



New Zealand's Internet insights 2021

A KANTAR PUBLIC RESEARCH REPORT

DECEMBER 2021

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Background and approach

This is the latest yearly survey conducted for InternetNZ to identify and understand the public's use of the Internet, what they think about it and any concerns they may have. It also measures awareness of InternetNZ and what New Zealanders' perceive as its role.



We surveyed 1,001 New Zealanders aged 18+ online.

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



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

Throughout the report we use the term "New Zealanders" to refer to the total survey sample, i.e., New Zealanders who are online. As people completed the survey 'online' they are therefore not representative of all New Zealanders' usage and views towards the Internet.



Fieldwork was conducted from 3rd – 17th November, 2021.

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

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



This survey has been conducted yearly since 2018. However, in 2018 we spoke to consumers, businesses, and consumers who also manage or own a business, whereas from 2019 we spoke to "consumers" in general (whether or not they also own a business). Due to this change in sample definition the consumer only 2018 results included in this report should be treated with caution.

*Ethnicity is included from 2021.

Key findings



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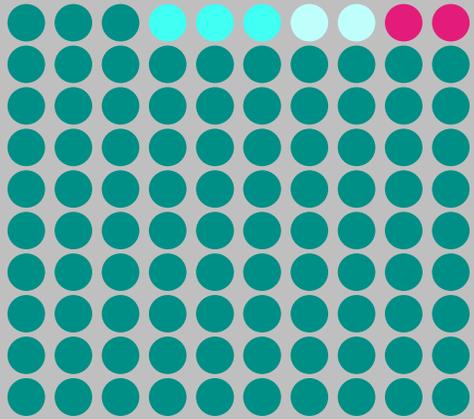


Key take outs...

1

Use of the Internet

There's extremely high, frequent **home** use of the Internet amongst our respondents: 98% use it once a week or more often at home (93% daily, 3% 2 or 3 times a week, 2% once a week). Only 2% use it less often than once a week.



Having a home Fibre connection continues trending upwards: 62% now have Fibre compared to 55% two years ago.

2

Use of social media

New Zealanders are significantly more likely to use the top three social media / communication platforms daily than they were a year ago:

- 1 Facebook: 67% use it daily (61% in 2020)
- 2 Facebook Messenger: 54% use it daily (47% in 2020)
- 3 Instagram: 32% use it daily (27% in 2020)

In addition, 55% use text to keep in touch at least daily (same as in 2020).

3

New Zealanders' concerns

The top five things New Zealanders are extremely concerned about in regards to the Internet are:

1. Young children accessing inappropriate content (38%)
2. Cyber bullying (35%)
3. Security of personal data (35%)
4. Being used to share dangerous or discriminatory message about individuals, groups, or communities (35%*)
5. Online crime (34%). ▲

Furthermore, people are **significantly more likely** to be extremely concerned about these aspects this year compared to last: online crime; misinformation; threats to privacy; online conspiracy theories; cost of Internet access.

4

Safety and security

Concerns about their personal details when using them on the Internet are a worry for people and are getting worse:

Extremely | Very concerned



Two thirds of New Zealanders have decided not to use an online service because of security or privacy concerns in the last year (a significant increase from 58% in 2020).

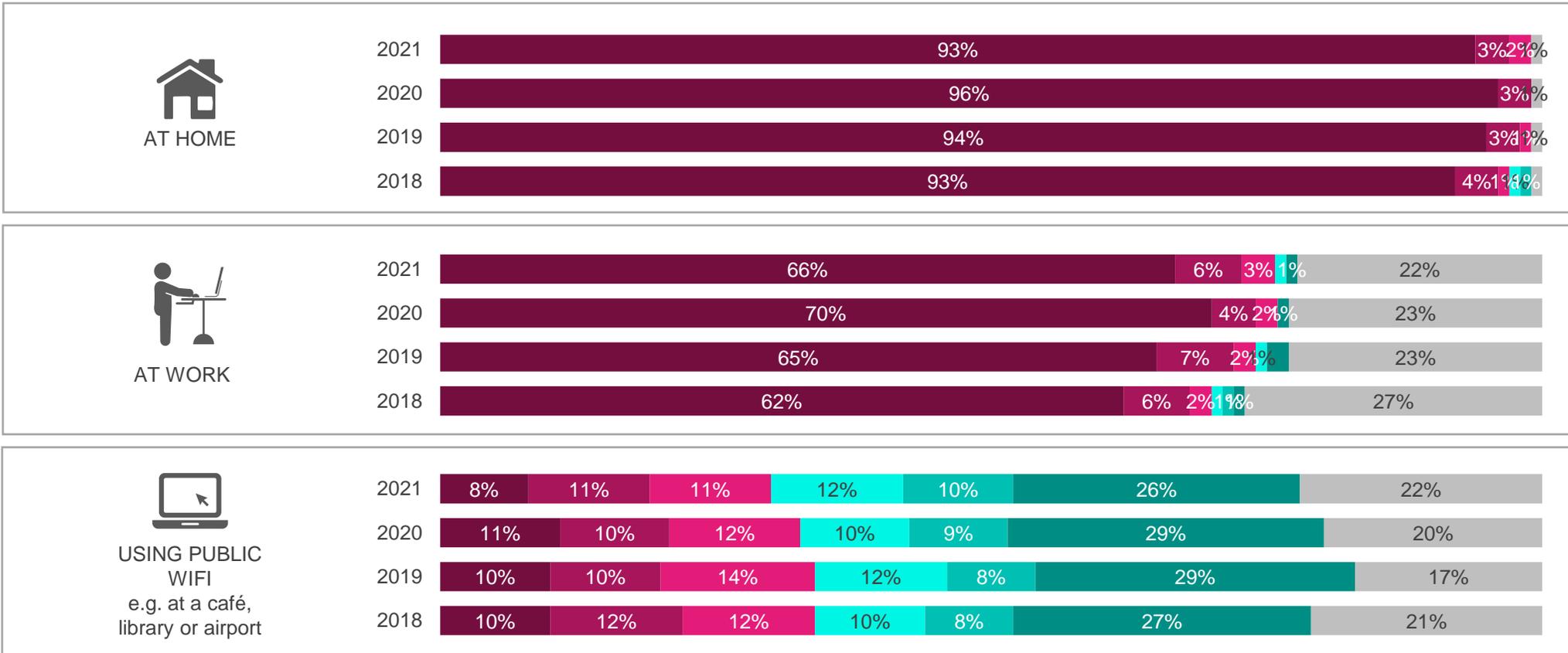
However, people are more likely to be proactively taking a variety of security precautions, with significantly more using multi factor authentication, unique passwords, and a password manager.

*New statement in 2021.

How do New Zealanders use the Internet?



Ninety-three percent of New Zealanders use the Internet at least once a day at home, and two thirds use it as often at work.



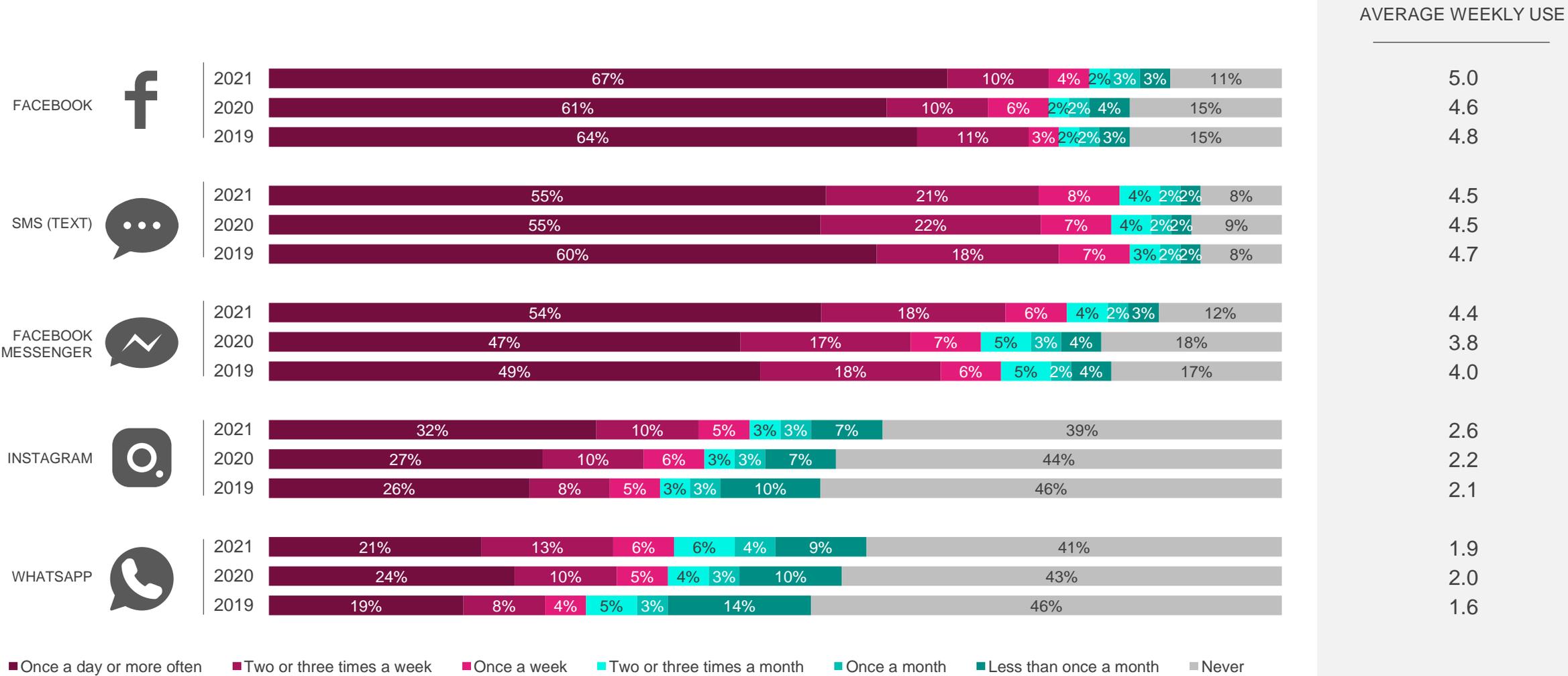
AVERAGE WEEKLY USE

6.6
6.8
6.7
6.6
4.8
5.0
4.8
4.5
1.1
1.2
1.2
1.6

■ Once a day or more often (7)
 ■ Two or three times a week (2.5)
 ■ Once a week (1)
 ■ Two or three times a month (0.6)
■ Once a month (0.25)
 ■ Less than once a month (0.1)
 ■ Never (0)

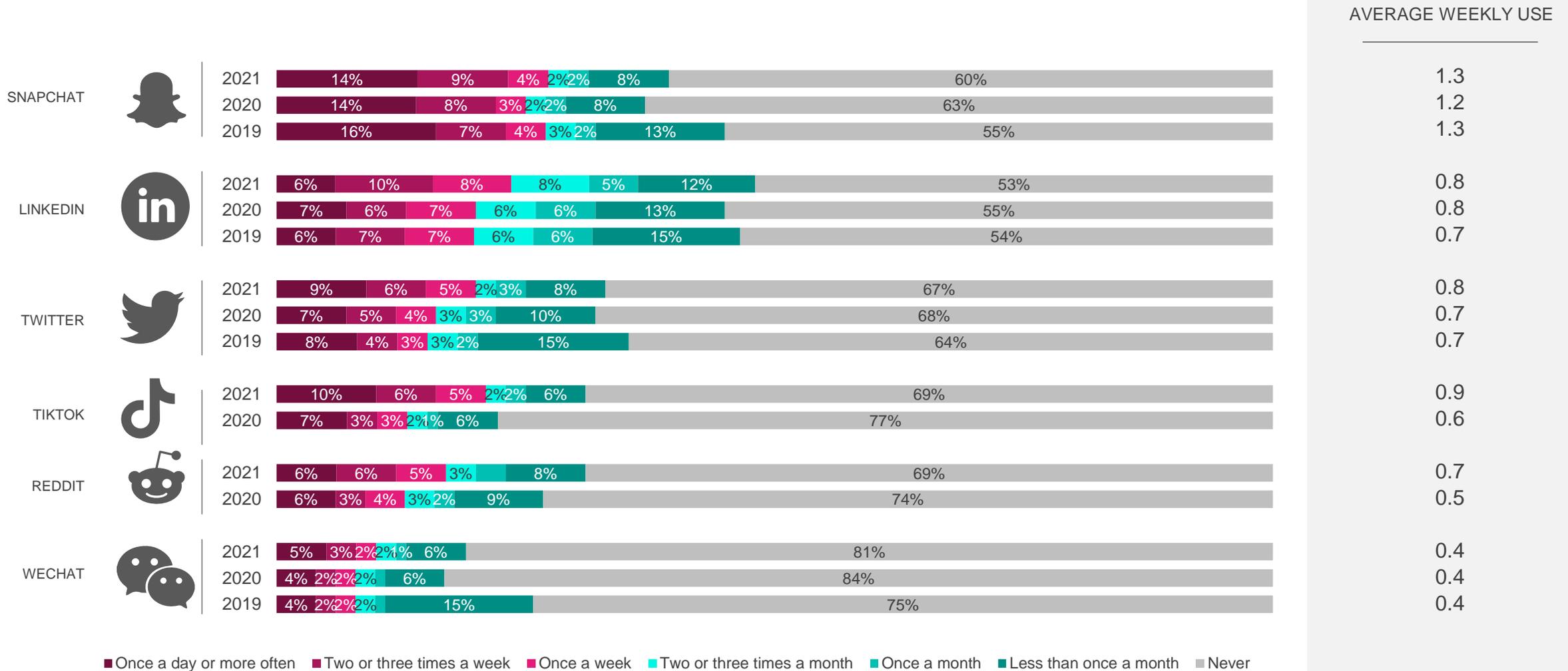
The unlabelled segments of each bar, each represent 1%.
 Q34. How often do you access the Internet in each of the following places?
 Base: All people 2021 n=1,001; 2020 n=1,000; 2019 n=1,001; 2018 Consumer only n=1,002

Facebook is the most frequently accessed communication or social media channel, with two thirds of New Zealanders using it at least daily. The next most frequently used are SMS Texts and Facebook Messenger.



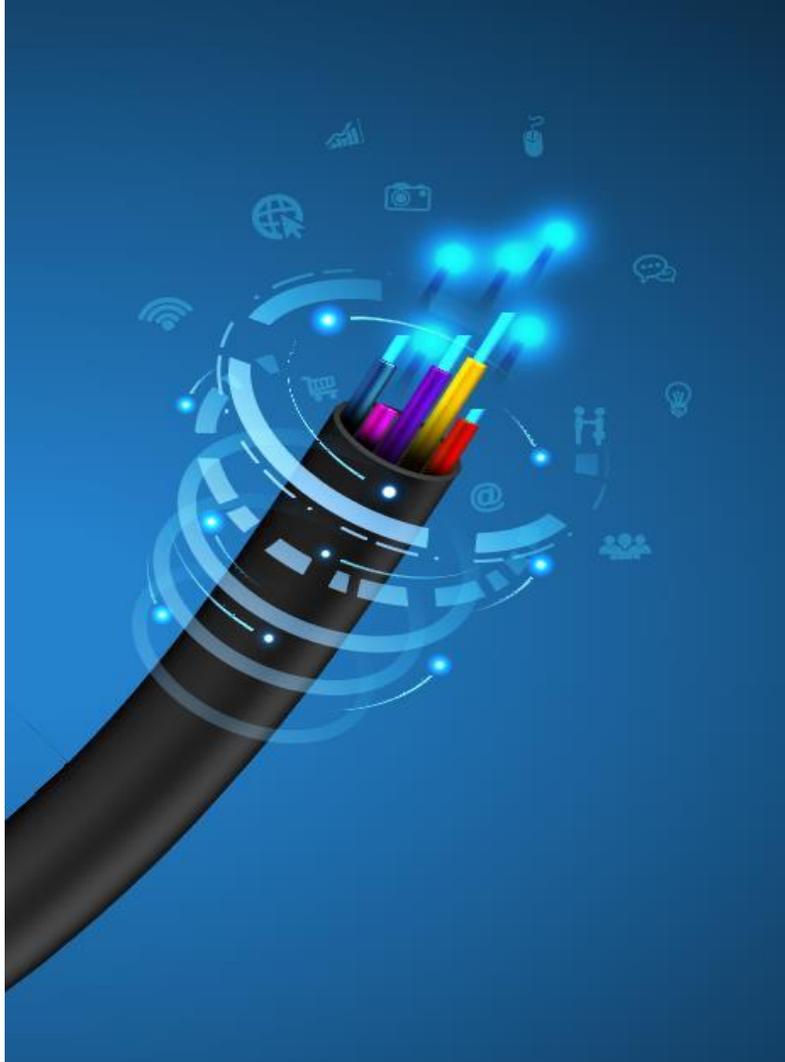
Q72. How often do you use the following social media channels or messaging services?
 Base: All people 2021 n=1,001; 2020 n=1,000; 2019 n=1,001

WeChat, Reddit and LinkedIn are only used by around five percent of people on a daily basis.



The unlabelled segments of each bar, each represent 1%.
 Q72. How often do you use the following social media channels or messaging services?
 Base: All people 2021 n=1,001; 2020 n=1,000; 2019 n=1,001

Home Fibre connections continue to increase with six in ten New Zealanders having this type of Internet connection.



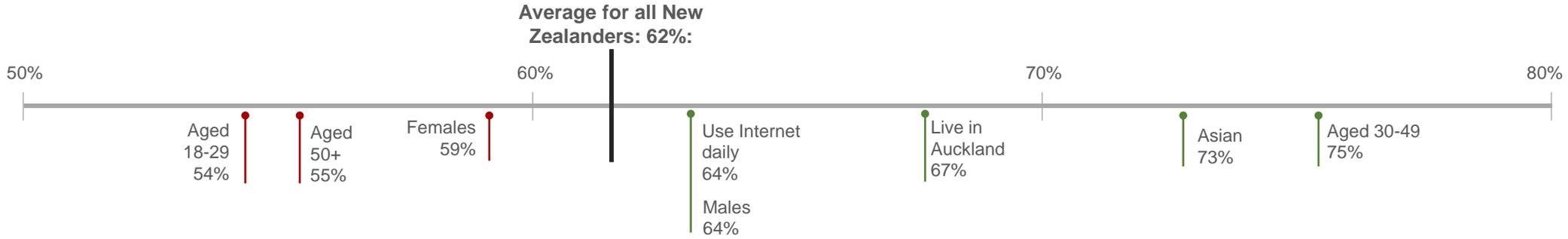
Q63. Which type of Internet connection do you have at home?
 Base: Consumers who access the Internet at home 2021 n=989; 2020 n=992, 2019 n=988; 2018 n=993

Younger New Zealanders and those aged 50 and over are less likely to have a fibre Internet connection.

