



New Zealand's Internet insights 2019

A Colmar Brunton research report
December 2019

Contents

Background and objectives	Slide 3
Methodology	Slide 4
Key findings	Slide 6
How do New Zealanders use the Internet?	Slide 8
What are the benefits of the Internet?	Slide 13
What are New Zealanders concerned about?	Slide 19
Christchurch Call	Slide 28
Awareness of InternetNZ	Slide 31
Flexible working	Slide 35
Internet provision	Slide 40
Appendix: Consumer demographics	Slide 43

Background and objectives



In 2018 InternetNZ conducted a consolidated research project that incorporated three historical research projects for both the former NZRS, and InternetNZ. This project covered business and consumer use and attitudes towards domain names, as well as public perceptions of the Internet in general.



In 2019 you have replicated a section of this research project, to understand any changes in consumer perceptions of the Internet. The survey follows the same processes for 2018, however in 2019 the survey focused only on consumer use of and perceptions of the Internet.

Our objectives for this research are to:

- Understand public perceptions of the Internet and perceptions of the market
- Understand how New Zealanders think about, and use the Internet, and identify any concerns
- Identify any significant changes from 2018
- Maintain consistency with 2018 to ensure continuity of benchmarks and reporting



Methodology



We spoke to a total of 1,001 people online.



Respondents were sourced from Colmar Brunton's online consumer panels.



We used a combination of pre-survey quotas and post survey weighting to ensure results are representative of all New Zealanders by age, gender, and region.



Fieldwork was conducted from 18th – 29th November 2019.

$$\text{M.E.} = \sqrt{\frac{0.25}{n}} \times 1.96$$

The maximum margin of error on the total group n=1,001 is $\pm 3.1\%$ at the 95% confidence interval.

Methodology – The sample in more detail

For the 2019 research we spoke to 1,001 consumers - 803 consumers, and 198 consumers who also manage or own a business. These people are demographically representative of the New Zealand population for age, gender and region.

This sample composition is different to 2018. In 2018 we spoke to both consumers and businesses - a total of 1,859 people. This group was comprised of 858 consumers, 857 businesses, and 144 consumers who also manage or own a business. Consumer behavior and perception results reported in 2018 included the views of all 1,859 people.

Results in 2019 are the views of consumers, and consumers who also own or manage a business. This is different from 2018, where the opinions and attitudes of businesses were a much greater influence. These differences are reflected in some of the results.

Where differences in the results year on year look to be driven by changes to the sample composition, we have included the consumer only result from 2018 for comparison and identification of changes over time.





Key findings



Things to take away...

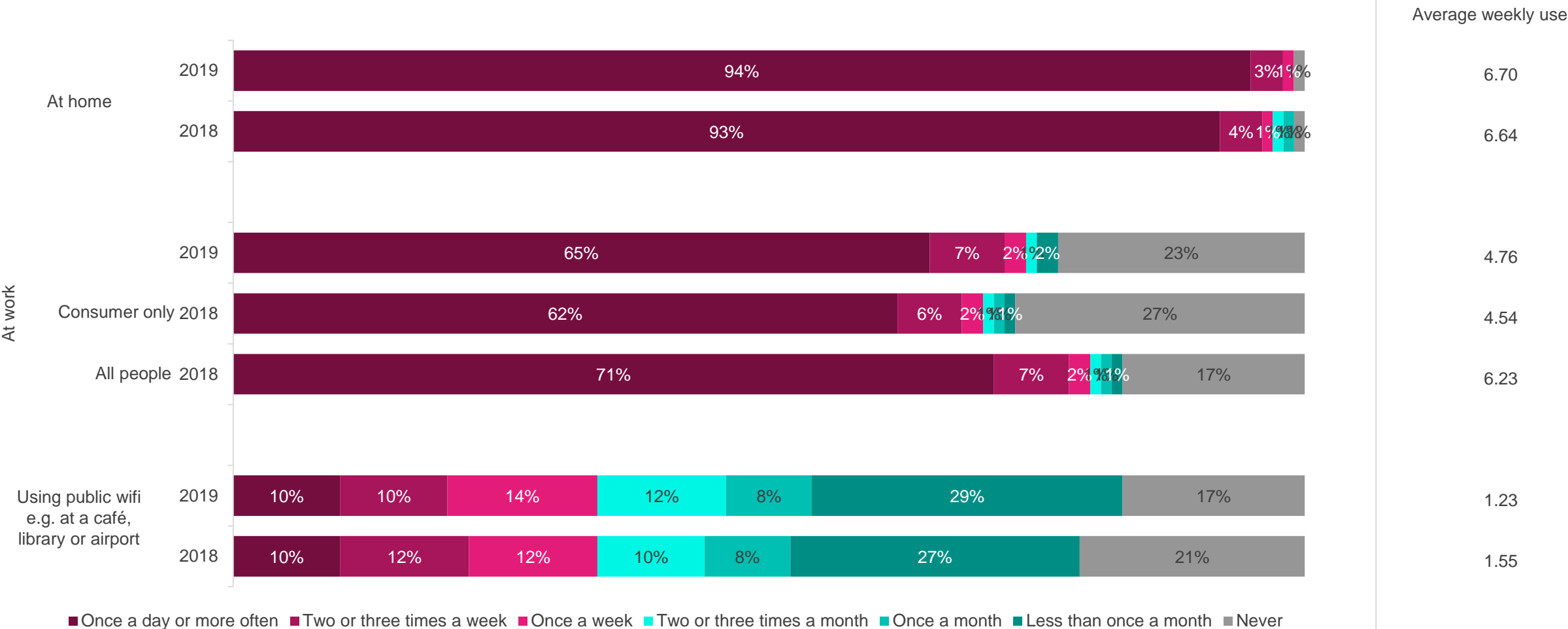
- 1** The way New Zealanders are accessing the Internet hasn't changed significantly in the last 12 months. We are still predominantly accessing the Internet from home, although the frequency of accessing at work has increased slightly.
- 2** SMS (text) is the most popular social media channel, however Facebook has the highest frequency of use.
- 3** Perceived benefits of the Internet continue to be accessing information and communicating with family and friends.
- 4** New Zealanders are concerned about young children accessing inappropriate content, cyber bullying and the security of personal data. While the latter continues to be a key concern, overall concerns about security have decreased significantly – people are less concerned about the security of their personal data, identity theft and threats to privacy than they were in 2018.
- 5** One fifth of people are aware of the Chch call and of those, four out of five can accurately articulate an aspect of the content.
- 6** Awareness of InternetNZ has decreased slightly from 2018, however understanding of what InternetNZ does has deepened to reflect aspects of protection and security.



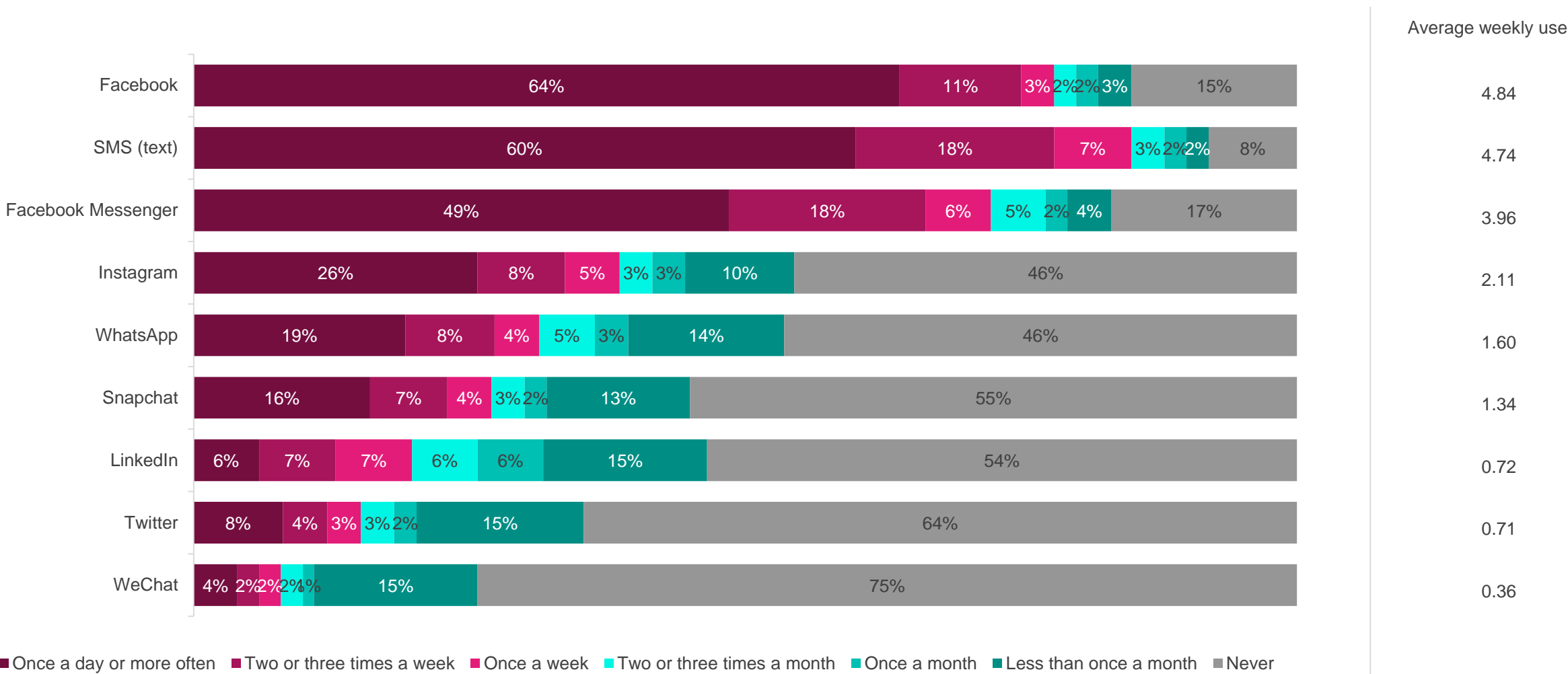
How do New Zealanders use the Internet?



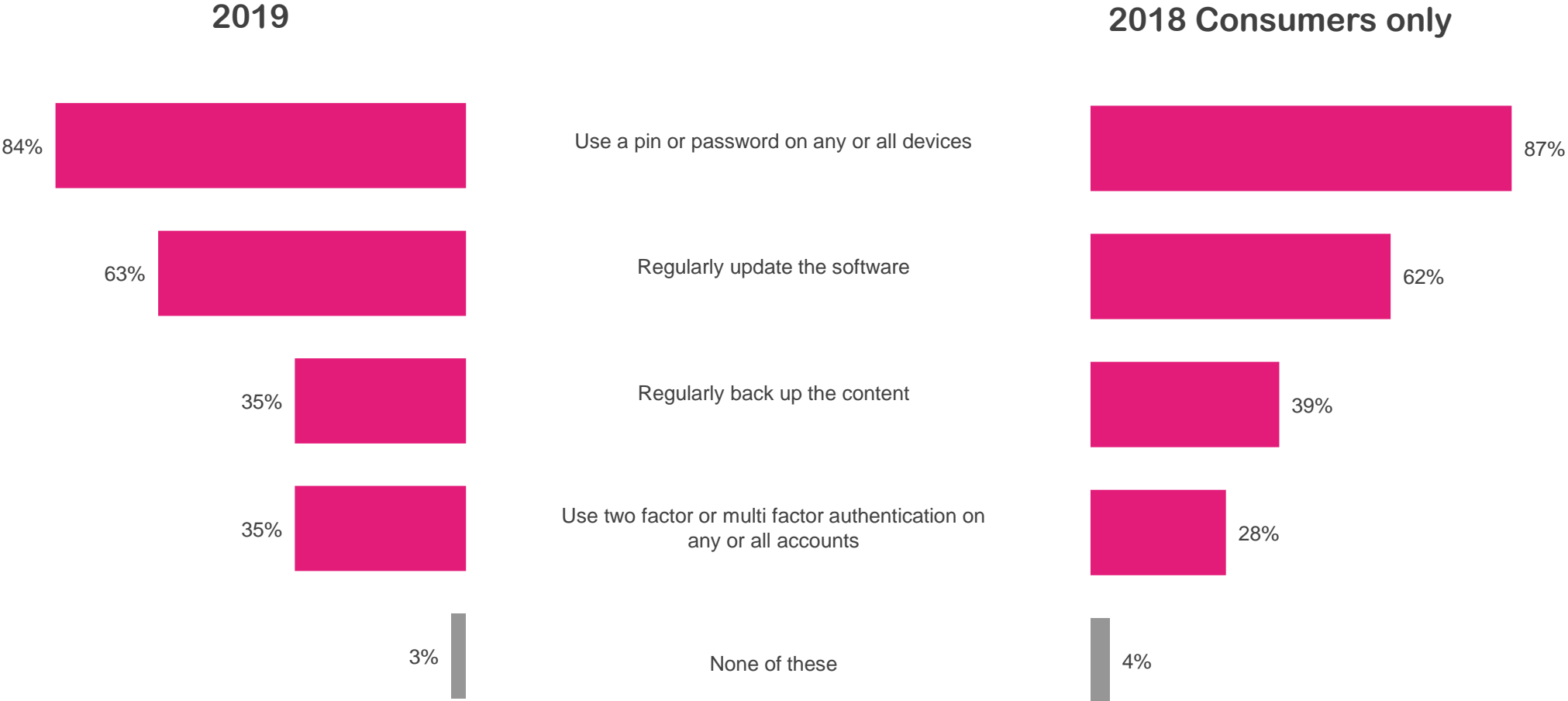
Frequency of accessing the Internet at home is similar from 2018 to 2019, while the frequency of accessing the Internet from work has increased slightly.



