



NZME.
Tell ME

**2021
Lifestyle
Survey**

So much has changed since the emergence of COVID-19.

NZ's response to the pandemic and our virtual elimination of community transmission has ensured that day-to-day life for many Kiwis has followed a very different path than those living in more deeply affected countries.

This divergent path has meant global insights into consumer behaviour no longer apply and that local research pre-dating the pandemic has been unable to accurately reflect the altered realities of life in New Zealand today.



Through a uniquely local lens,
New Zealand Media and
Entertainment has uncovered
how New Zealanders feel, shop,
work, travel, and live - today,
and beyond.

The result is our **2021 Lifestyle Survey – How We're Doing** - a snapshot of New Zealanders and their attitudes as we follow our unique path. This is the first in our **TellME Research Series**.



Our methodology

We invited Kiwis to tell us about themselves. We engaged Colmar Brunton as our research partner to seek insights into how we're living today and the life we seek for the future: How we're feeling now, what's changed, the challenges we face today, and the decisions we're looking to make tomorrow.

Between 19 February and 5 March 2021, we spoke with 1,000 New Zealanders to find out how people are feeling after an 'unprecedented' year, and to assess what changes we've experienced during the past year.

- All responses are weighted to the NZ population
- The survey was run online for a period of two weeks, distributed through Colmar Brunton's panel.
- We asked a range of questions of respondents that were framed to reveal how they felt or what had changed compared to the same time last year.

See appendix for a full methodology outline.

How we're doing

We've kept going, we're tough and are feeling like things will improve.

TellMe reveals how New Zealand remains an optimistic nation, and while we have uncertainty around the way we live, work and play, most of us feel that overall things will either stay the same or improve in the next 12 months.





How we're doing

New Zealanders are:

THINKING

New Zealand will improve in the next 12 months

FEELING

lucky compared to the rest of the world

DOING

more bulk buying and fewer top-up grocery trips

USING

more digital media, especially online TV and news websites

FEARING

the threat of redundancy



Nine out of ten New Zealanders are feeling lucky compared to others around the world



41% of New Zealanders are working from home in some capacity during the week



34% are spending more time trying to get the best deal



Millennials and Gen Y are leading the way with financial caution, with Gen X being more frivolous



51% of New Zealanders are optimistic about travelling overseas in the next year



Eight out of ten Kiwis are making do with the food they have in the cupboard



Over a third are exercising outdoors more than they were a year ago



Over a third of New Zealanders are saving more money than they're used to



Over a third are reading more online news and watching more TV than they were a year ago

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How we feel

How 'OK' we are and what emotions
are we experiencing?



Feeling lucky

There's a strong consensus that we're in a good place as a nation, with nine out of ten New Zealanders feeling lucky compared to others around the world.

Media messaging around 'kindness' and 'community' are reflected in our survey results: We're looking out for those around us and feeling more tolerant of our fellow New Zealanders. Those who are feeling more open with friends and family about their feelings are more likely to be doing ok.

Reassuringly, nearly half of our population say that they're doing well at the moment, and this was asked during the time when the nation increased alert levels. The Auckland region saw two separate alert level increases and as expected, slightly fewer Aucklanders are in a good place compared to the rest of the country.

Many of us have emotions in a state of higher alert compared to over a year ago. It seems common to have conflicted feelings such as a heightened sense of anxiety and happiness occurring at the same time.



How we spend

How we use credit cards, pay for big ticket items and how the crisis has affected our spending