Younger New Zealanders and those aged 50 and over and/or females are less likely to have a fibre Internet connection.

FIBRE (ANY)

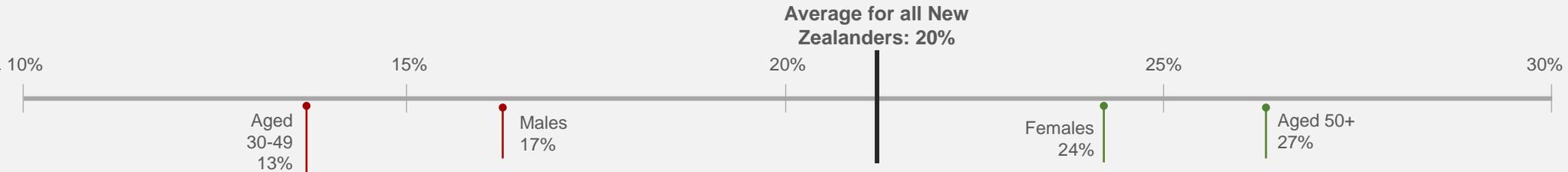
62%



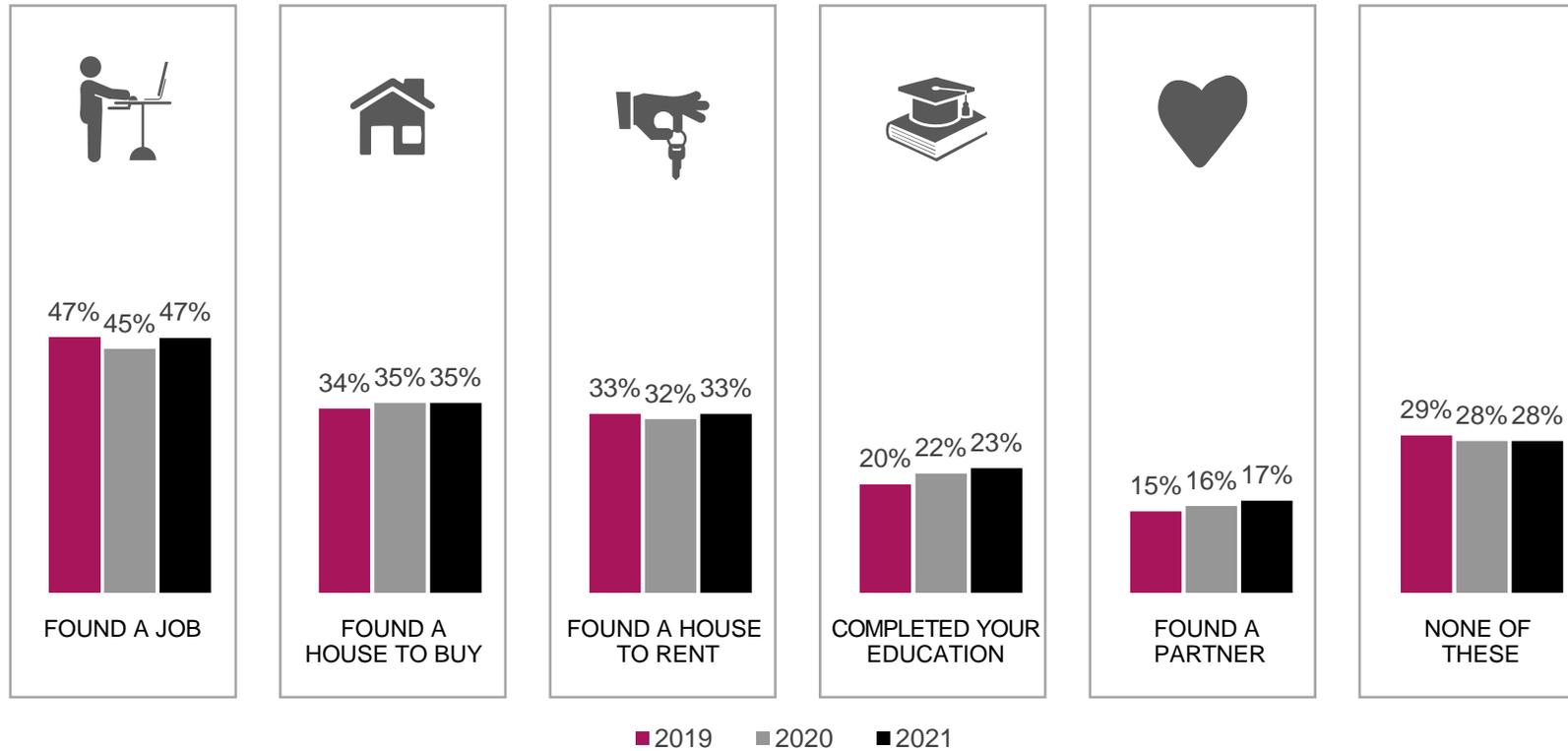
The following groups are less likely to have wireless broadband: aged 30 – 49 years; men.

WIRELESS BROADBAND

20%



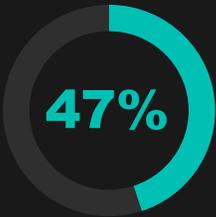
The activities people are doing online are fairly consistent to last year...



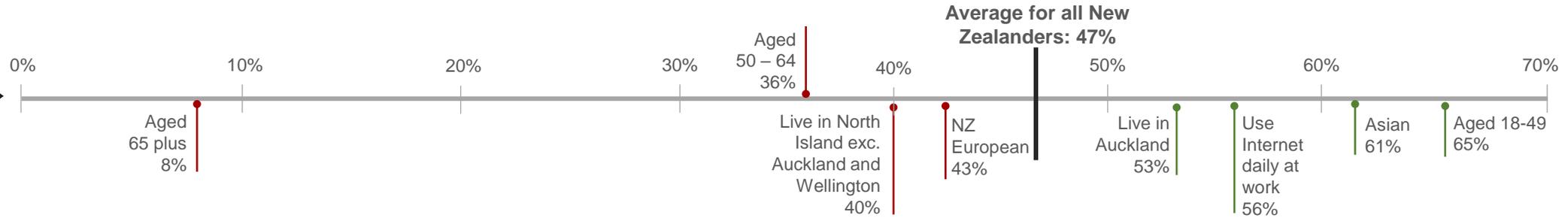
Q73. Which of the following have you done online?
 Base: All people 2021 n=1,001; 2020 n=1,000, 2019 n=1,001

Generally, older New Zealanders are less likely to use the Internet to find a job, a home to buy, or a house to rent than are younger New Zealanders.

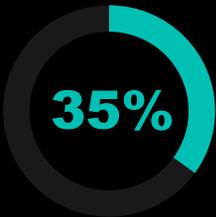
FOUND A JOB



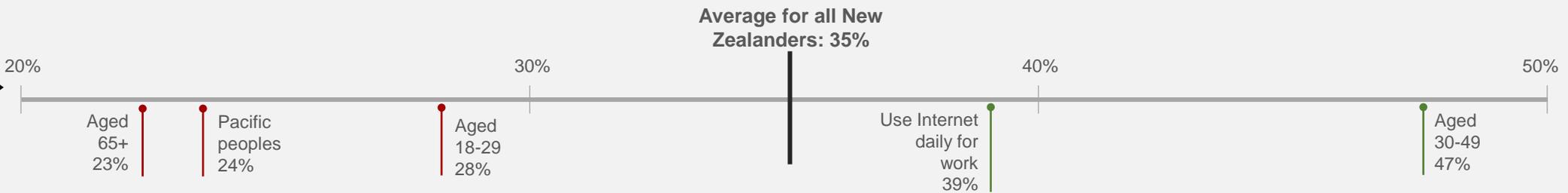
The following groups are less likely to have found a job online: older New Zealanders; live in North Island (exc. Auckland or Wellington); identify as NZ European



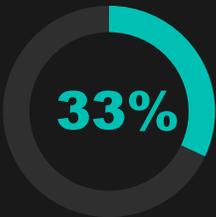
FOUND A HOUSE TO BUY



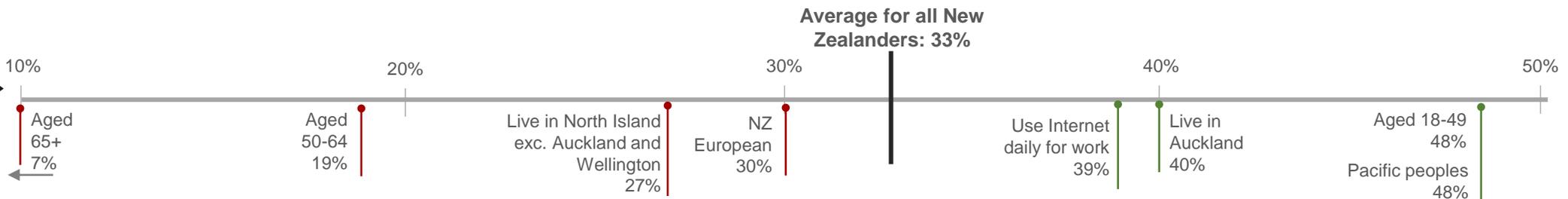
Older and younger (potentially due to lifestyle and not having bought a house yet) New Zealanders are less likely to have found a house to buy online



FOUND A HOUSE TO RENT



The following groups are less likely to have found a house to rent online: older New Zealanders; live in North Island (exc. Auckland or Wellington)

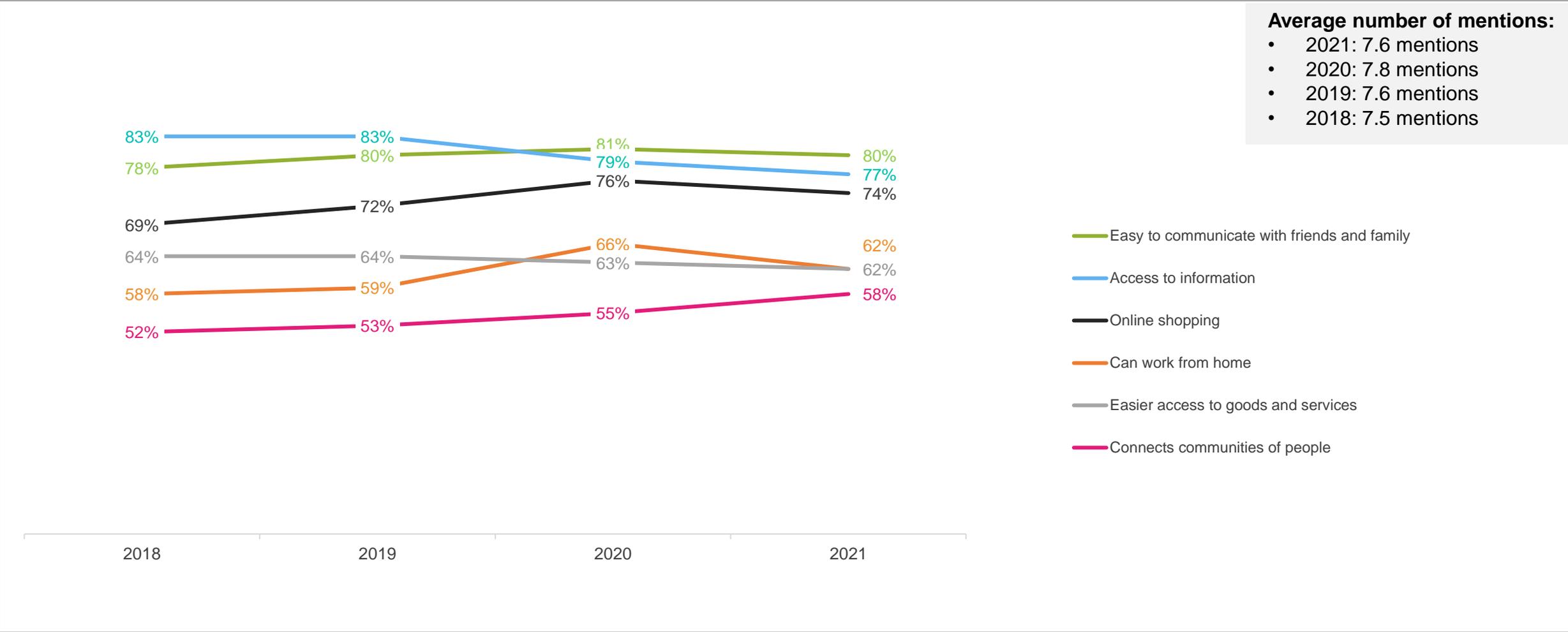


Q73. Which of the following have you done online?
Base: All people 2020 n=1,000, 2019 n=1,001

What are the benefits of the Internet?



There's three key social benefits New Zealanders perceive the Internet provides: facilitates communication with friends and family, providing access to information, and online shopping. There's also an upward trend in people seeing the Internet as a way to connect communities.



Average number of mentions:

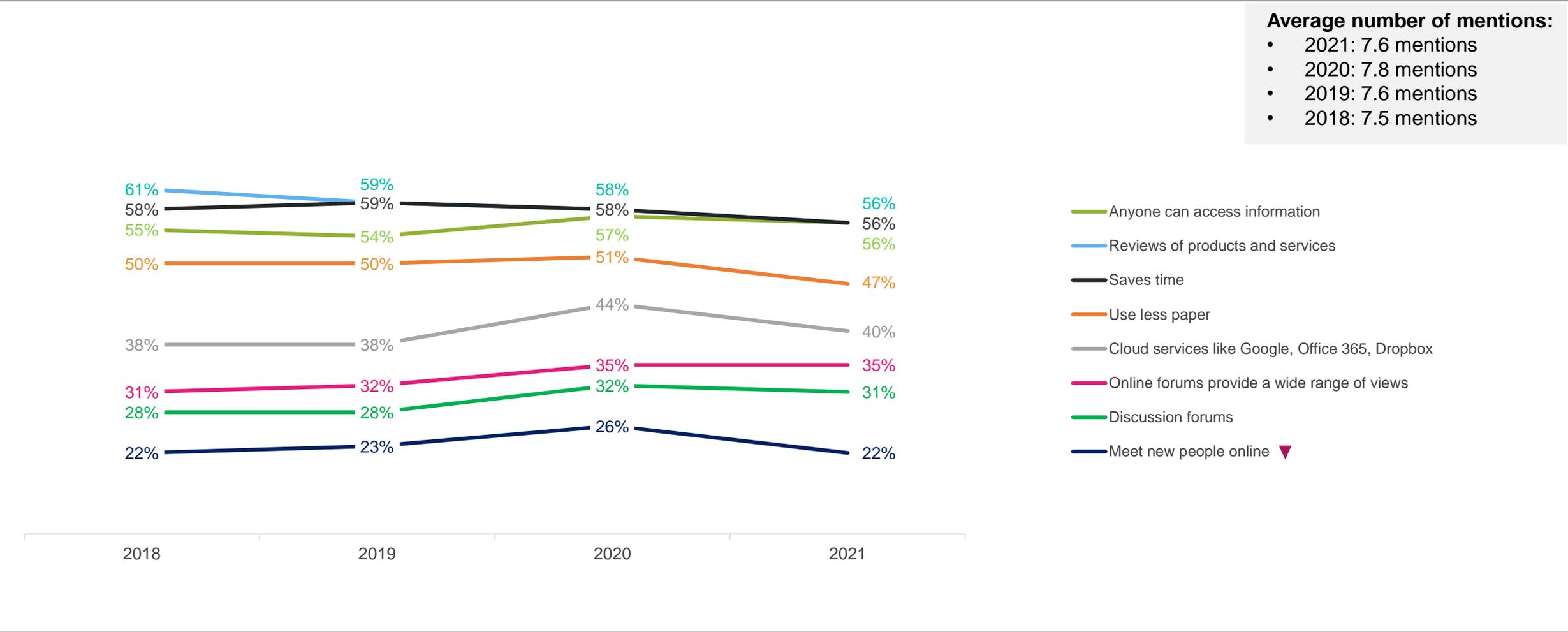
- 2021: 7.6 mentions
- 2020: 7.8 mentions
- 2019: 7.6 mentions
- 2018: 7.5 mentions

- Easy to communicate with friends and family
- Access to information
- Online shopping
- Can work from home
- Easier access to goods and services
- Connects communities of people

Q35. Which of the below do you think are the key benefits of the Internet? Please think about the key social benefits, regardless of whether or not you personally use the Internet for this reason.
 Base: All people 2021 n=1,001; 2020 n=1,000; 2019 n=1,001; 2018 n=1,859

▲ ▼ Significantly higher / lower than 2020.

New Zealanders are less likely to perceive the Internet's key social benefits as enabling online forums with a range of views, discussion forums, and a way to meet new people online.

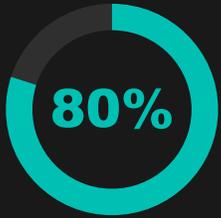


Q35. Which of the below do you think are the key benefits of the Internet? Please think about the key social benefits, regardless of whether or not you personally use the Internet for this reason.
 Base: All people 2021 n=1,001; 2020 n=1,000; 2019 n=1,001; 2018 n=1,859

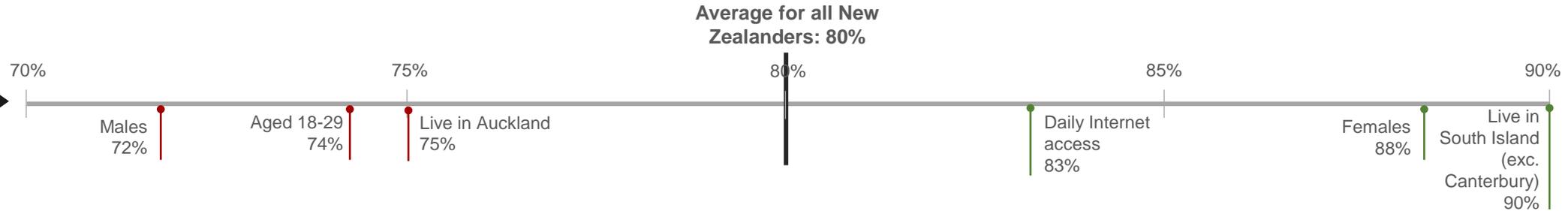
▲ ▼ Significantly higher / lower than 2020.

Younger New Zealanders are less likely to perceive the key benefits of the Internet – this may be because they’ve never known life without it. Females are also more likely to see benefits than men.

