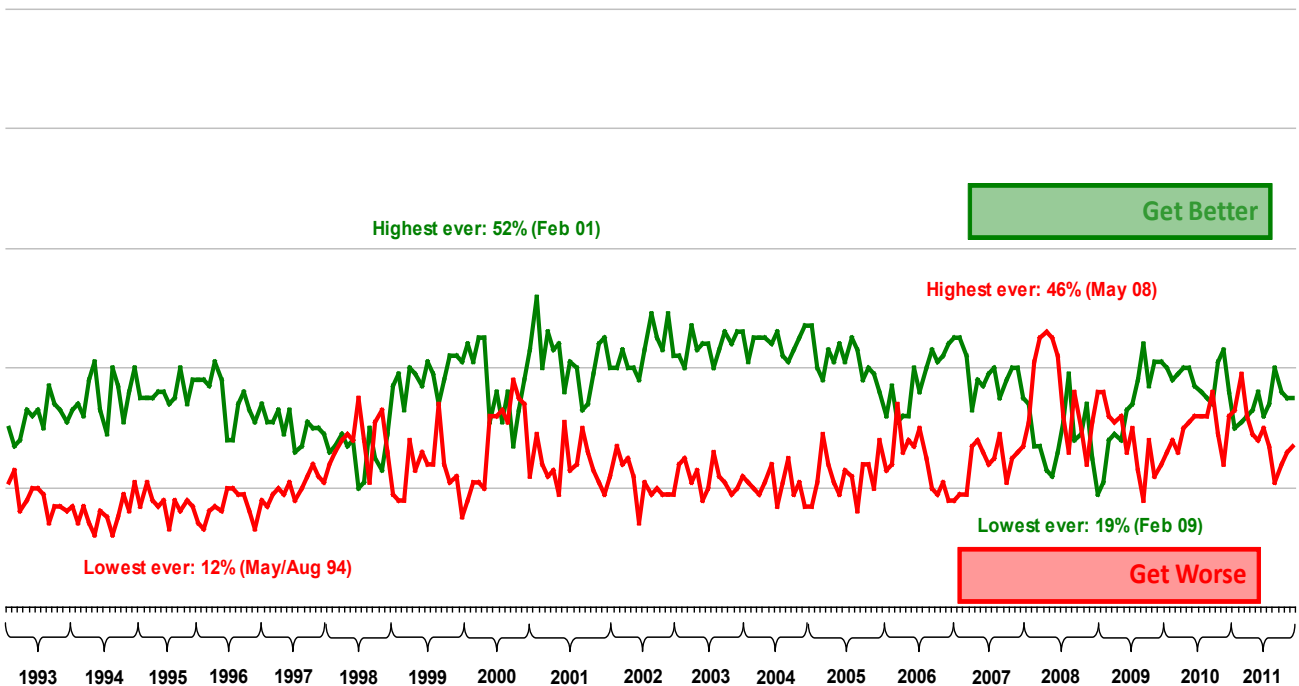
expectations for living standards

The only year when the annual average has pessimists outnumbering optimists was 2008 (where 30% on average thought that their standard of living would get better and 35% believed it would get worse).

The most optimistic year was 2004, and the five highest results were recorded in consecutive years between 2001 and 2005.

Expectations For Living Standards – Long term tracking

Do you expect the following to get better or worse in the year ahead? - *You or your family's standard of living*



Base: All, n=750, UMR Telephone Omnibus

expectations for unemployment

We have been monitoring unemployment expectations since 1995.

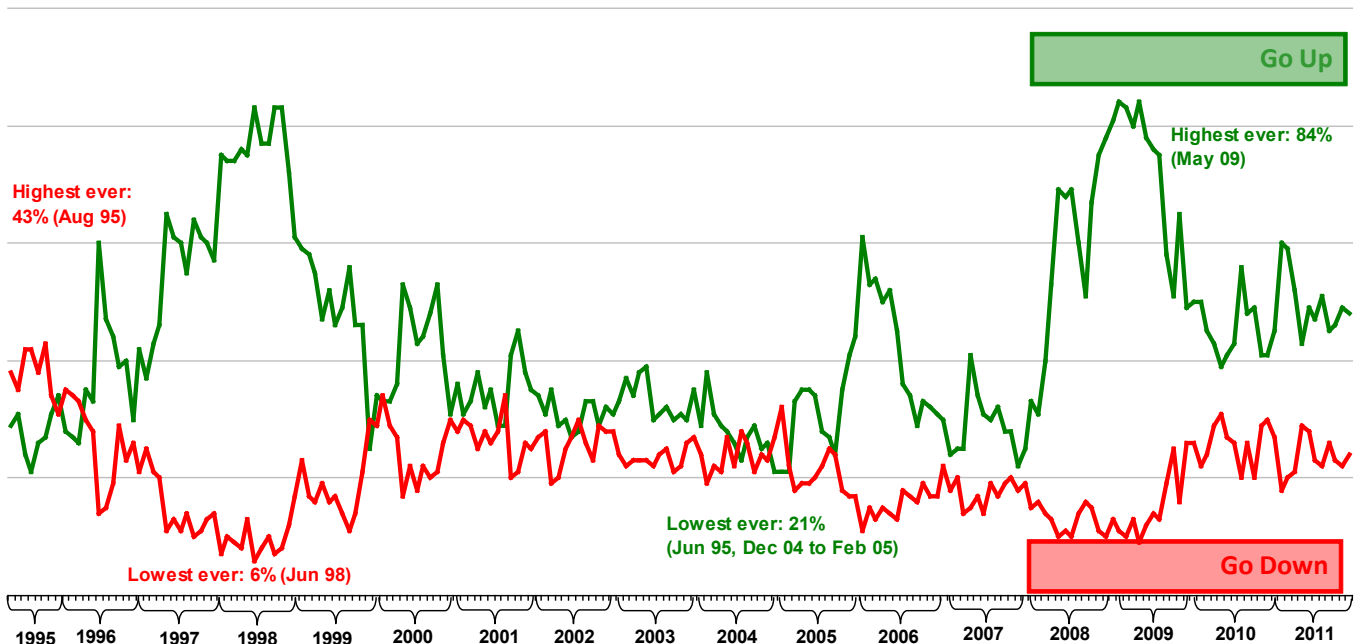
In December 2011, 48% expected unemployment to increase in the year ahead, while 24% believed that it would go down.

The highest proportion ever expecting unemployment to increase was 84% (May 2009), while the lowest proportion was 21% (recorded on three occasions, most recently in February 2005).

The numbers expecting unemployment to go up usually exceed the numbers expecting it to go down. The last time the number expecting unemployment to go up was less than the number expecting it to go down was in February 2005.

Expectations For Unemployment – Long term tracking

Do you expect the following to go up, down, or stay the same in the year ahead? – Unemployment -



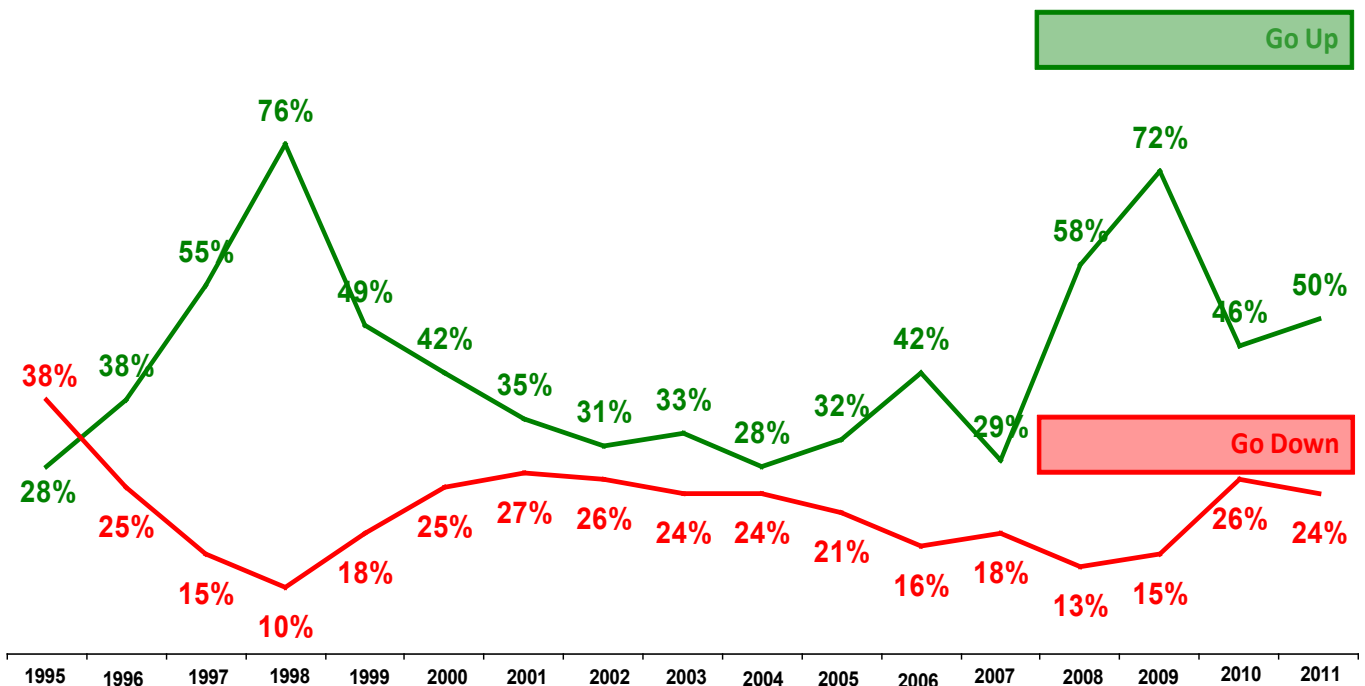
Base: All, n=750, UMR Telephone Omnibus

expectations for unemployment

The most pessimistic year for unemployment expectations was 1998, while the most optimistic was 1995.

Expectations For Unemployment – Annual Average

Do you expect the following to go up, down, or stay the same in the year ahead? – *Unemployment* -



Base: All, n=750, UMR Telephone Omnibus

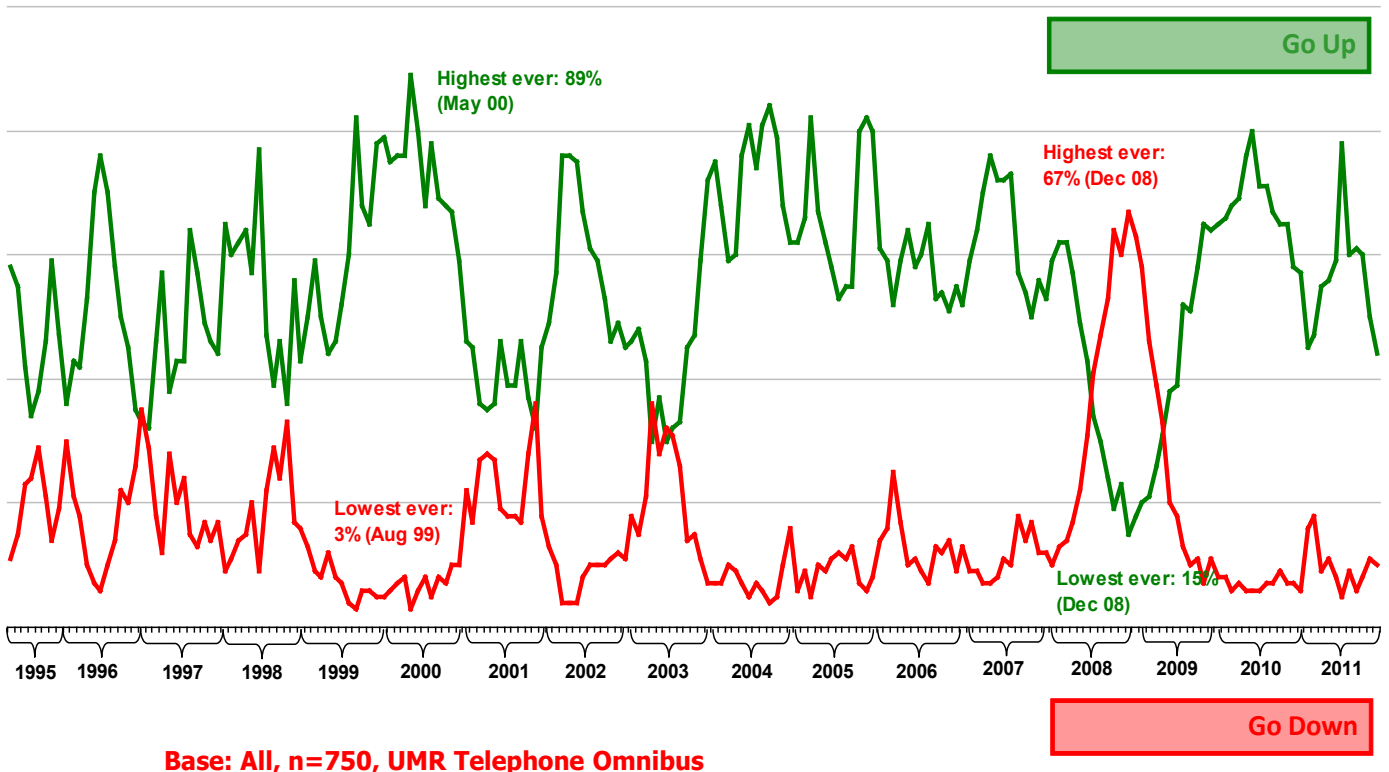
We have also tracked interest rate expectations since 1995.

In December 2011, 44% thought that interest rates would increase and 10% believed that they would decrease. The number expecting interest rates to increase was well down on the numbers recorded in July 2011 (78%).

The number expecting interest rates to increase peaked at 89% (in May 2000), while the highest number expecting interest rates to go down was recorded in December 2008 (67%).

Expectations For Interest Rates – Long term tracking

Do you expect the following to go up, down, or stay the same in the year ahead? - *Interest Rates* -





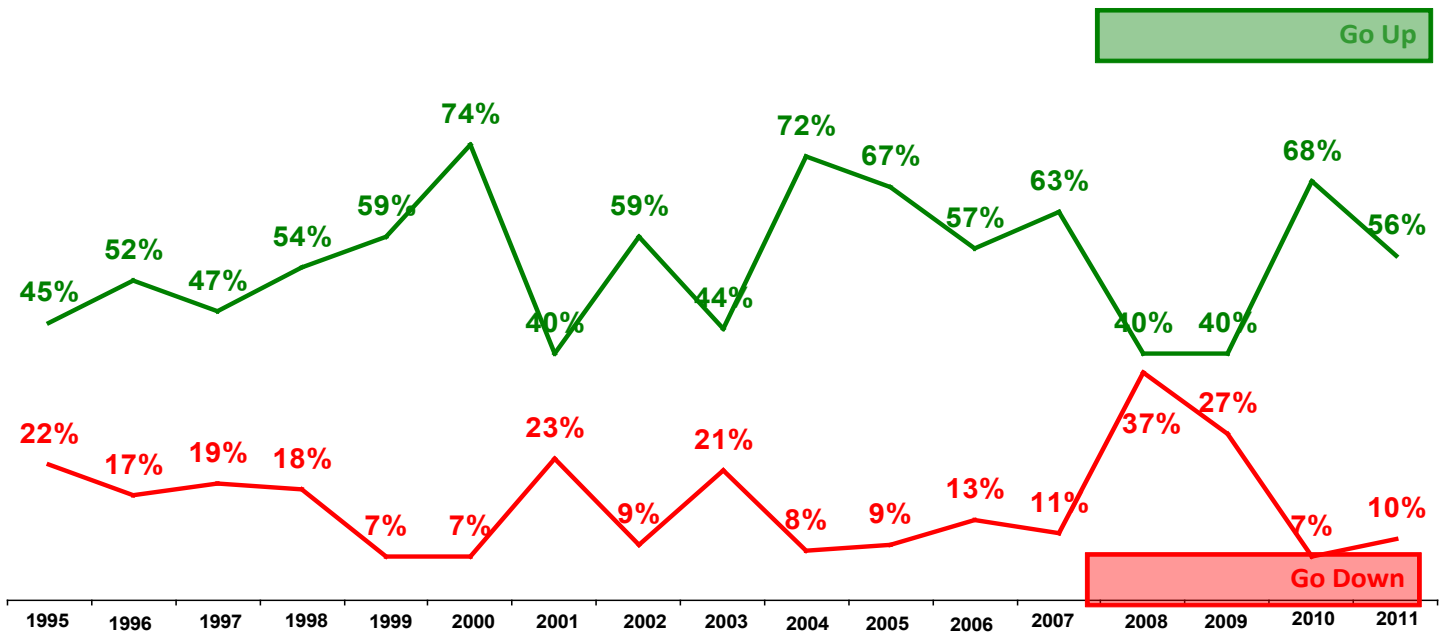
expectations for interest rates

The number expecting interest rates to increase almost always exceeds the number expecting them to fall. The only time when the reverse has been true for two or more consecutive polls was 2008.

