

Consumer perceptions of the internet

June 2017

Methodology

- Results are based upon questions asked in the UMR Research nation-wide omnibus; a telephone survey of a nationally representative sample of 750 New Zealanders 18 years of age and over.
- Fieldwork was conducted from the 7th of June to the 15th of June 2017 at UMR Research's national interview facility in Auckland.
- The margin of error for sample size of 750 for a 50% figure at the 95% confidence level is $\pm 3.6\%$.

Key findings

Internet access, connection and use

- Similarly to last year, 64% (up 3%) said they have access to the internet both at work and home. Overall, 93% (no change from 2016) have access to the internet either at home, work, or both. Fewer than 1 in 10 New Zealanders (6%) said they do not have access to the internet.
 - Older respondents (60+) and those in households with a household income of less than \$50k were more likely to say they have internet just at home (56% and 51% respectively).
- Of those who have access to the internet, “computers/laptops” and “smartphones” were yet again the most common devices used to connect to the internet (92% (up 9%) and 76% (up 11%) respectively).
 - Younger respondents (under 30s) and respondents aged 30-44 were much more likely to use a smartphone to connect to the internet (92% and 87% respectively).
 - Older respondents (60+) were less inclined to connect to the internet via a smartphone (50%), a tablet or iPad (41%), a smart TV (12%) or a gaming console (0%).
- “Broadband or Wi-Fi at home” was the most common internet connection type (97%, up 5%).
 - Younger respondents were more likely than other age bands to use a data plan on a phone or tablet (67%) and broadband or Wi-Fi at a free location (42%).
- Almost all respondents who have access to the internet (94%) said they use the internet once a day or more.

Key findings (continued)

Internet activities

- Half of the respondents (up 2%) said they use the internet for “social media purposes”. This was followed by “ability to learn and get information” (45%, up 3%).
- Use of the internet for entertainment purposes had the largest increase; up 7% to 34% this year.
- Around a third (30%, down 1%) also said they use the internet to communicate with people.
- Other uses included:
 - Banking; down 1% to 16%
 - Shopping; down 1% to 10%
 - Connecting with groups/people with similar interests; up 4% to 8%.
 - News; up 4% to 7%
 - Email; down 1% to 6%
 - Work; up 1% to 6%

Benefits

- Almost three quarters (73%, up 5%) said the main benefit of the internet is the accessibility to information.
- A quarter thought it is an easy way to communicate with others (down 1%) and connect with people and communities (no change).
- A greater proportion of respondents this year believed a benefit of the internet is that it saves time (9%, up 4%).

Key findings (continued)

Unprompted concerns

- Almost two fifths (38%, up 11%) said their main concern (unprompted) was threats to the security of personal data.
- This was followed by concerns in relation to threats to their privacy (20%, up 4%).
- There was a 6% increase in concern for the amount of misleading or wrong information available on the internet (now at 14%).
- There was also a 6% drop in concern for respondents being concerned by identity theft (now at 7%).

Prompted concerns

- When provided with specific concerns, three quarters of respondents (74%, up 5%) rated cyber-bulling as a concern (1+2, on a scale of 1 to 5 where 1 means very concerned and 5 means not concerned at all).
- Almost two thirds (64%) were concerned about the amount of misleading or wrong information available on the internet. This is a 13% increase from 2016 and the largest increase in concern out of the tested concerns.
- Concern levels fell by 5% for the speed of New Zealand internet (35%), the cost of internet access (37%) and threats to your privacy (62%).
- Respondents showed the lowest concern for being prosecuted for downloading copyrighted material (24%, down 6%).