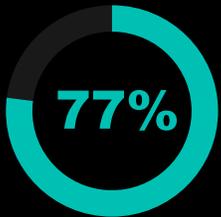
EASY TO COMMUNICATE



The following groups are less likely to say ‘easy to communicate with friends/family’ is a key benefit of the Internet: younger New Zealanders; men; those living in Auckland



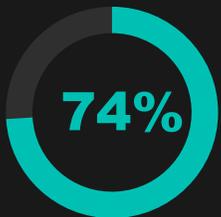
ACCESS TO INFORMATION



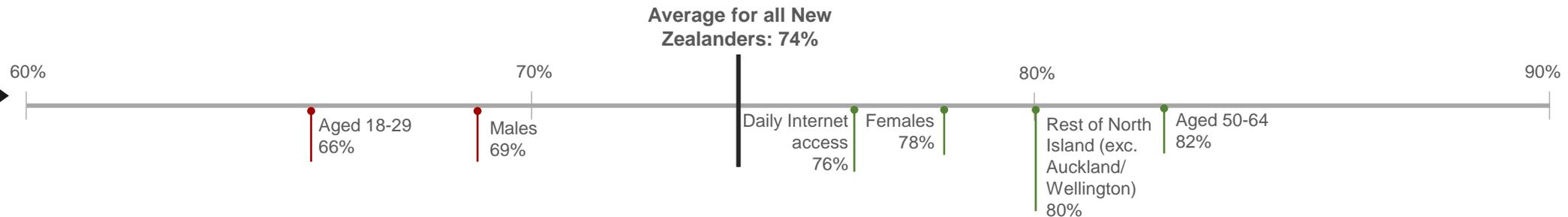
The following groups are less likely to say ‘access to information’ is a key benefit of the Internet: younger New Zealanders; men



ONLINE SHOPPING



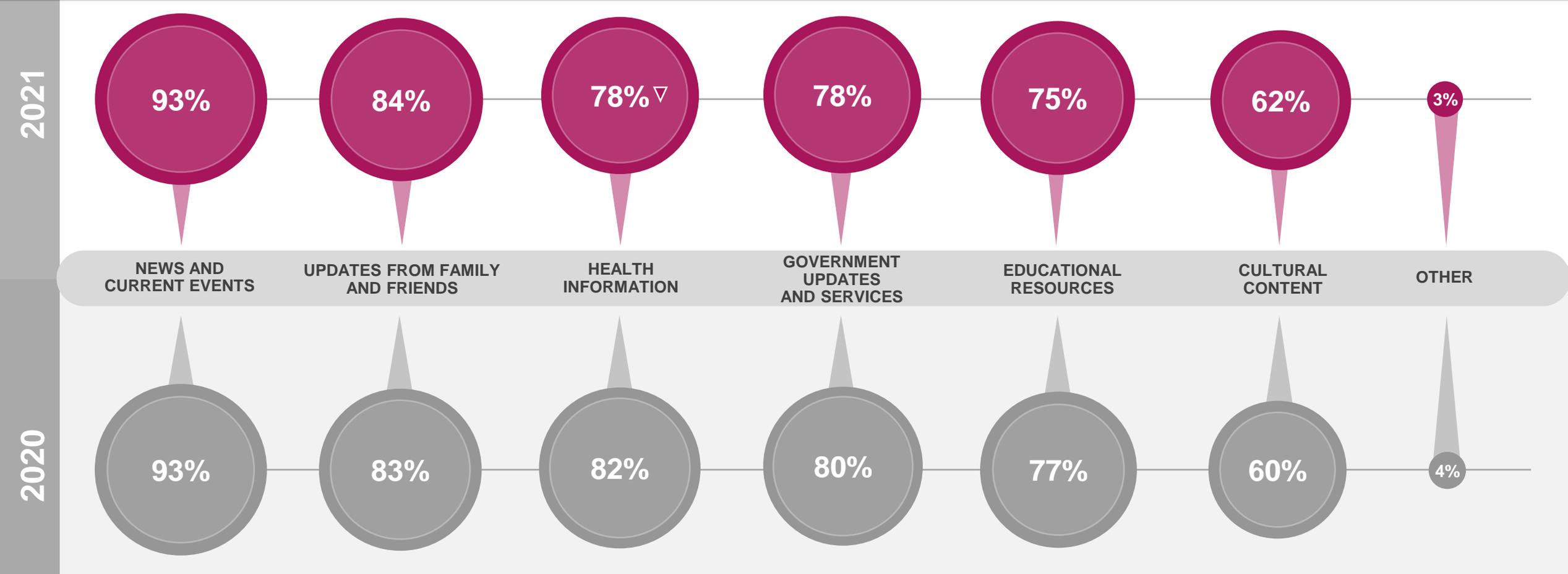
The following groups are less likely to say ‘online shopping’ is a key benefit of the Internet: younger New Zealanders; men



Q35. Which of the below do you think are the key benefits of the Internet? Please think about the key social benefits, regardless of whether or not you personally use the Internet for this reason.

Base: All people 2021 n=1,001

Access to news and current events continues to be the most important type of information the Internet offers.



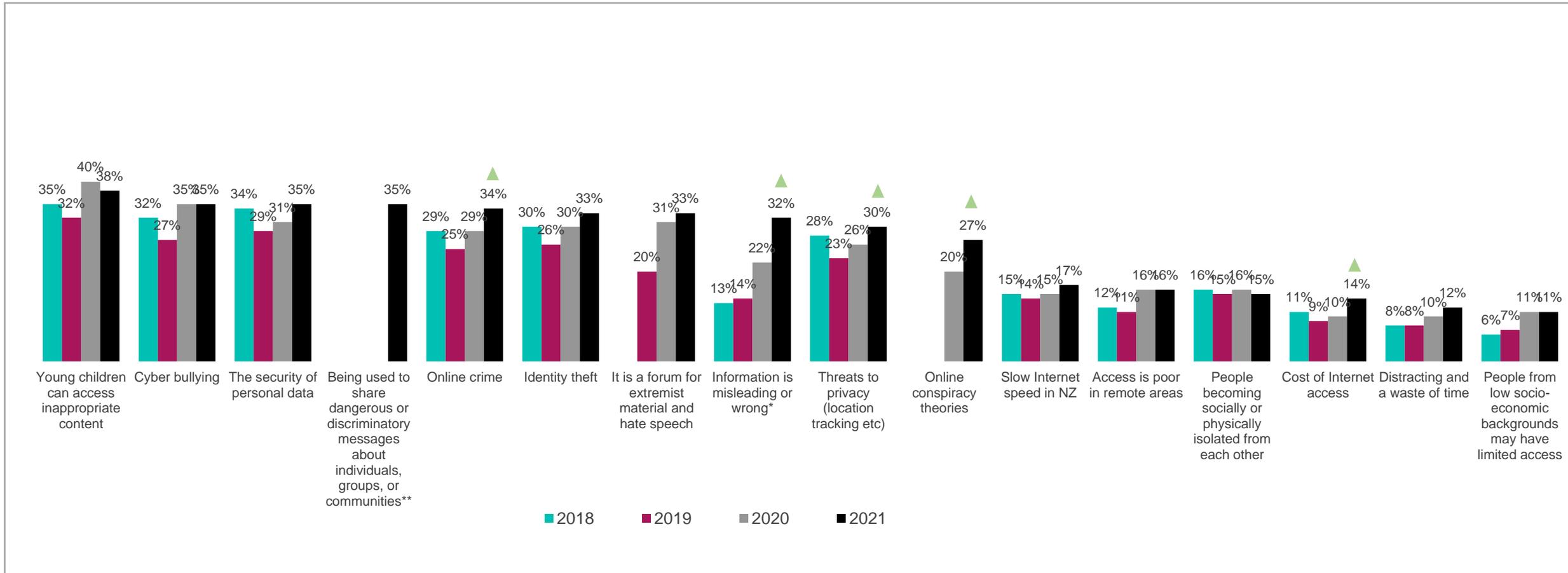
“If you're in doubt or want to know something, just Google, very helpful.”

What are New Zealanders concerned about?



Enabling young children to access inappropriate content remains the number one concern about the Internet. Enabling “misinformation” has the largest increase – up ten percentage-points to 32% of people being extremely concerned about it in 2021.

CONCERN ABOUT INTERNET ASPECT: EXTREMELY CONCERNED

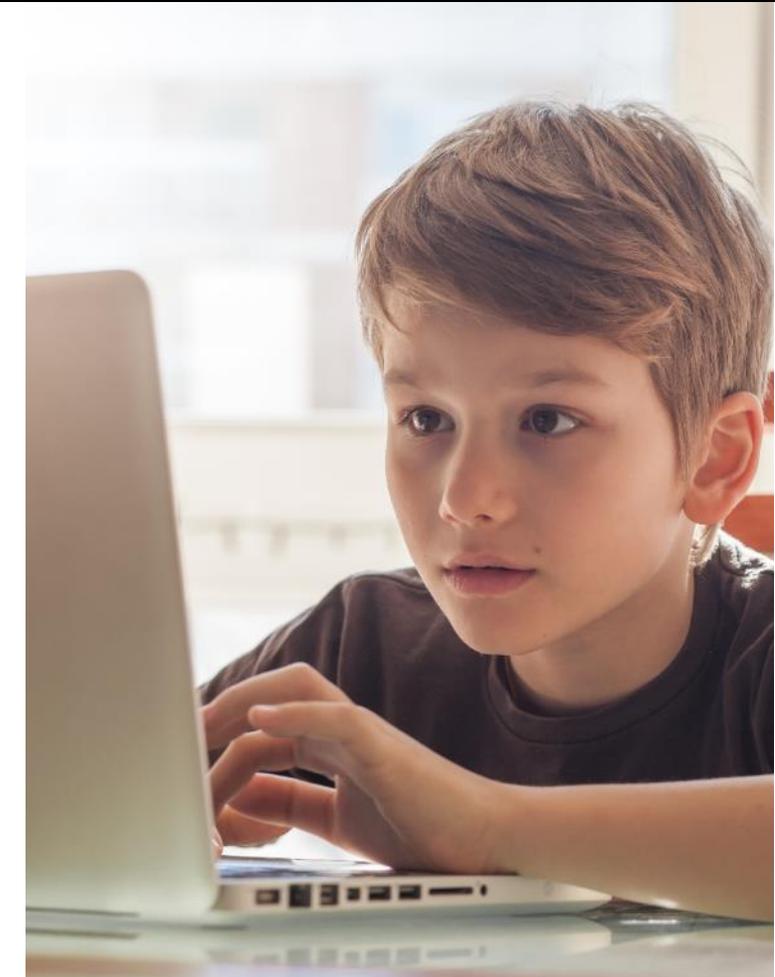
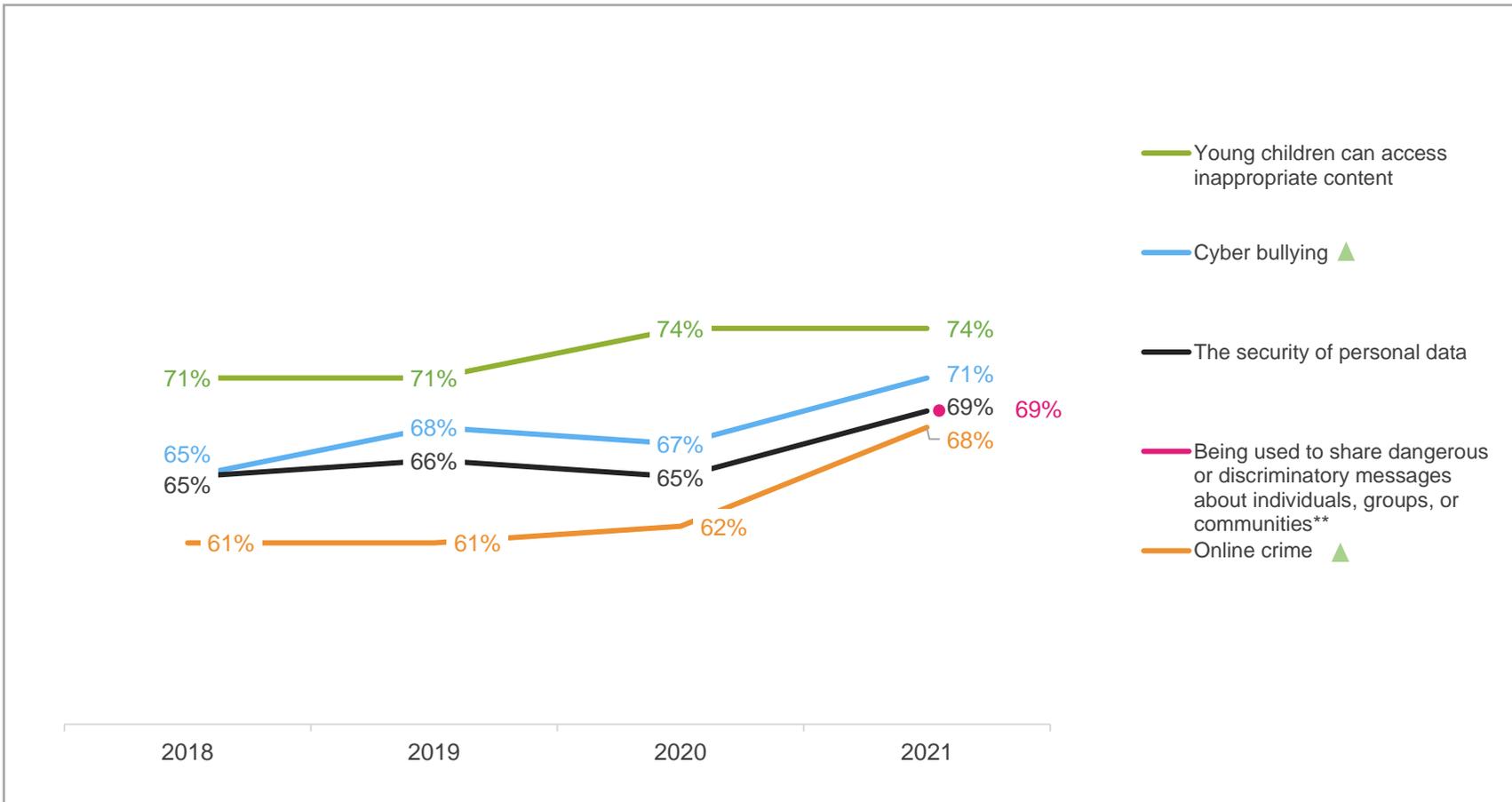


Q36. How concerned are you about each of the following aspects of the Internet? For each aspect please indicate on the scale your level of concern. Again, please think about society as a whole, rather than anything you may or may not have personally experienced.
 Base: All people 2021 n=1,001; 2020 n=1,000; 2019 n=1,001; 2018 Consumers n=1,002. Excludes don't know. *Statement updated to include "e.g., Misinformation" in 2021. **New statement 2021.

▲ ▼ Significantly higher / lower than 2020

Now looking at things people are extremely or very concerned about, three quarters of New Zealanders are worried about children accessing inappropriate material online. The other top concerns are cyber bullying, security of personal data, the Internet being used to share dangerous or discriminatory messages, or online crime.

CONCERN ABOUT INTERNET ASPECT: EXTREMELY CONCERNED | VERY CONCERNED OVER TIME



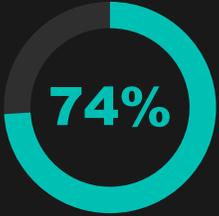
Q36. How concerned are you about each of the following aspects of the Internet? For each aspect please indicate on the scale your level of concern. Again, please think about society as a whole, rather than anything you may or may not have personally experienced.

Base: All people 2021 n=1,001; 2020 n=1,000; 2019 n=1,001; 2018 Consumers n=1,002. Excludes don't know. **New statement 2021.

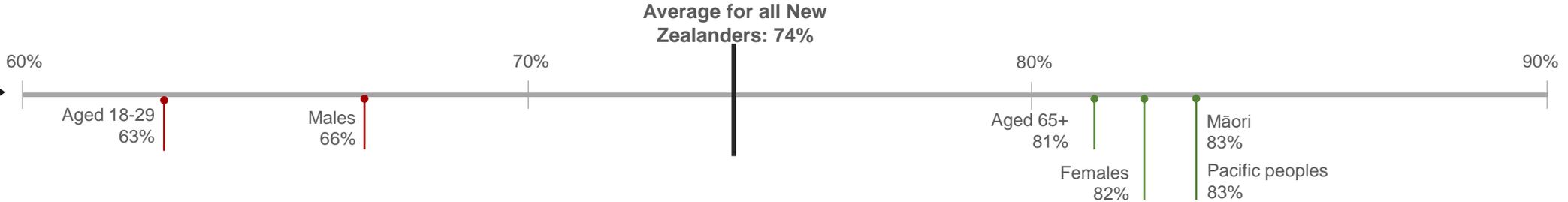
▲▼ Significantly higher / lower than 2020

Younger New Zealanders and men are less concerned about the top-rated negatives of the Internet compared to other New Zealanders.

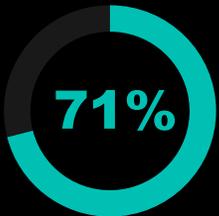
YOUNG CHILDREN CAN ACCESS INAPPROPRIATE MATERIAL



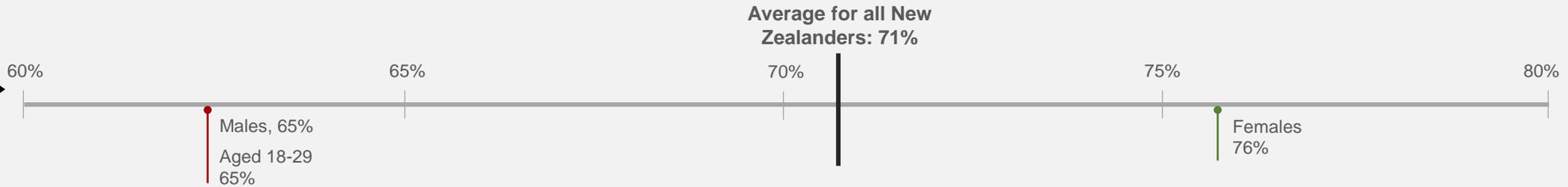
The following groups are less likely to be extremely / very concerned that young children can access inappropriate material on the Internet: younger New Zealanders; men



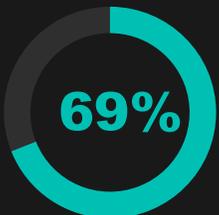
CYBER BULLYING



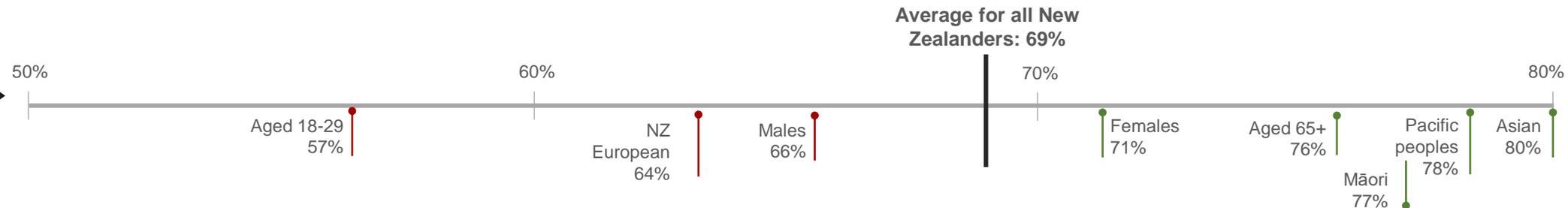
The following groups are less likely to be extremely / very concerned about cyber bullying on the Internet: younger New Zealanders; men



SECURITY OF PERSONAL DATA



The following groups are less likely to be extremely / very concerned about security of personal data on the Internet: younger New Zealanders; men; NZ Europeans

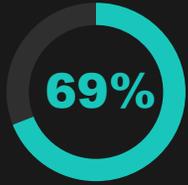


Q36. How concerned are you about each of the following aspects of the Internet? For each aspect please indicate on the scale your level of concern. Again, please think about society as a whole, rather than anything you may or may not have personally experienced.