Average expectations for an interest rate increase were highest in 2000 and lowest in 2008.

Expectations For Interest Rates – Annual Average

Do you expect the following to go up, down, or stay the same in the year ahead? - *Interest Rates* -



Base: All, n=750, UMR Telephone Omnibus

expectations for specific issues

New Zealanders are only moderately optimistic about the long-term prospects for the economy, given the economic circumstances of the last few years.

45% expect the economy to be better in 10 years' time, while 22% think that it will be worse. This does, however, represent a 10% improvement on 2010.

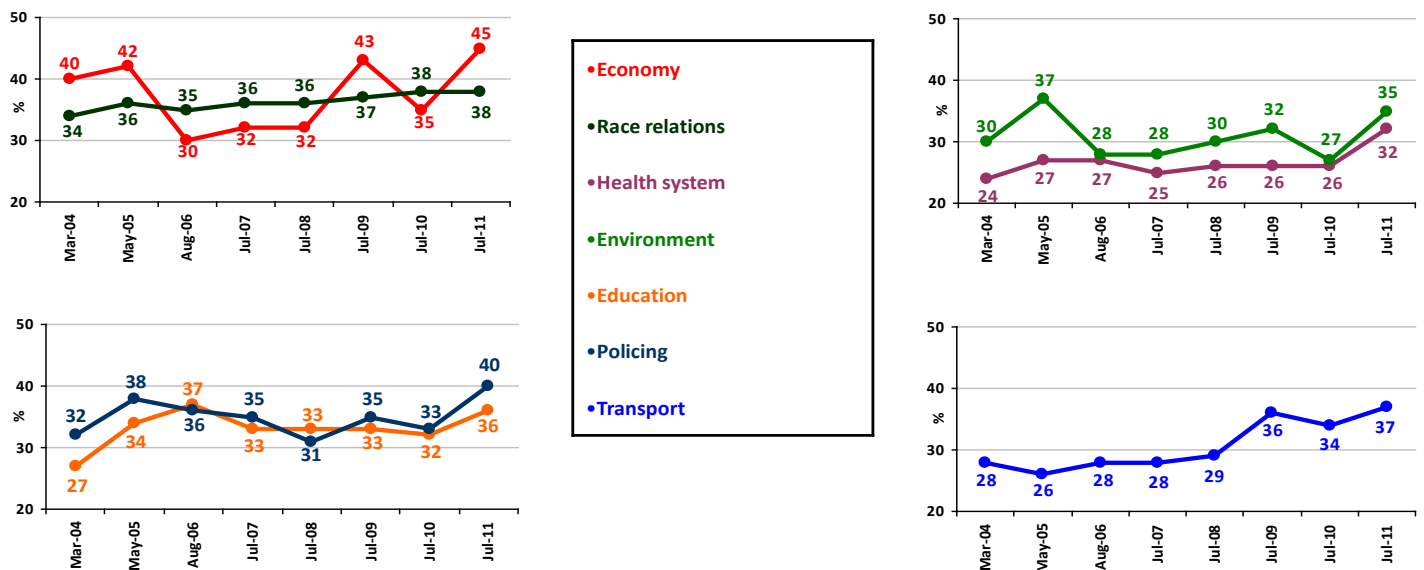
New Zealanders have also become more optimistic about prospects for policing (40% think that it will get better, up 7% on 2010), the environment (35% better, up 8%) and the health system (32% better, up 6%).

Expectations for the transport system improved markedly in 2009, and these gains have been maintained in the two years since. 37% now think that the transport system will improve in the decade ahead, up 3% on the 2010 result.

Expectations for specific issues

Using a scale of 1 to 5 where 1 means it will be much better and 5 much worse, - how do you think the following will be in ten years?

Total Better Only – '1 – Much Better' + '2'



Base: All, n=750, July 2011, UMR Telephone Omnibus

satisfaction



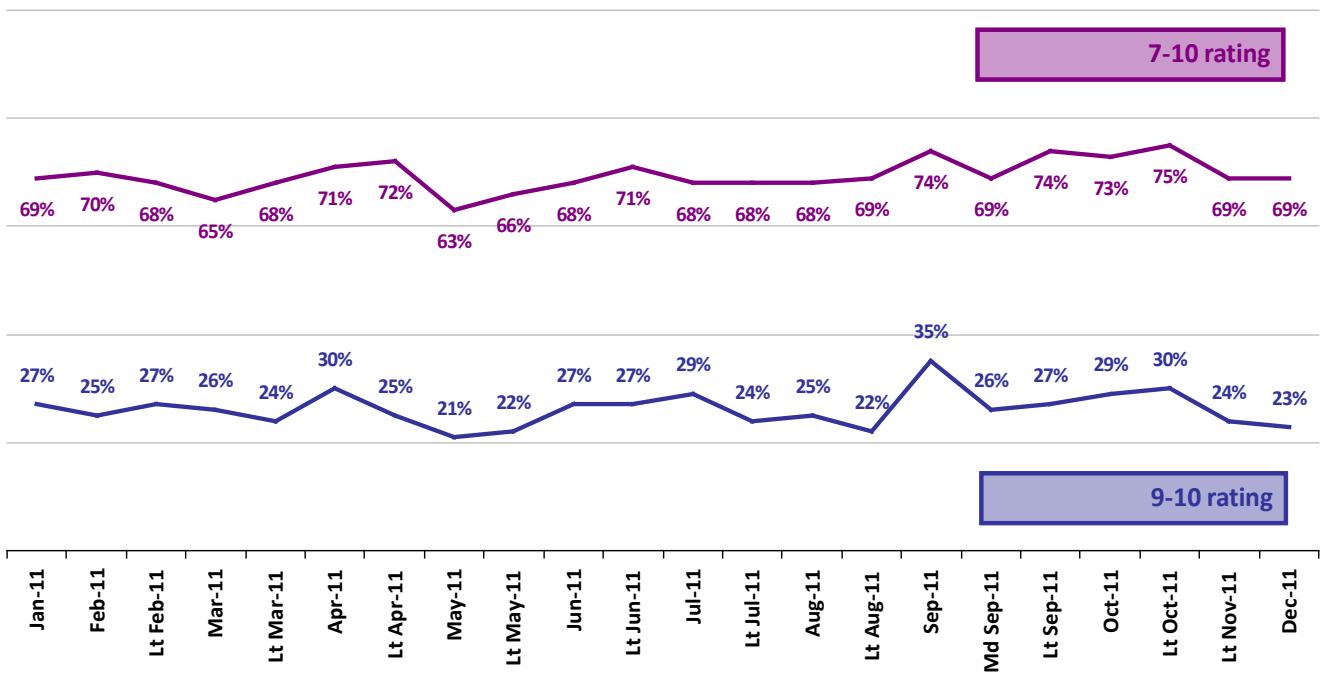
New Zealanders felt happier with life over the period of the Rugby World Cup, although number of us who feel happy with life is well down on when UMR started this series in 2007.

In December 2011, 69% of New Zealanders rated their level of happiness with life as 7 or higher out of 10. This compares with an October peak of 75%.

The proportion of New Zealanders rating their happiness as 9 or 10 out of 10 rose from 25% in August to 30% in October, before dropping back down to 23% in December.

Happiness

Using a 0 to 10 scale where 0 means very unhappy and dissatisfied and 10 very happy and satisfied, please tell me how happy and satisfied you are with the way life is going.



Base: All, n=750, UMR Telephone Omnibus

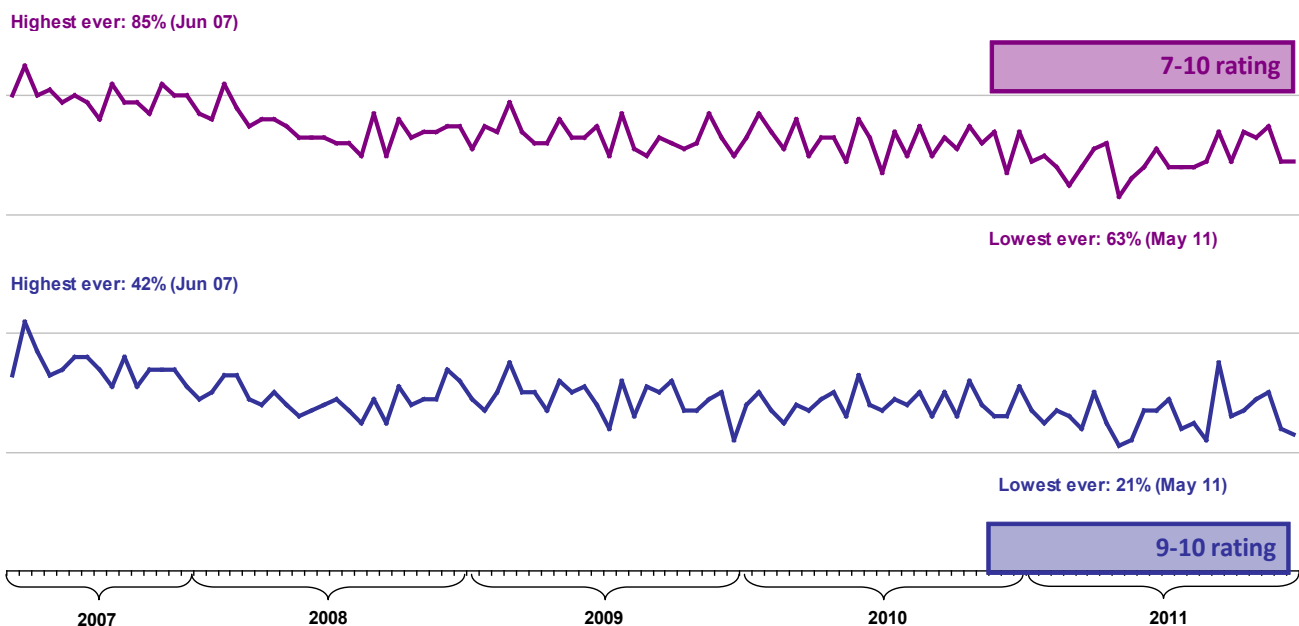


happiness - long term tracking

Happiness ratings have generally trended downwards since 2007. In June 2007, 85% of New Zealanders rated their happiness of 7 or higher out of 10, including 42% who rated their happiness as 9 or 10 out of 10.

Happiness – Long Term Tracking

Using a 0 to 10 scale where 0 means very unhappy and dissatisfied and 10 very happy and satisfied, please tell me how happy and satisfied you are with the way life is going.



Base: All, n=750, UMR Telephone Omnibus

satisfaction with aspects of life

Despite the decline in the mood, New Zealanders have become more likely to be satisfied with a number of specific aspects of life.

80% now say they are satisfied with their financial situation, up 6% since 2010 and the highest since 2008.

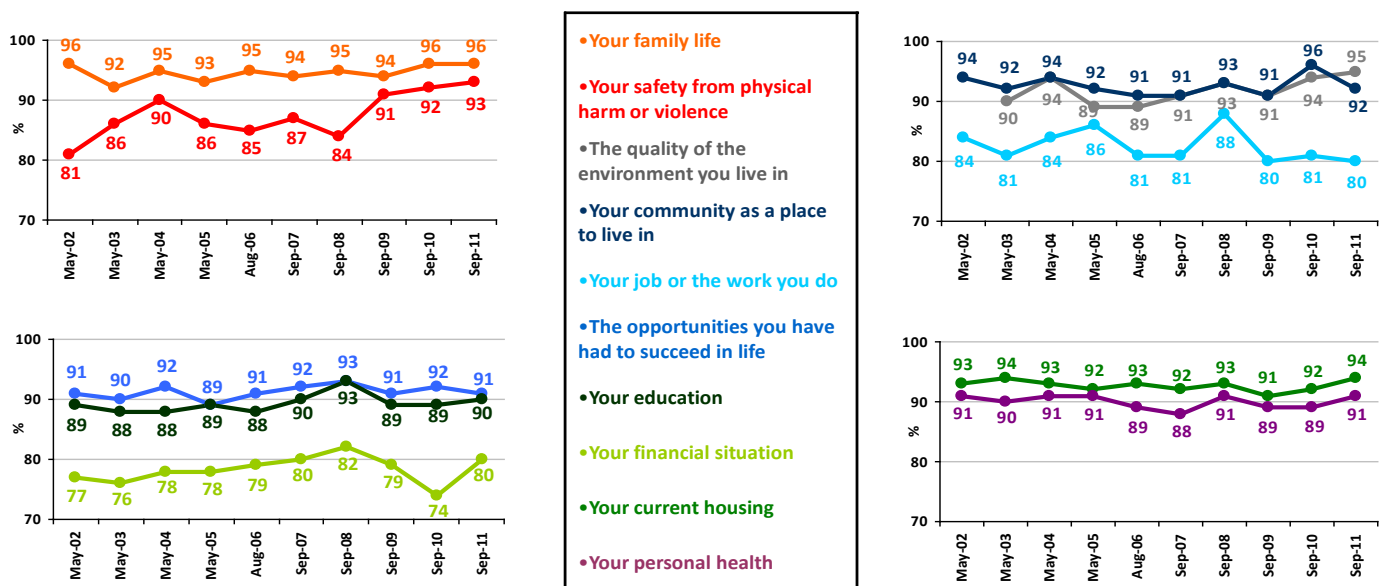
There have been smaller increases in the numbers satisfied with their current housing (up 2% to 94%) and their personal health (up 2% to 91%).

There has, however, been a 4% drop in the number satisfied with their community as a place to live in (now 92%) and job satisfaction remains well below its 2008 peak (now 80%, 8% below the 2008 result).

Satisfaction With Aspects Of Life

How satisfied are you with the following aspects of your life – very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied?

Total Satisfied Only – ‘Very satisfied’ + ‘Somewhat satisfied’



Base: All, n=750, September 2011, UMR Telephone Omnibus

political settings



UMR has New Zealand's longest running and most consistently taken political poll, with tracking of the vote starting from the first UMR omnibus in September 1991. The tracking therefore covers two electoral systems, three governments, four prime ministers, seven elections and ten elected political parties.