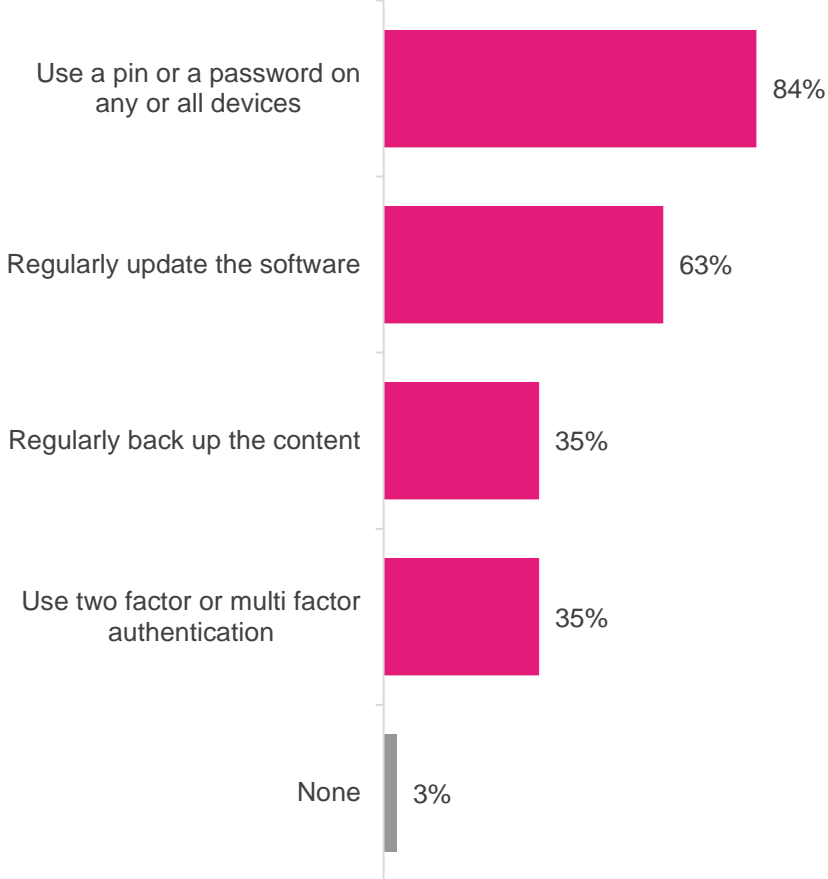
SMS (text) has the highest use (over nine out of 10 people use SMS), however Facebook is the most frequently accessed channel. Six out of 10 people use Facebook but they use it on average 4.8 times a week, compared to 4.7 times a week for SMS.



Over four out of five consumers use a pin or password on their devices. The incidence of two or multi factor authentication has increased significantly from 2018.



Females, and people aged 50 years or older are more likely to use a pin or password. Males, and people aged under 50 are more likely to use all the other precautions we asked about.



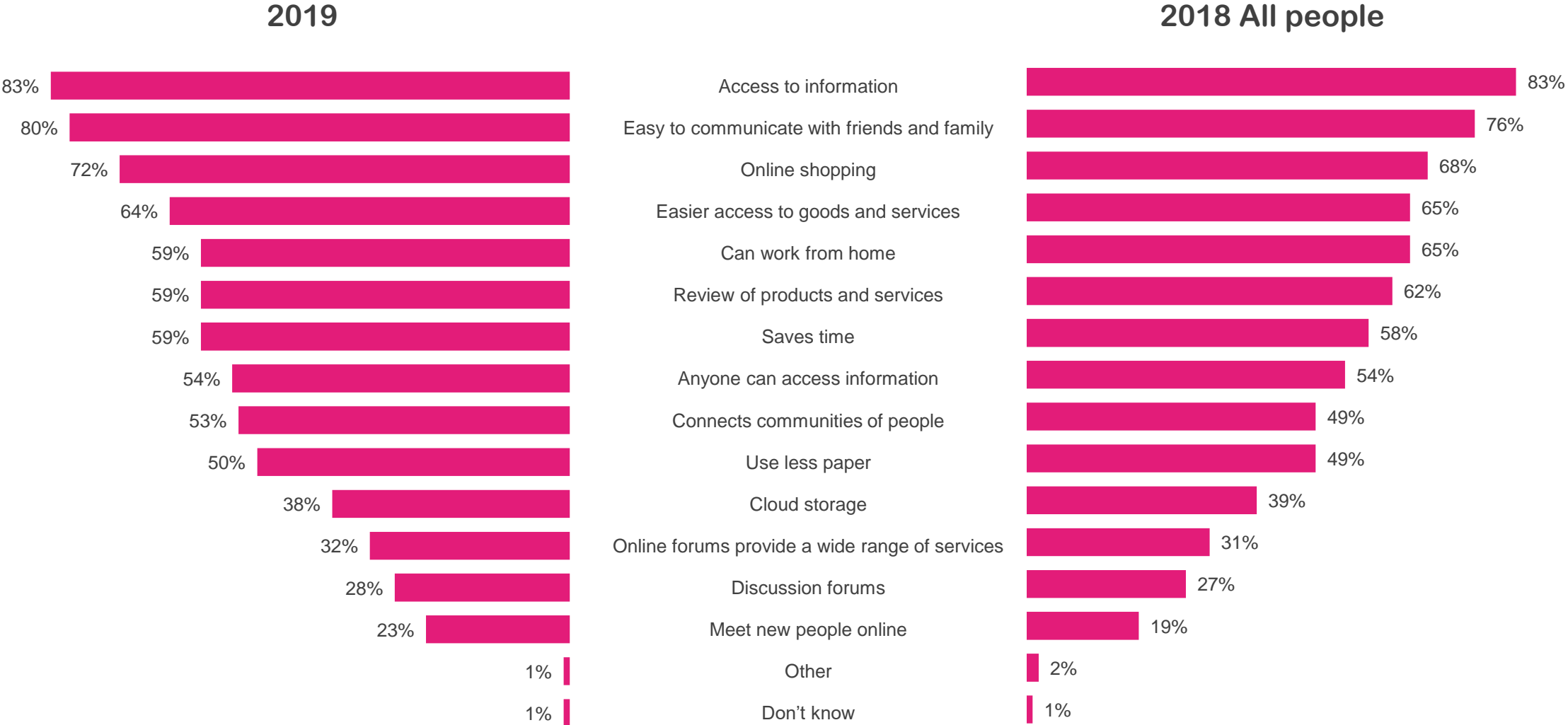
	Use a pin or password	Regularly update software	Regularly back up content	Two or multi factor authentication
Total	84%	63%	35%	35%
Male	80%	66%	38%	39%
Female	88%	61%	33%	31%
18-29 years old	79%	65%	37%	40%
30-49 years old	82%	67%	36%	40%
50-64 years old	87%	62%	33%	30%
65 years and over	91%	57%	35%	28%
Auckland	85%	67%	39%	38%
Wellington	82%	67%	36%	46%
Canterbury	83%	68%	32%	26%
Rest of North Is	85%	57%	33%	32%
Rest of South Is	86%	66%	32%	32%



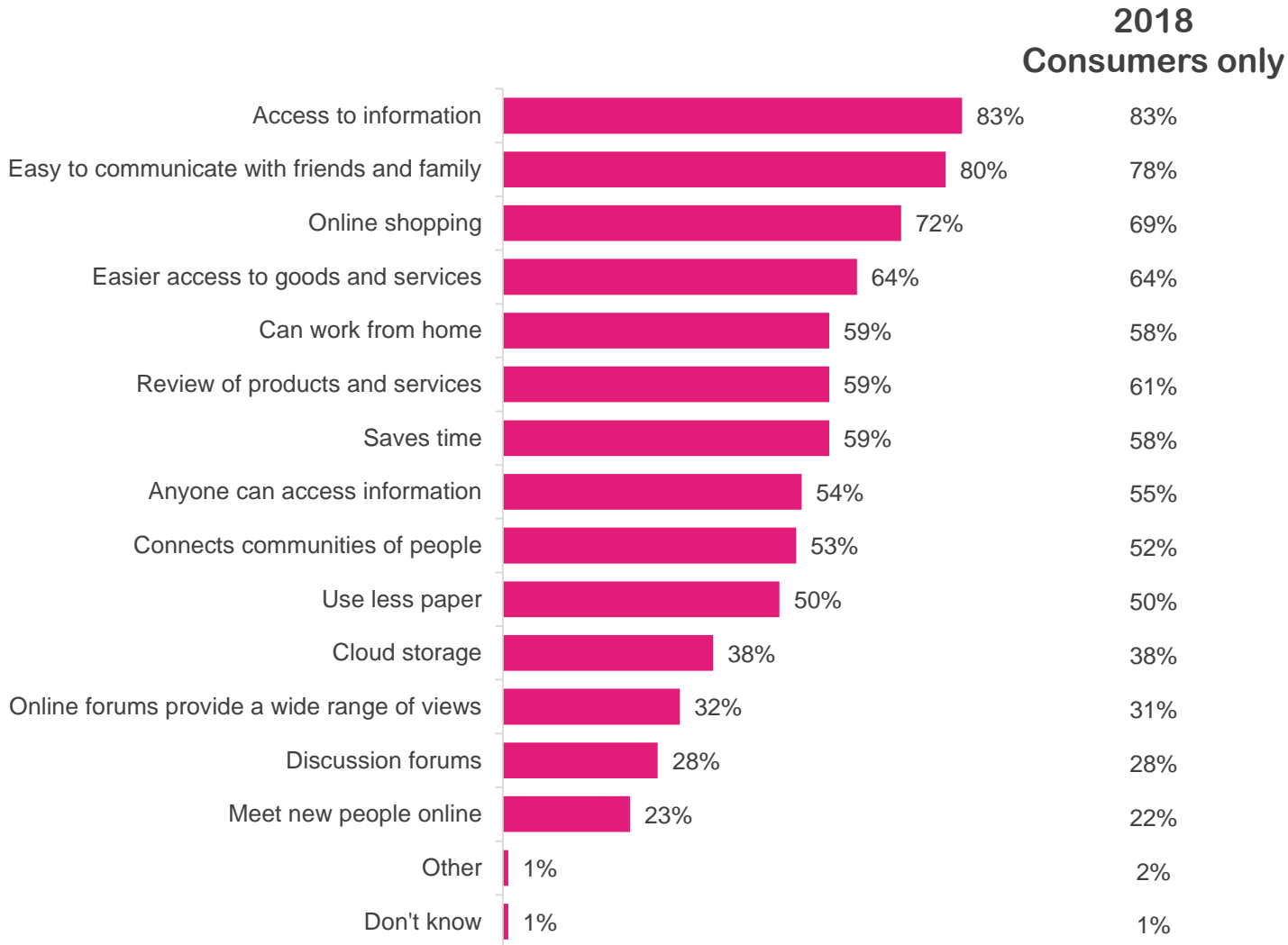
What are the benefits of the Internet?



The top three benefits of the Internet remain unchanged from 2018 to 2019 – people see access to information, communication with friends and family and online shopping as the three key benefits.



Results are also consistent with the consumer only group from 2018.

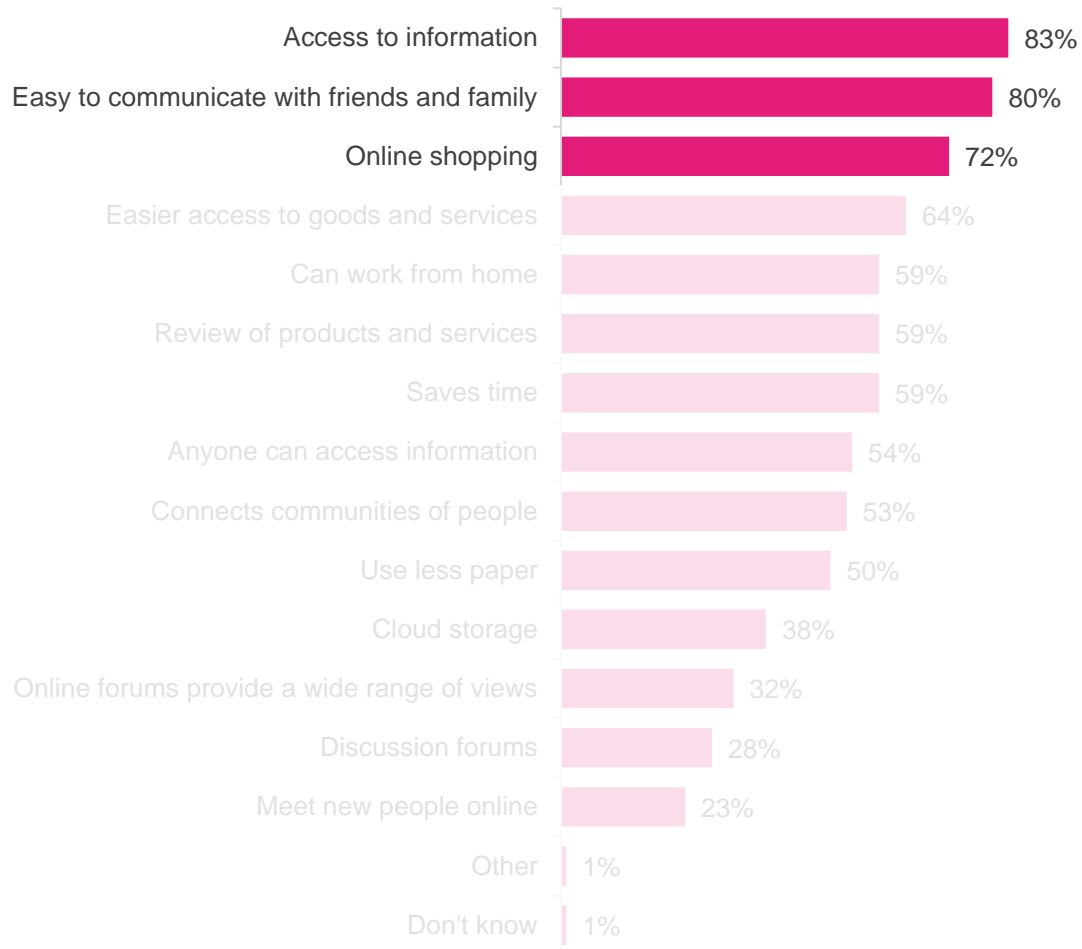


Females are generally more likely to articulate benefits and are more likely to mention communication and shopping aspects.