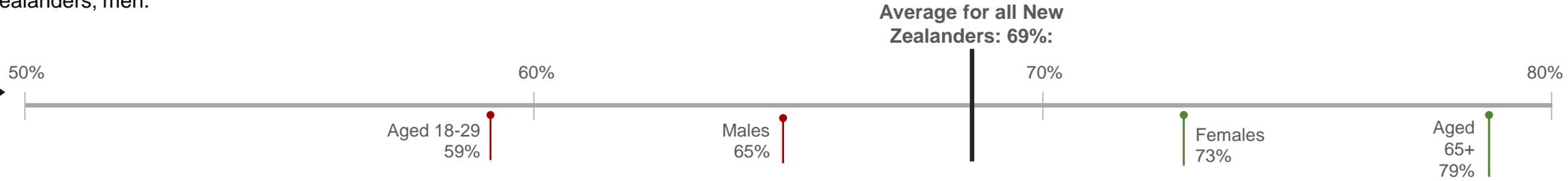
Base: All people 2021 n=1,001. Excludes don't know.

Younger New Zealanders and/or men are less concerned about the top-rated negatives of the Internet compared to other New Zealanders (cont'd).

BEING USED TO SHARE DANGEROUS OR DISCRIMINATORY MESSAGES**



The following groups are less likely to be extremely / very concerned about the Internet being used to share dangerous or discriminatory messages: younger New Zealanders; men.



ONLINE CRIME



The following groups are less likely to be extremely / very concerned about online crime: younger New Zealanders; men; NZ Europeans



AVERAGE NUMBER OF CONCERNS PER GROUP

The following groups have a slightly larger number of concerns about the Internet in general: women; older New Zealanders; Pacific peoples; Asian.



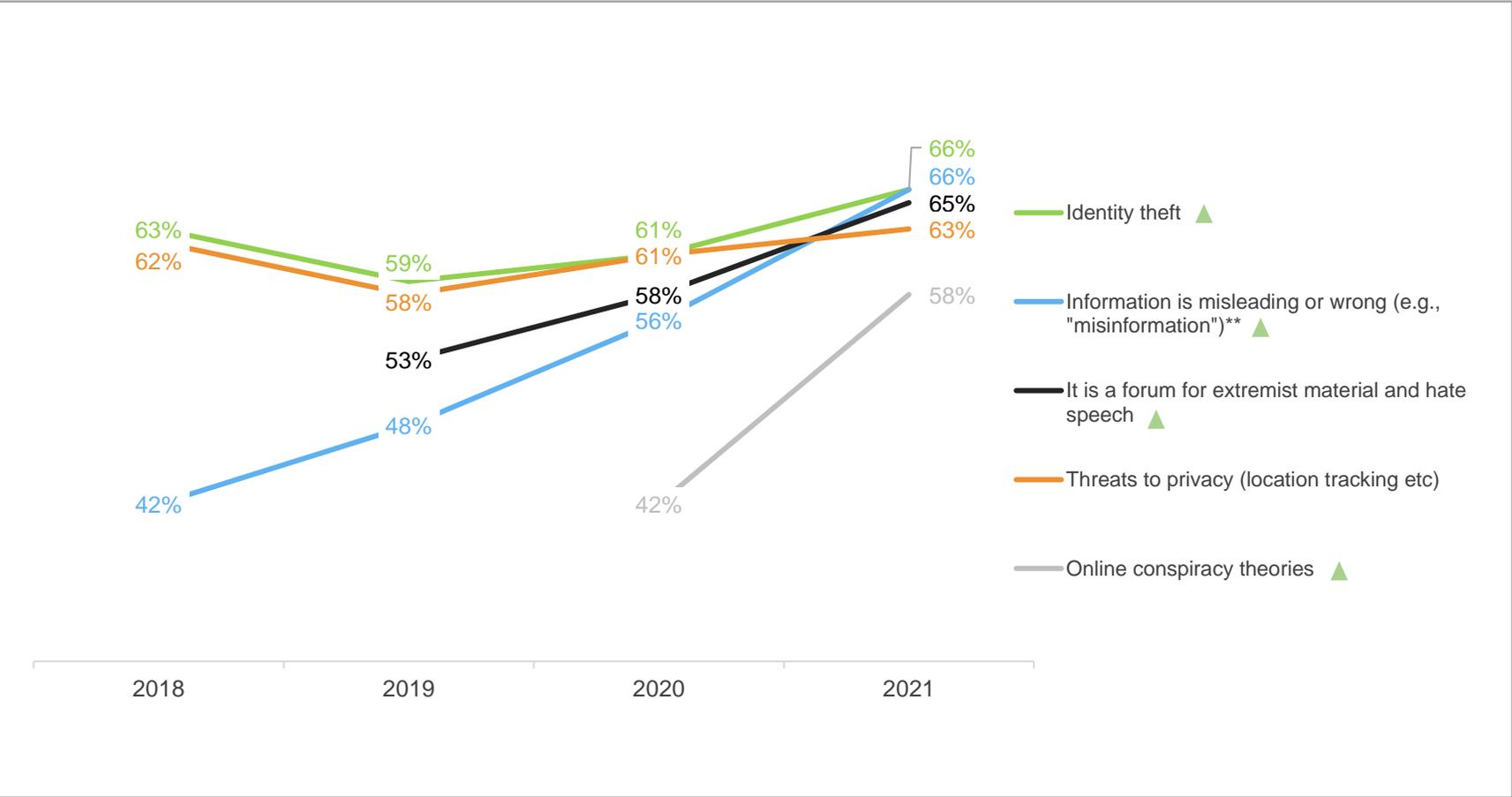
Extremely concerned | Very concerned

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: All people 2021 n=1,001. Excludes don't know.

There is a significant increase in being concerned about identity theft, “misinformation”, the Internet being a forum for extremist material and hate speech, and online conspiracy theories this year.

CONCERN ABOUT INTERNET ASPECT: EXTREMELY CONCERNED | VERY CONCERNED OVER TIME (CONT'D)

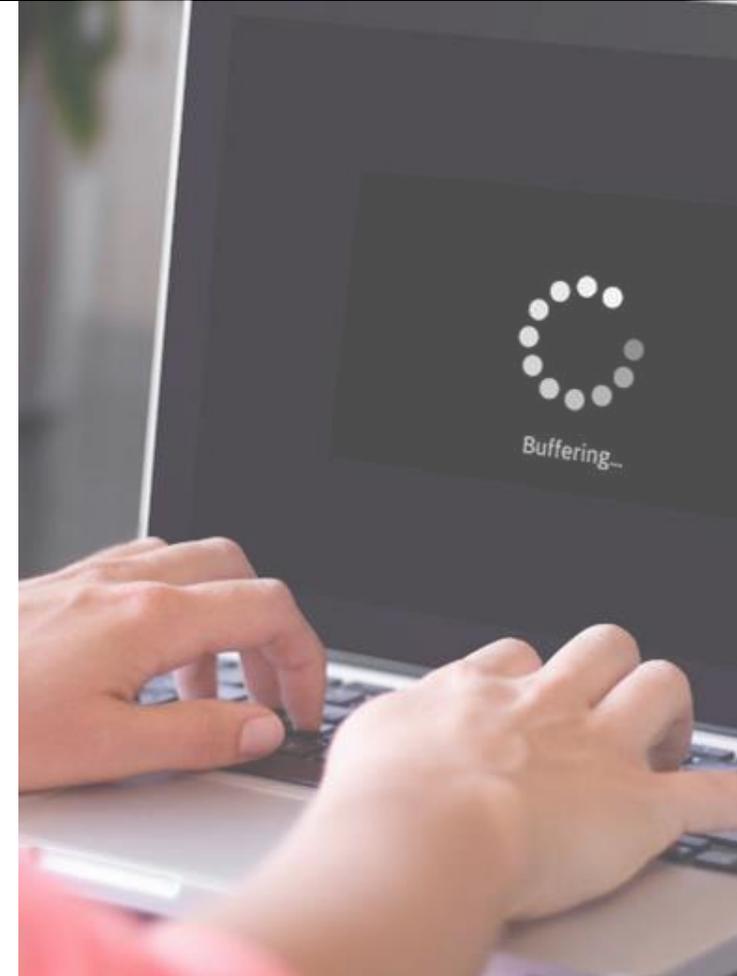
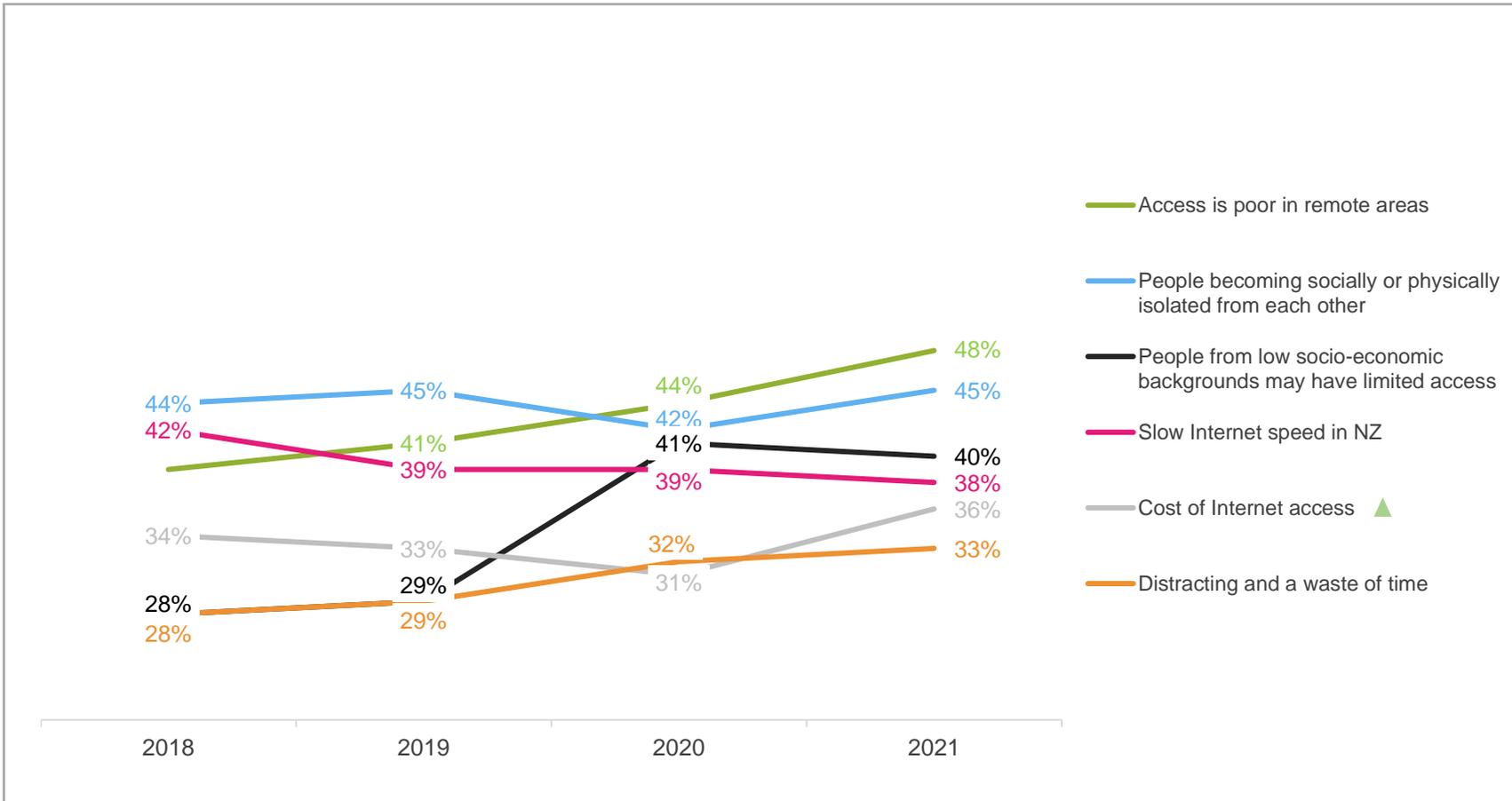


Q36. How concerned are you about each of the following aspects of the Internet? For each aspect please indicate on the scale your level of concern. Again, please think about society as a whole, rather than anything you may or may not have personally experienced. *Statement updated to include “e.g., Misinformation” in 2021. Base: All people 2021 n=1,001; 2020 n=1,000; 2019 n=1,001; 2018 Consumers n=1,002. Excludes don't know.

▲ ▼ Significantly higher / lower than 2020

There is also a significant increase in concern about the cost of Internet access in 2021.

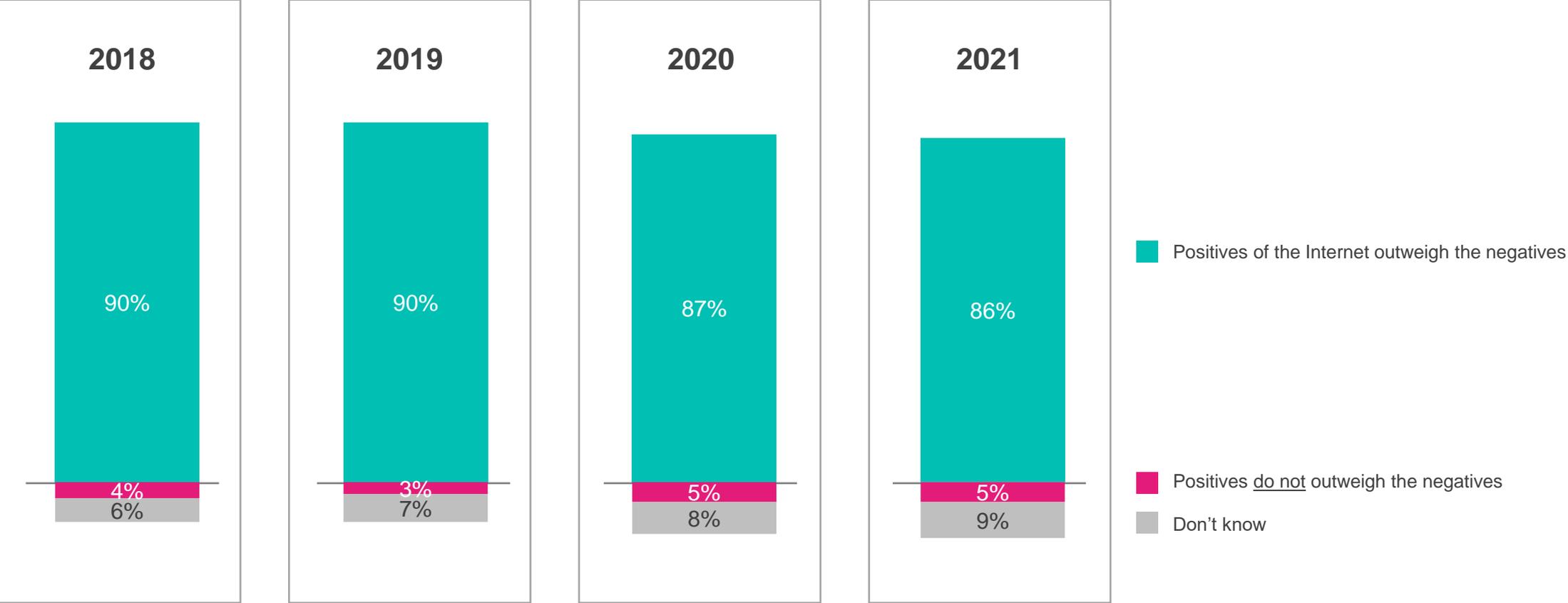
CONCERN ABOUT INTERNET ASPECT: EXTREMELY CONCERNED | VERY CONCERNED OVER TIME (CONT'D)



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: All people 2021 n=1,001; 2020 n=1,000; 2019 n=1,001; 2018 Consumers n=1,002. Excludes don't know.

▲ ▼ Significantly higher / lower than 2020

The majority of people continue to think that the positives of the Internet outweigh the negatives.



Q37. There are positives and negatives to the Internet but overall do you think the positives outweigh the negatives?
Base: All people 2021 n=1,001; 2020 n=1,000; 2019 n=1,001; 2018 n=1,859

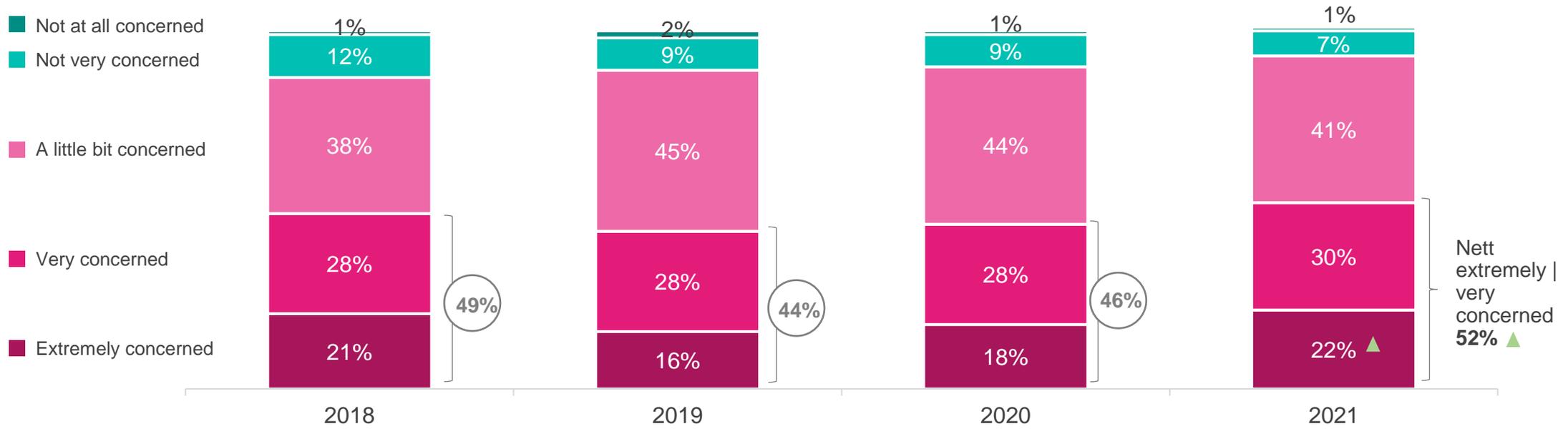
Do New Zealanders feel safe online?