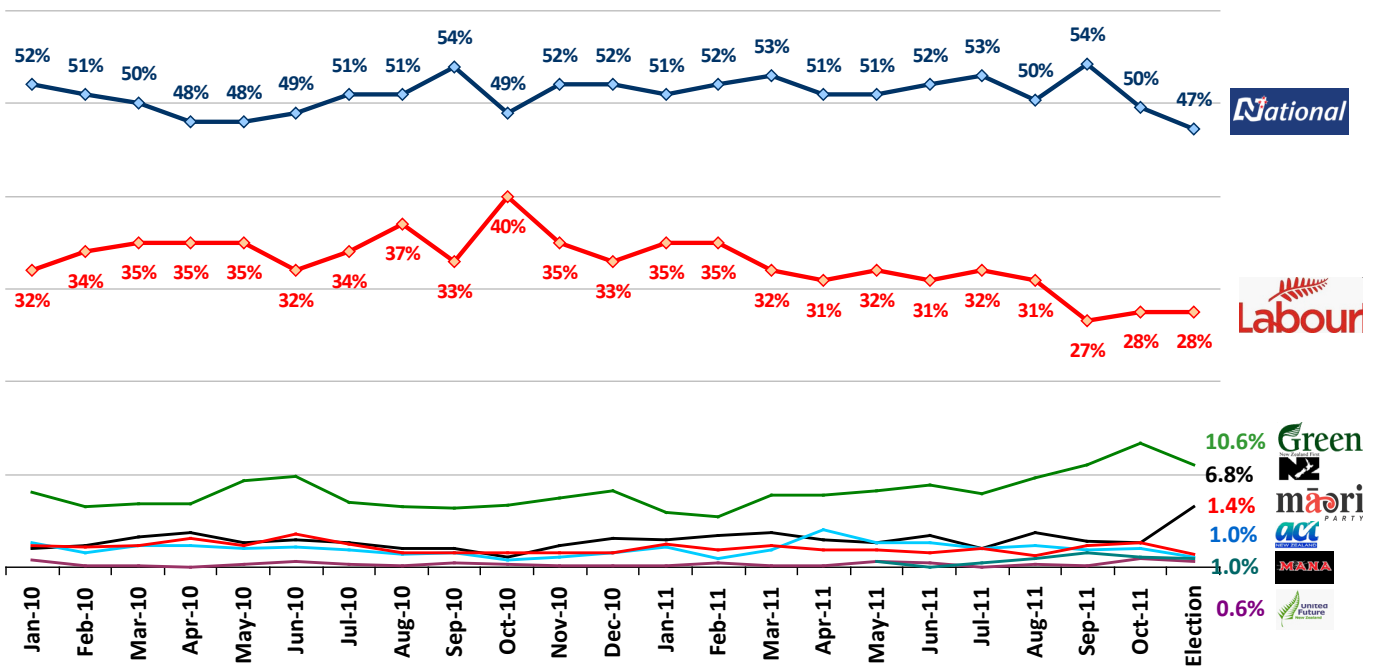
National's vote has been consistently around 50% in our poll for the last five years, as they have been in most other polls. Their 47% share of the election vote is the highest for any party since 1990 (albeit on very low turnout).

Labour's vote has been in the low to mid 30s for the last four years, and dropped below 30% in September.

The Green's vote hovered between 8% and 10% throughout most of 2011, surging over the 10% mark for the first time in September. Their election vote of 11.1% is the highest for any minor party since 1996.

The Vote

Under MMP you have two votes. One for the candidate in the electorate you live in, and the second for a party. Thinking about this party vote only, if the general election were held today which party would you vote for?



Base: All, n=750, UMR Telephone Omnibus

long term voting trends

The record high for any political party in our poll is the 55% Labour achieved in July 2002. National has, however, achieved 54% on five occasions (most recently in September 2011).

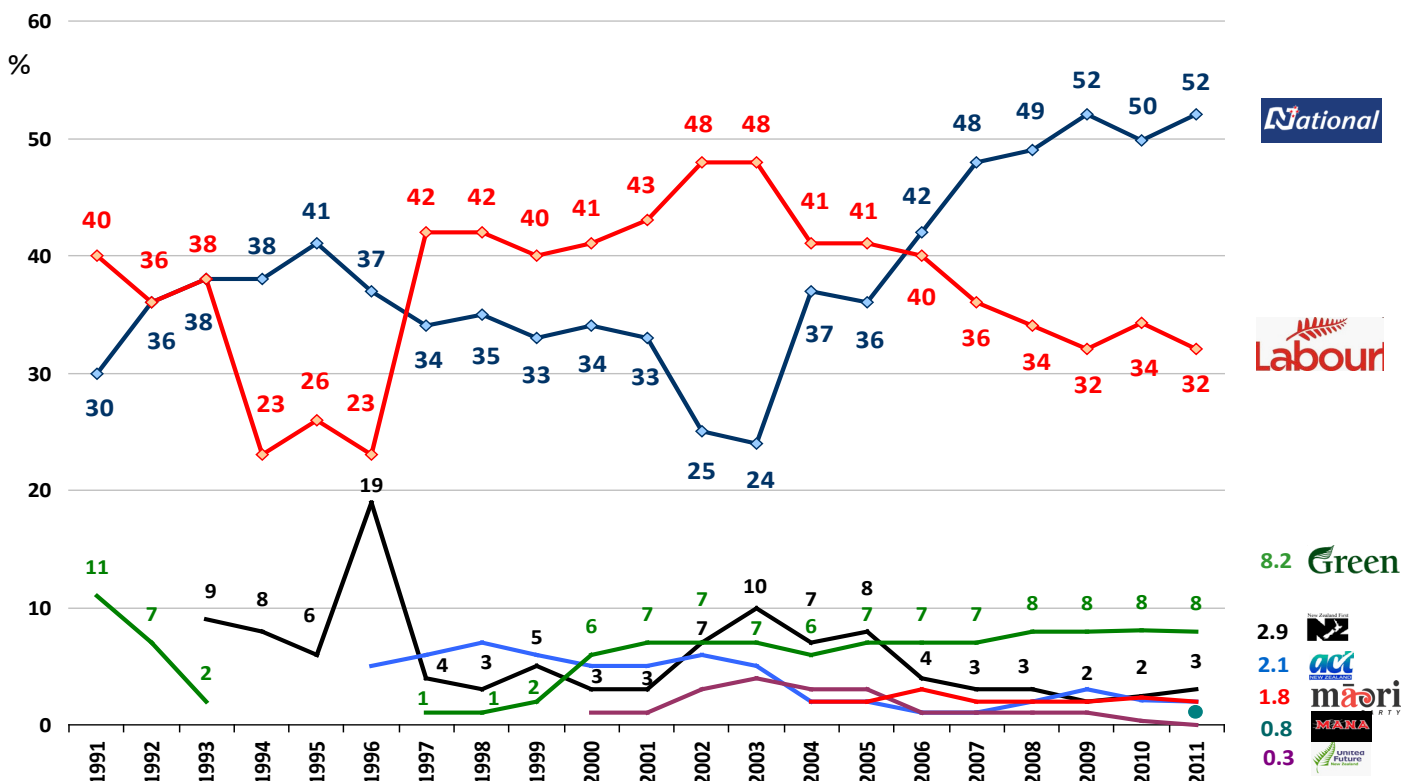
Labour's lowest ever in a UMR poll is 17%, recorded in August 1994. Labour's two worst years are 1994 and 1996, while their best years have been 2002 and 2003.

National's low is 18%, which happened in December 2002. National's worst year on average was 2003, while their best years have been 2009 and 2011.

The Greens have averaged above 5% in the UMR poll every year since 2000 and if anything are trending slightly upwards. No other minor party has come close to matching this achievement (e.g. the last time ACT's annual average was above 5% was before National's vote recovered in early 2004 on the back of Brash's Orewa speech).

Minor parties have only outpolled one of the major parties for two periods in the last 20 years. The Alliance polled ahead of Labour for nine months in 1994 (peaking at 35% - just 4% behind National), while New Zealand First was ahead of Labour for five months in 1996 (peaking at 30%).

Average Annual Party Vote





John Key:

John Key's favourability rating has on occasion been the highest we have yet recorded for a prime minister, although his image did take a big hit over the election campaign. The proportion of New Zealanders with a favourable opinion of John Key has twice hit 81%, most recently in December 2010. The previous record was 78% for Helen Clark in April 2002.

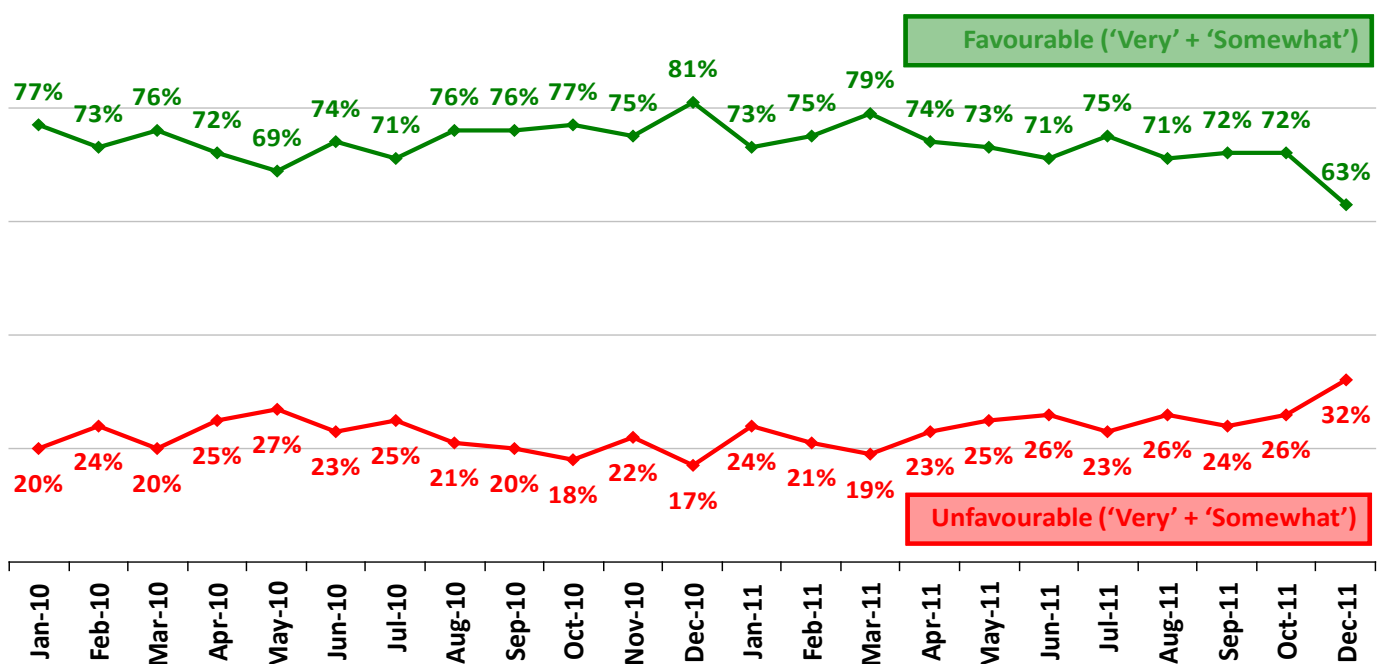
Key's favourability rating did, however, drop 9% over the course of the election campaign. In December 2011, 63% of New Zealanders viewed John Key favourably, down from 72% in October and the same as Helen Clark's final rating in October 2008.

The referendum on the electoral system saw MMP retained, and our polling shows that support for retaining MMP remained fairly consistent throughout 2010 and 2011. There was considerably more variation in the preferred alternative system.

Along with the large number of voters who did not cast valid votes on this question in the referendum, this volatility is likely to reflect either public ambivalence to the issue or a lack of knowledge. While First Past the Post was always the preferred alternative system, support for Supplementary Member surged from 4% in May to 24% in the November referendum. John Key's endorsement of Supplementary Member is likely to have contributed to this rise, particularly in an environment when many people did not know much about the options and were looking for direction.

Favourability Ratings – John Key

Thinking about the following leaders of the main parties and other politicians tell me if you generally have a very favourable, somewhat favourable, somewhat unfavourable or very unfavourable opinion of them.



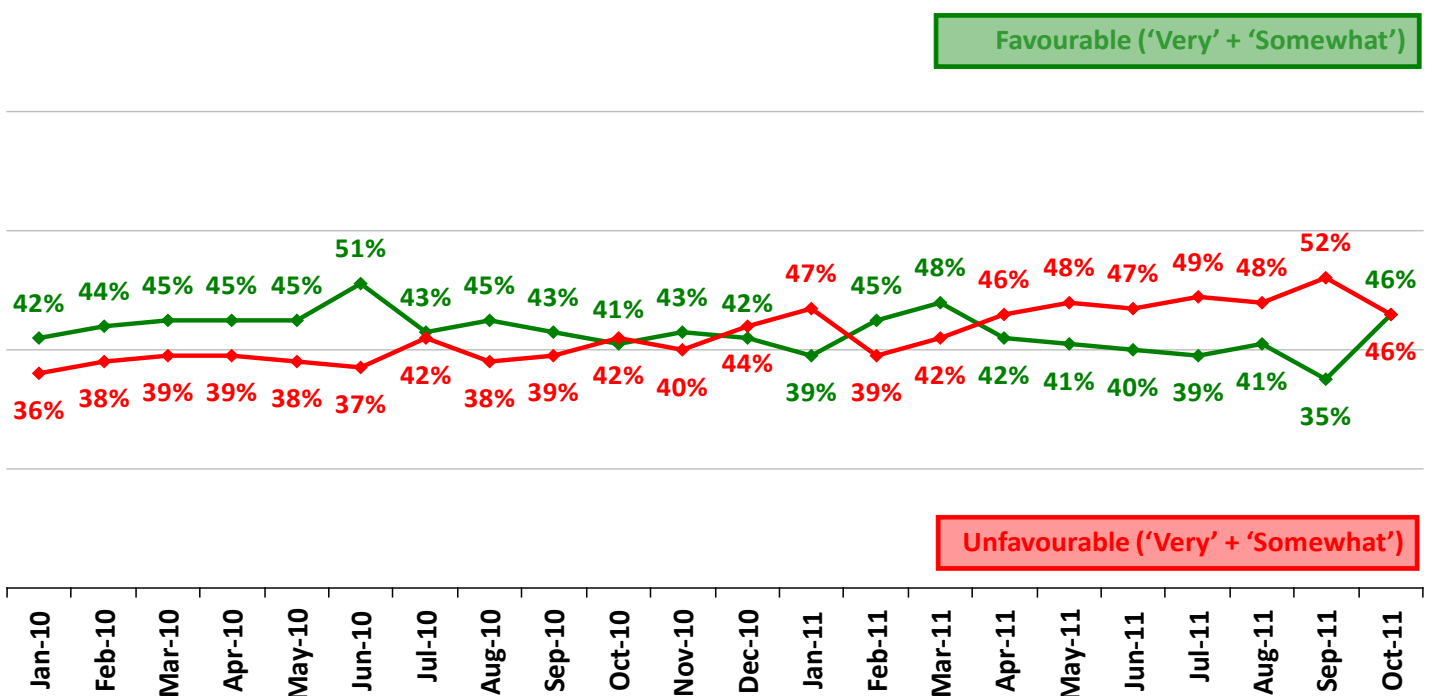


Phil Goff:

Phil Goff's favourability rating took a big hit in September, the same time as the Labour party vote dipped. His ratings generally remained narrowly in positive territory throughout 2010, before dropping in early 2011. The number viewing Phil Goff favourably was steady between 39% and 42% from April to August, before dropping to 35% in the September poll. His image did, however, recover to 46% favourable - 46% unfavourable by October, and other polling shows that his image improved further in the election campaign.

Favourability Ratings – Phil Goff

Thinking about the following leaders of the main parties and other politicians tell me if you generally have a very favourable, somewhat favourable, somewhat unfavourable or very unfavourable opinion of them.



issues



most important issues

Every month UMR asks New Zealanders what they see as the most important problem facing New Zealand today. Economic and financial issues dominate the agenda at the moment.