Younger males like discussion forums and meeting new people online, while Aucklanders are most likely to articulate working from home aspects, including cloud storage.

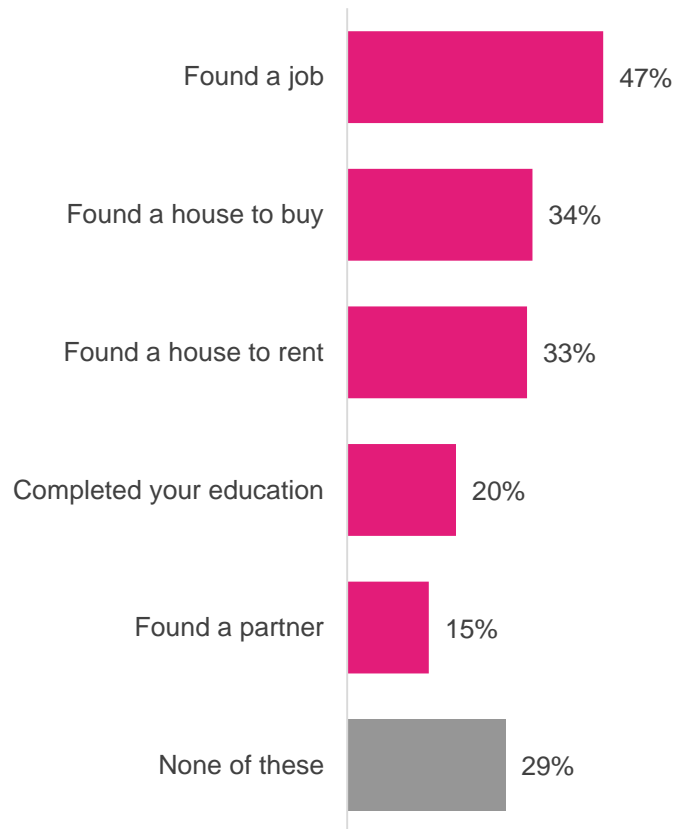
People aged 50 years and older are most likely to mention access to information including product and service reviews.

People aged 50 years and over are more likely to agree access to information and ease of communication are key benefits of the Internet. People aged 65 years or over, and people who live in the South Island outside of Canterbury are less likely to see the benefits of online shopping.



	Access to information	Easy to communicate with friends and family	Online shopping
Total	83%	80%	72%
Male	81%	72%	66%
Female	85%	88%	77%
18-29 years old	78%	76%	72%
30-49 years old	79%	77%	74%
50-64 years old	88%	84%	76%
65 years and over	91%	86%	64%
Auckland	81%	79%	71%
Wellington	88%	81%	75%
Canterbury	85%	81%	72%
Rest of North Is	85%	82%	74%
Rest of South Is	80%	77%	64%

Nearly half of consumers have found a job online, and a third have found a house to buy or rent.



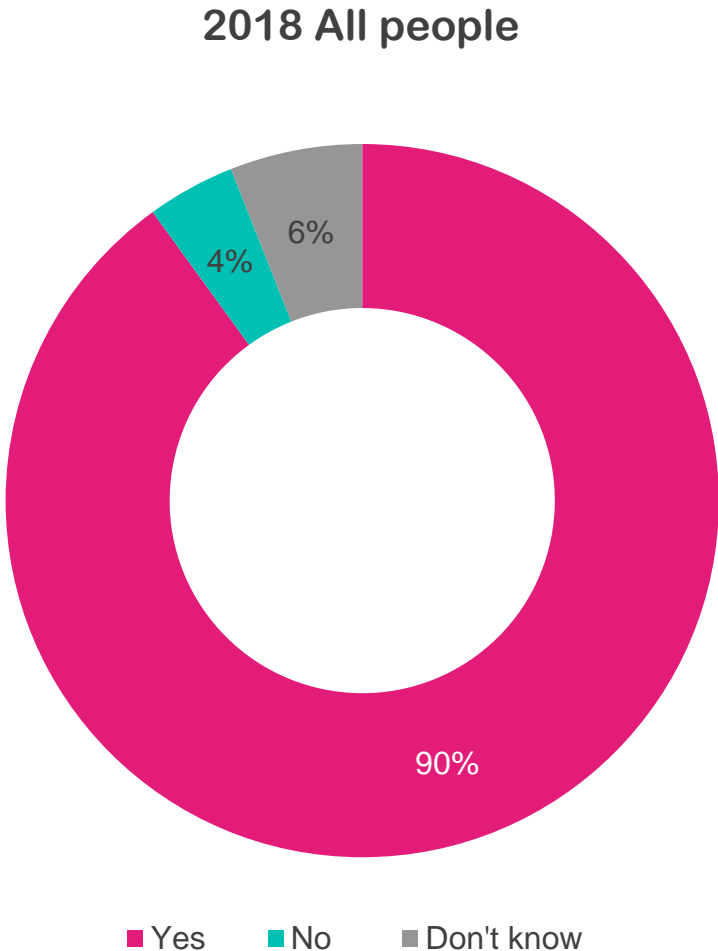
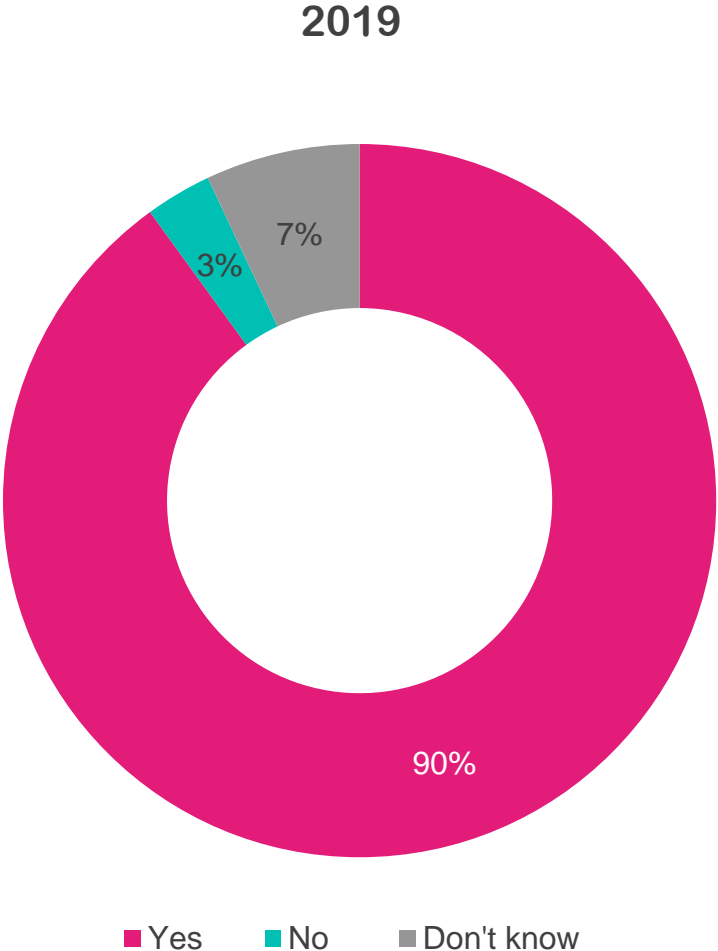
People aged 18-29 are more likely to have found a job online (70%), followed by people aged 30-39 (62%). These are also the two age groups most likely to have completed their education online (29% and 25% respectively), found a house to rent and found a partner.

Auckland is the most likely region for these activities, people in Auckland are significantly more likely to have found a house to buy or rent (both 39%) or found a job (59%).

People who own or manage a business are more likely to find a house to buy online (43%).

People who have done none of these things are most likely to be aged 50-64 (34%) or 65 and over (67%) and live in the North Island outside of Auckland or Wellington (36%).

Perceptions of the Internet are overwhelmingly positive, nine out of 10 people think the positives outweigh the negatives.

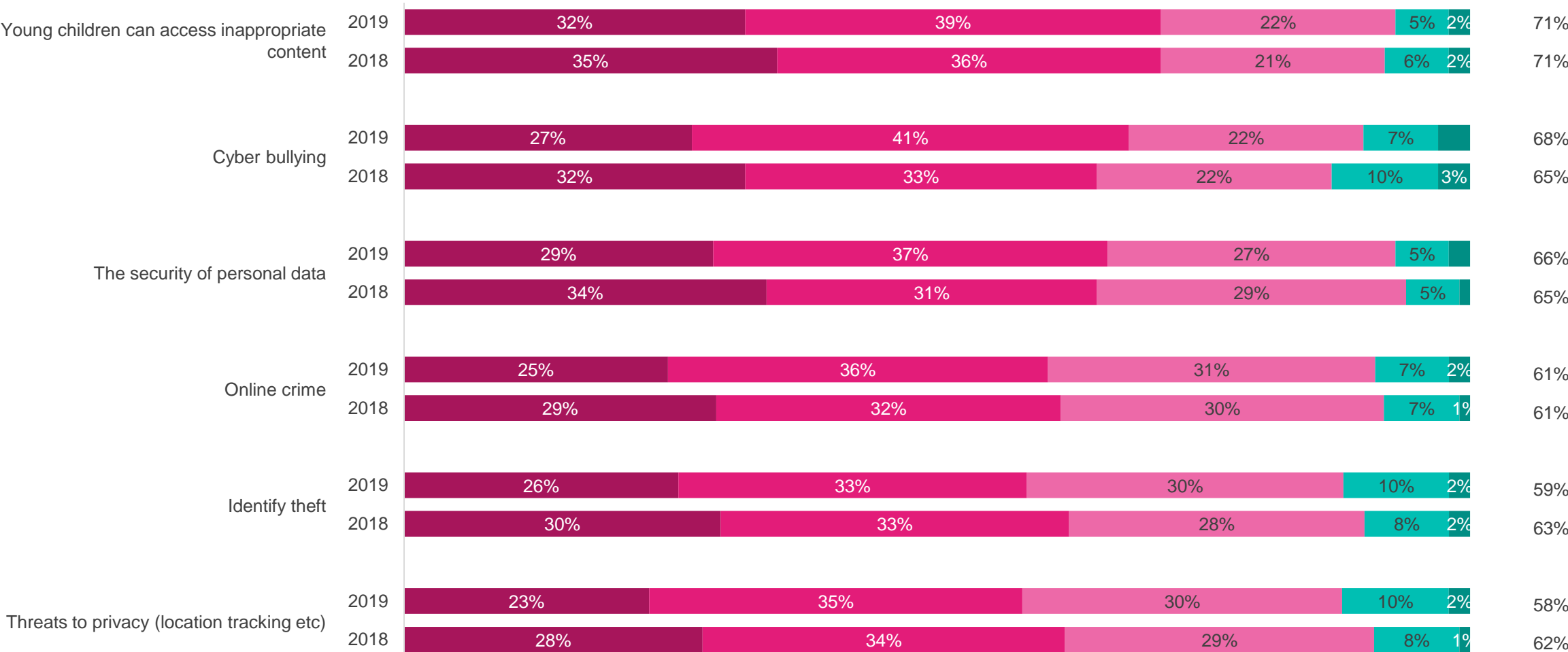




What are New Zealanders concerned about?