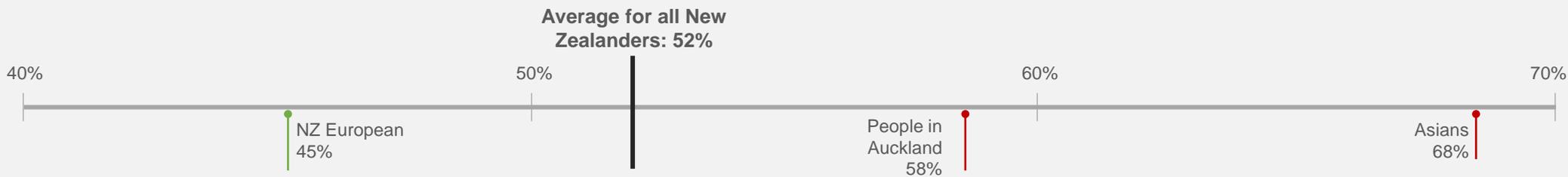
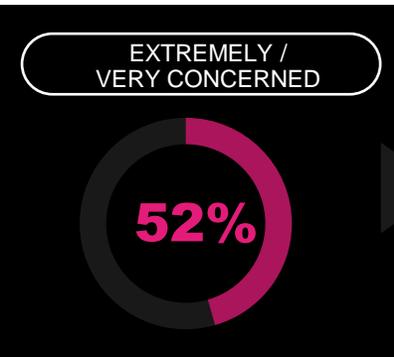
KANTAR PUBLIC



Concern about the security of personal details online has increased this year.



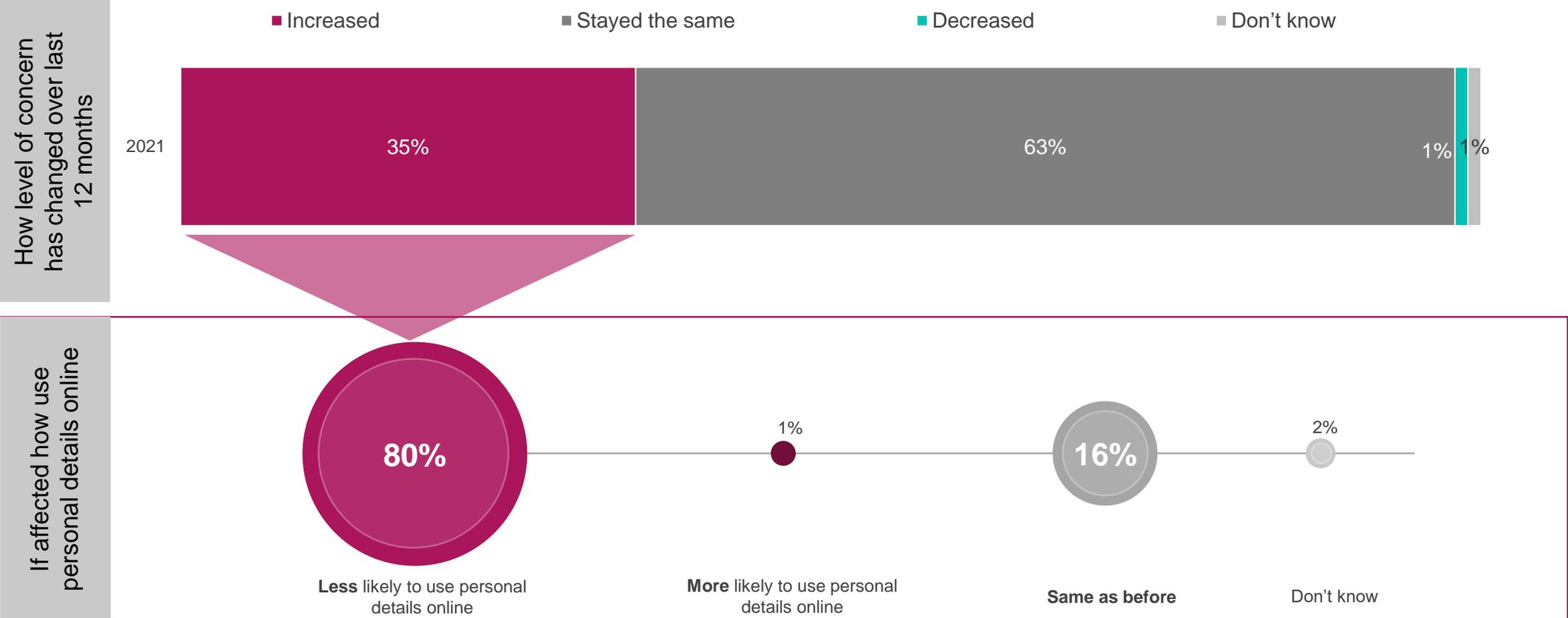
The following are more likely to be extremely / very concerned about security of their personal details when using them on the Internet: people in Auckland; Asians.



Q39. How concerned are you about the security of your own personal details when you use them on the Internet?
 Base: All people (excluding those who don't use personal details on the Internet) 2021 n=1,001; 2020 n=1,000; 2019 n=1,001; 2018 Consumers only n=1,002

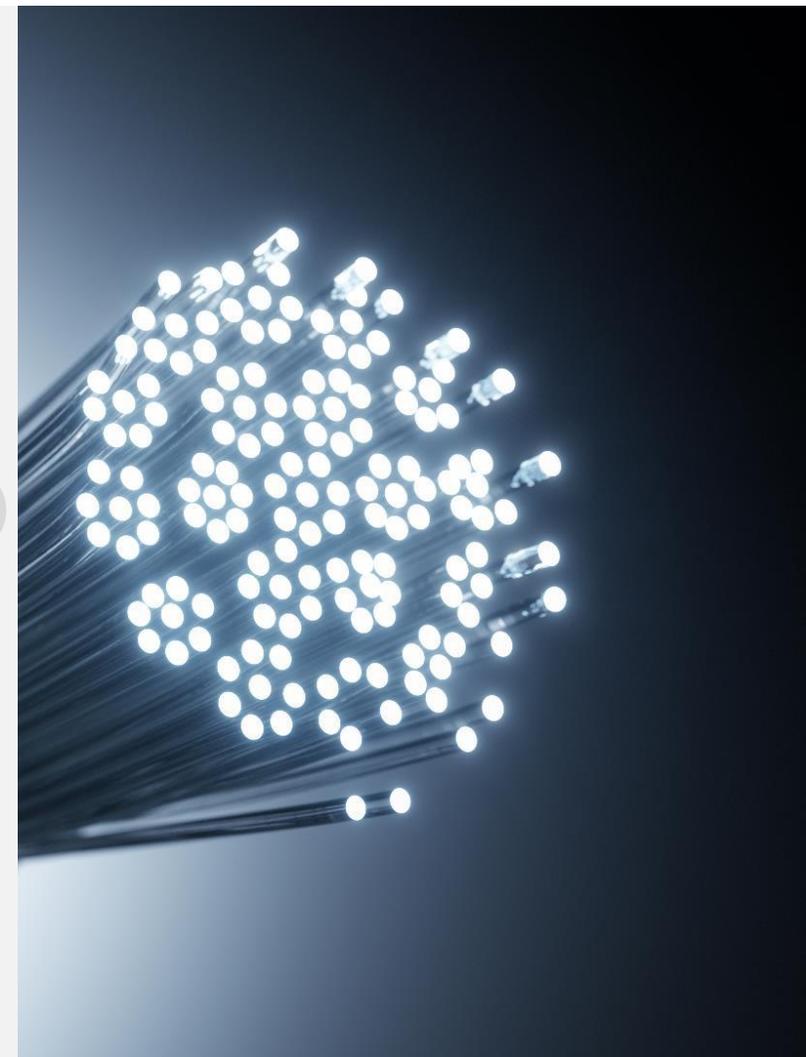
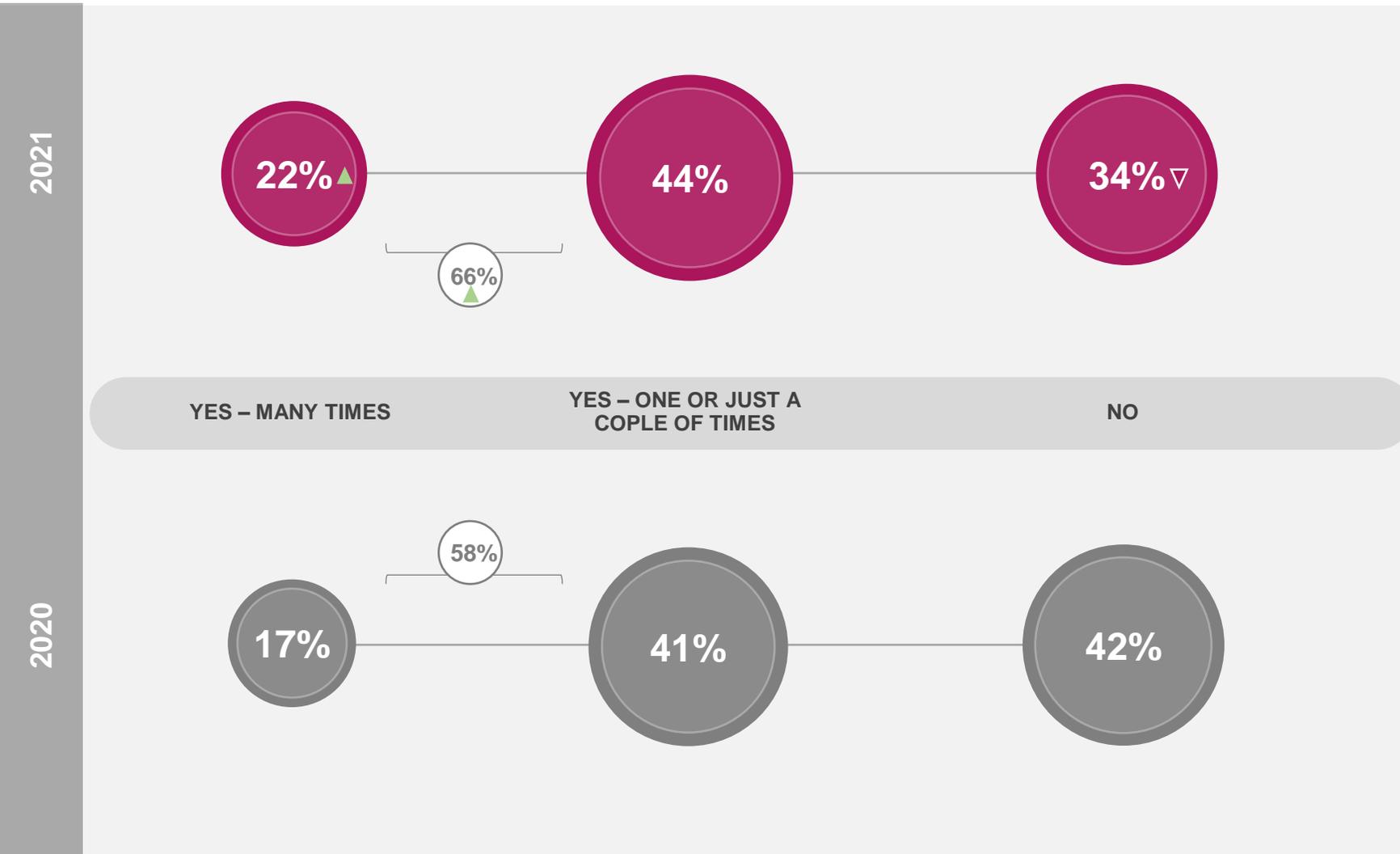
▲ ▼ Significantly higher / lower than 2020

Overall, around a third of New Zealanders say their level of concern about using personal details online has increased over the 12 months. Of these people, 80% are less likely to use their personal details online because of this.



Q40. How has your level of concern changed over the last 12 months? Q41. Has this affected how you use your personal details online?
 Base: All people 2021 n=1,001 | Base: All people who's level of concern has increased in last 12 months n=364.

Two thirds of New Zealanders have chosen not to use at least one online service because of security or privacy concerns in the past 12 months, which is an increase compared to last year.

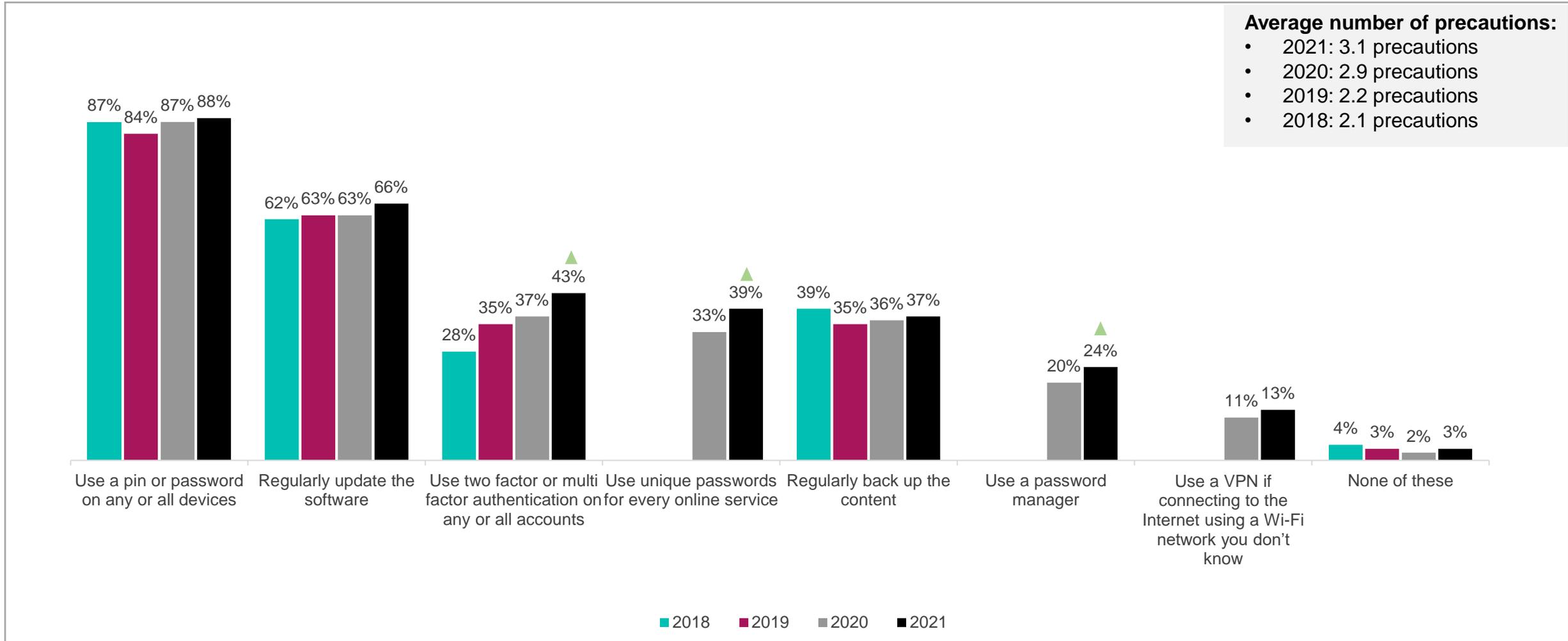


New question 2020.
 Q41Ci. In the last 12 months have you decided NOT to use an online service because of security or privacy concerns?
 Base: All people 2021 n=1,001; 2020 n=1,000

▲▼ Significantly higher / lower than 2020

Asians are significantly less likely to have decided not to use an online service because of security or privacy concerns (56% cf. 66%). No other significant differences by subgroups.

To stay safe online nearly nine in ten New Zealanders use a pin or password on their devices. There continues to be an upward trend in the use of two or multi factor authentication, using unique passwords, and/or a password manager.

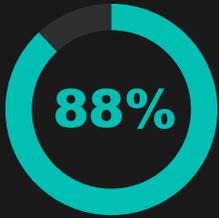


*New statements 2020.
 Q42. Which of the following security precautions do you take with your own devices?
 Base: All people 2021 n=1,001; 2020 n=1,000; 2019 n=1,001; 2018 Consumers only n=1,002

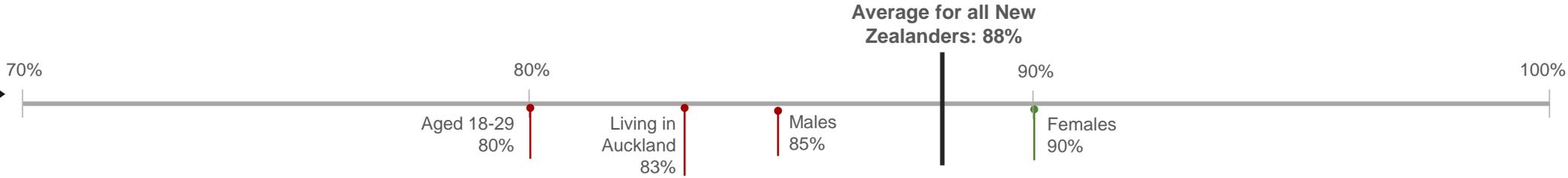
▲ ▼ Significantly higher / lower than 2020.

Older New Zealanders and/or men are less likely to use two factor or multi factor authentication on their online accounts.