Carefully spending, carefully saving

Over a third of New Zealanders are saving more money than they used to

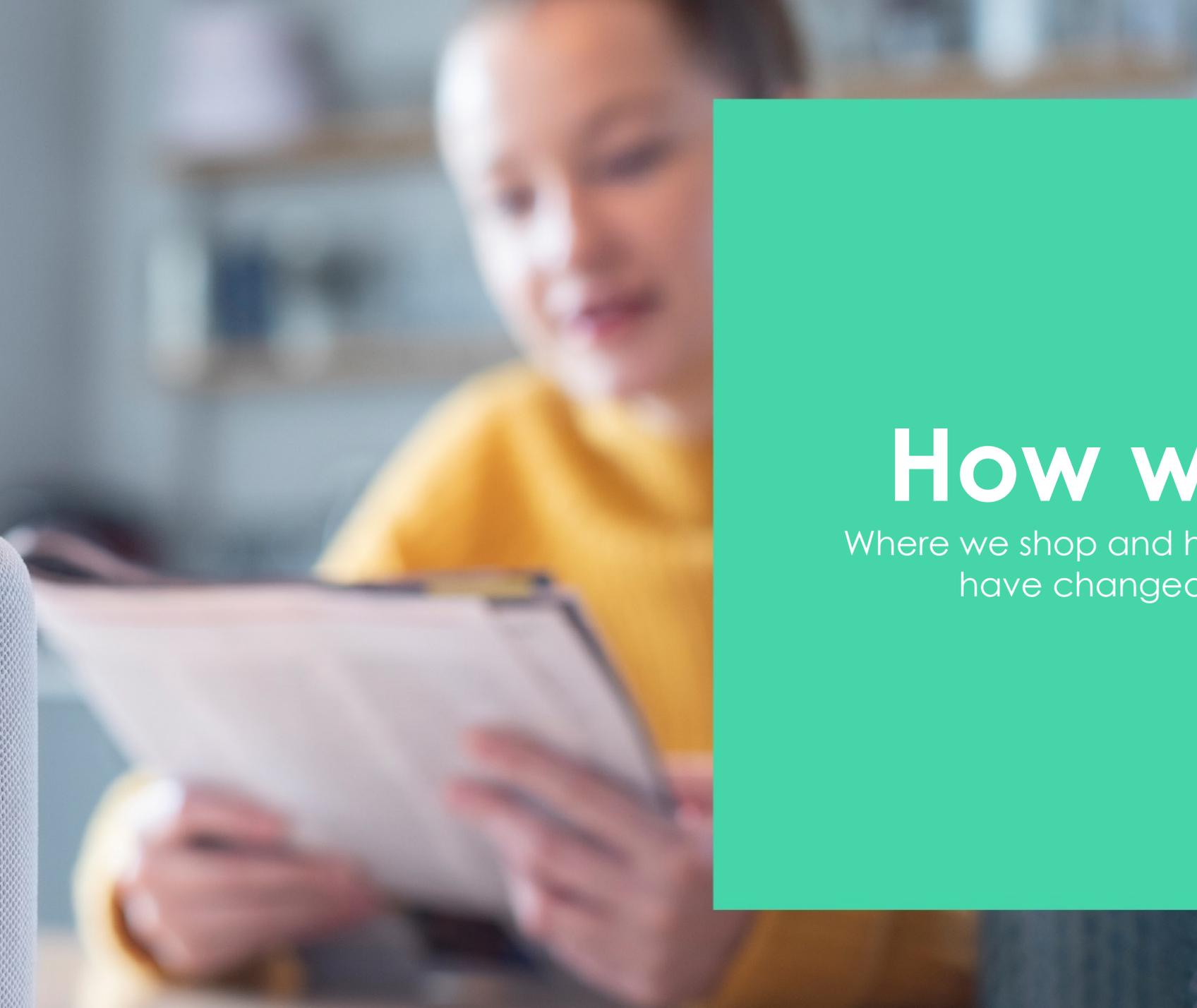
While we might assume finances have been hard hit as a result of the crisis, we're managing to save more money than before, especially those in the higher income groups who have bought a new property in the past year.

We saw young Kiwis motivated to jump on the property ladder, whether that's buying or planning – this is likely driven by Kiwis who returned home last year. It's realistic to expect that many of these young adults are first time buyers who have been able to take advantage of the low mortgage interest rates we've seen.

There's a push to put more money aside in case of an emergency compared to a year ago, particularly for those in the younger age groups. Covid scared a lot of us (who were able) to save an emergency fund.

When we are buying big ticket items, we are now spending more time thinking about whether it is something we actually need. Kiwi families (the squeezed middle) are more likely to lean on payment plans for these purchases and are juggling their finances to make ends meet.



A woman with dark hair, wearing a bright yellow sweater, is looking down at a tablet computer she is holding. The background is a blurred indoor setting, possibly a living room. A large teal speech bubble graphic is overlaid on the right side of the image, containing the main text.

How we shop

Where we shop and how our shopping habits
have changed in the past year

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A nation of considered shoppers

34% are spending more time trying to get the best deal

The way we shop has changed enormously at both a global and local level. More shoppers have shifted online.

Compared to a year ago, nearly half of us say we're more likely to check prices online for the best deals, we're taking more time to shop and thinking about whether we *really* need something. Women in particular are saying that they're less impulsive than before the crisis, and younger females are a group who are shopping online more to avoid contact with people.

Younger Kiwis are still shopping at stores and malls, driving growth in visits to shopping areas such as Tauranga's The Crossing, Queensgate in Wellington and the new Commercial Bay development in Auckland.

Shopping is becoming more functional and transactional. We are planning ahead, searching online for the best deal and much of the decision is often made before we set foot in the shop.



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At home

How we are spending our
downtime at home



Our home, our castle

The internet saved our sanity in lockdown, however close to half of us indulged in therapeutic pastimes such as reading, organising our homes, gardening and baking

Post lockdown, we're feeling slightly jaded. Although we have more freedom compared to the rest of the world, we have become a little more introverted and are spending more time at home. Our homes have become our bubble.