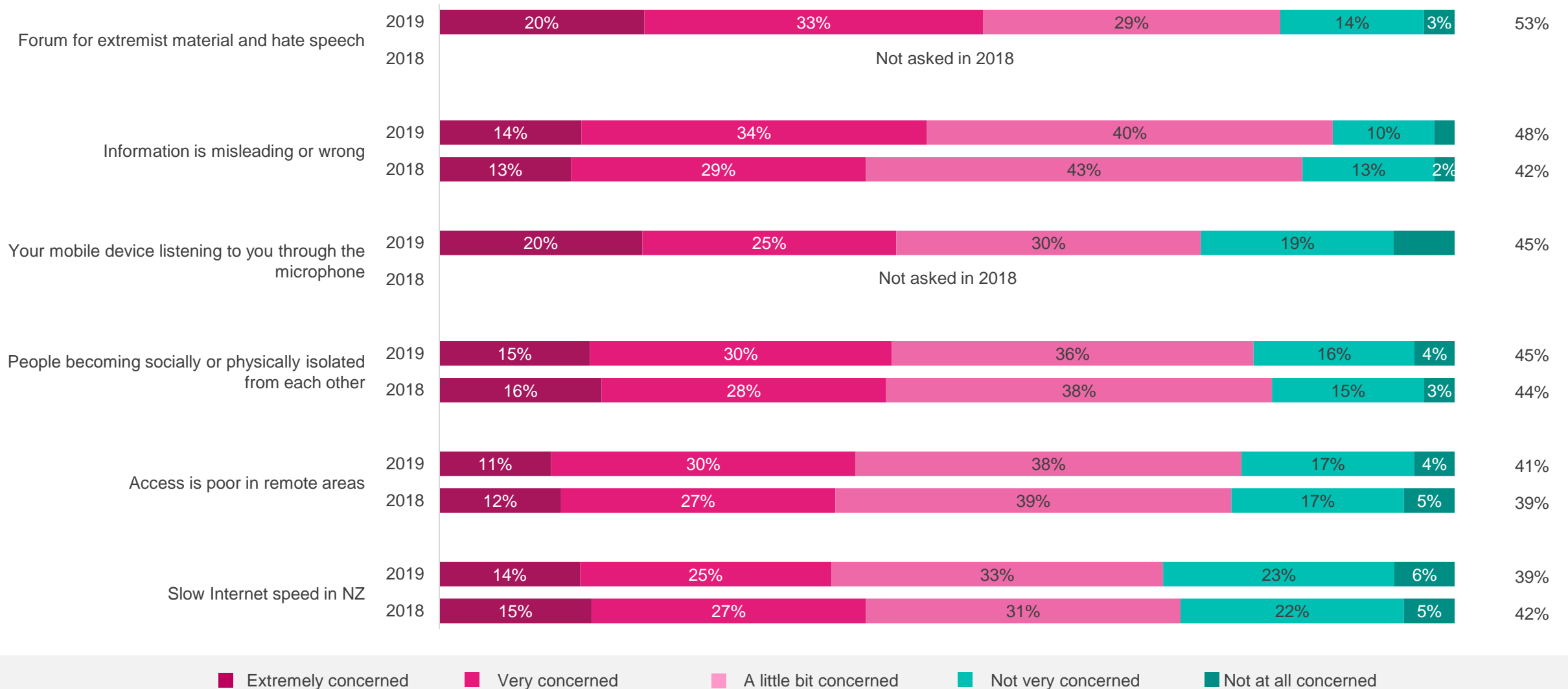


Young children accessing inappropriate content, cyber bullying, and the security of personal data continue to be concerns for two-thirds of people. The level of concern about identity theft and threats to privacy have declined in the last 12 months.



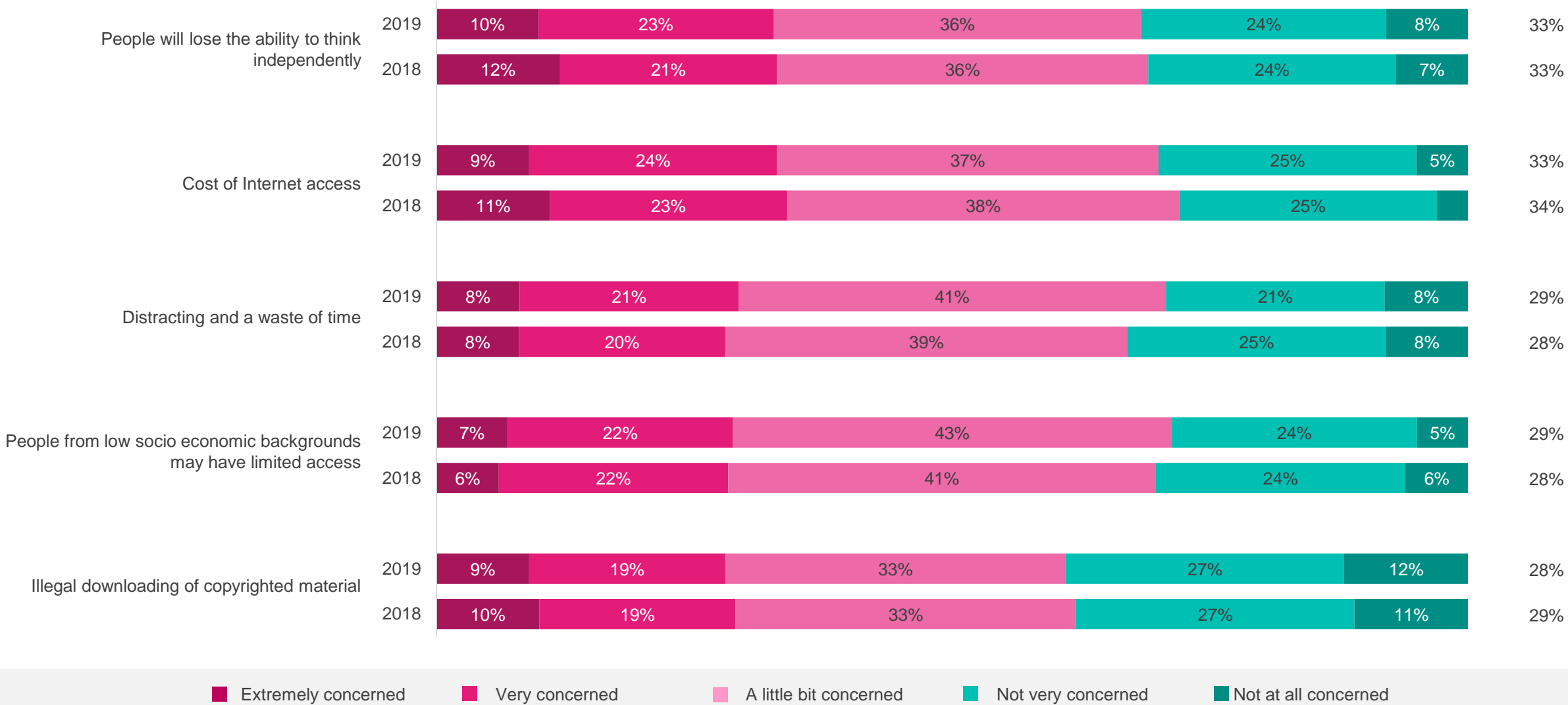
■ Extremely concerned
 ■ Very concerned
 ■ A little bit concerned
 ■ Not very concerned
 ■ Not at all concerned

Over half of New Zealanders are concerned that the Internet is a forum for extremist material and hate speech, and concerns that information is misleading or wrong have increased significantly since last year.



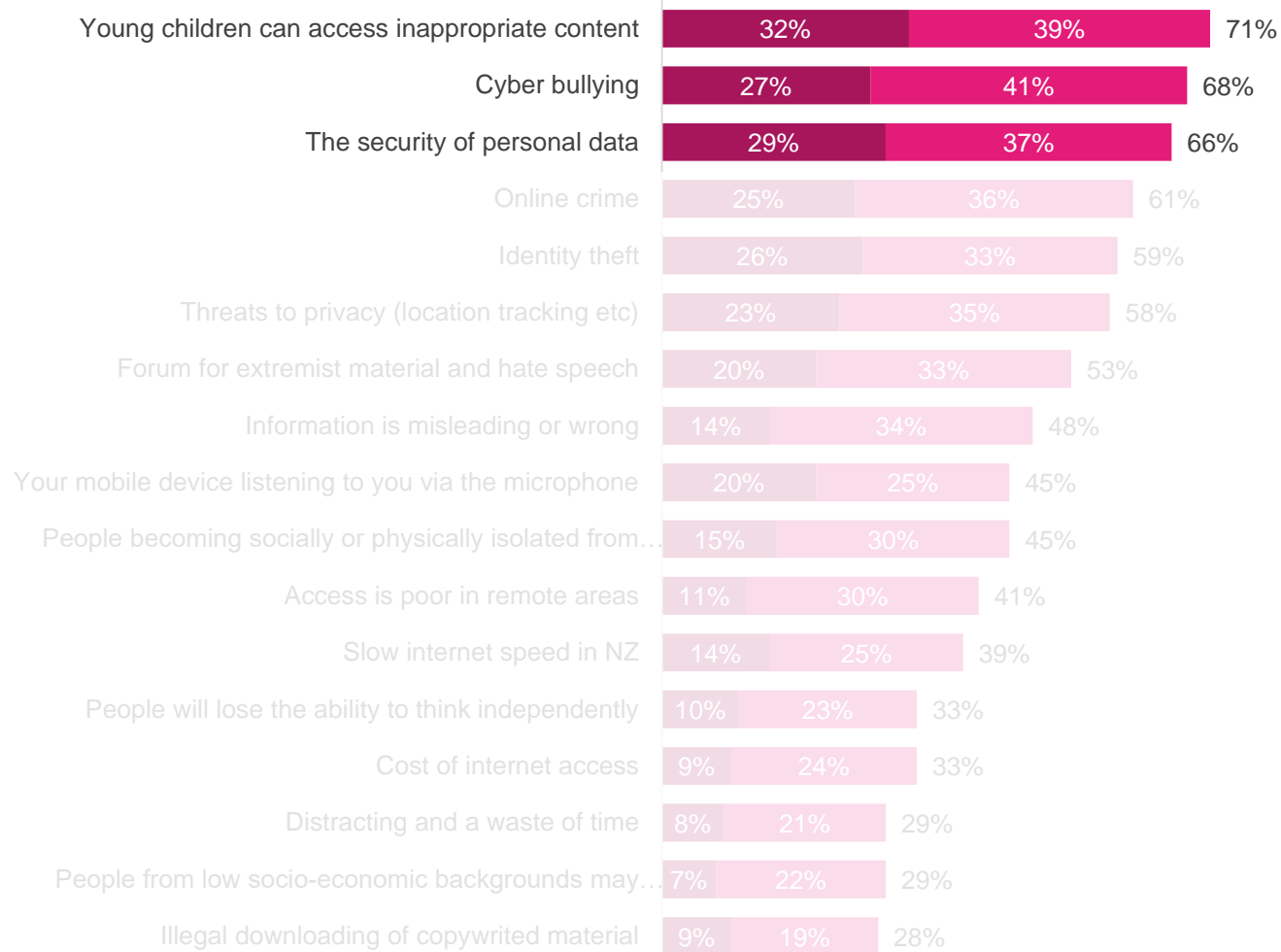
Q36. How concerned are you about each of the following aspects of the Internet? For each aspect please indicate on the scale your level of concern. Again, please think about society as a whole, rather than anything you may or may not have personally experienced.
 Base: 2019 All people (excl don't know) n≈1,001; 2018 Consumers (excl don't know) n≈1,002

The list of concerns at the lower end of the scale remain similar to 2018, people are least concerned about illegal downloading of copyrighted material, limited access for lower socio-economic groups, and that the Internet may be distracting and a waste of time.



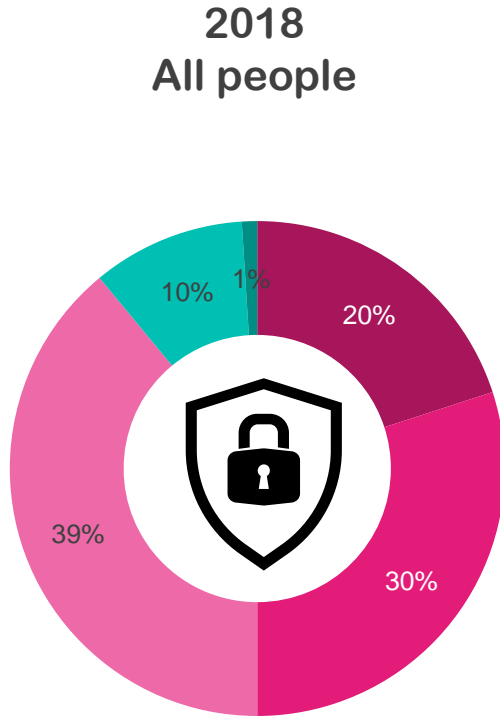
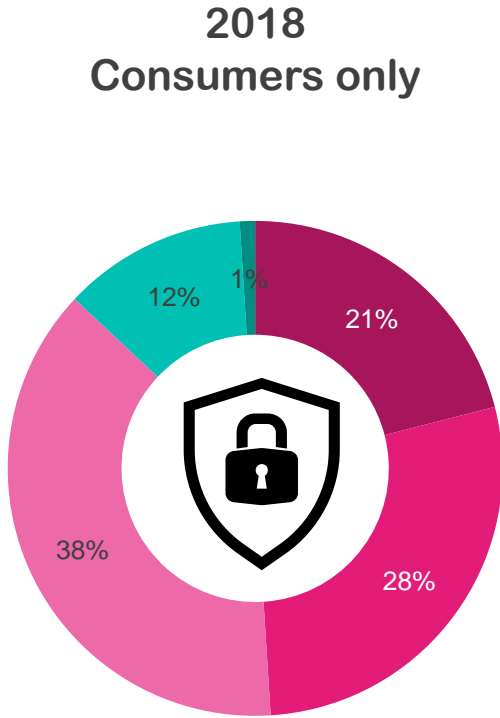
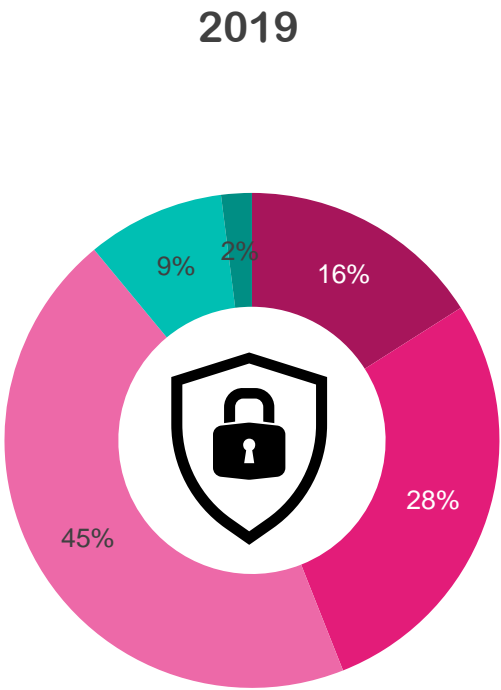
Extremely concerned Very concerned A little bit concerned Not very concerned Not at all concerned

Females, and people aged 65 years or over are most concerned about young children accessing inappropriate content, cyber bullying, and the security of personal data.