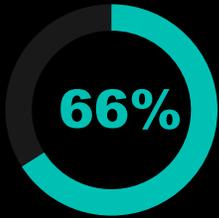
USE A PIN OR PASSWORD ON ALL DEVICES



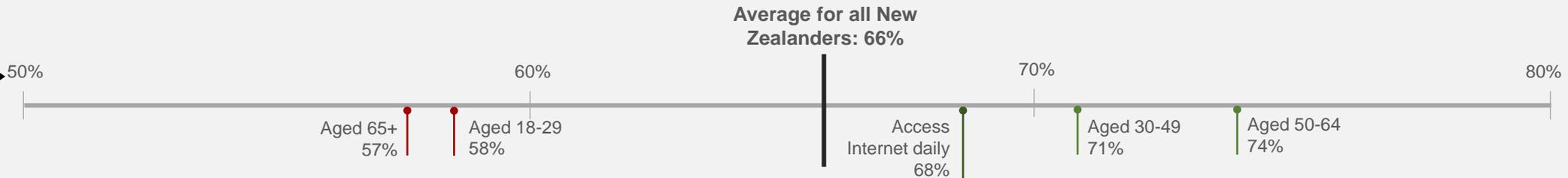
The following groups are less likely to use a pin or password on all their devices: younger New Zealanders; men; live in Auckland



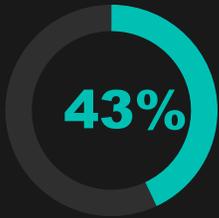
REGULARLY UPDATE SOFTWARE



The following group are less likely to regularly update software: older and/or younger New Zealanders



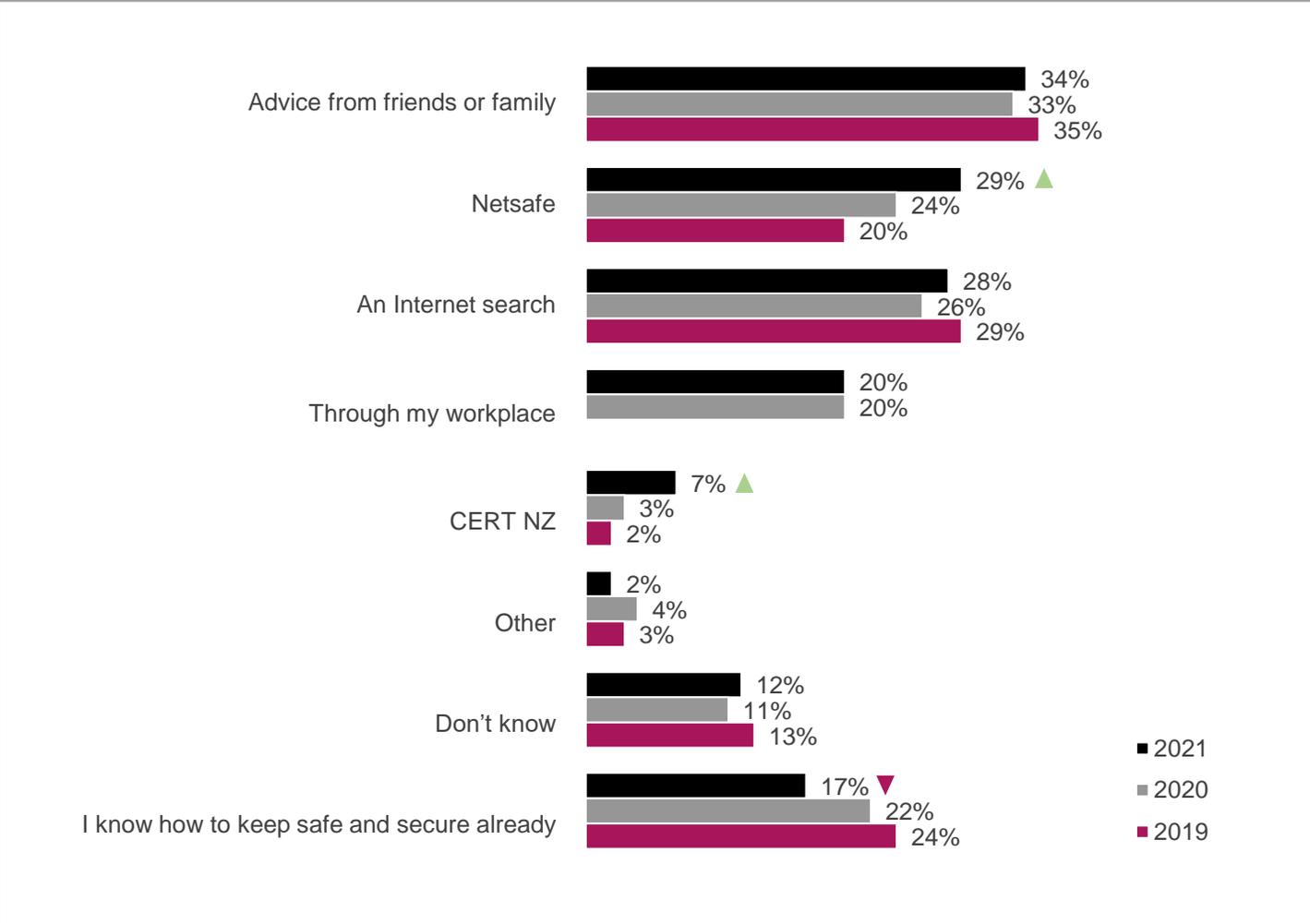
USE TWO / MULTI FACTOR AUTHENTICATION



The following group are less likely to use two / multi factor authentication on any or all accounts: older New Zealanders; men; those living in the South Island (excluding Canterbury).



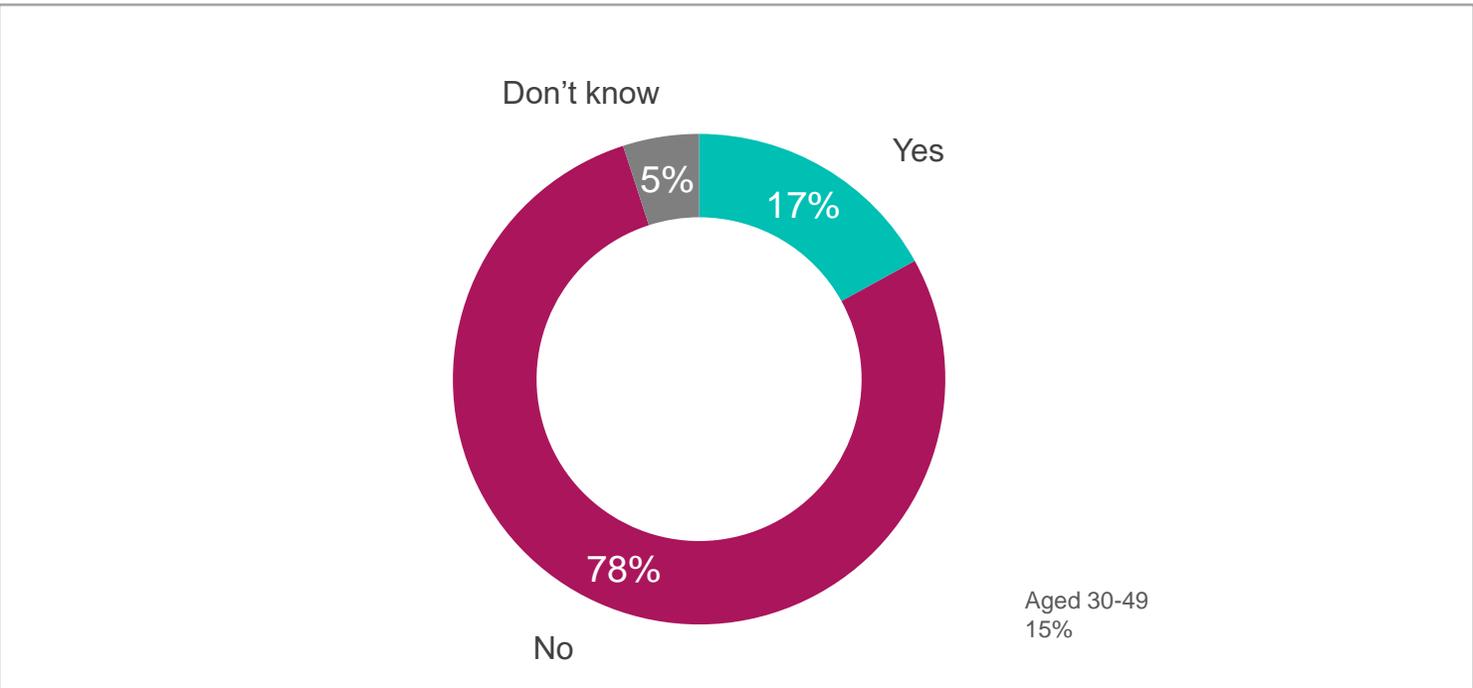
The main sources of information about online security are through friends and/or family, Netsafe, or an online search. This year significantly more New Zealanders say they visit CERT NZ for relevant information.



Q67. Where do you go for information about keeping safe and secure online?
 Base: All people 2021 n=1,001; 2020 n=1,000; 2019 n=1,001

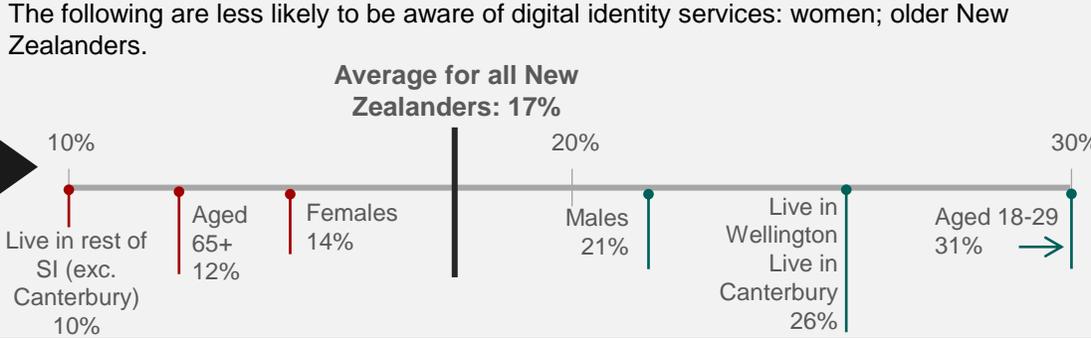
▲ ▼ Significantly higher / lower than 2020.

Seventeen percent of New Zealanders have heard about the development of 'digital identity' services.



YES, AWARE OF 'DIGITAL IDENTITY' SERVICES

17%



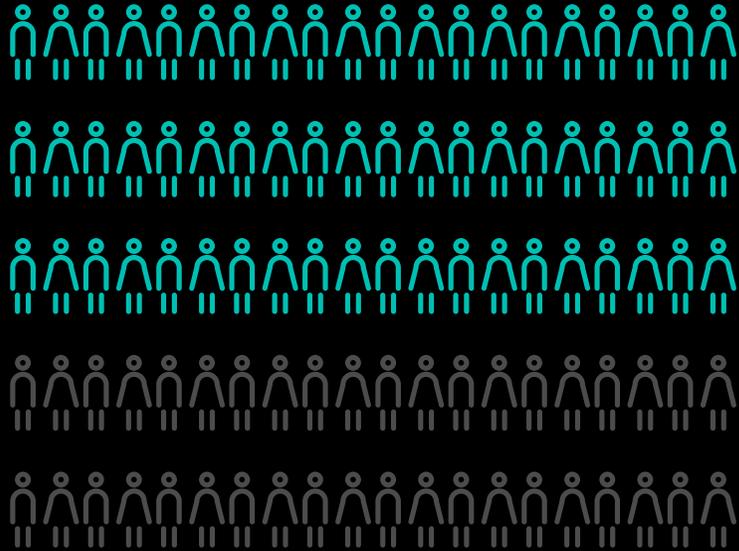
New question in 2021.
 Q70. And finally, have you heard about the development of 'digital identity' services in New Zealand?
 Base: All people 2021 n=1,001

Flexible working

internetnz 

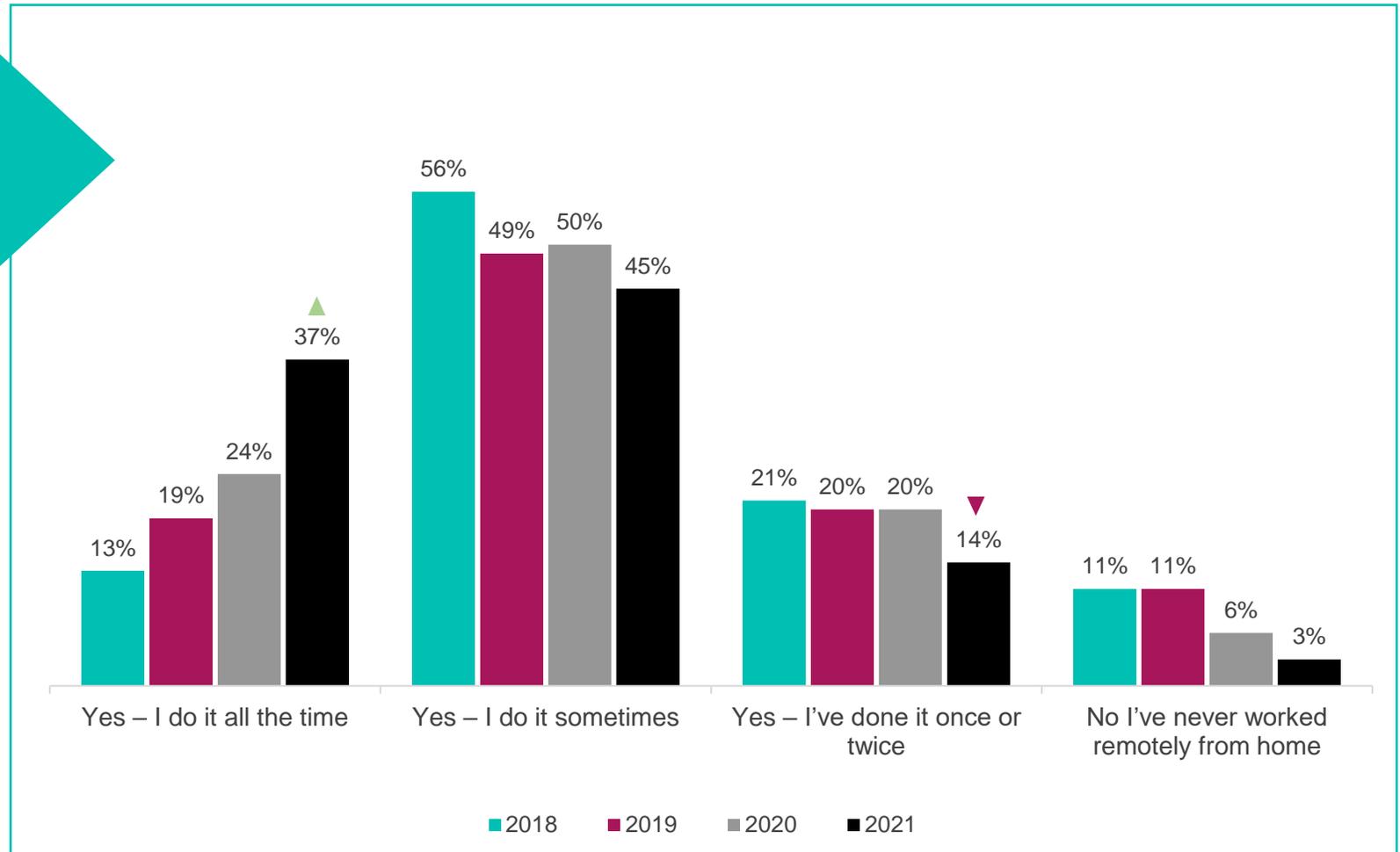


Perhaps unsurprisingly given COVID-19 lockdowns, there's an increase in the frequency people work from home (amongst those who can work from home).



60%

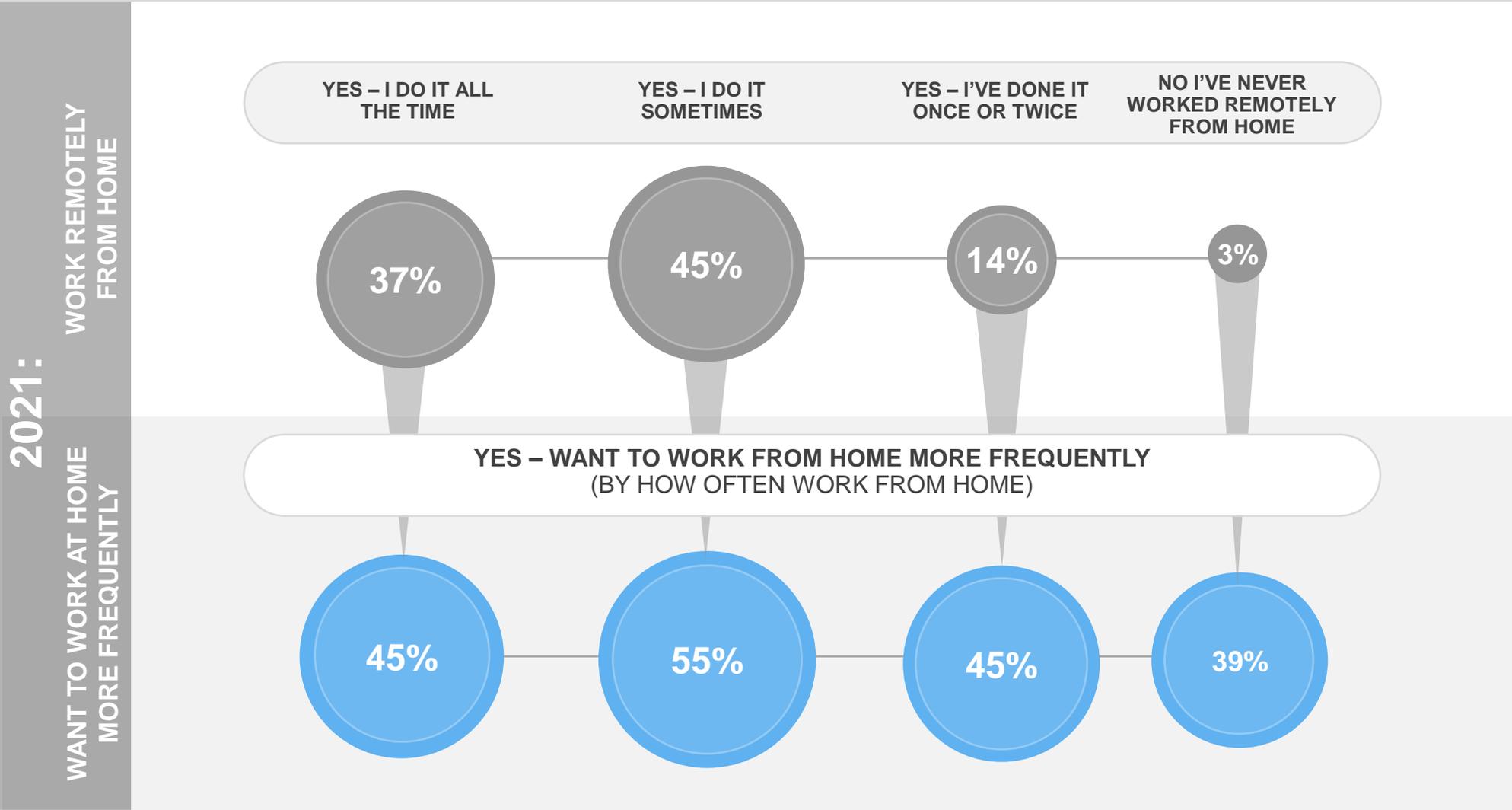
Of those working do the type of work which allows them to work from home



Q49. Regardless of whether your employer encourages you to do so or not, is the type of work you do something you could do from home, as well as from your workplace? | Q50. Do you work remotely from home?
 Base: Q49 People who can access the Internet from work and are working 2020 n=674 | Q50. People who do the type of work that allows them to work from home 2021 n=410; 2020 n=403; 2019 n=467

▲ ▼ Significantly higher / lower than 2020.