During the first lockdown, most of us had at least one positive experience. There was more time for hobbies, exercise and putting a teddy in the window. There is an increased a sense of community especially in metro areas, and for some there were increased family bonds and national pride.

Nearly half of us watched more TV online compared to last year. Reading and gardening are favoured home activities for older Kiwis, while the under 50s make the most of any spare time they have by catching up on sleep.

Women are twice as likely as men to spend their downtime/spare time at home organising their home, as well as cooking and baking.





How we eat

Food and grocery trends;
what has the crisis meant for food shopping

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Better prepared

Eight out of ten Kiwis are making do with what they have in the food cupboard

Lockdown has shifted our shopping habits. We're now used to having to plan ahead and do the supermarket or online shop once a week or fortnightly – and we're doing fewer top-up shops.

We're dropping the top-up shop in favour of a bulk-buy, and when we're down to the bottom of the fridge, eight out of ten of us are "shopping the pantry", where we get creative with the foods we have hiding at the back of the cupboard.

We continue to shop local - the local butcher, baker and grocer - but conversely we are visiting destination specialty stores less.

Pre-prepared meal kits have soared in popularity with around a fifth of under 50s using them more often than a year ago. The ease of having at least three meals a week delivered to the home, prepped and ready to cook is more appealing than ever.



How we work

Changes to our work and the evolution of
working from home



A work life balance

41% of New Zealanders are working from home in some capacity during the week

Many of us can work from home in some capacity. During Covid-19 there were reports of people working longer hours and not able to switch off. How has this affected us now that we are able to be back in the workplace?

We're finding our jobs more demanding, especially those in the 50-64 age group, a career stage where people would generally like to be settled and established in their roles. This age group is less likely to be working from home, so will have had to deal with extra pressures of co-ordinating work with lockdowns, perhaps returning to work to a bigger workload after each lockdown period.

For those who are finding their jobs more demanding, 40% are still working full time at their workplace. Many feel more frustrated, anxious and worried.

Kiwis working from home are saving more time without having to include a commute to work. They are spending more time with family, being able to get on top of household chores and increase their outdoor exercise. This goes some way to compensating for the extra demands work is placing on them and correcting the work/life imbalance curve ball thrown by last year's long lockdown.

There are functional benefits to a shift to working from home, however for many they don't fully compensate for the additional stress that workers are experiencing.



Our fitness

Changes we've made to our
exercise routines



Movement is good for the soul

Over a third of us are exercising outdoors more than we were a year ago

There was a newfound love for exercise during the pandemic. Bike purchases soared with some reports of a 12-month waiting list. For households with dogs, there were plenty of walks to be had in a day.

Whilst Netflix and sleep have been key themes of lockdowns, we're still making the time to fit some exercise into our routine. Only a small number of us have stopped exercising completely, with slightly more people cancelling gym memberships than joining a gym.

Online exercise routines using paid apps or videos are popular with young Kiwis, especially in Auckland and Wellington. We have evolved our exercise regimes over the last year to adjust to current needs. We saw a spike in those that needed more relaxing exercises like meditation and mindfulness.

Over a third of us are spending more time outdoors doing exercise compared to a year ago, this could be driven by the need to get out of the house. Those with higher income households are more likely to be running, cycling or swimming in their spare time.

Kiwis who are exercising outside are showing a likelihood to look out for those around them, and to be more tolerant of others, as well as cooking meals from recipes. Carrying on their exercise regimes has led to a more positive viewpoint, where they feel that in the next year things will improve.



Our holidays

Future travel and when we intend
to go overseas





Cautious excitement over travel

Over half of us have the potential to travel in 2021 - 2022

In October 2020, Tourism NZ predicted that the number of New Zealand domestic holidays would increase by 118% YOY.

With the recent opening of the Australia and Cook Islands travel bubbles, perhaps the caution we felt earlier this year around a global rollout of the vaccine being a major factor in our travel plans has reduced. As with many national trends, it appears that young Aucklanders will be the first to book tickets, with the 50-64s a little less likely to be dusting off their passports – they're tending to wait until international borders have been open for longer.

Australia and the Pacific Islands are the top destinations for Kiwis, with over half of us saying these are the places we would most like to travel on our next trip.

Kiwis haven't lost their zest for adventure and 82% are interested in traveling overseas. We just want to hear reassurances from travel companies that they are in our team of five million, with robust cancellation policies, a trustworthy record and refunds if plans must change.

The winners will be the travel brands that both understand how our national mindset around heading overseas has shifted, and work to allay our fears.



Our media usage

What have we consumed more or less of
and how much time are we spending with our
media channels

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Going digital

Over a third have increased their online consumption of TV and news articles, compared to a year ago

We are spending more time in front of screens, headphones on or with our nose in a publication.

Compared to a year ago, we are spending more time with streaming TV services such as Netflix and Disney+, as well as online news websites and social media. With the eyes of the world's media upon us, we've looked to our local brands to tell the real story, with increasing engagement and time spent with our trusted NZ news brands.