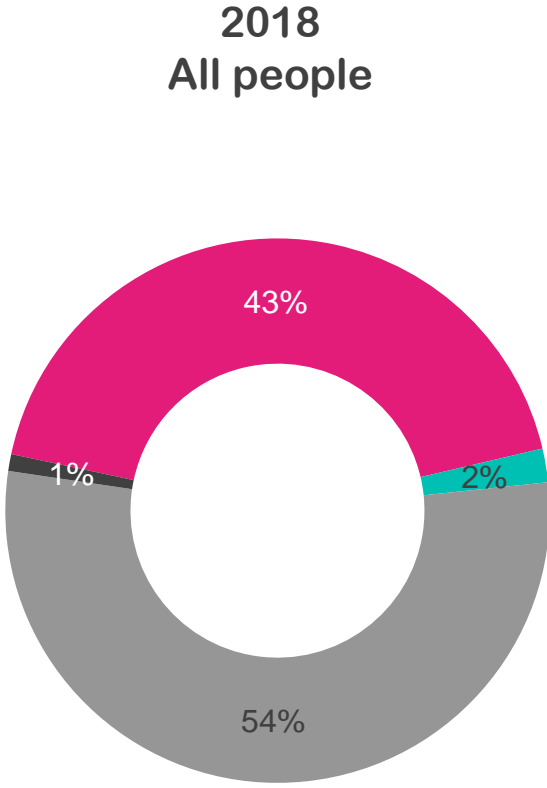
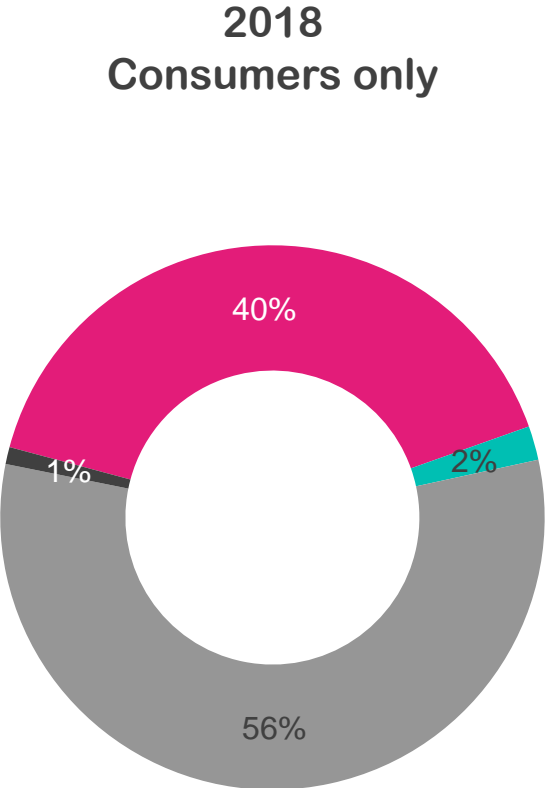
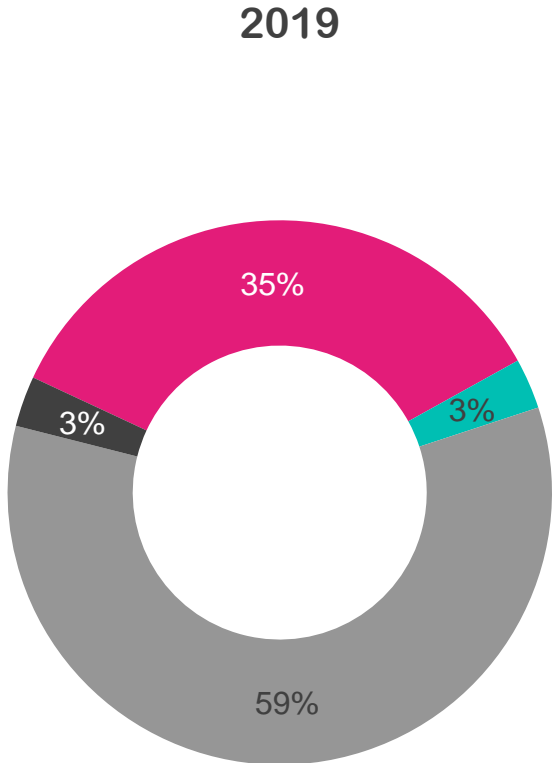
	Young children can access inappropriate content	Cyber bullying	The security of personal data
Total	71%	68%	66%
Male	62%	58%	63%
Female	80%	76%	69%
18-29 years old	57%	60%	54%
30-49 years old	72%	69%	67%
50-64 years old	71%	66%	71%
65 years and over	84%	73%	75%
Auckland	71%	69%	68%
Wellington	68%	63%	61%
Canterbury	73%	65%	66%
Rest of North Is	73%	70%	68%
Rest of South Is	66%	63%	63%

The number of people who are extremely or very concerned about the security of personal details on the Internet has decreased significantly from 2018.



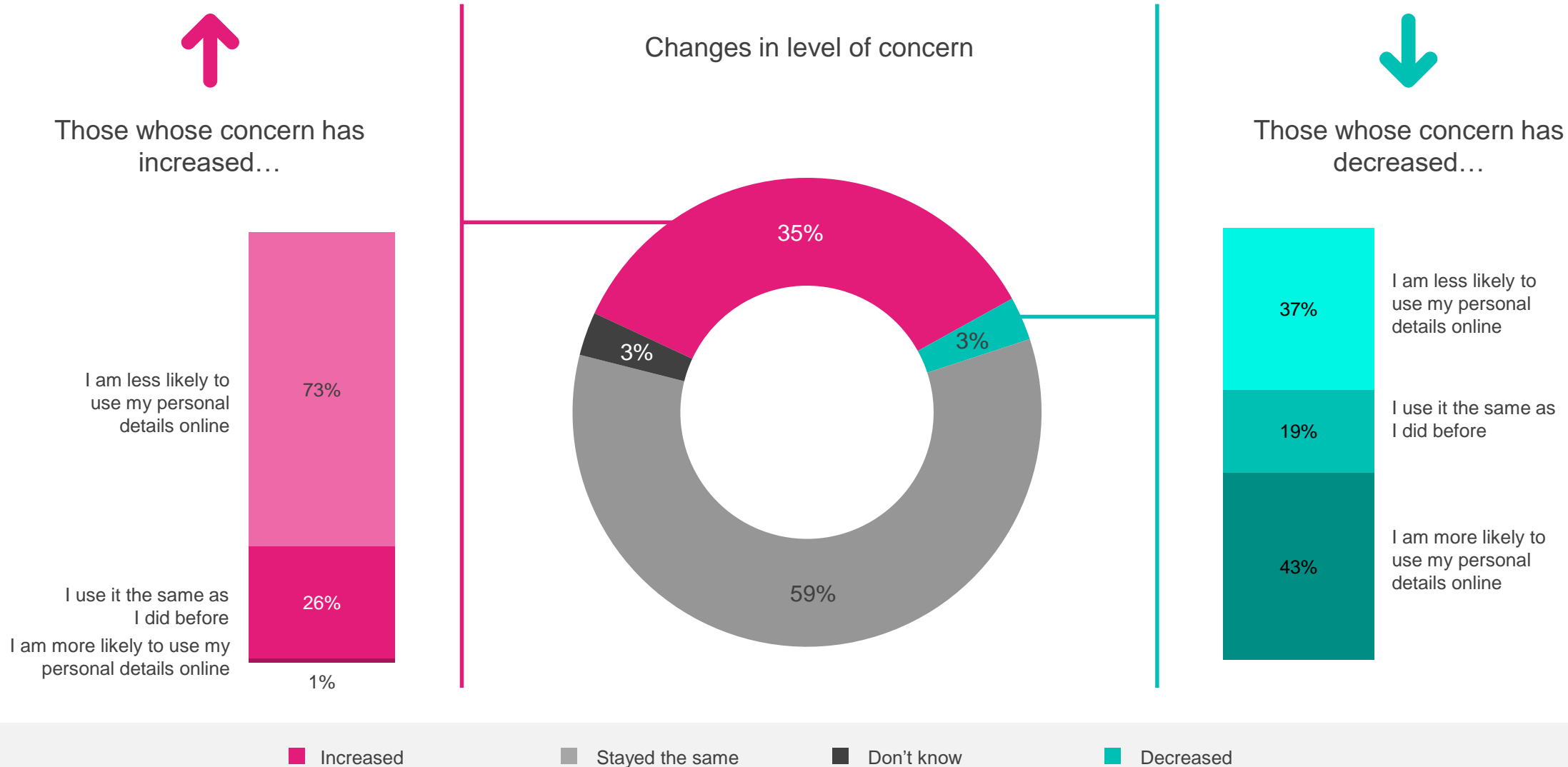
■ Extremely concerned ■ Very concerned ■ A little bit concerned ■ Not very concerned ■ Not at all concerned

However, one third of people still say their level of concern has increased in the last 12 months. This is significantly less than in 2018, but is still a large group of people.



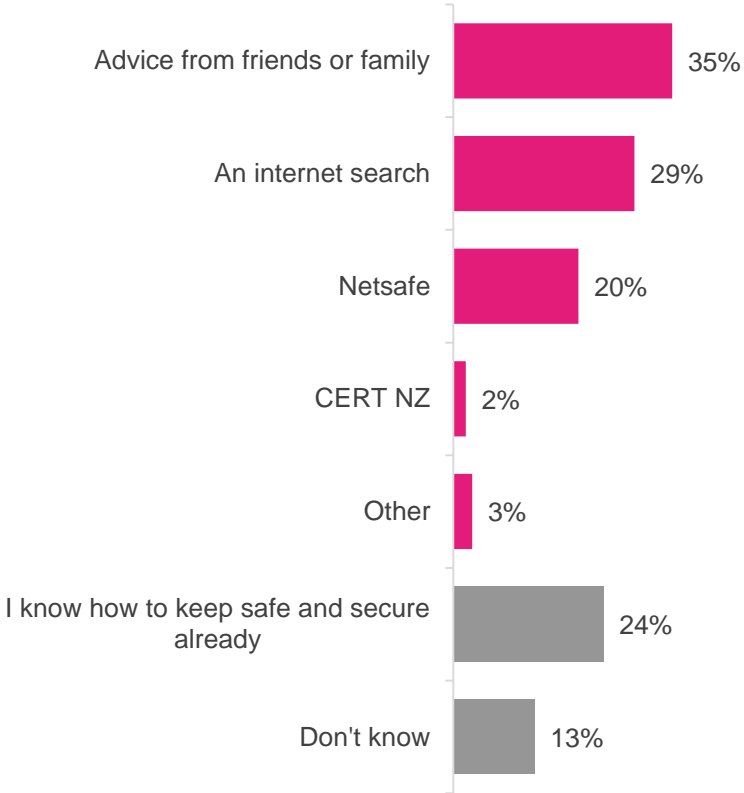
■ Increased ■ Stayed the same ■ Don't know ■ Decreased

Three-quarters of the group whose concern has increased are less likely to use their personal details online.

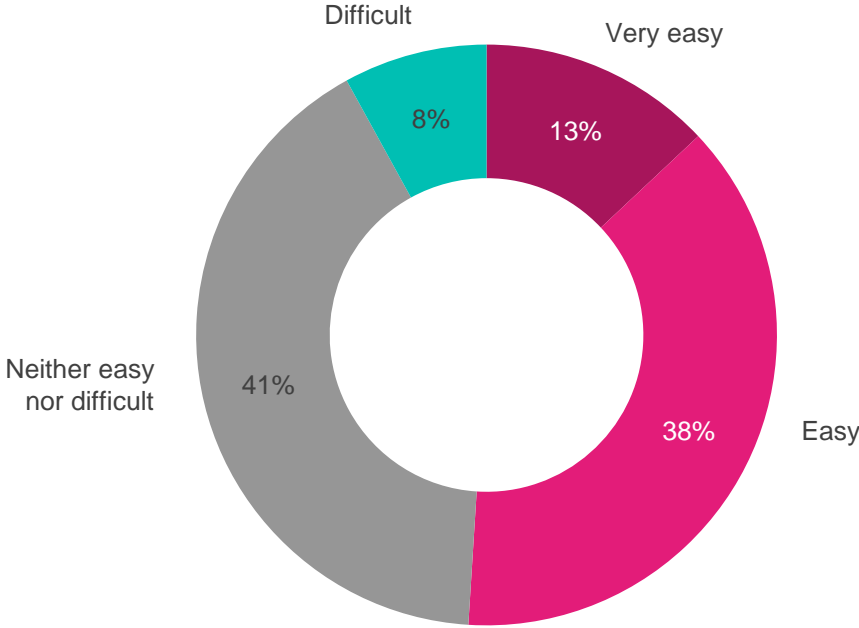


People are most likely to take advice about security from friends or family, or an Internet search, and half of people think this information is easy to access.