Overall half of people who are able to work from home would like to do so more frequently than they currently do (51% in 2020, 53% in 2019, and 54% in 2018).



2021:
WANT TO WORK AT HOME MORE FREQUENTLY

WORK REMOTELY FROM HOME

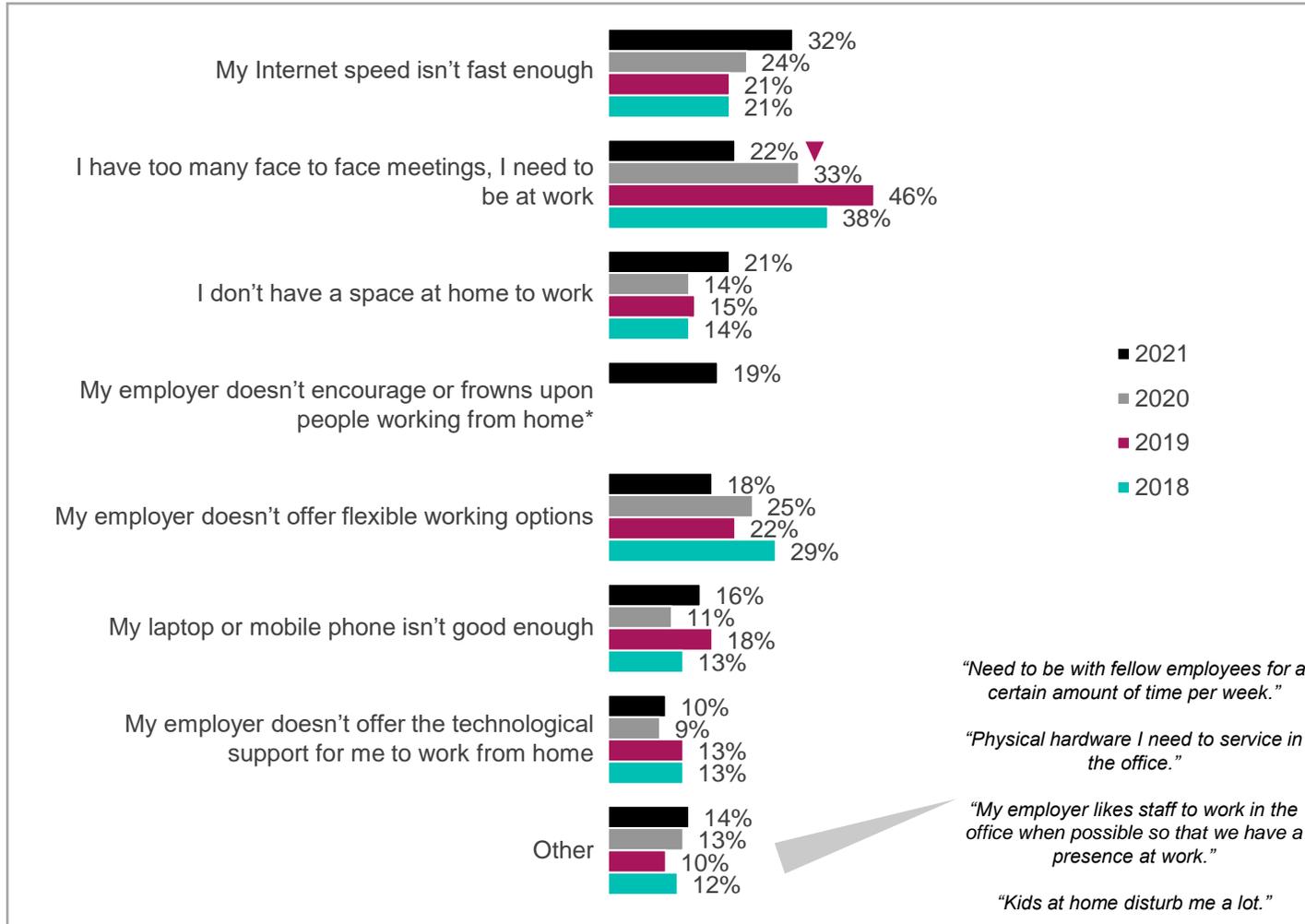


“We have specific days we have to be in the office.”

“I don’t have the same equipment i.e. dual screens.”

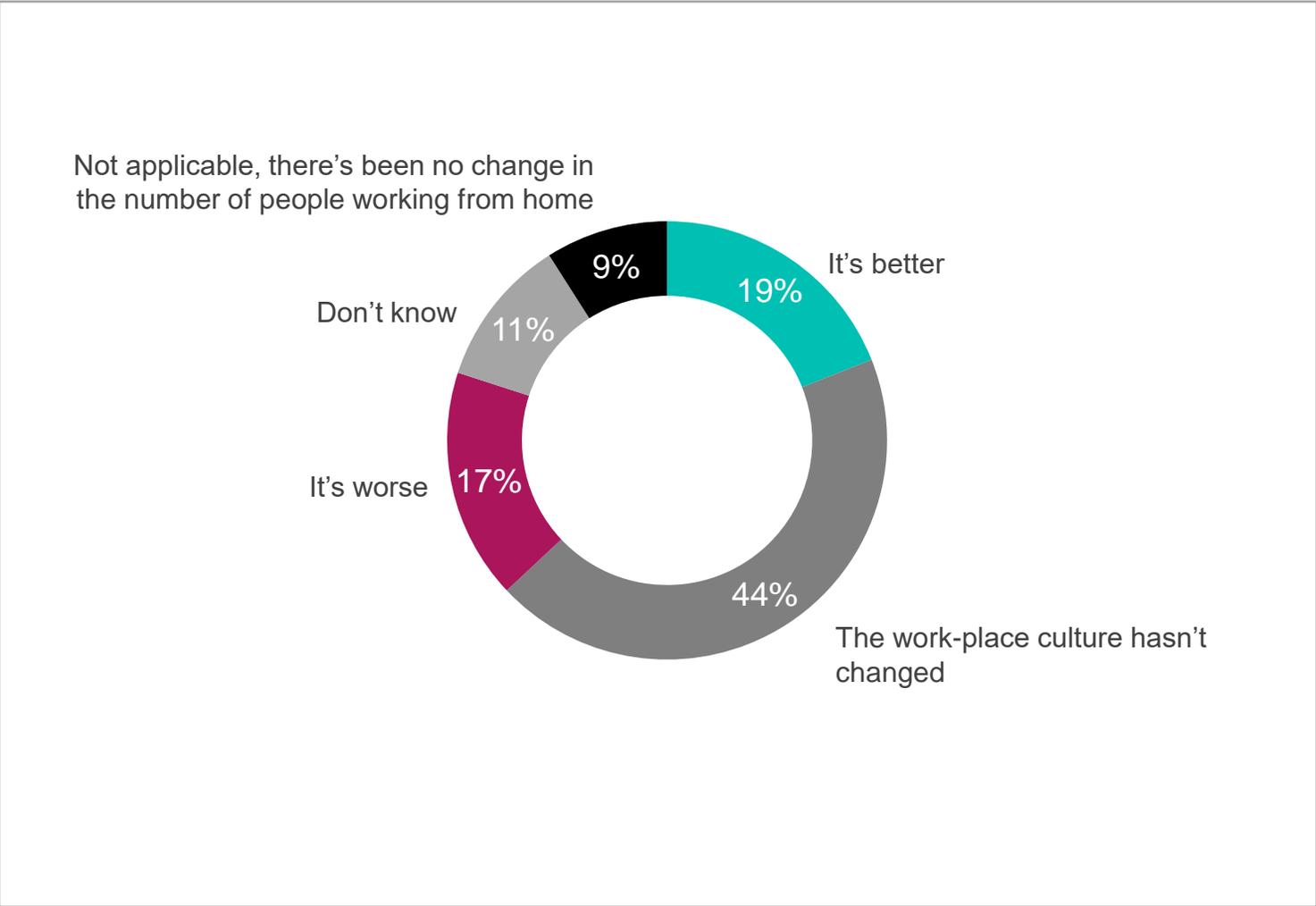
“Expectation to be in the office a few days a week.”

The three main reasons preventing people from working from home more often are: not having fast enough Internet speed, having too many meetings which need to be face-to-face, not having enough space at home to work properly.



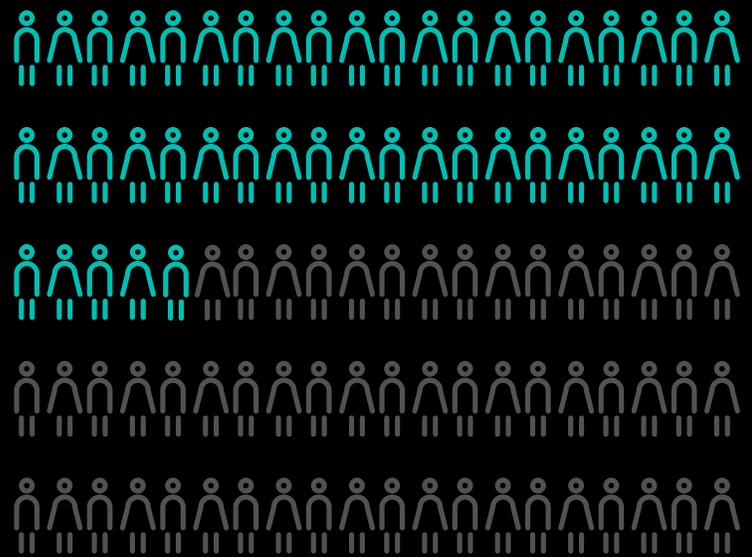
*New statement 2021.
Q52. Which of the below are barriers for you working from home more often?
Base: Consumers who would like to work from home more often 2021 n=210; 2020 n=207; 2019 n=229

The perceived benefits of working from home on work culture is polarising: 19% say it's better since more people have been working from home, while 17% say it's worse.



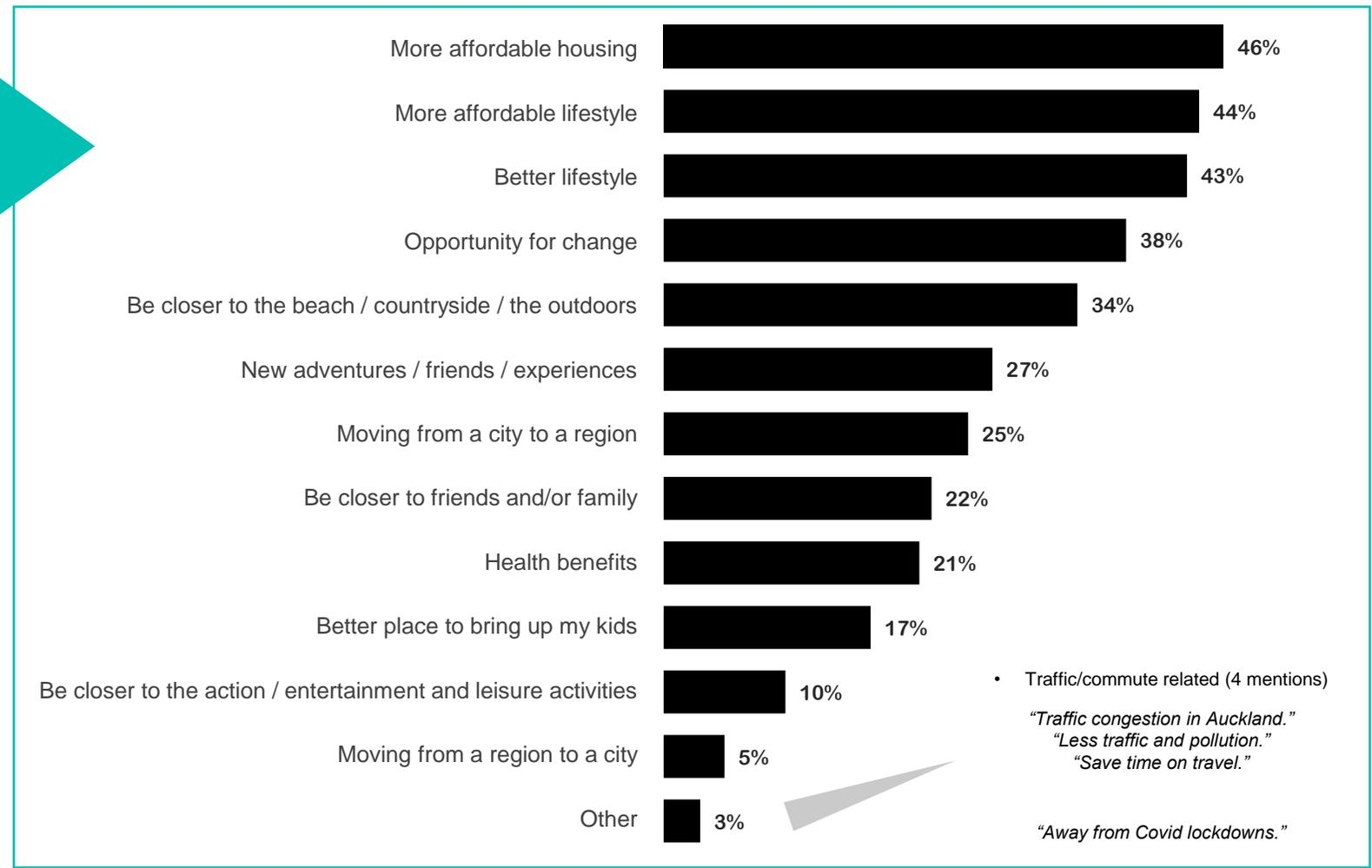
Q77. Thinking of your work-place, how has the culture been affected by more people working from home over the last year and a half?
Base: People who do the type of work that allows them to work from home and access the Internet for work 2021 n=410

Forty-five percent who could work from home (equating to one in five of the overall population) would consider re-locating if they could keep their current job. Their main reasons are more affordable, better housing and/or lifestyle.



45%

Of those who do the type of work which allows them to work from home would consider moving somewhere else in NZ if they could re-locate their current job.



Q75. Would you consider moving somewhere else in NZ if you were able to re-locate your current job? | Q76. And what would be your main reasons for re-locating somewhere else in Aotearoa?
 Base: People who do the type of work that allows them to work from home 2021 n=410 (new question 2021). Base: People who would consider relocating 2021 n=183.

Significantly higher / lower than previous year

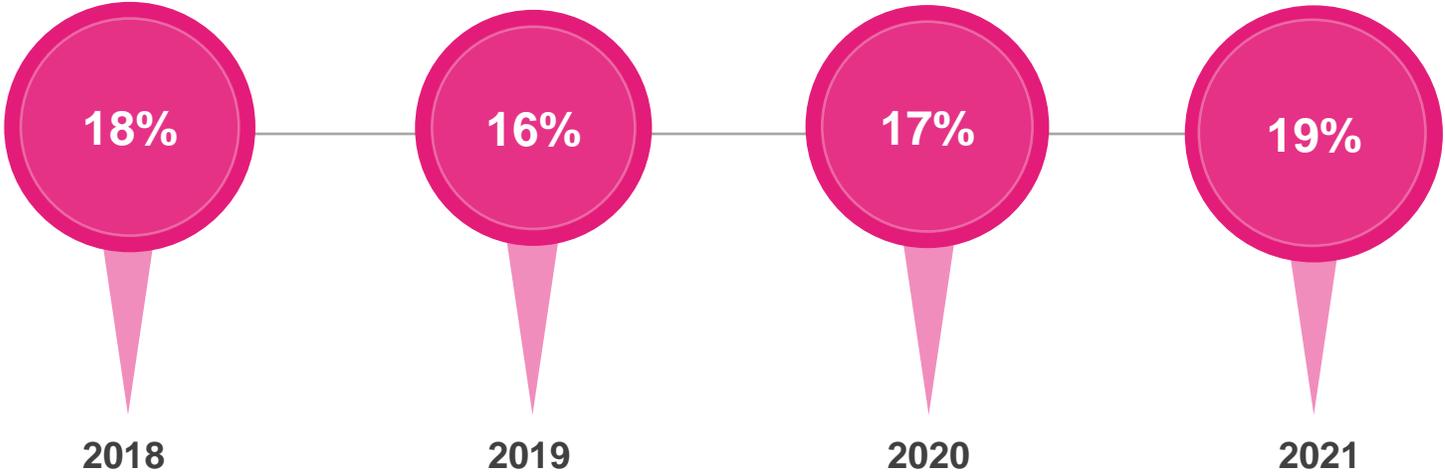
Awareness of InternetNZ



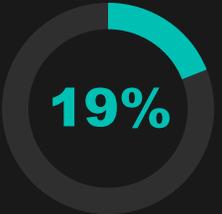
KANTAR PUBLIC



Overall, nearly one in five New Zealanders have heard of InternetNZ, which is a slight improvement on previous years.