Younger audiences are turning to printed newspapers in high numbers, a movement likely driven by many younger people returning to their family homes in lockdown and developing new habits. In fact, 18-34s are the age segment most likely to have seen an increase in newspaper frequency of reading.

As well as augmenting their printed newspaper consumption with online news websites, 18-34s are also increasing their use of podcasts, social media, online music and radio as they navigate the first global disaster their generation has experienced. Podcasts in particular have grown at nearly double the rate for 18-34s, where this age group are looking for thought leadership from respected peers to guide their thinking.



Our future

Looking ahead, what will happen to the economy, travel, health, finances and day-to-day routines



The future is looking up

We're an optimistic nation with 42% of us feeling that overall, things will improve in the next 12 months. Only a small section of us are worried that things will get worse, a sentiment that is keenly felt especially in the South Island.

While NZ may have got off lighter than other countries as a result of the crisis, and a lot of us are doing ok, there are many pockets of our society that are struggling, particularly the lower-earning 35-49 age group, who are trying to manage work and family life.

We're largely undecided on whether the economy will improve, stay the same or get worse in the next 12 months, with the majority feeling that travel restrictions, and our personal freedoms, health and finances will remain the same or improve. The takeout here is that we feel the economic fall-out from the crisis will be a longer-term issue, even after other problems have been resolved.

Higher income households have a generally more favourable viewpoint on what the future holds, and see themselves travelling more, perhaps using the financial gains they've made recently.

New Zealand spent the majority of 2020 at the centre of the global stage for our world-leading response to the Covid crisis. As we settle into our new normal, we feel the need to capitalise on being in a mostly positive and safe place, and to look ahead to a united and interesting future.

Summary

The overall sentiment is that as a nation we are feeling positive and lucky compared to others around the world, but we are still a little cautious and anxious. There is a feeling that we've lost our safety net when it comes to security at work and what our future plans might look like.

While we might think that finances have been hard hit as a result of the crisis, we're managing to save more money than before, and we saw young Kiwis motivated to jump on the property ladder. There's a push to put more money aside now, with some of us creating emergency funds as a result of the pandemic.

In saying that, we are still shopping, it's just changing slightly. It has become more functional and transactional; we are planning ahead by searching for the best deal and much of the decision has already been made before stepping into a store.

During the first lockdown, there were increased community and family bonds and we felt like we had a country wide pact to support New Zealand, this came through strongly with around 70% of us looking out for those around us.

Encouragingly, only 2% of Kiwi's have lost their job. For those still in employment, we are finding our jobs more demanding, after the lockdown period we are retuning to bigger workload.

We've lost a bit of our shell and our resilience has taken a hit, but we've kept going, we're tough and are feeling good.

A woman with dark hair, wearing a bright yellow top, is looking down at a tablet computer she is holding. The background is a blurred indoor setting. A large teal speech bubble shape is overlaid on the right side of the image, containing text.

Tell us more

The NZME Research team are available to provide further insights on the 2021 Lifestyle Survey.

As part of NZME's TellME Research Series, we'll be checking in with New Zealanders soon, and if you'd like to be a part of that conversation, please get in touch.

Email: tellme@nzme.co.nz

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Appendix

Lifestyle Survey 2021

Methodology

In January 2021, NZME designed a questionnaire to talk with all New Zealanders and engaged Colmar Brunton to run the survey. We wanted to find out about our lives; how we live today, and the life we seek for the future. How we're feeling now, what's changed, the challenges we face today, and the decisions we're looking to make tomorrow.

Between 19 February and 5 March 2021, we spoke with 1,000 New Zealanders across the country to find out how people are feeling after this turbulent year and to assess whether we are radically different that we were a year ago.

- All responses are weighted to the NZ population, so are reflective of all New Zealanders.
- The survey was run online for a period of a week, it went out through the Colmar Brunton panel which has a wide representation across New Zealand. The results were then analysed by the NZME research and insights team.
- We asked a range of questions that respondents are asked how they feel or what they have changed compared to the same time last year.

Timeline for Survey Fieldwork, which overlapped with multiple lockdown levels

	Survey Fieldwork	Auckland	Rest of NZ	
14 Feb 21				
15 Feb 21		Level 3	Level 2	
16 Feb 21				
17 Feb 21				
18 Feb 21				
19 Feb 21	Fieldwork	Level 2	Level 1	
20 Feb 21				
21 Feb 21				
22 Feb 21				
23 Feb 21				
24 Feb 21			Level 1	Level 1
25 Feb 21				
26 Feb 21				
27 Feb 21				
28 Feb 21				
1 Mar 21				
2 Mar 21			Level 3	Level 2
3 Mar 21				
4 Mar 21				
5 Mar 21				