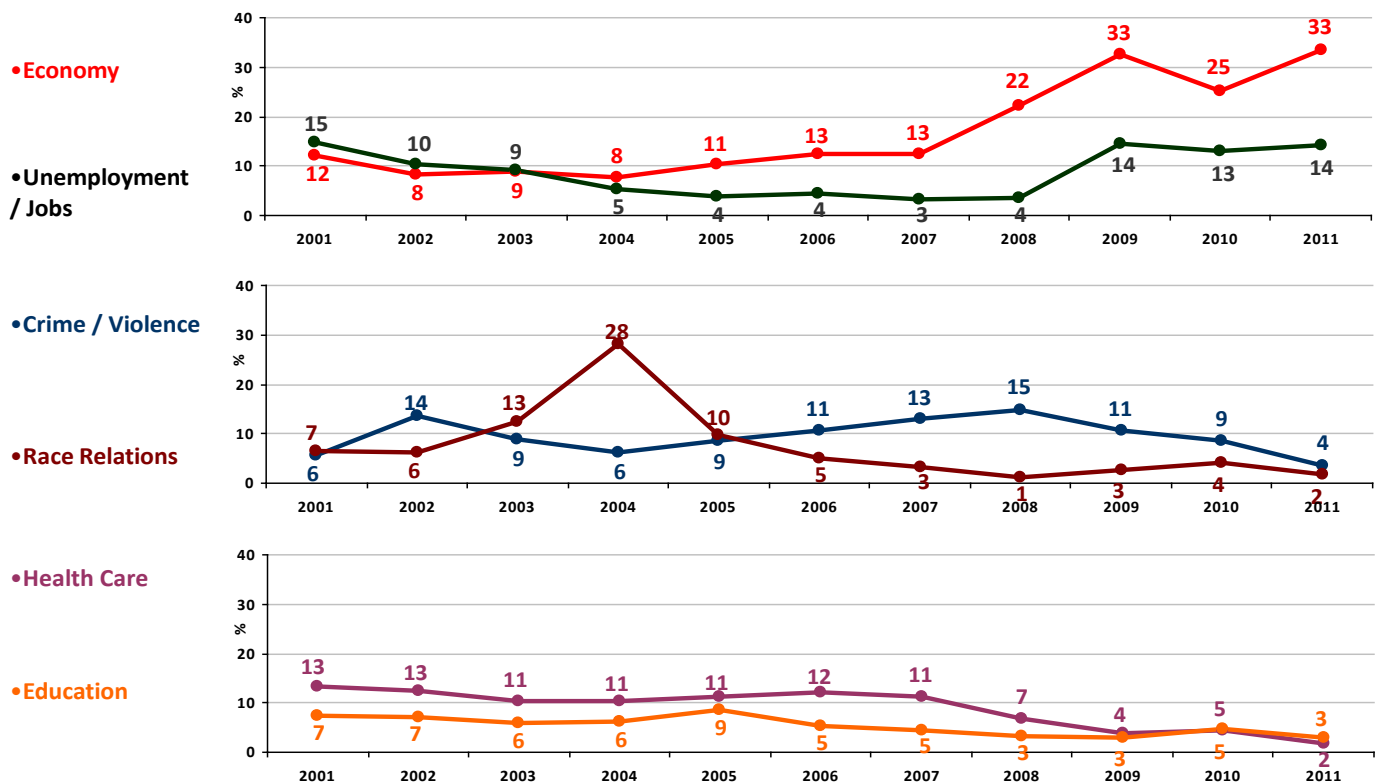
The economy is the top issue for the seventh year in a row, and the number nominating the economy as the most important issue (33%) is as high as any issue has ever been since this series began in 2001.

Unemployment is in second place for the third year in a row, with 14% nominating it as the most important problem facing New Zealand.

The number choosing crime and violence as their most important issue fell for the third consecutive year, and the current figure (4%) is the lowest since the series began.

Most Important Issues – Year Average

What do you think is the most important problem facing this country today?



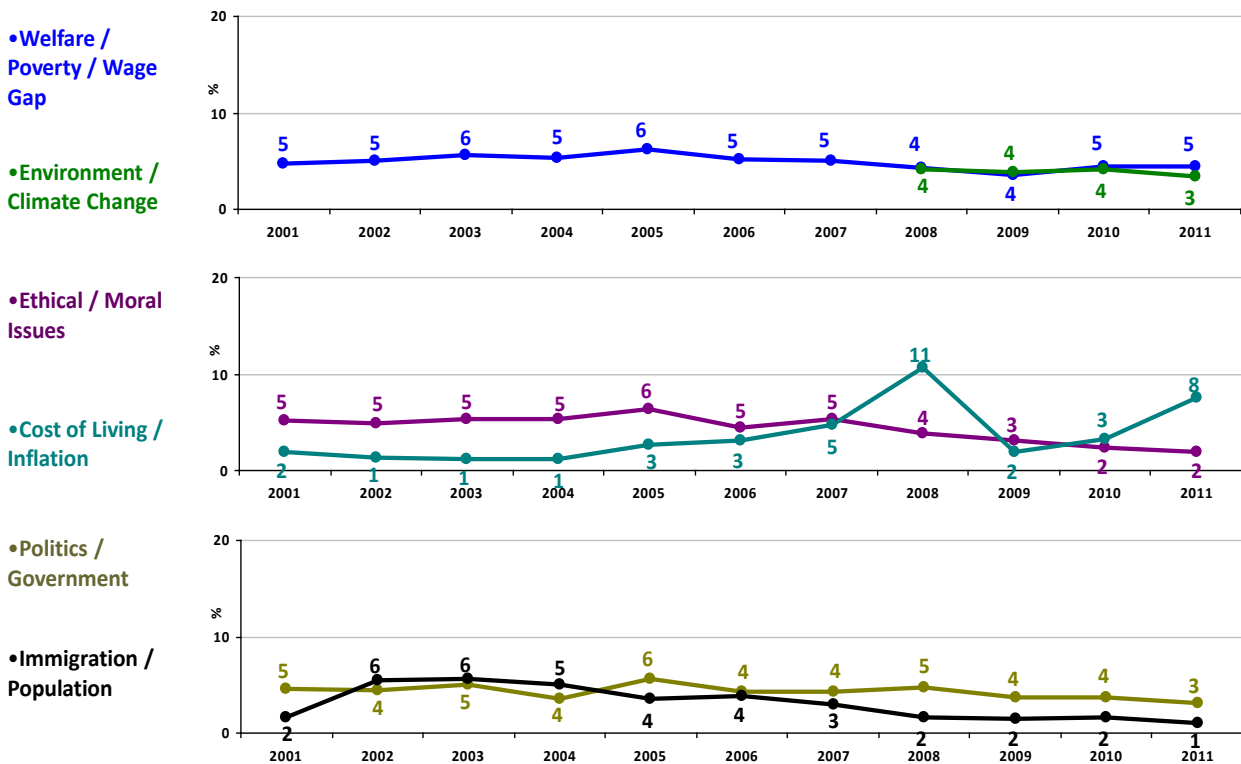
Base: All, n=750, UMR Telephone Omnibus

most important issues

Concerns about cost of living increased this year, with this issue shifting into third place on 8%.

The number citing the Christchurch Earthquake as the most important issue averages 3%, although it went as high as 14% soon after the February earthquake.

Most Important Issues – Year Average (Continued)



Base: All, n=750, UMR Telephone Omnibus

2011 has clearly been the biggest year for news since UMR began tracking interest in news stories in 2003. The data shows that four of the six biggest news stories in the last eight years have happened in the last 15 months.

The Christchurch earthquake is clearly the biggest news story since the series began, with 96% closely following the story.

Top News Stories In 2011

Using a scale of 1 to 5 where 1 means very closely and 5 means not closely at all, please tell me how closely you are following or have followed these news stories in the last month. If you do not know enough about it just say so

Followed Closely Only – 1+2 On The 1-5 Scale

		RANK
The Christchurch Earthquake (<i>February</i>)	96%	1
The All Blacks winning the Rugby World Cup (<i>October</i>)	83%	2
The large earthquakes in Christchurch on Jun 13 (<i>June</i>)	79%	3
The breakup of the cargo ship Rena in the Bay of Plenty (<i>October</i>)	78%	4
The Japanese earthquake, tsunami and nuclear crisis (<i>March</i>)	74%	5
The government's announcement of homes in the worst affected Christchurch suburbs that will have to be abandoned following the earthquakes (<i>June</i>)	72%	6
The Australian floods (<i>January</i>)	71%	7
The Rugby World Cup (<i>September</i>)	69%	8
The so-called polar-blast which has brought snow to most of New Zealand (<i>August</i>)	68%	9
The damage by Cyclone Yasi in Queensland (<i>February</i>)	67%	10

NB: Dates in *italics* refer to when the survey was in the field, not when the story was in the media

Base: All, n=750, UMR Telephone Omnibus

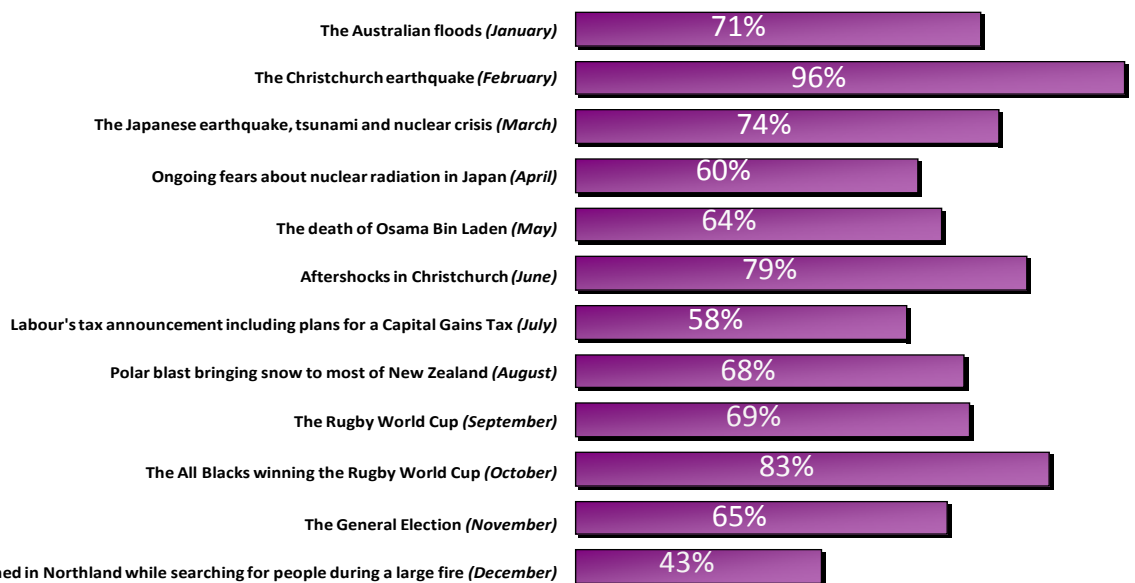
top news stories each month

The data also shows how the 2011 election was overshadowed by other events. 65% said that they closely followed the election, compared with 79% for the June aftershocks in Christchurch, 78% for the Rena story and 74% for the Japanese earthquake, tsunami and nuclear crisis. The election was only the 12th biggest story this year, much lower than it was in either 2005 (7th) or 2008 (8th). This is likely to have contributed to the exceptionally low turnout.

Top News Stories Each Month

Using a scale of 1 to 5 where 1 means very closely and 5 means not closely at all, please tell me how closely you are following or have followed these news stories in the last month. If you do not know enough about it just say so

Followed Closely Only – 1+2 On The 1-5 Scale



NB: Dates in *italics* refer to when the survey was in the field, not when the story was in the media

top news stories since 2003

The Canterbury earthquake in September 2010 is the second biggest story (followed by 92%).

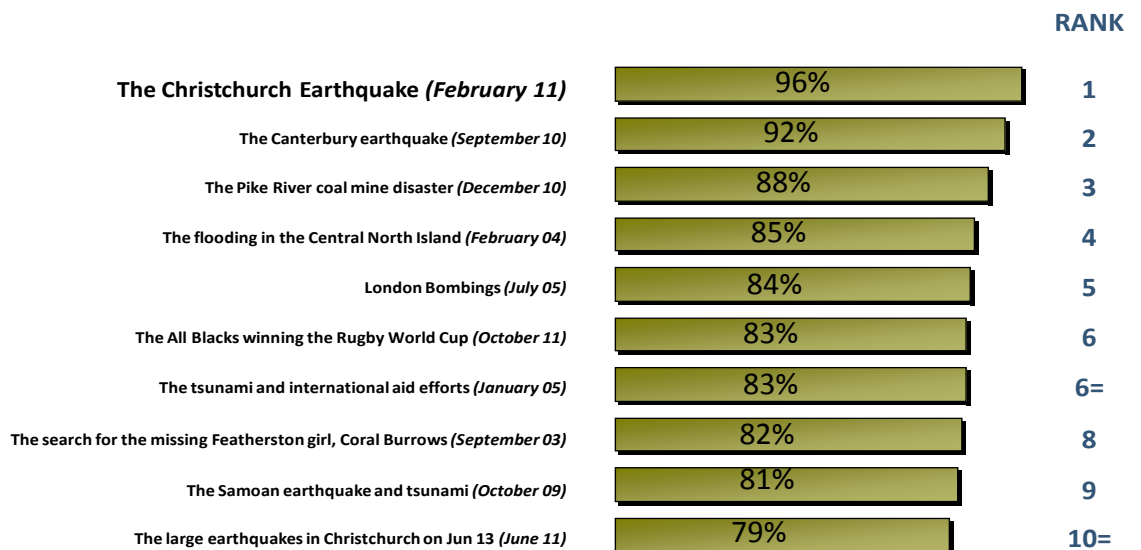
The Pike River disaster is the third biggest story of the last eight years, with 88% saying that they followed that story closely.

The All Black's victory in the Rugby World Cup was followed by 83%, putting it in 6th equal place. The All Black's victory would have been the most closely followed story in 5 of the 9 years UMR has been running this question.

Top News Stories since 2003

Using a scale of 1 to 5 where 1 means very closely and 5 means not closely at all, please tell me how closely you are following or have followed these news stories in the last month. If you do not know enough about it just say so

Followed Closely Only – 1+2 On The 1-5 Scale



NB: Dates in *italics* refer to when the survey was in the field, not when the story was in the media

business & the workplace



Attitudes towards most of the banks fell backwards this year, although the relative order of the banks remains similar to in previous years.

Kiwibank tops the favourability ratings for the sixth consecutive year. 66% of New Zealanders view Kiwibank favourably, down 2% on the 2010 result but still 10% ahead of the nearest competitor.

ASB returns to second place, although its current rating of 56% is well down on its 2007 peak of 65%.

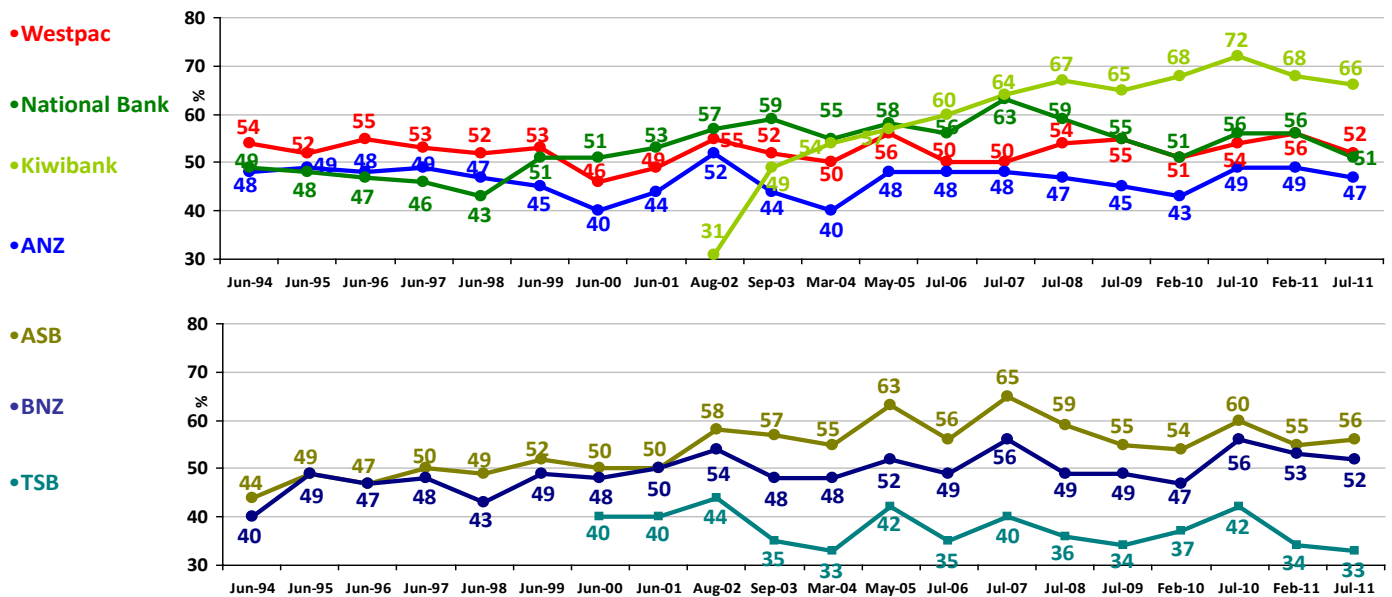
The National Bank drops from second equal to fifth, and now comes in on 51%, marginally behind Westpac and the BNZ (both 52%). The National Bank's rating is 12% down on their rating in 2007.