YES, AWARE OF INTERNETNZ

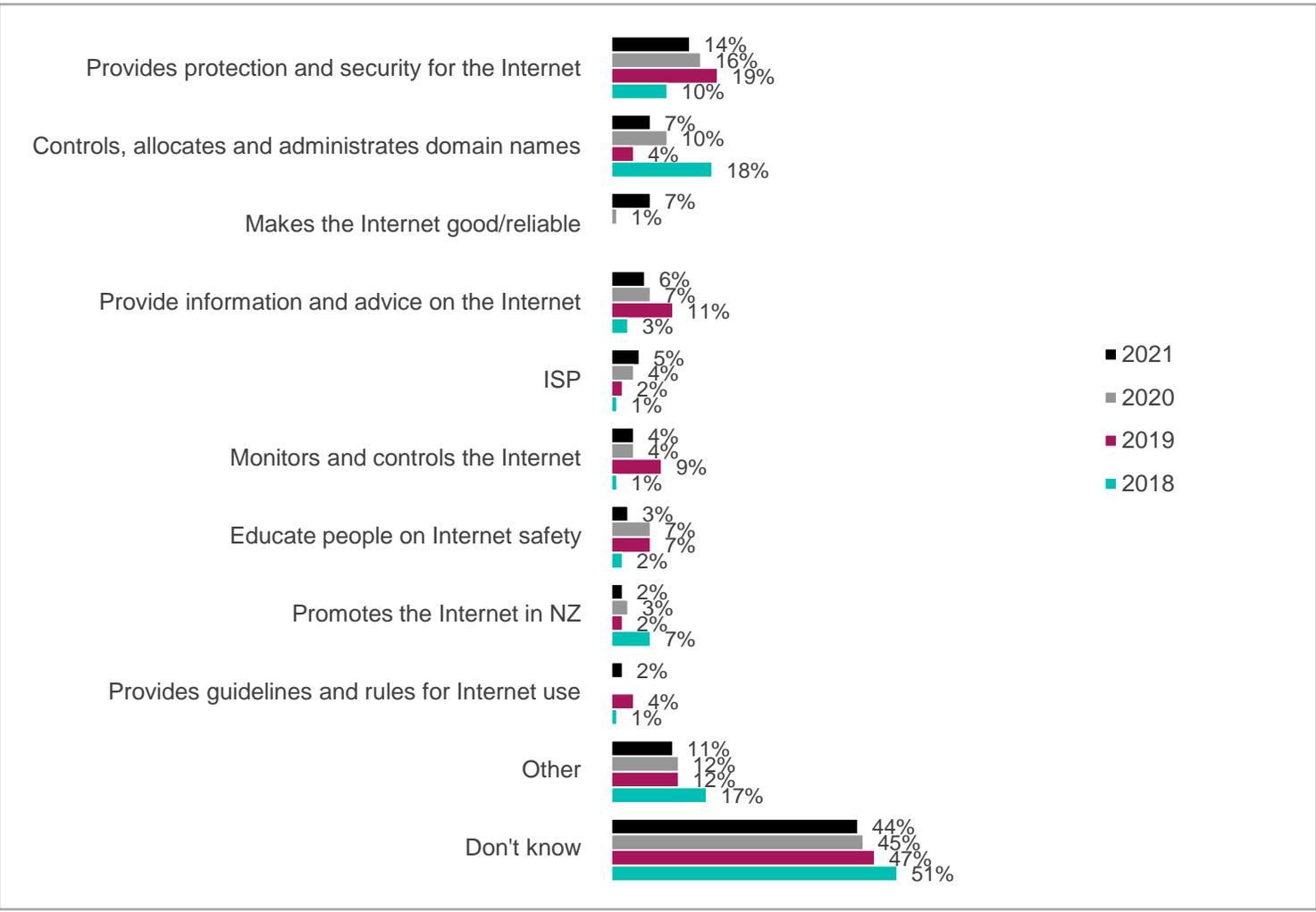


The following are less likely to be aware of InternetNZ: women; those aged 30 – 49 years; live in South Island (excluding Canterbury).



Q60. Have you heard of an organisation called InternetNZ?
 Base: All people 2021 N=1,001; 2020 n=1,000; 2019 n=1,001; 2018 Consumers only n=1,002

InternetNZ is most associated with providing protection and security for the Internet, controlling and administrating domain names, making the Internet reliable, and providing information and advice.



*Mentions of 1% combined in 'other'.
 Q61. What is your understanding of the role or function of InternetNZ?
 Base: Consumers aware of InternetNZ 2021 n=190; 2020 n=168; 2019 n=154; 2018 n=181

Some of the comments illustrating the more frequently mentioned associations New Zealanders have with InternetNZ...



“

“I’ve only heard of them but know little about them other than that they try to promote a safe Internet for NZ.”

“

“Not entirely sure what it’s role/function is but presumably to do with Internet security?”

“

“They contribute to a more secure and accessible Internet for all Kiwis.”

“

“They look after the .nz domain in an effort to create safe Internet for everyone.”

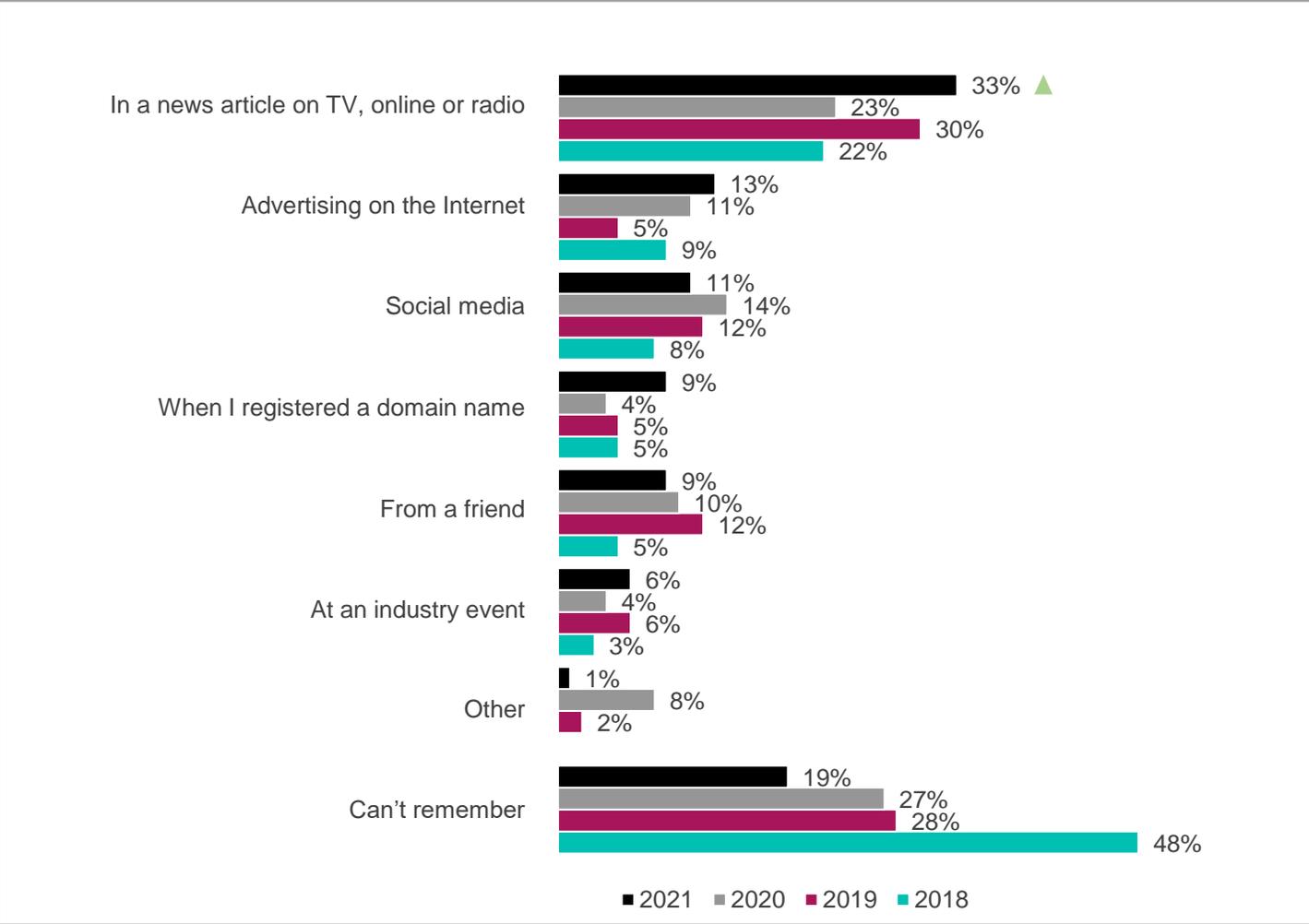
“

“Manages the .nz domain, promotes Internet use in NZ

“

“Speaking publicly on online issues. Providing research and public commentary on key issues.”

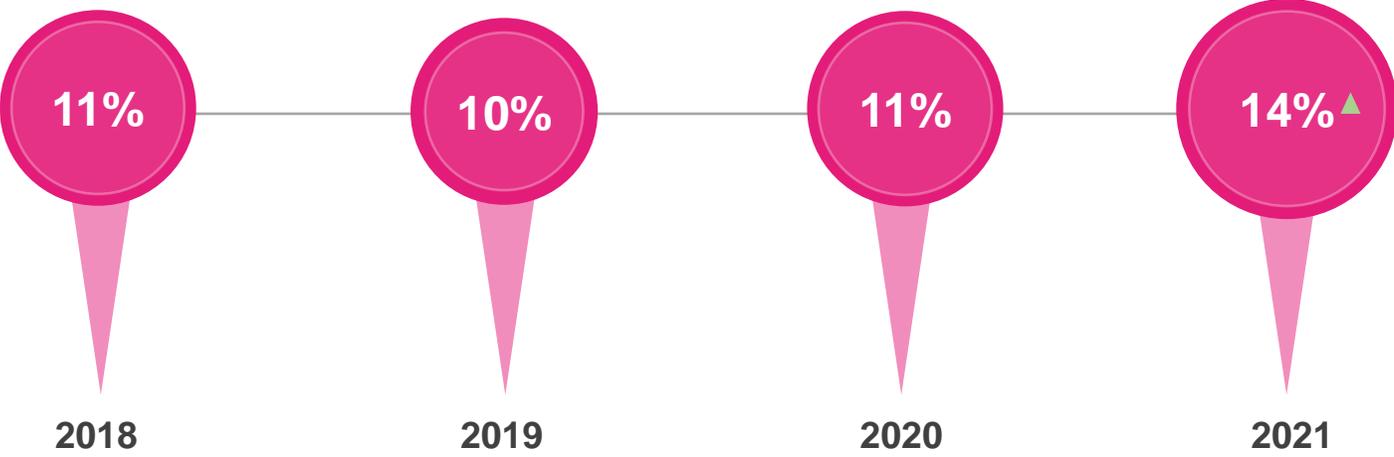
New Zealanders are most likely to have heard about InternetNZ through news articles.



Q62 How did you first hear about InternetNZ?
 Base: Consumers aware of InternetNZ 2021 n=190; 2020 n=168; 2019 n=154; 2018 n=181

▲ ▼ Significantly higher / lower than 2020.

Fourteen percent of New Zealanders are aware of the National Broadband Map, which is an increase from last year.



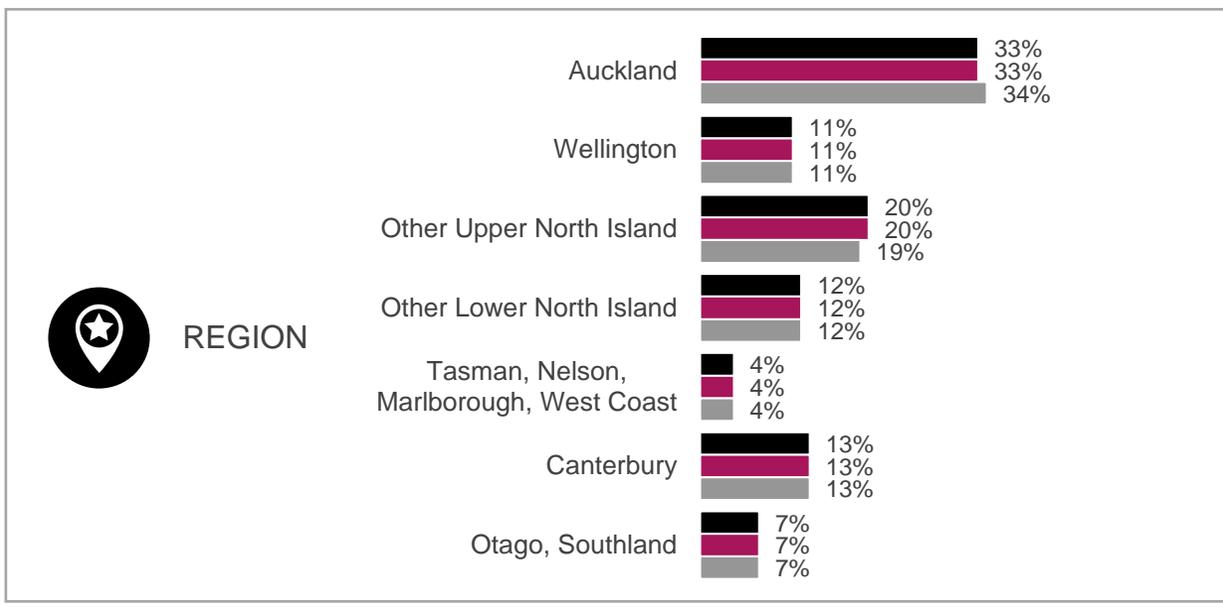
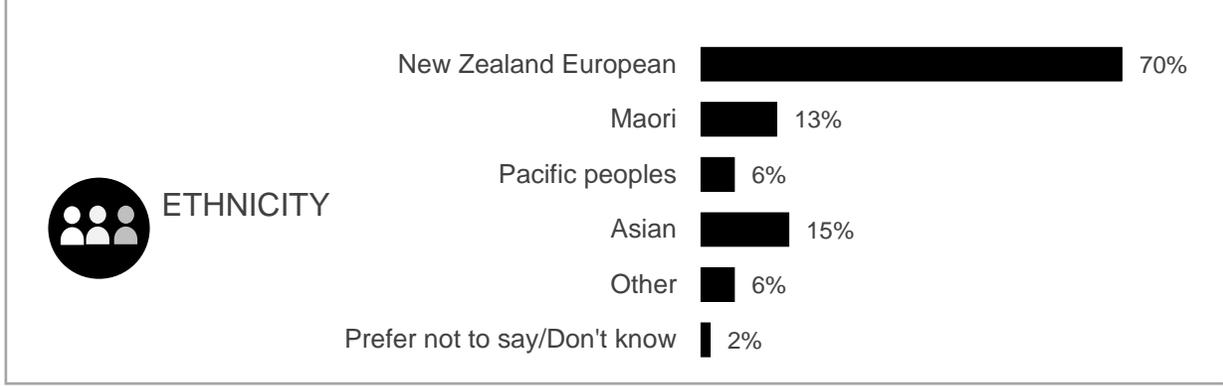
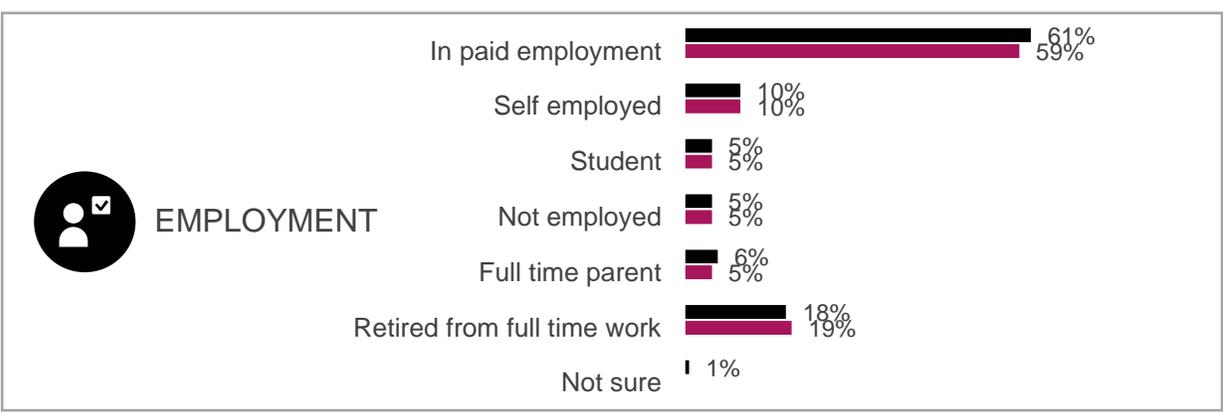
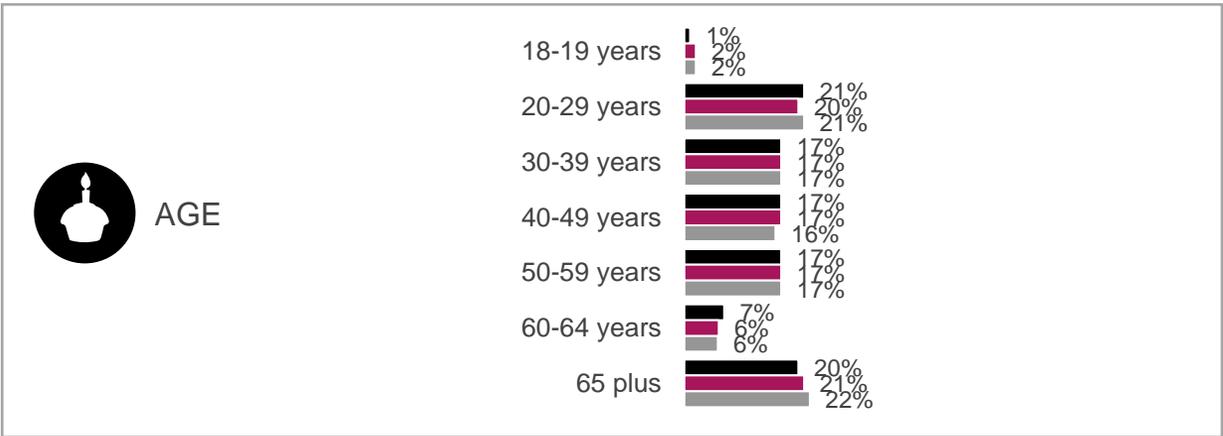
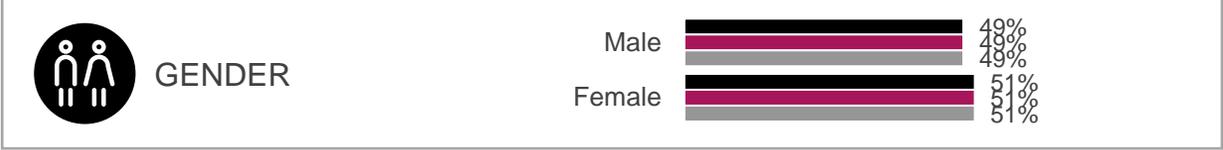
Q66. Have you heard of the National Broadband Map?
Base: Consumers who access the Internet at home 2021 n=989; 2020 n=992; 2019 n=988

▲▼ Significantly higher / lower than previous year

Appendix



Respondent profile (weighted)



*Gender, age, region, ethnicity are the variables weighted to be representative of the NZ population. Base: All people 2021 n=1,001; 2020 n=1,000; 2019 n=1,001



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