Key findings (continued)

Online security and behavior

- When asked about concern for personal security, a clear majority said their level of concern has remained the same in the last 12 months. Just below a third (30%) said concern increased, and just 2% said it had decreased.
 - Under 30s and those in households with a household income over \$100k were slightly more likely to declare that their concern has increased (36% and 37% respectively).
- Of those who said their concern for personal security increased, only around a third (31%) said they changed how much they do online and 69% said it hasn't changed their usage.
- Of those who said their concern for personal security decreased (caution small sample size, n=11), again around a third (32%) said their usage changed and 68% said it hasn't changed. It must be reiterated that the sample size is very small and thus these results must be taken as indicative only.
- When asked on various behaviours in relation to devices, a clear majority said they use a PIN or password on all their devices (80%) and they regularly update their device (74%).
 - Half of the respondents said they regularly back up the device and just over a third (36%) said they use two-factor authentication. 28% of respondents were unsure if they use two-factor authentication.

Signal and WhatsApp use

- Just over a fifth (21%) said they use either Signal or WhatsApp. Over two thirds (69%) declared they do not use either.
 - Those aged 30-44 were more likely to use these messaging platforms (30%).
 - Those in households with a household income less than \$50k and those who are older (60+) were less likely to use these platforms (13% and 14% respectively).

Key findings (continued)