ANZ remains the least favourably viewed of the major banks, down 2% to 47%.

Corporate Ratings – The Banks

Now I'm going to read you the names of some banks and financial institutions, tell me if you have a very favourable, somewhat favourable, somewhat unfavourable or very unfavourable opinion of them. If you do not know enough about them just say so

Total Favourable Only – 'Very favourable' + 'Somewhat favourable'



Base: All, n=750, UMR Telephone Omnibus



confidence in institutions

Since 2001 UMR has asked an annual question assessing the level of confidence New Zealanders feel in a range of organisations and institutions. We now measure public confidence in eighteen organisations and institutions.

In 2011, for the first time the police took over from GPs as the institution New Zealanders have greatest confidence in. 72% now feel confident in the police, up 5% on 2010 and up 19% since 2005.

Confidence in GPs was down 1% to 67%. Although confidence has fallen by 6% since 2007, GPs are still clearly in second place.

Primary schools take out third place (up 5% to 64%), followed by the military (up 7% to 61%), universities (up 2% to 60%) and secondary schools (up 4% to 51%).

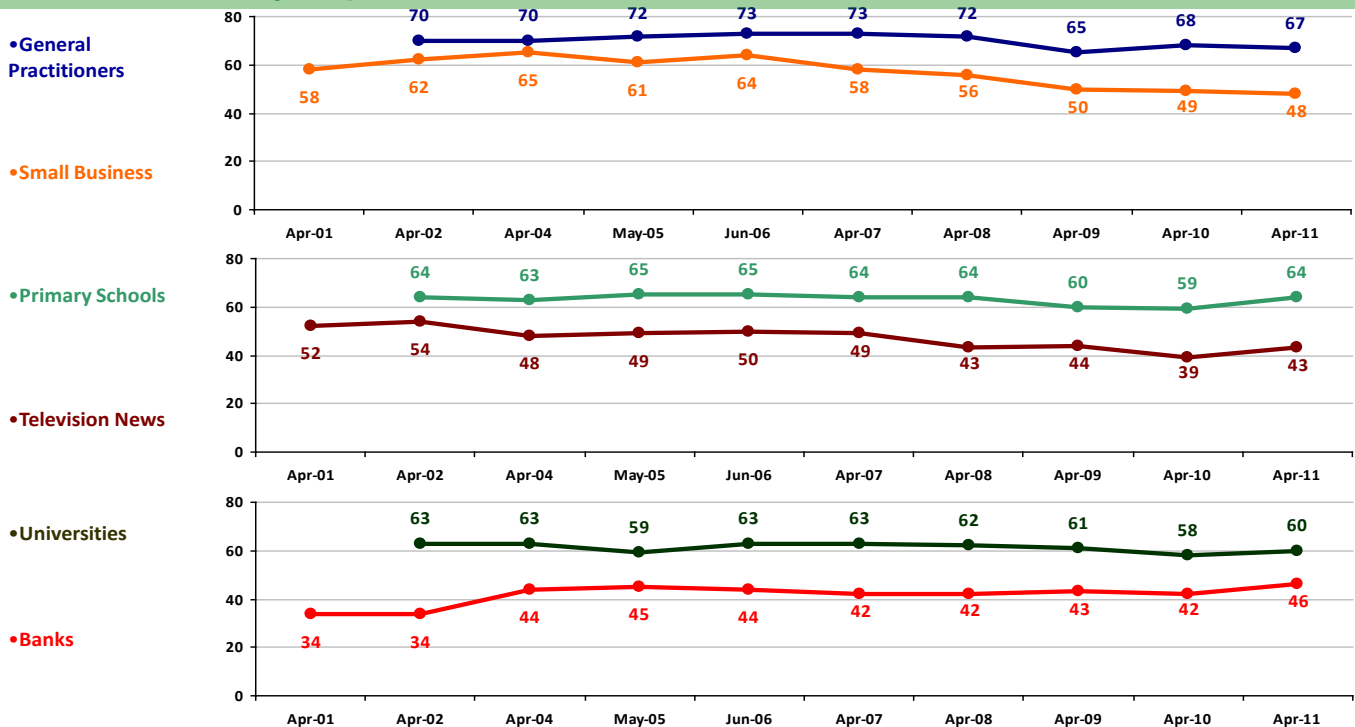
The lowest rating is for Parliament (up 3% to 25%), which is just behind big business and unions (both of which up 5% to 27%).

Confidence in small business has dwindled markedly over the last few years. 48% now feel confident in small business, down 16% since 2006. Over that time, small business has fallen from 3rd to 7th place.

Confidence in Institutions

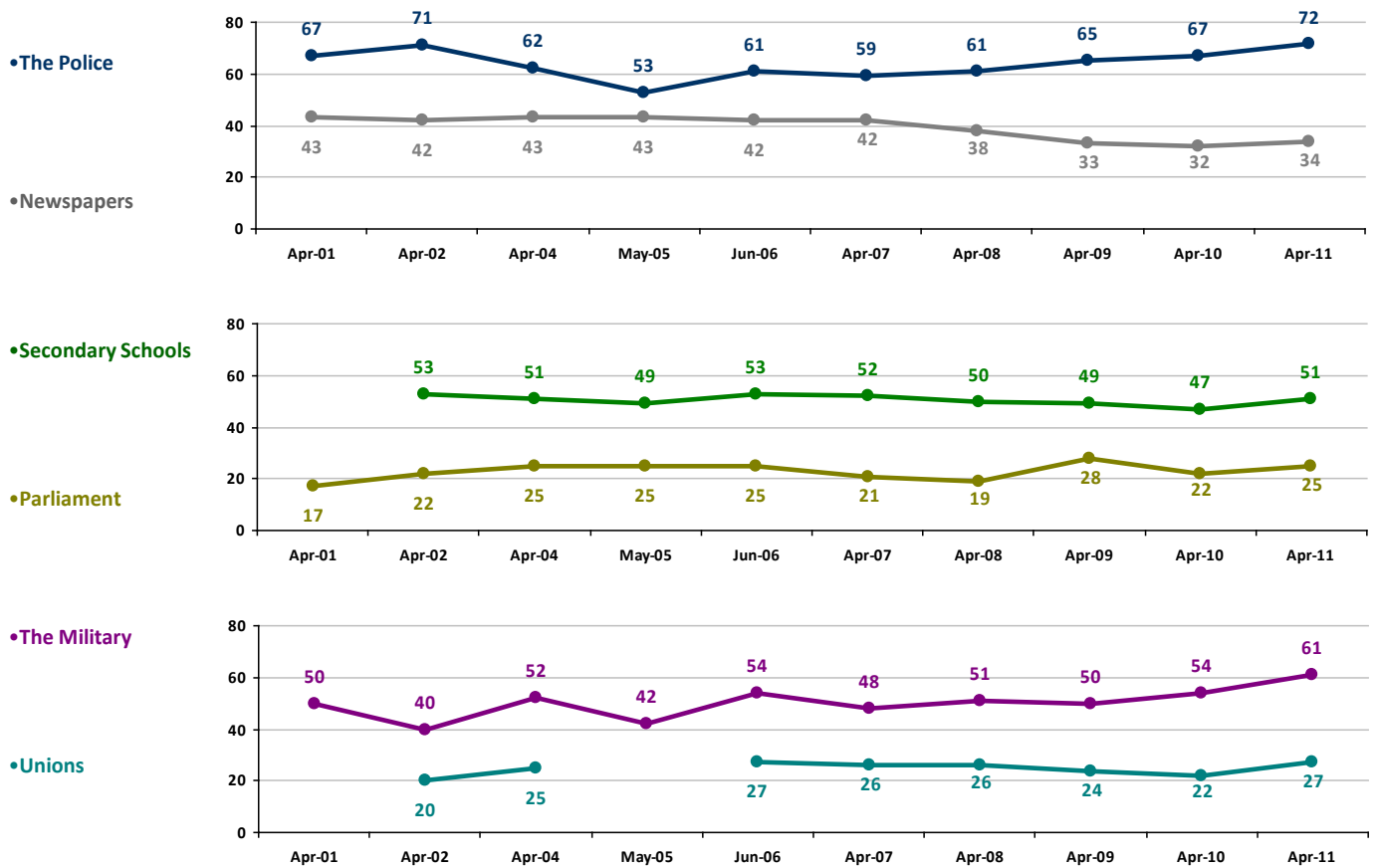
Now I am going to read you a list of institutions in New Zealand society. Please tell me how much confidence you have in each one – a great deal, quite a lot, some or very little?

Total Confident Only – ‘A great deal’ + ‘Quite a lot’



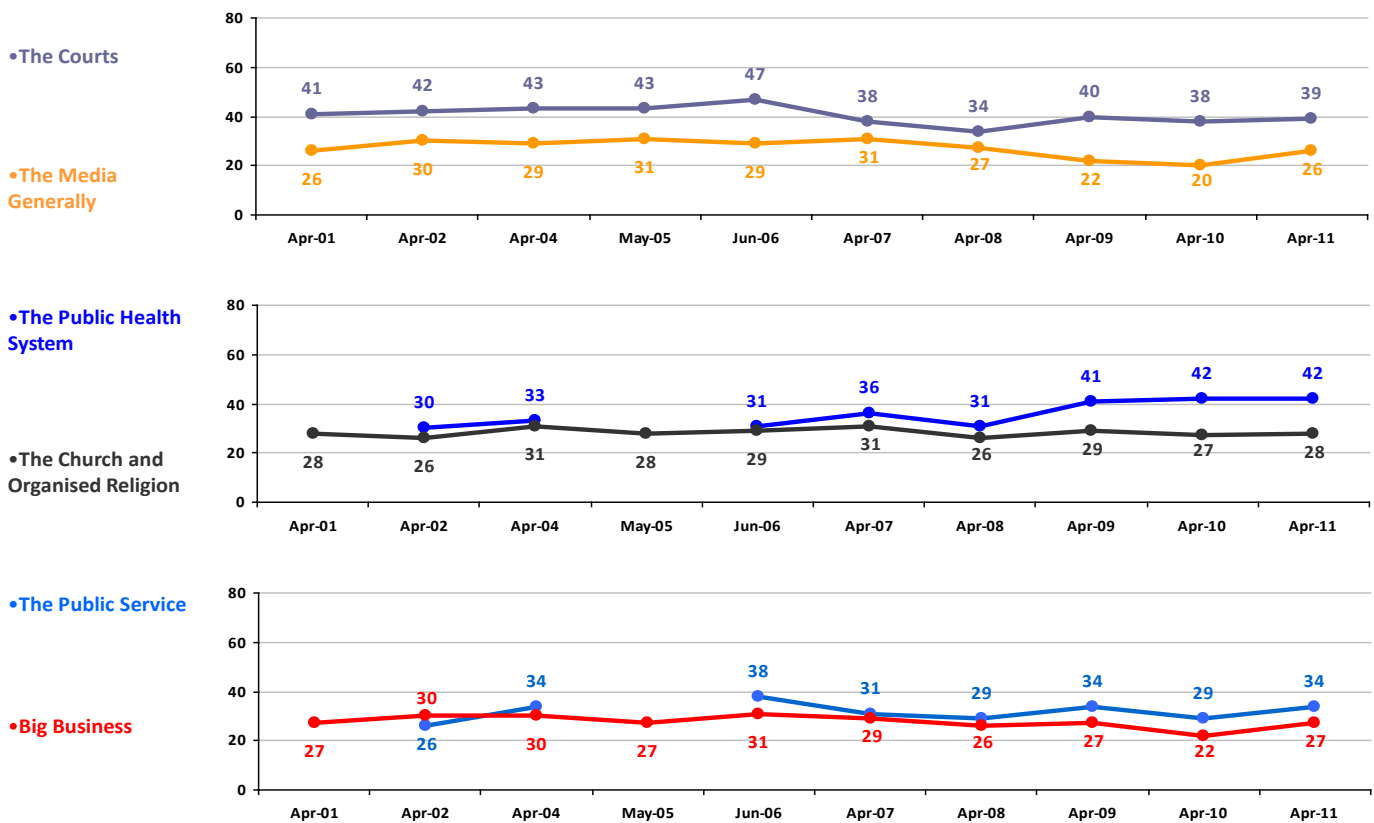
Base: All, n=750, UMR Telephone Omnibus

Confidence in Institutions (Continued)



Base: All, n=750, UMR Telephone Omnibus

Confidence in Institutions (Continued)



Base: All, n=750, UMR Telephone Omnibus



occupational respect

UMR's third measure of perceptions of New Zealand's national institutions is our annual occupational respect ratings. Several of these have been running since 1992.

Nurses have topped the occupational respect ratings every year we have been running this series. New Zealanders now give nurses an average rating of 8.6 out of 10, the same as in 2009.

Doctors remain in second place, with an average rating of 8.3 out of 10.

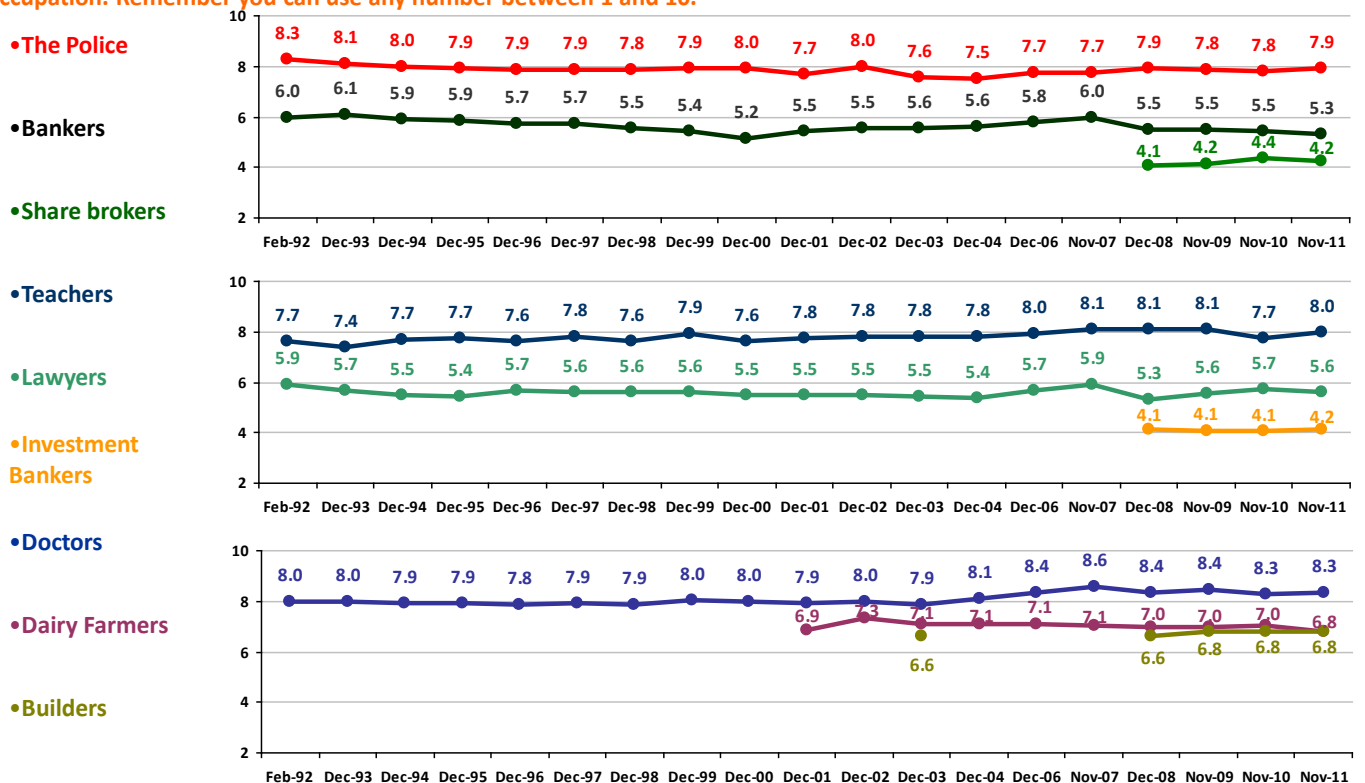
Teachers have slipped past police into third place, rising from 7.7 to 8.0 out of 10. Police are up from 7.8 to 7.9.