Where to go for information



Ease of accessing information



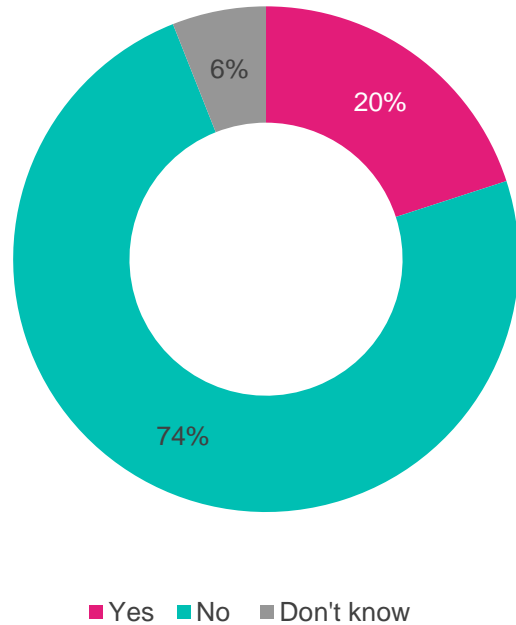


Christchurch Call

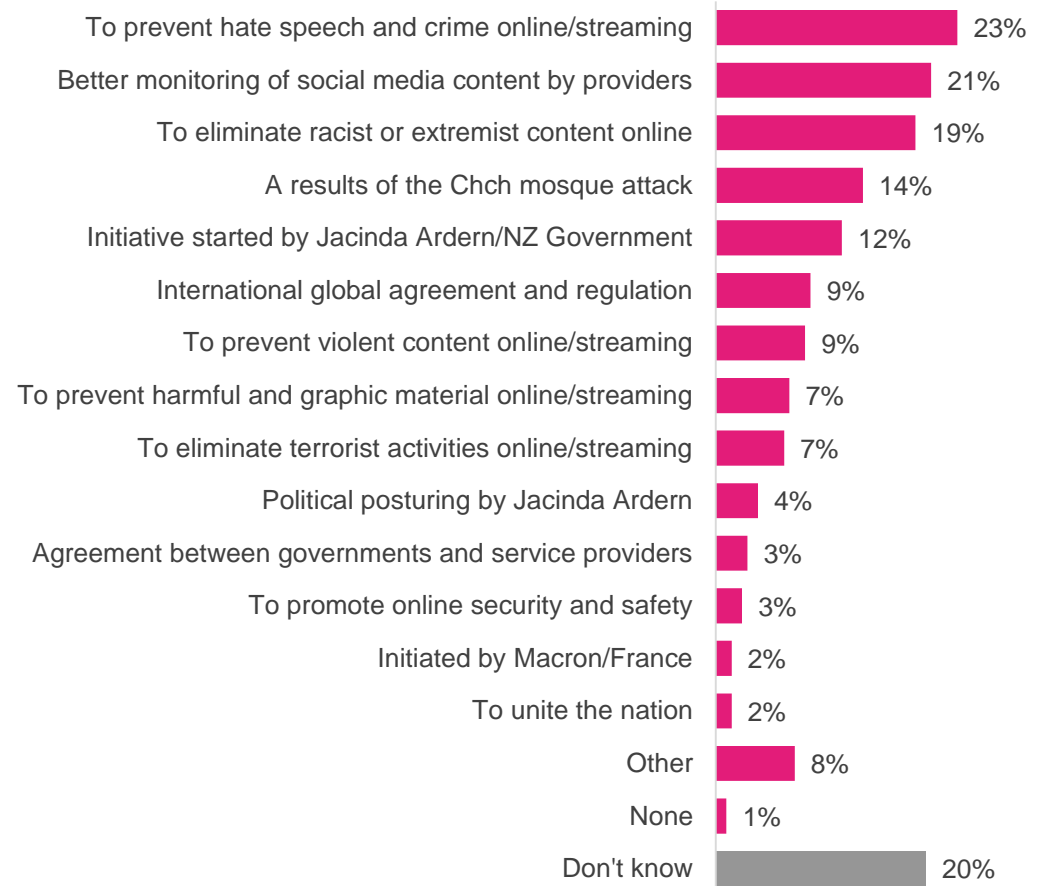


One-fifth of people have heard of the Christchurch Call. The majority of these people understand one or more aspects of the Christchurch Call.

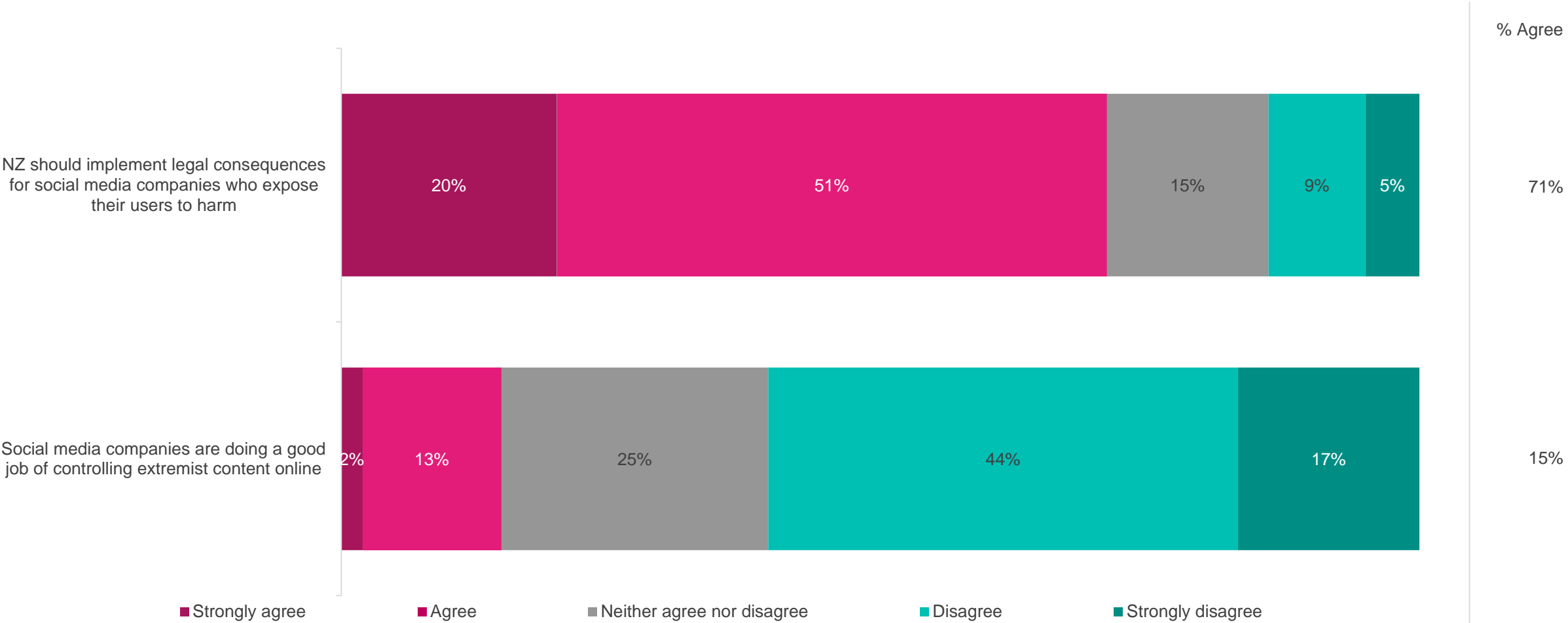
Awareness of Christchurch Call



Understanding of the Christchurch Call



Nearly three-quarters of people think that NZ should implement legal consequences for social media companies who expose their users to harm. Nearly two-thirds disagree that social media companies are doing a good job of controlling extremist content.



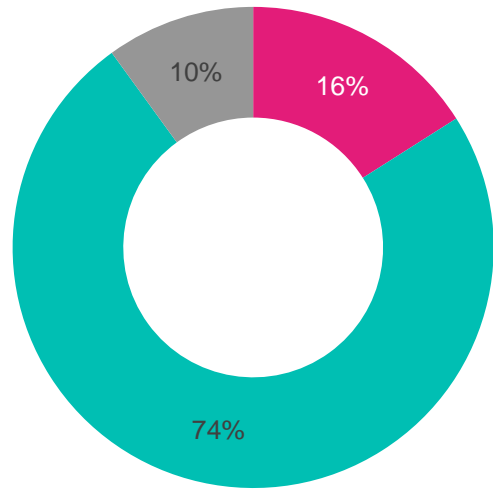


Awareness of InternetNZ



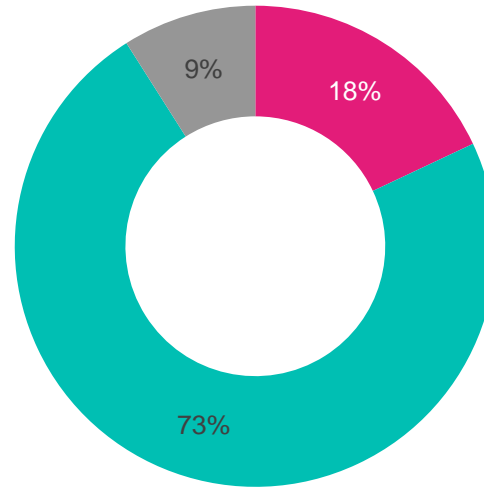
Awareness of InternetNZ has decreased slightly from 2018...