Real Estate Agents resume their place at the bottom of the list after a one-year hiatus. New Zealanders give them an average rating of 4.1 out of 10, just behind investment bankers and share-brokers on 4.2 out of 10.

Politicians get an average rating of 4.6 out of 10. While this is below the 2008 peak, it is still well ahead of the results recorded in the late 1990s.

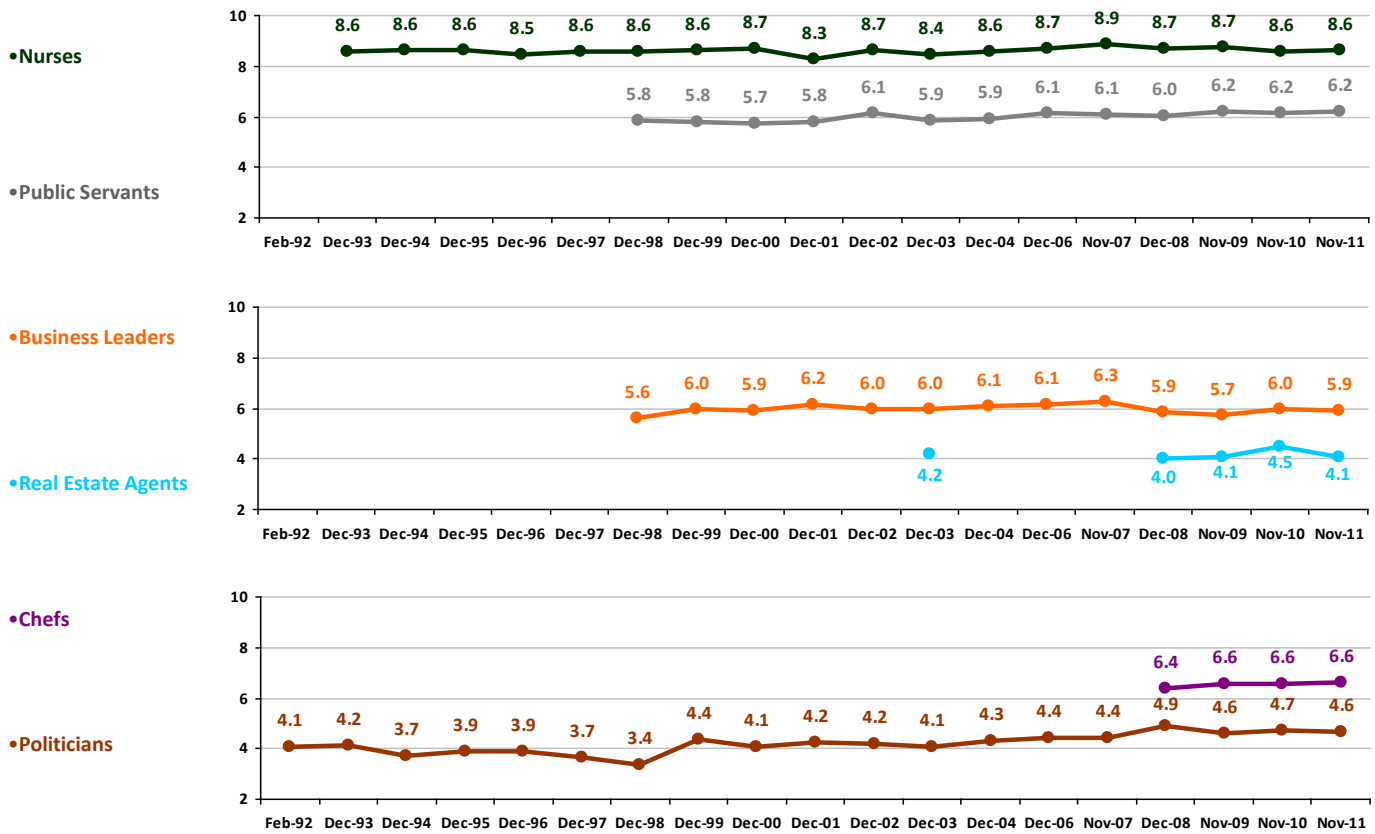
Occupational Respect – Mean Score

Thinking about how much respect you give to different occupations. I want you to rate the following occupations on a 1 to 10 scale where 1 means you have no respect at all for the occupation and 10 means you have an enormous amount of respect for the occupation. Remember you can use any number between 1 and 10.



Base: All, n=750, UMR Telephone Omnibus

Occupational Respect – Mean Score (Continued)



Base: All, n=750, UMR Telephone Omnibus

government departments



UMR also tracks performance ratings on an annual basis for a range of government agencies, with trendlines in some cases available back to 1994. It should be noted that performance ratings at least partly reflect the nature of what the agencies do and how much people know about them, and it is more difficult for some organisations to score well than it is for others.

The Fire Service remains in top spot, where it has been every year since it was first included in 2004. 90% now rate the Fire Service's performance positively, down 4% since 2010.

The Police remain in second place, with 78% rating their performance positively.

The biggest mover of the last two years has been ACC, which has recovered from 29% positive in 2009 to 38% positive in 2011. The Ministry of Health's rating has risen for five consecutive years, from 31% in 2006 to 51% now.

Government Department Performance

I am going to read you a list of Government departments. As far as you are aware how good a job do you think they are doing - are they doing an excellent job, a good job, only a fair job or a poor job. If you don't know enough about them just say so.

Total Good Job Only – 'Excellent' + 'Good'

• Department of Conservation (DOC)

• Ministry of Agriculture and Fisheries (MAF)

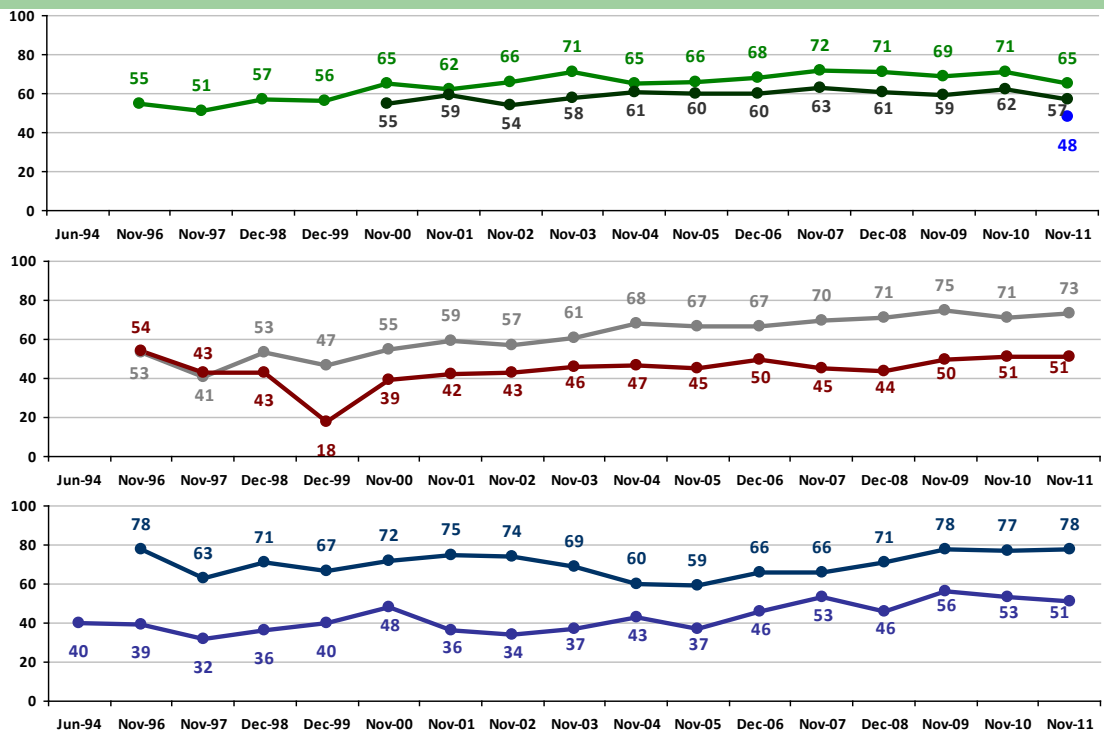
• Ministry for the Environment

• New Zealand Customs Service

• Inland Revenue Department

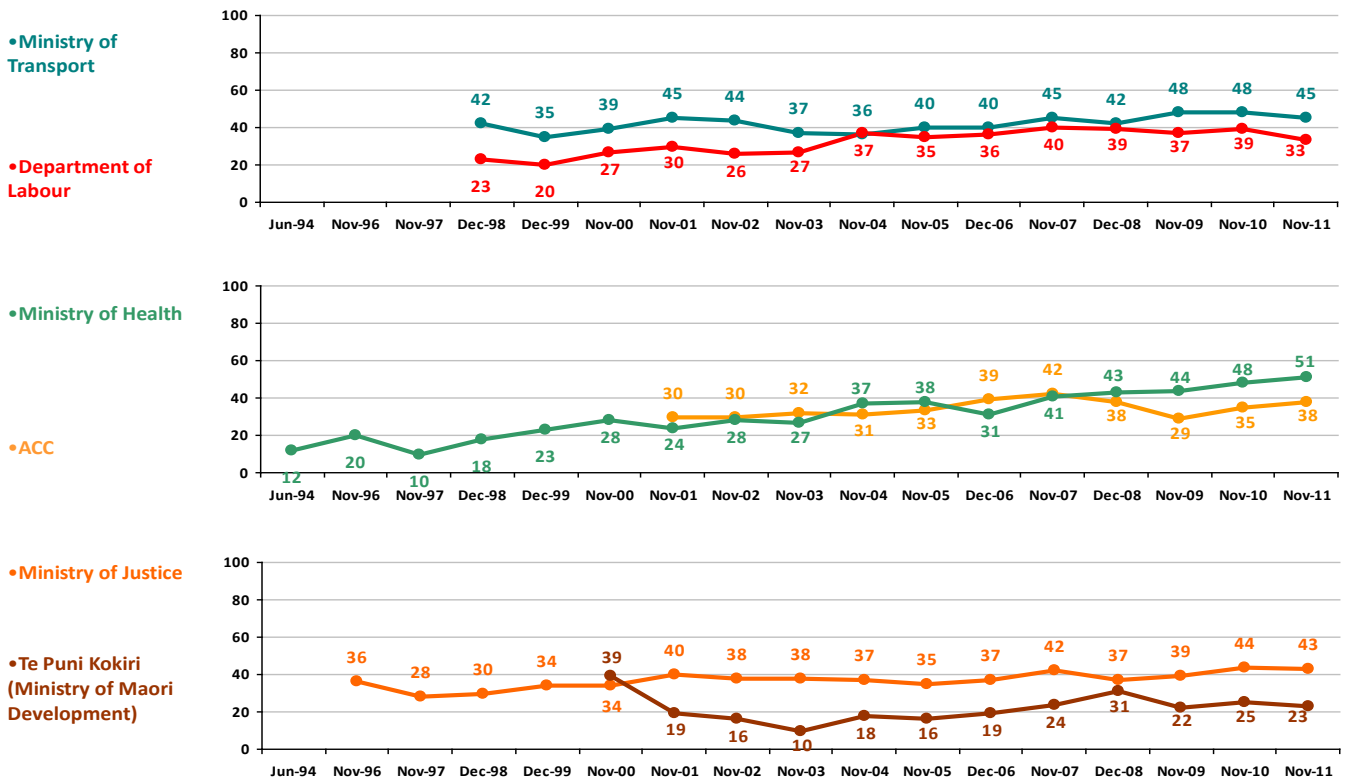
• New Zealand Police

• Ministry of Defence



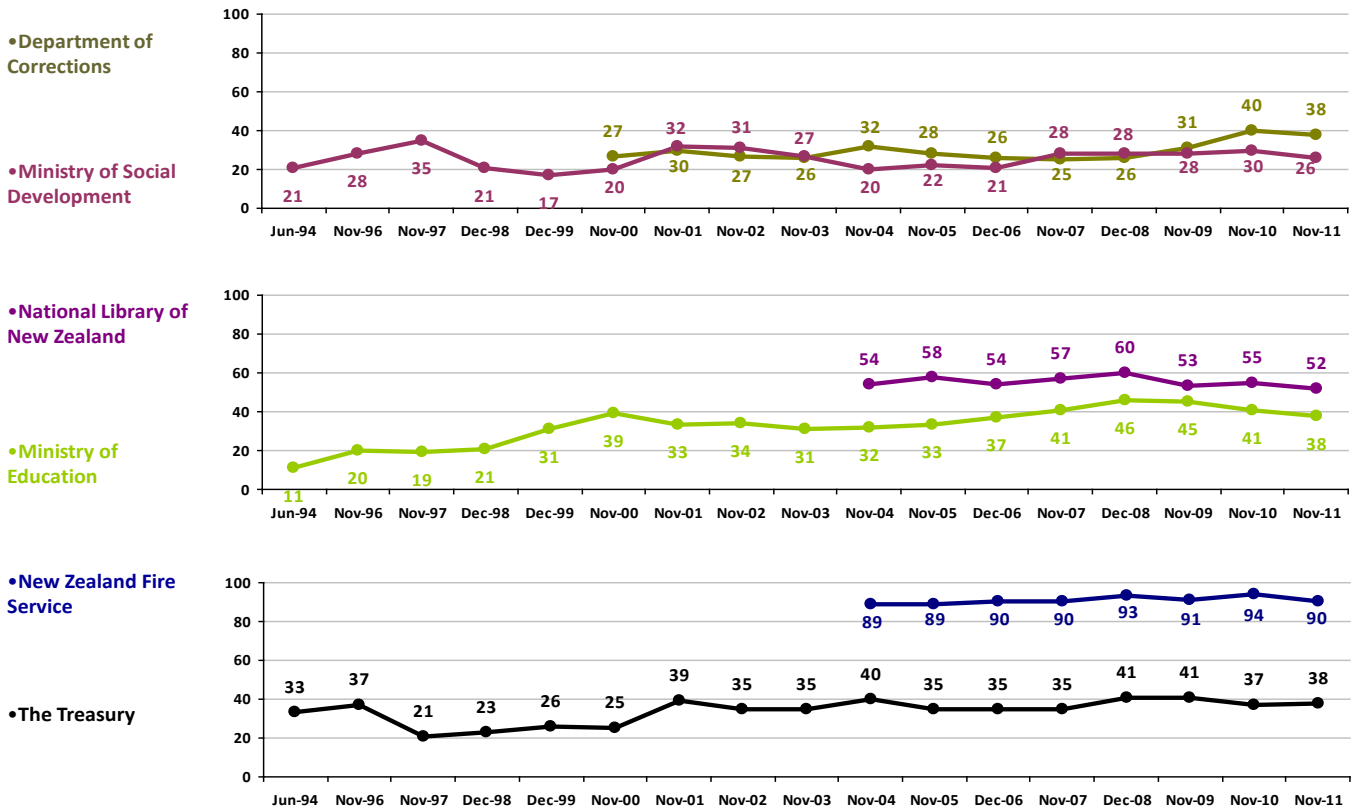
Base: All, n=750, UMR Telephone Omnibus

Government Department Performance (Continued)



Base: All, n=750, UMR Telephone Omnibus

Government Department Performance (Continued)



Base: All, n=750, UMR Telephone Omnibus

christchurch earthquake

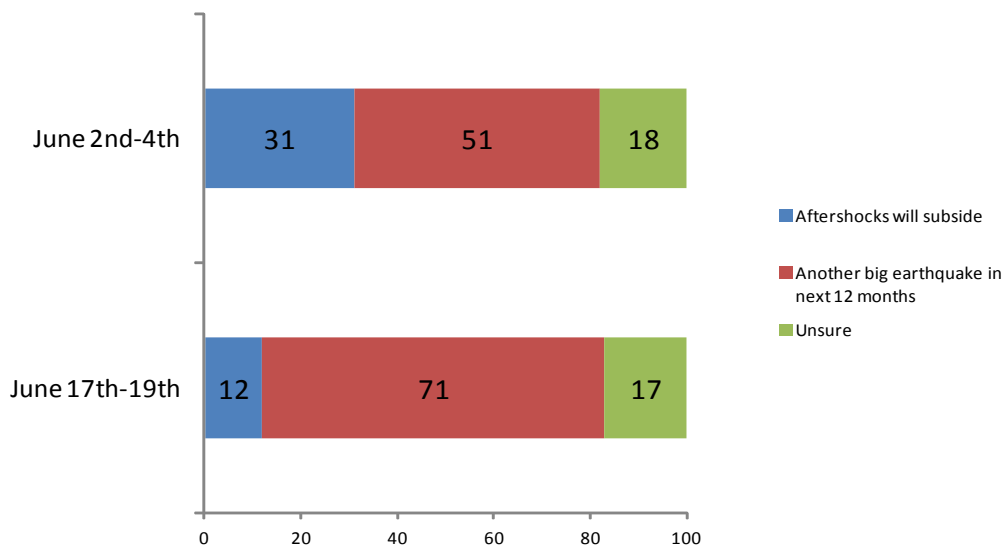


UMR has asked a range of questions for various clients on the situation in Christchurch. In early June, we conducted a standalone survey to look at the attitudes and expectations of Christchurch residents. Nine days after fieldwork finished, the major June aftershocks struck. Assuming that the major aftershocks may have changed attitudes, we conducted a follow-up survey four days after that. This therefore offers a unique picture of how the big June aftershocks affected Christchurch residents attitudes and expectations.