2019



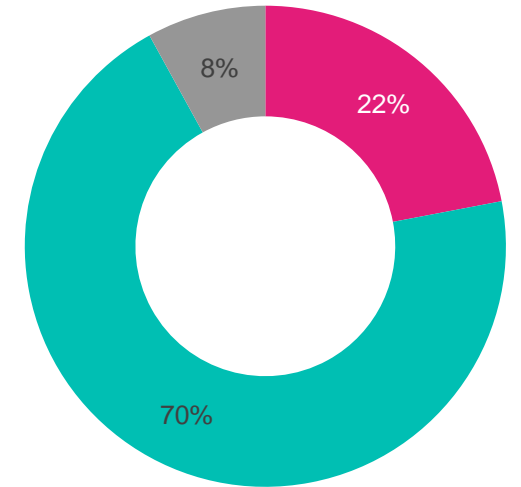
■ Yes ■ No ■ Don't know

2018 Consumers only



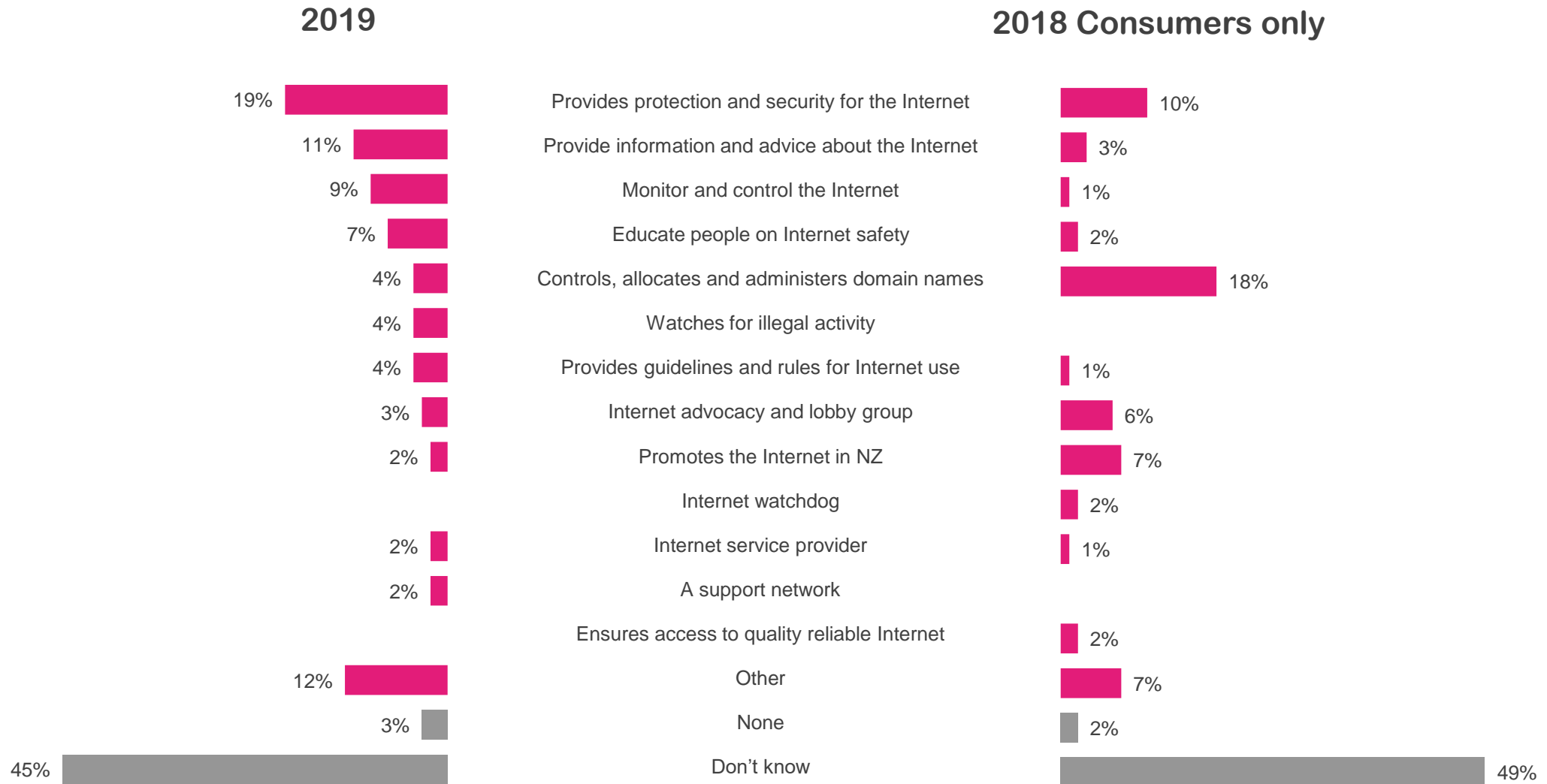
■ Yes ■ No ■ Don't know

2018 All people

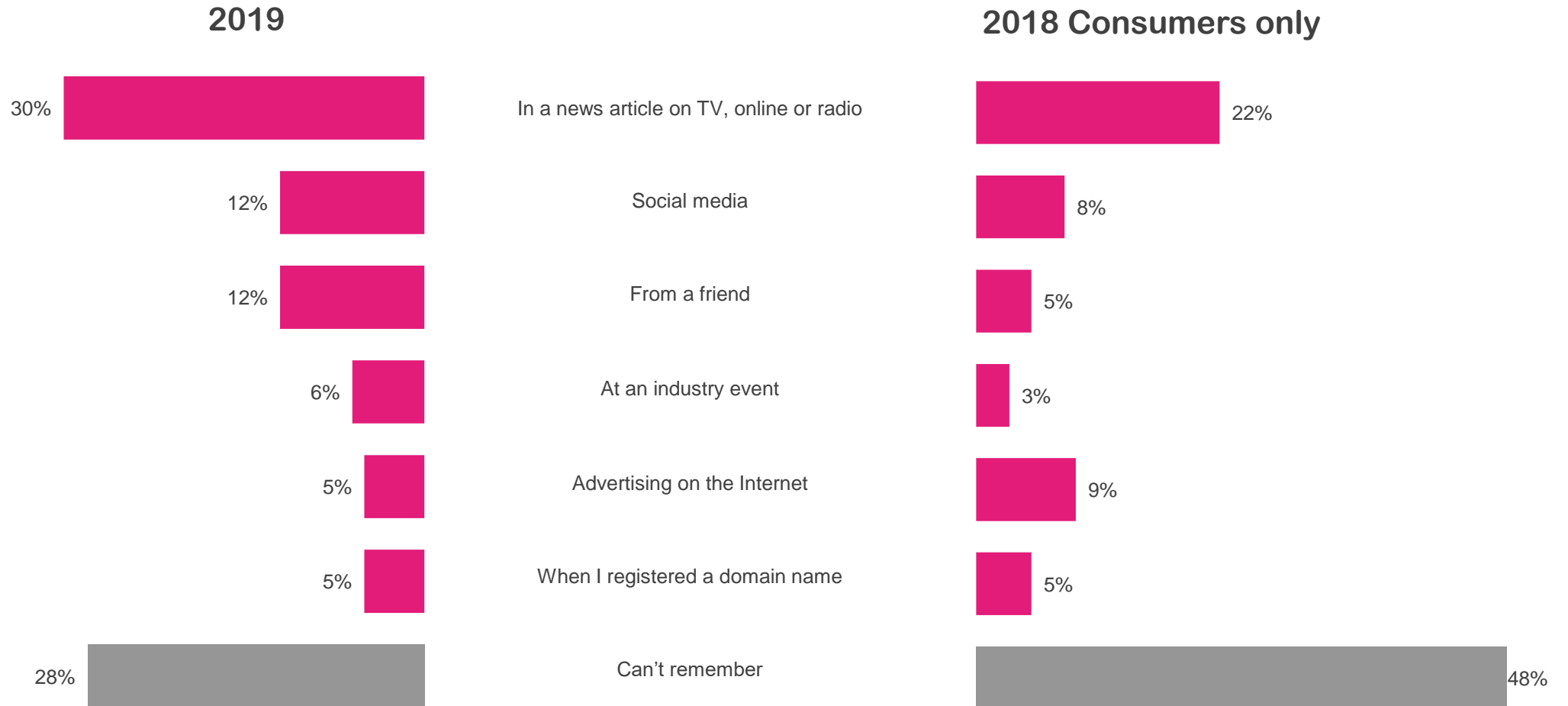


■ Yes ■ No ■ Don't know

... however consumer understanding of the role of InternetNZ has deepened in the last 12 months. Consumers call to mind protection and security, and are less likely to think of the administration of domain names than in 2018.



Consumers are more likely to hear about InternetNZ through news articles or word of mouth channels (From a friend or social media) compared to 2018.

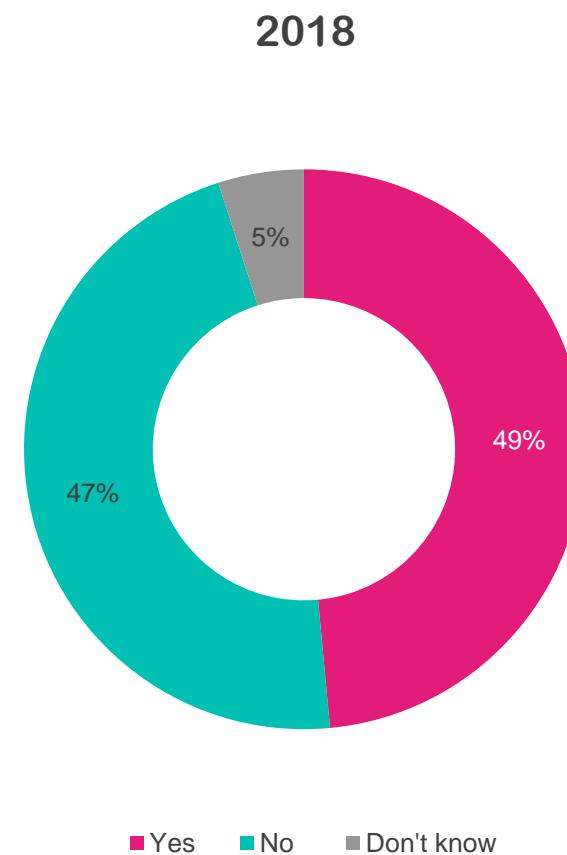
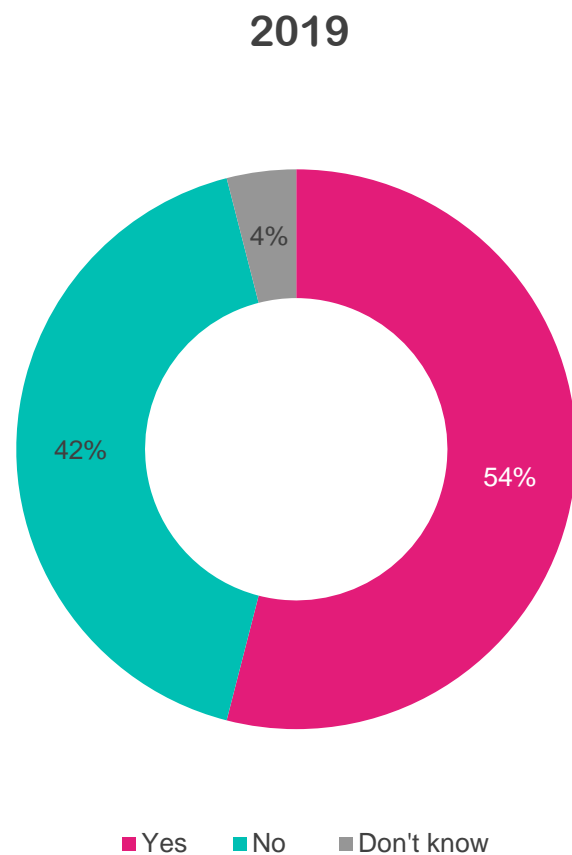




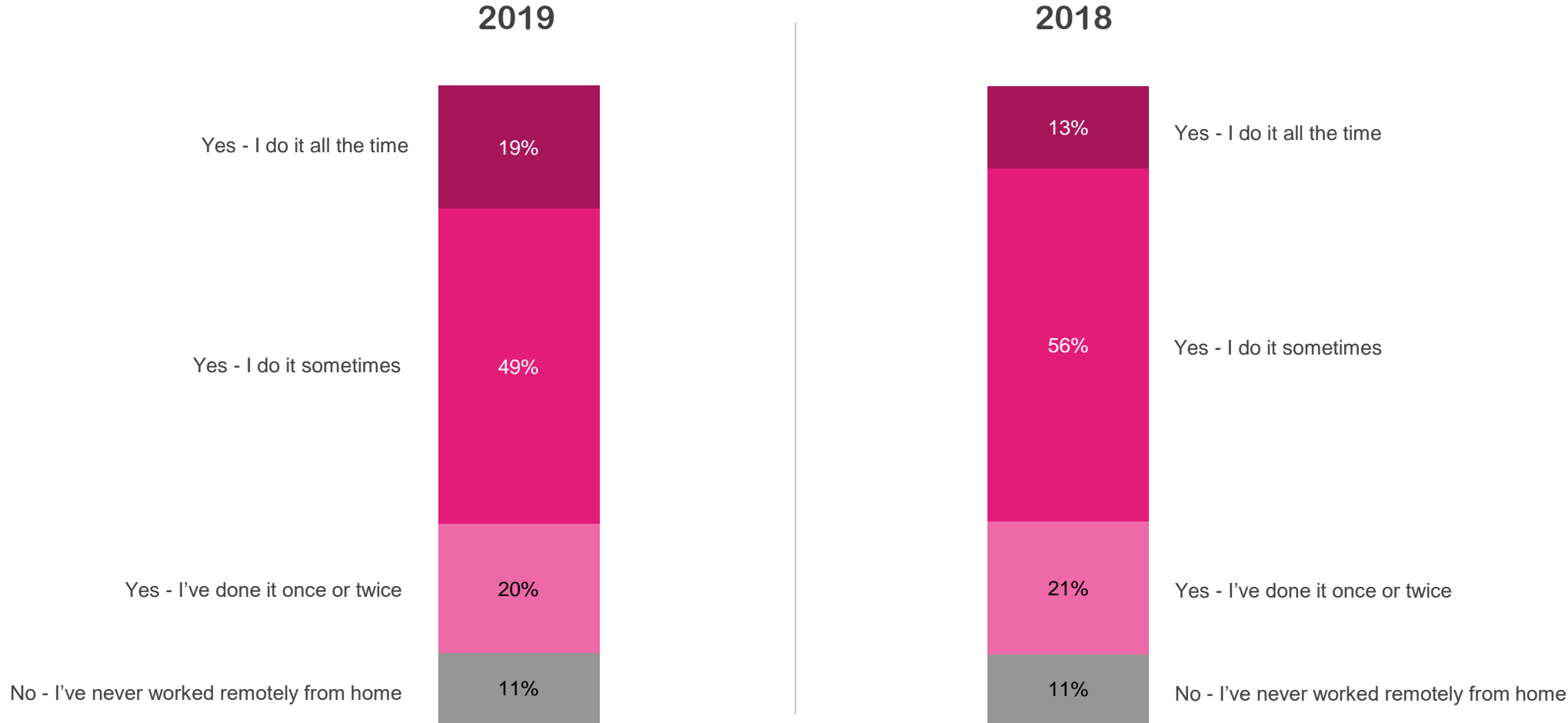
Flexible working



There are slightly more people who have the opportunity to work from home than in 2018.

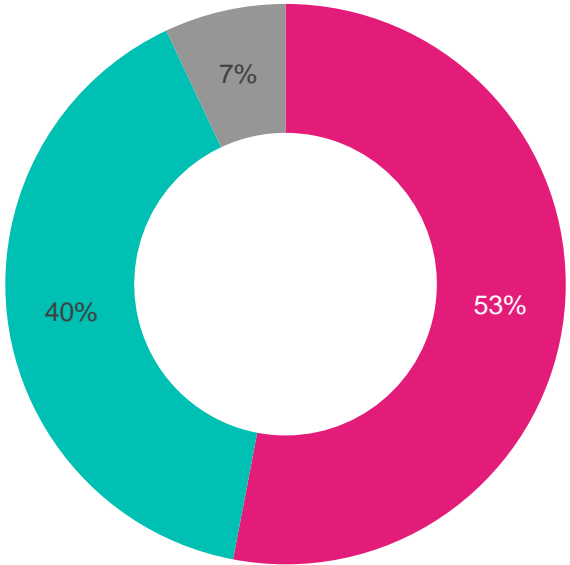


People who work from home are doing it significantly more frequently than in 2018 – nearly one in five people do it all the time, compared to one in eight in 2018.



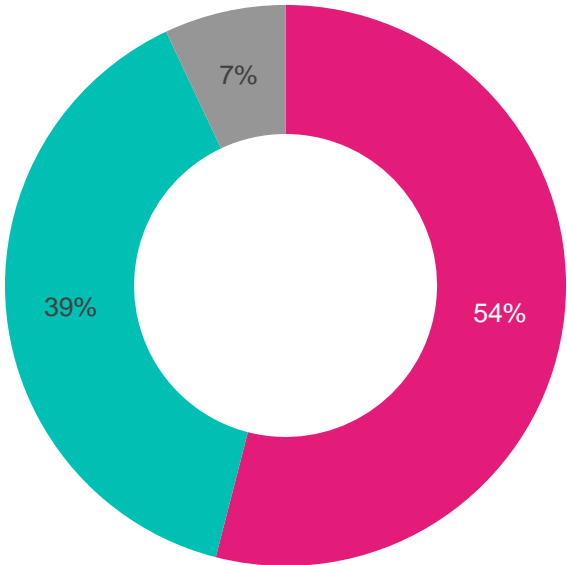
Over half of those who could work from home would like to do it more, this is consistent with 2018.

2019



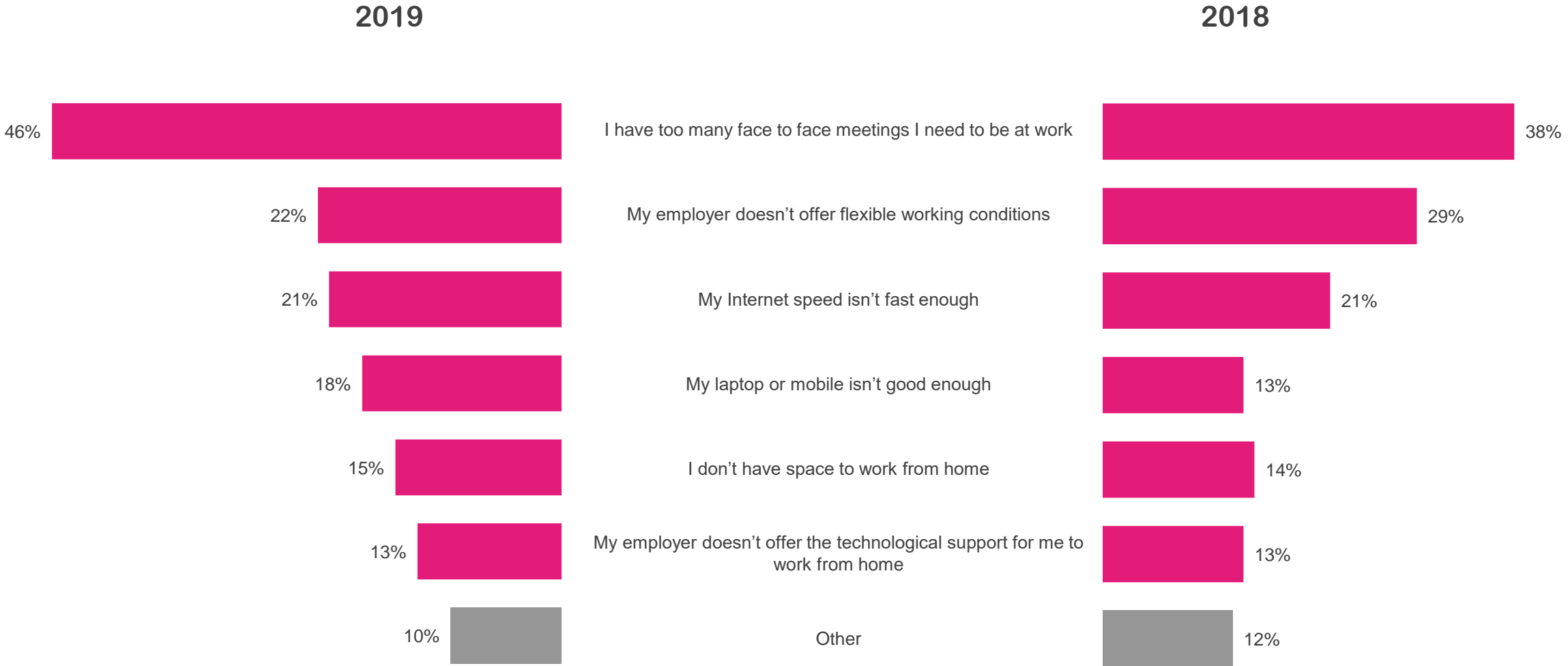
■ Yes ■ No ■ Don't know

2018



■ Yes ■ No ■ Don't know

Nearly half of people say they have too many face to face meetings to work from home. One in five people say it is because their Internet speed isn't fast enough, the same amount as in 2018.

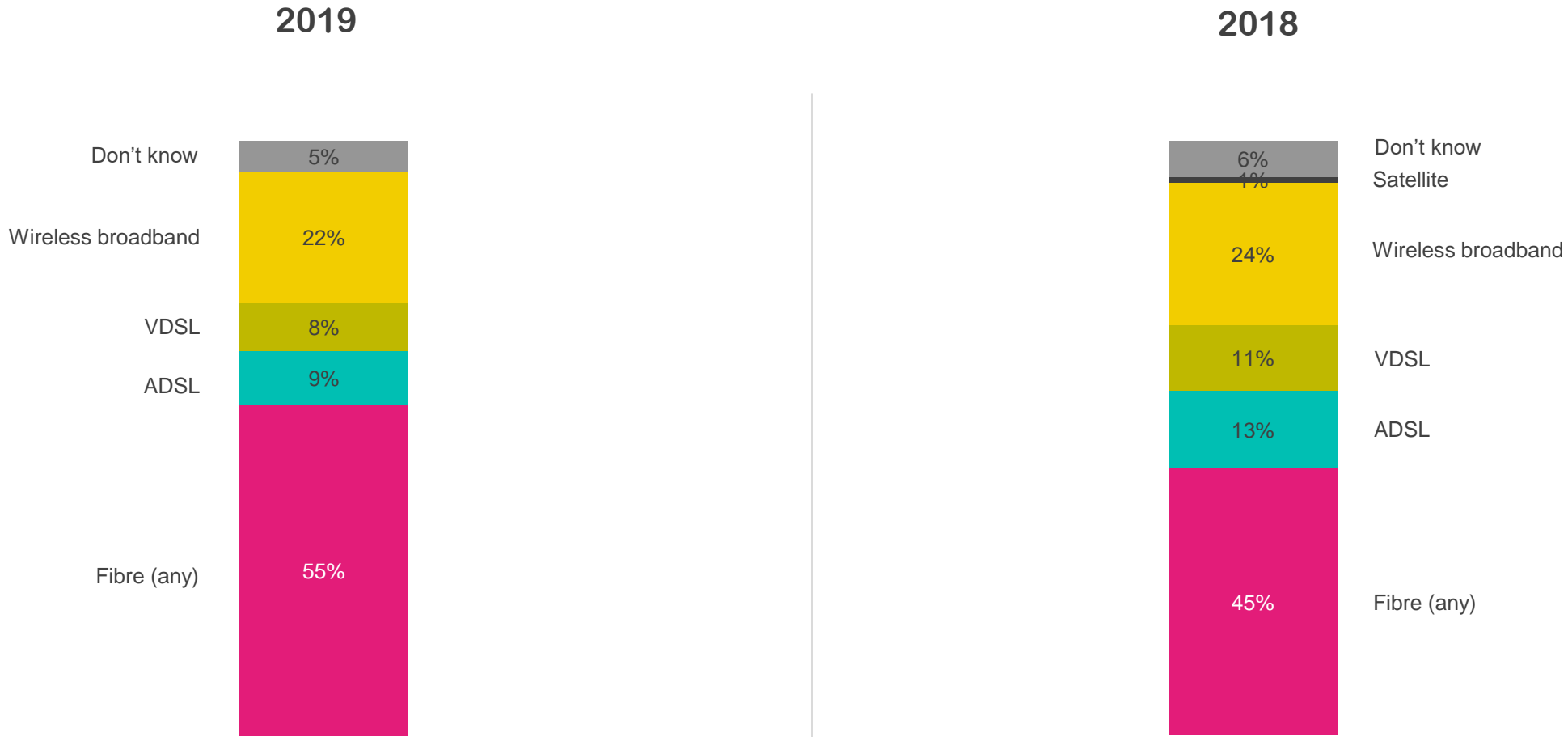




Internet provision

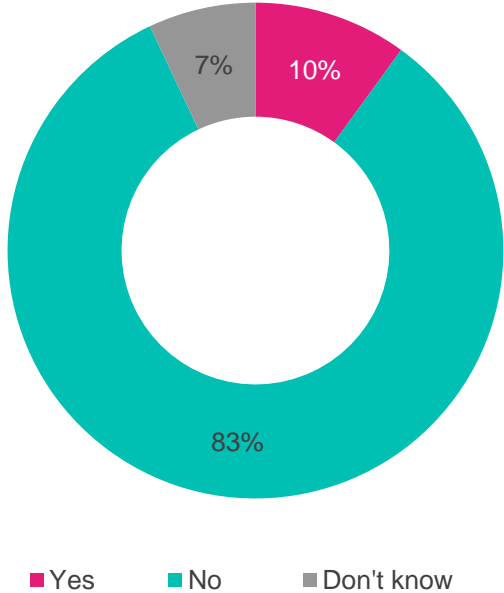


The incidence of fibre connections at home has increased from 2018, reflecting the changes in offerings from Internet providers.

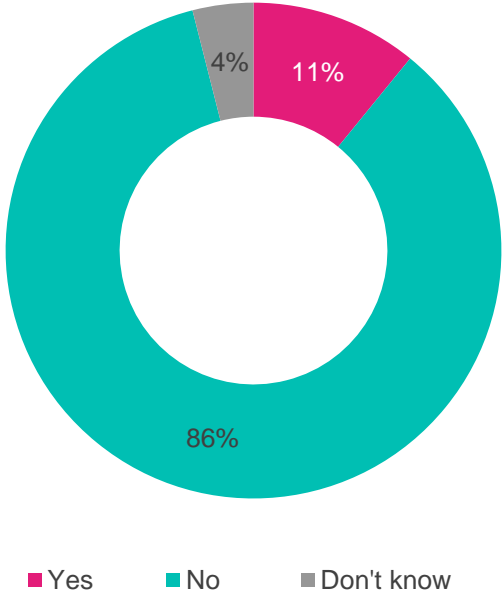


Awareness of the National Broadband Map remains stable from 2018, approximately one in 10 people have heard of it.

2019



2018

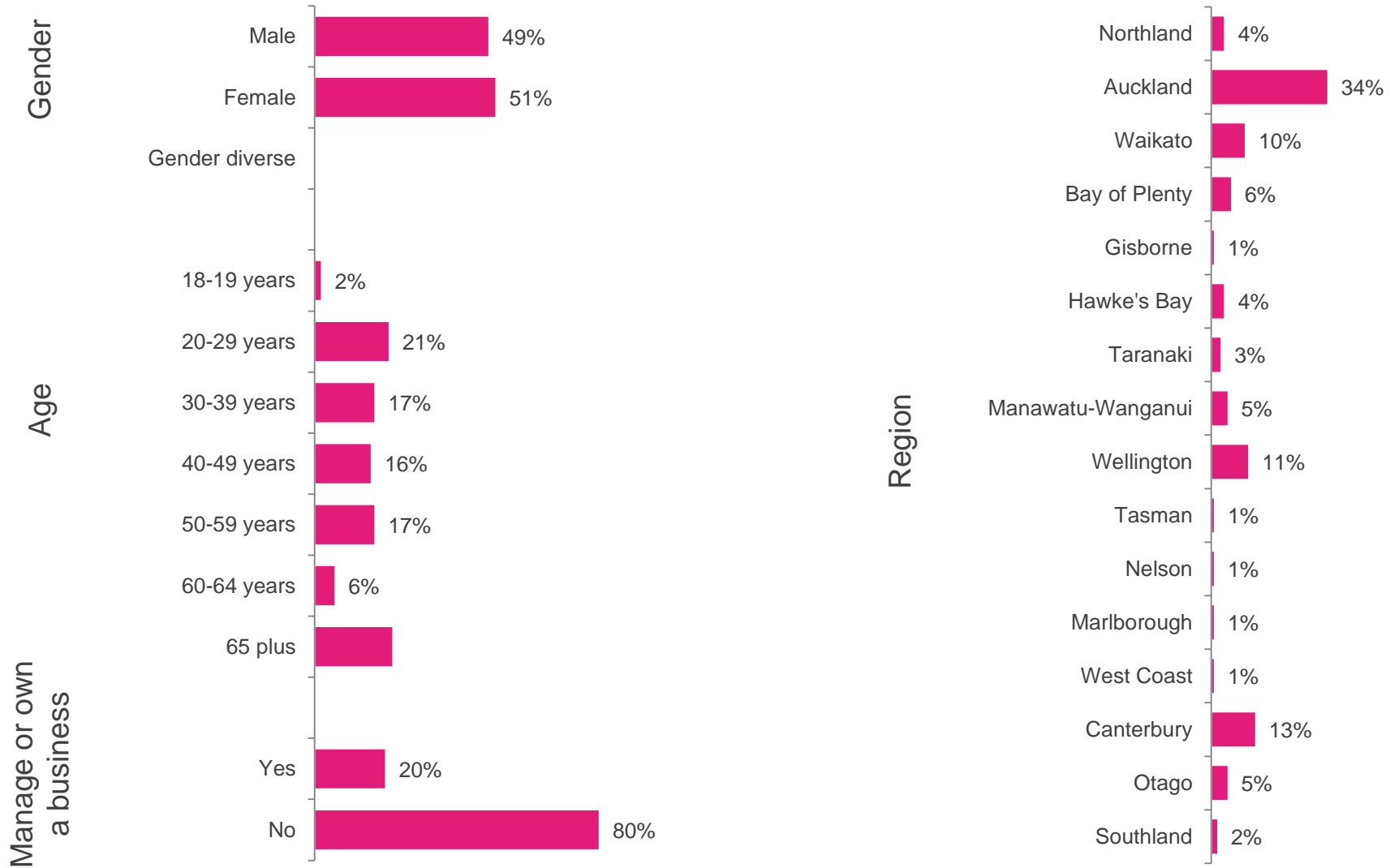




Appendix: Consumer demographics



Respondent profile



Base: All people n=1,001



**For more information
please contact:**

**Kate Brazier
Colmar Brunton
Level 9, 101 Lambton Quay
Wellington 6021
kate.brazier@colmarbrunton.co.nz; (04) 913 3000**