Following the aftershocks, residents became much more likely to expect another big earthquake within the next 12 months. This number surged from 51% to 71% of residents, while those who believed the aftershocks will subside took a dive from 31% to 12%.

Expectations for future earthquakes

While it is hard to tell, do you think there are now only aftershocks which will subside or do you think that there could be another big destructive earthquake in the next twelve months?



Base: All, n=750, June 2011, UMR Telephone Omnibus



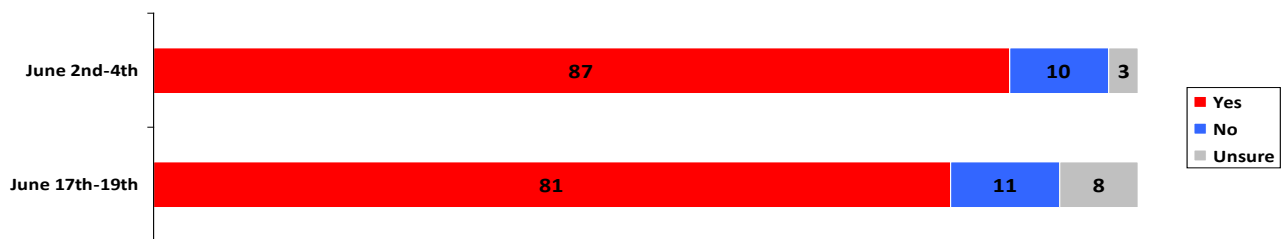
christchurch earthquake

At the same time, more residents re-considered their long term plans. Most Christchurch residents still expect to stay in the city, but this figure dipped from 87% to 81%.

Confidence that the support would continue once Christchurch was no longer in the headlines slipped after the June 13 aftershakes (down from 69% to 43%).

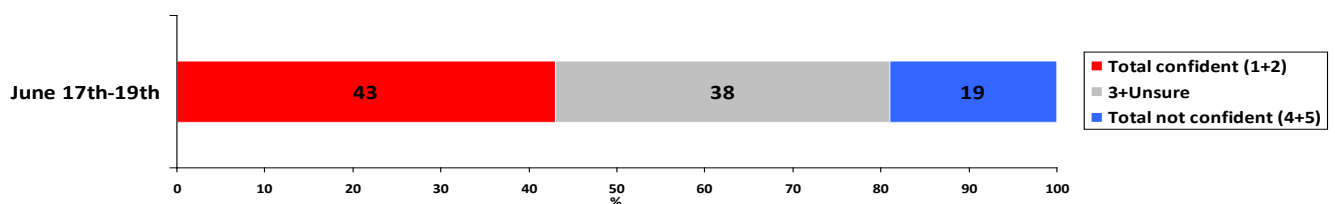
Living Intentions

Do you expect to keep living in Christchurch in the next few years?



Continued Support

Support will continue when Christchurch is not so much in the headlines.



Base: All, n=750, June 2011, UMR Telephone Omnibus

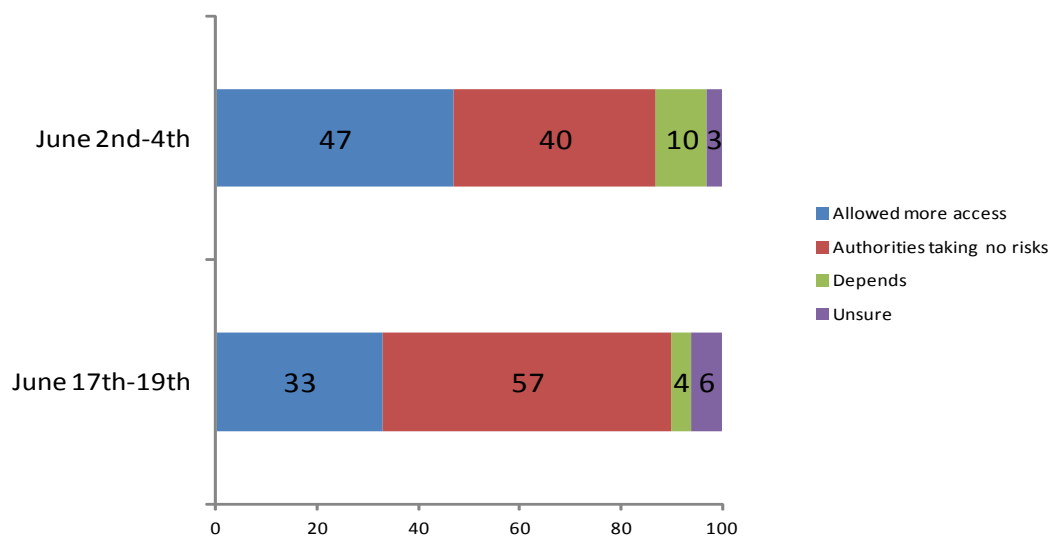
Prior to June 13th almost half the residents had been unhappy with the decision by authorities to restrict access to the CBD. Following the aftershocks those who believed there should be more access dropped to 33% from 47%.

Christchurch residents were united in their praise of emergency services with the New Zealand Fire Service attracting a 95% approval rating and Police and Urban Search and Rescue 93% respectively.

Although commitment to heritage buildings is still strong in the city (94% believing at least some or more of the heritage buildings should be restored and protected), an unmistakable 75% believe that overall the city should be 're-built with a new and more modern' look.

Access to the CBD

Do you think that the CBD business owners should have been allowed more access to their business premises or do you think that authorities have been right to take no risks with safety?



Base: All, n=750, June 2011, UMR Telephone Omnibus

rugby world cup



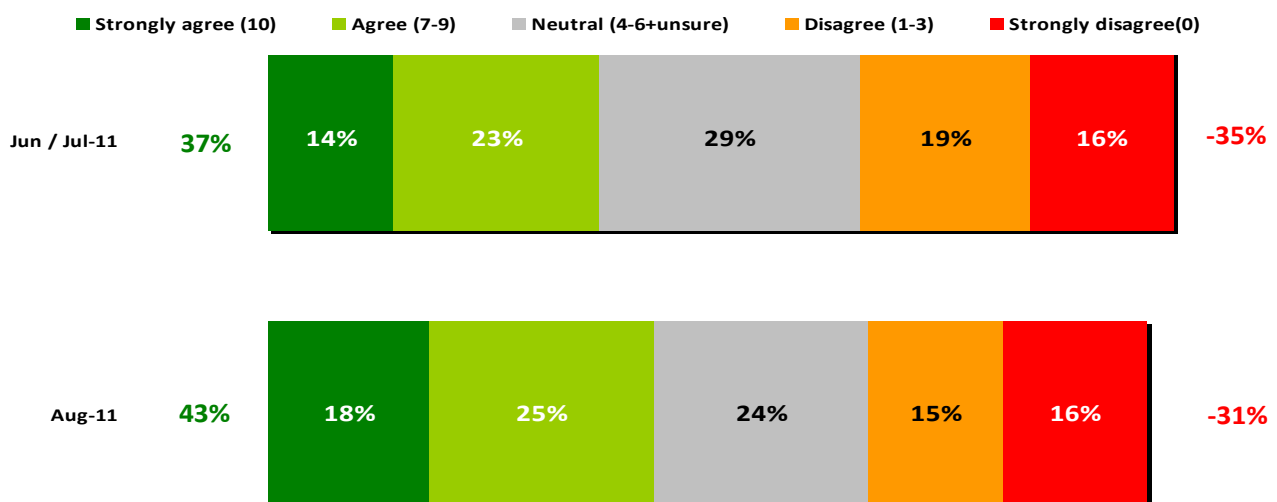
Even though the national mood improved over the period of the World Cup, New Zealanders were not especially enthusiastic about it before it started. A poll was conducted in August 2011 to look at the public's opinion of the world cup.

43% were looking forward to the World Cup, and 31% were not.

Anticipation of Rugby World Cup

On a scale of 0 to 10, where 0 is strongly disagree and 10 is strongly agree, please indicate how do you feel about the following:

"I am looking forward to the RWC"



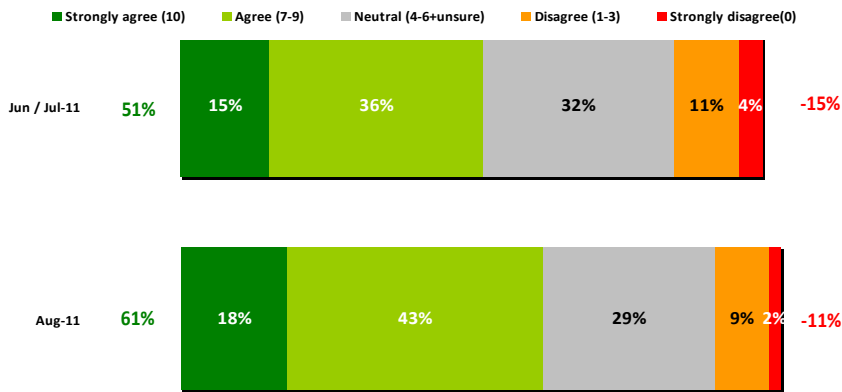
Base: All, n=1000, August 2011, UMR Online Omnibus.

61% thought that it would be good for New Zealand’s economy, but 35% believed that it would be disruptive for many New Zealanders.

Rugby World Cup Good for the Economy?

On a scale of 0 to 10, where 0 is strongly disagree and 10 is strongly agree, please indicate how do you feel about the following:

“The RWC will be good for New Zealand’s economy”

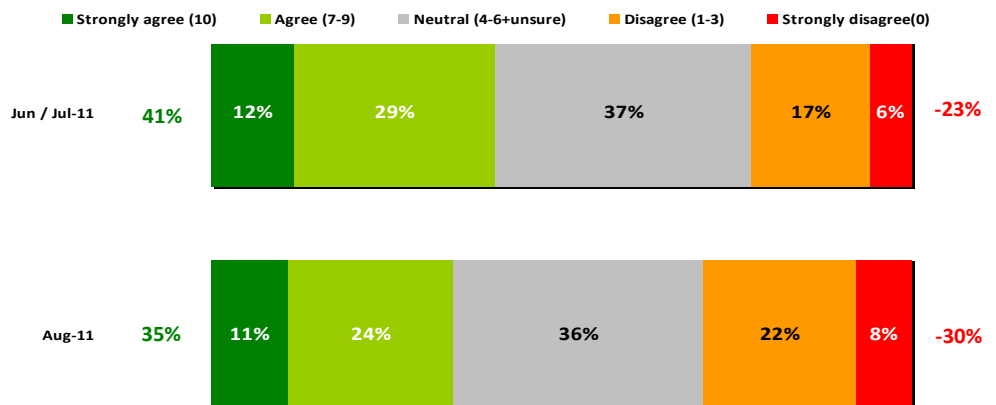


Base: All, n=1000, August 2011, UMR Online Omnibus.

Rugby World Cup Disruptive

On a scale of 0 to 10, where 0 is strongly disagree and 10 is strongly agree, please indicate how do you feel about the following:

“The RWC will be very disruptive for many New Zealanders”



Base: All, n=1000, August 2011, UMR Online Omnibus.

biggest rival at rugby world cup

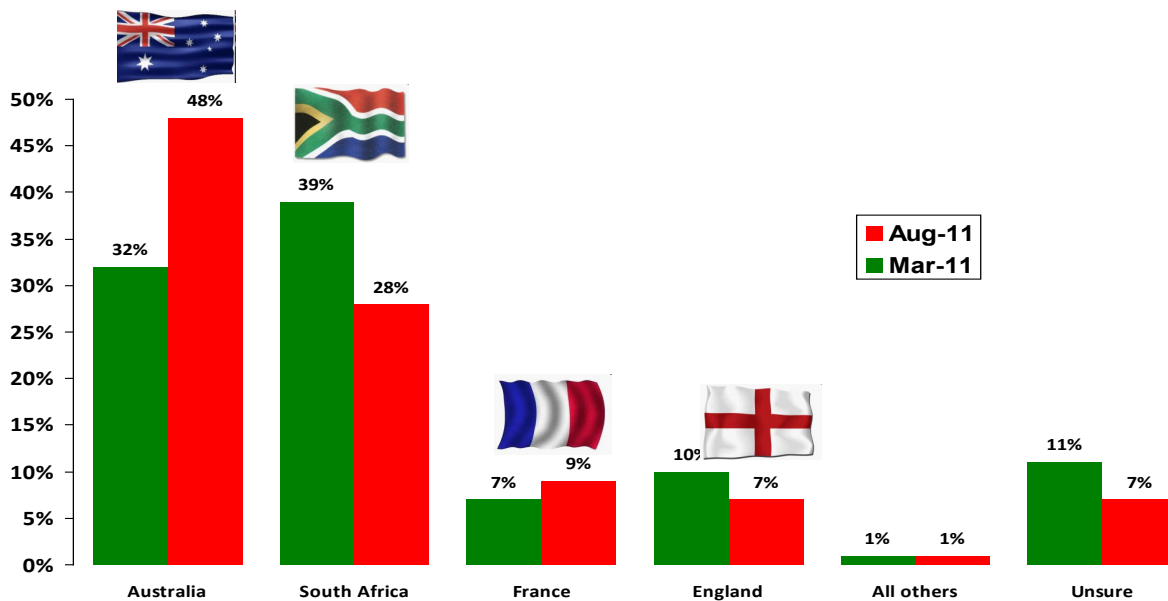
We were quietly confident of an All Black victory, although few of us thought that France would be the biggest threat.

82% of New Zealanders who were interested in rugby were confident that the All Blacks would win, although only 28% were very confident.

Just 9% thought that our biggest rival would be France, compared with 48% for Australia and 28% for South Africa.

Biggest Rival at Rugby World Cup

Who do you think will be the All Blacks most serious opponent at the World Cup?



Base: All, n=750, August 2011, UMR Telephone Omnibus.

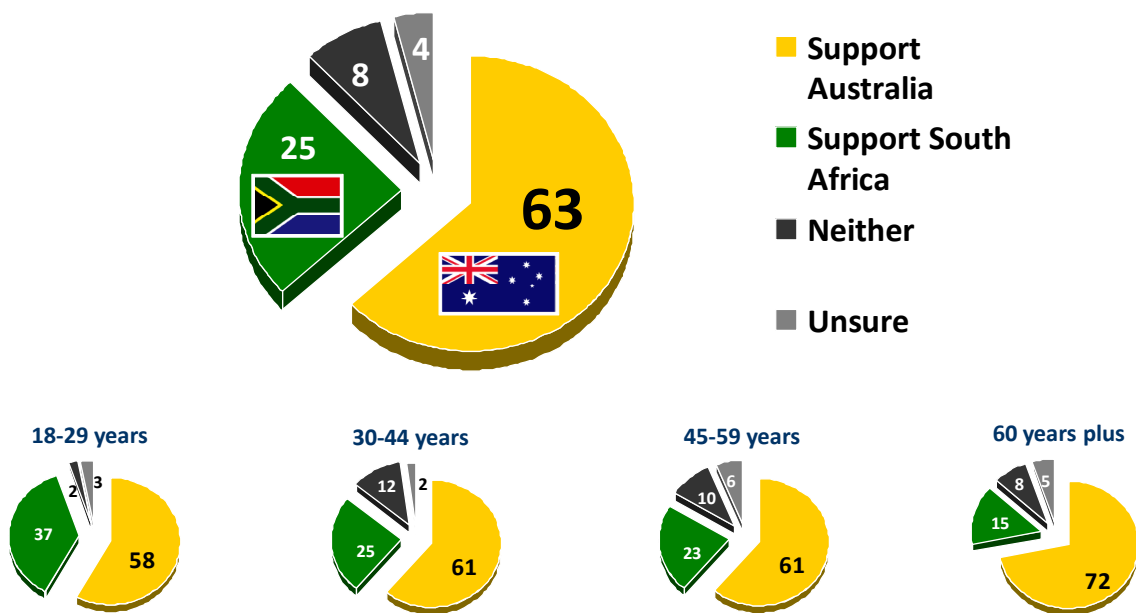
support of australia vs south africa

Even though Australia was seen as a bigger threat than South Africa, most New Zealanders wanted Australia to win the quarterfinal with South Africa.

63% said that they would support Australia in that match, while 25% thought they would go for South Africa.

Support of Australia versus South Africa

In the likely event of an Australia vs South Africa Rugby World Cup quarter final, will you support Australia or South Africa?

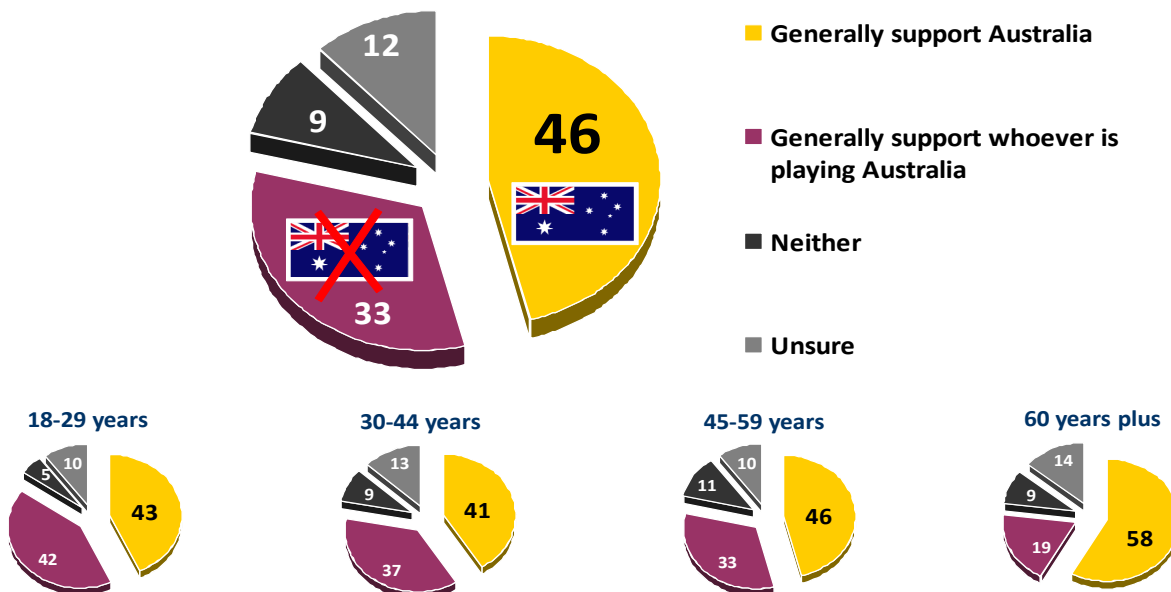


Base: All, n=750, September 2011, UMR Telephone Omnibus.

Asked who they generally supported in matches between Australia and other countries, 46% reported that they usually supported Australia and 33% that they supported 'anyone but Australia'.

Support of Australia

When Australia is participating in matches other than New Zealand, do you generally support Australia or generally support whoever is playing Australia?



Base: All, n=750, September 2011, UMR Telephone Omnibus.

the internet



UMR released a poll in April which outlined the dramatic changes in the way New Zealanders use the internet over the last twelve years (1999-2011).

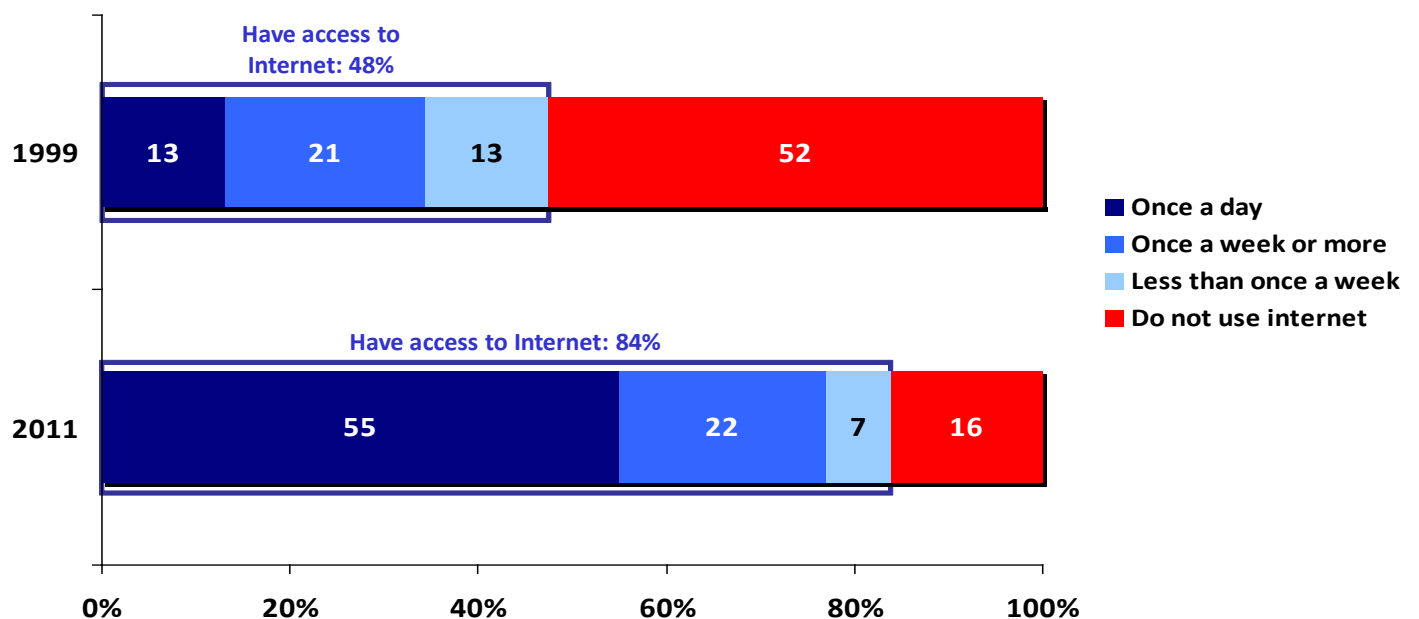
The proportion of New Zealanders with access to the internet has almost doubled – from 48% in 1999 to 84% in 2011.

The real change, however, is in the frequency New Zealanders use it. 55% of New Zealanders now use the internet every day, almost five times as many as in 1999.

Internet Access (Frequency)

Do you have access to the Internet, either at home or at work?

[If Yes] And about how often do you visit websites on the Internet?



Base: All, n=750, March 2011, UMR Telephone Omnibus

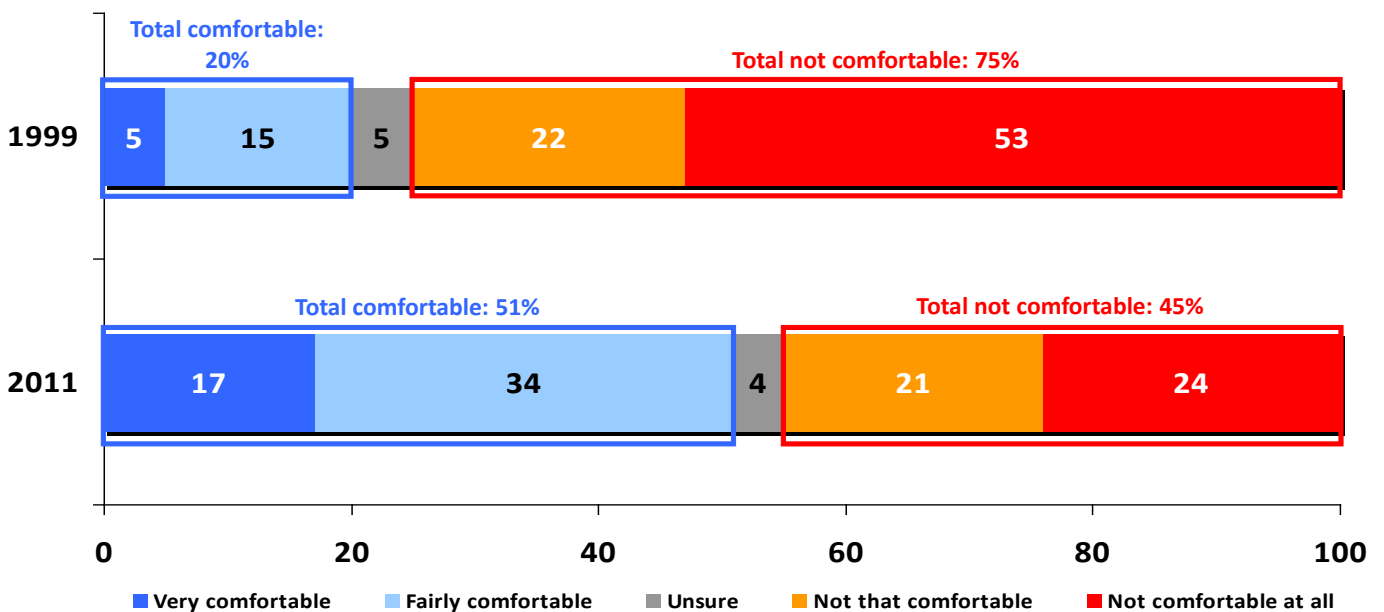


comfort with credit cards

The proportion who were comfortable with using credit cards over the internet has increased from 20% in 1999 to 51% now.

Level of Comfort with Credit Card

Generally how comfortable would you be with purchasing products directly from the Internet using a credit card?:



Base: All, n=750, March 2011, UMR Telephone Omnibus



views on facebook and google

1999 is an excellent starting point for measuring these trends, because that year saw the introduction of New Zealand's first widely available broadband service and the launch of Trademe, which grew to become the website New Zealanders use more than any other.

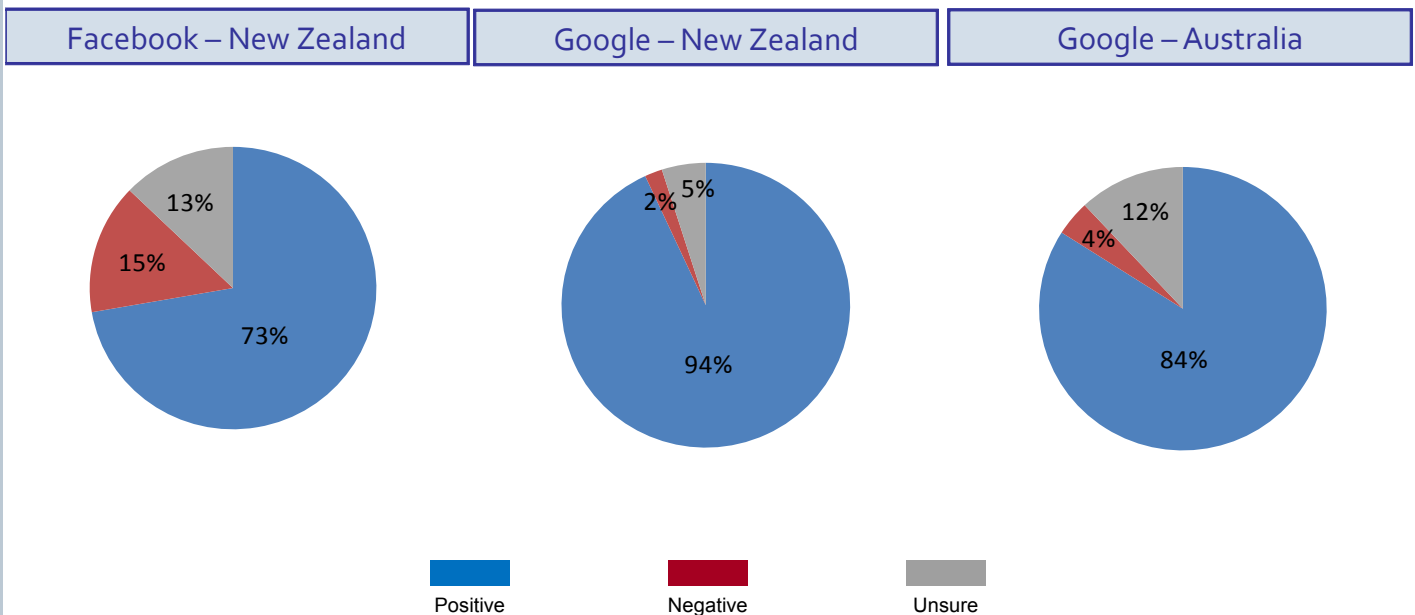
Most New Zealanders have positive opinions of both Facebook and Google, and most of us think that Google does not manipulate search results for its own benefit.

94% of New Zealanders have positive opinions of Google.

73% view Google positively.

Views on Facebook / Google

Do you have a positive or negative opinion of Facebook / Google?



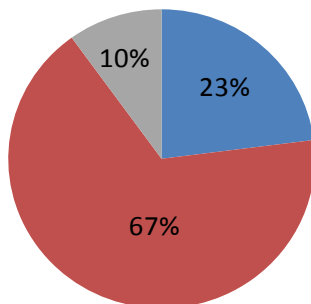
Base: All, n=1000, May 2011, UMR Online Omnibus

67% of us believe that Google does not manipulate search results for its own benefit.

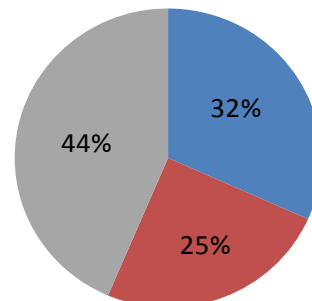
Google manipulation of search results

Do you think Google manipulates its search results for its own benefit?

Google – New Zealand



Google – Australia



Yes

No

Unsure

Base: All, n=1000, May 2011, UMR Online Omnibus

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