Overall view of the internet

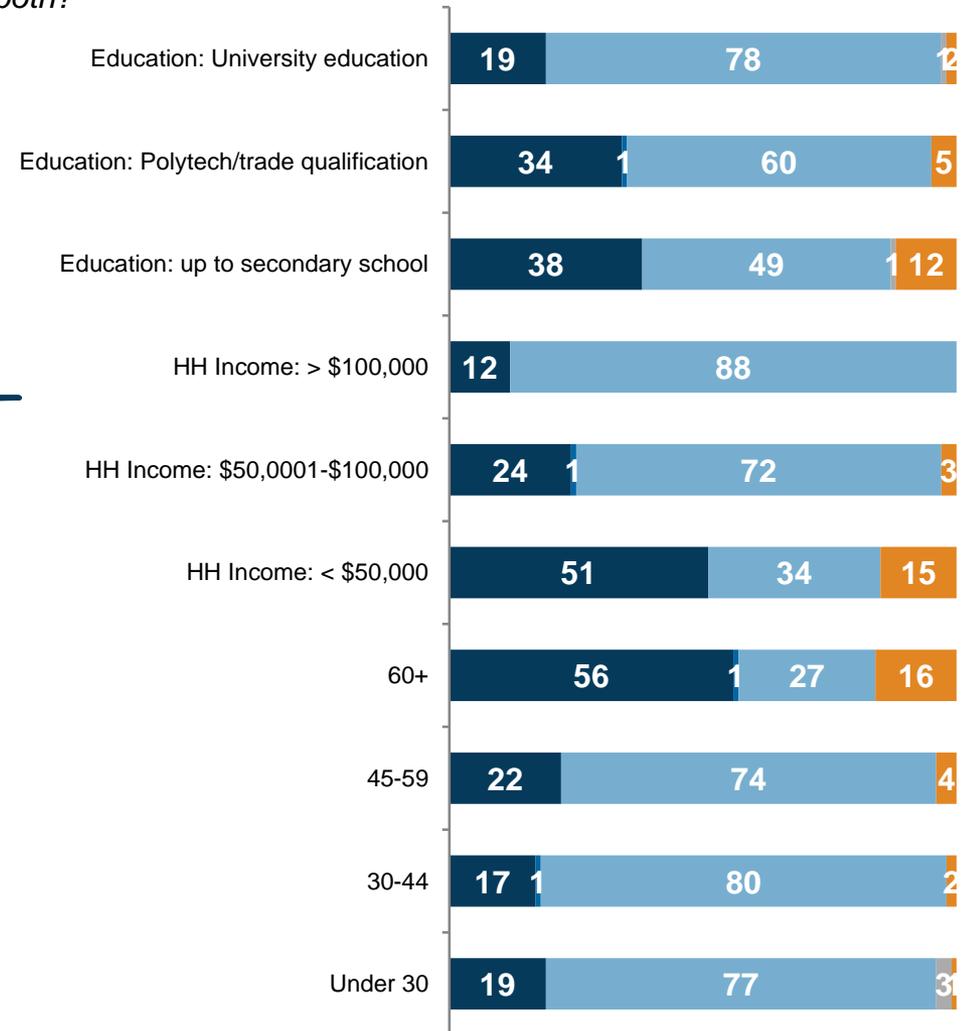
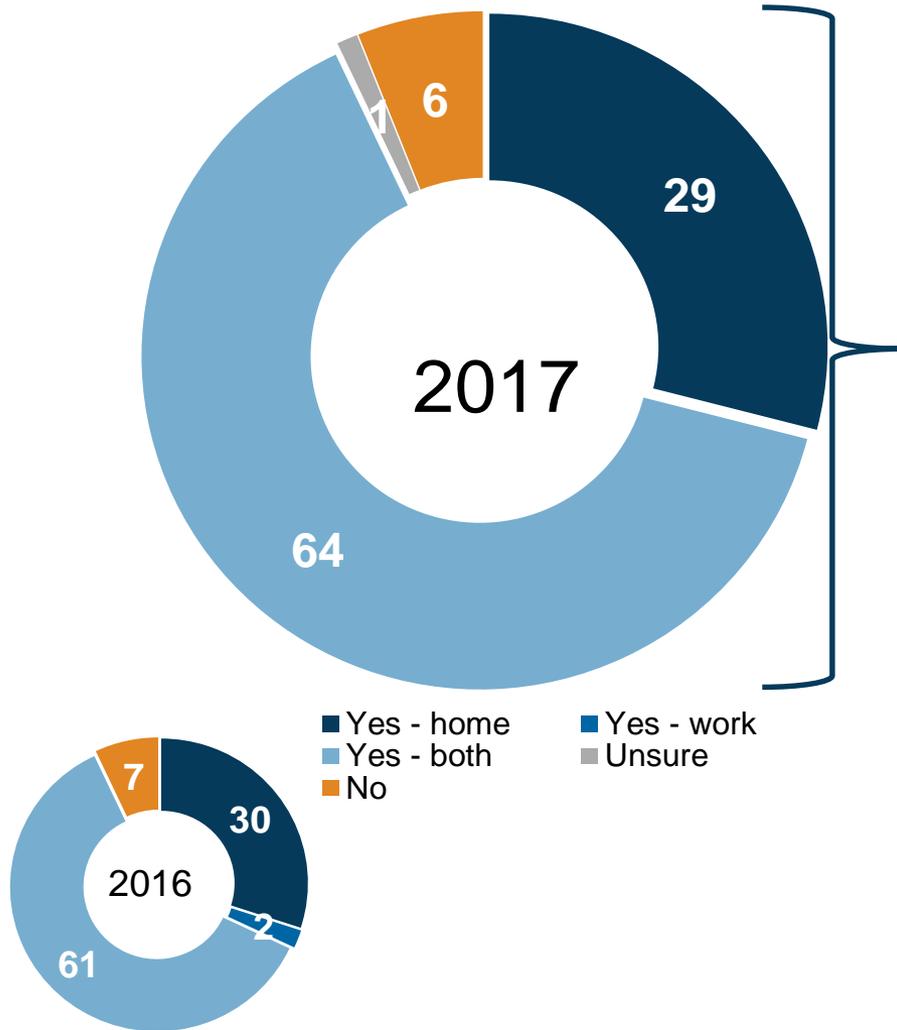
- Similarly to the results of 2016, almost 9 in 10 (88%, down 1%) New Zealanders thought the benefits of the internet outweigh the negatives.
 - Those in households with a household income less than \$50k were less likely to feel the benefits outweigh the negatives (79%) whilst those in households with a household income over \$100k were more likely to feel the benefits outweigh the negatives (95%).



Usage of the internet

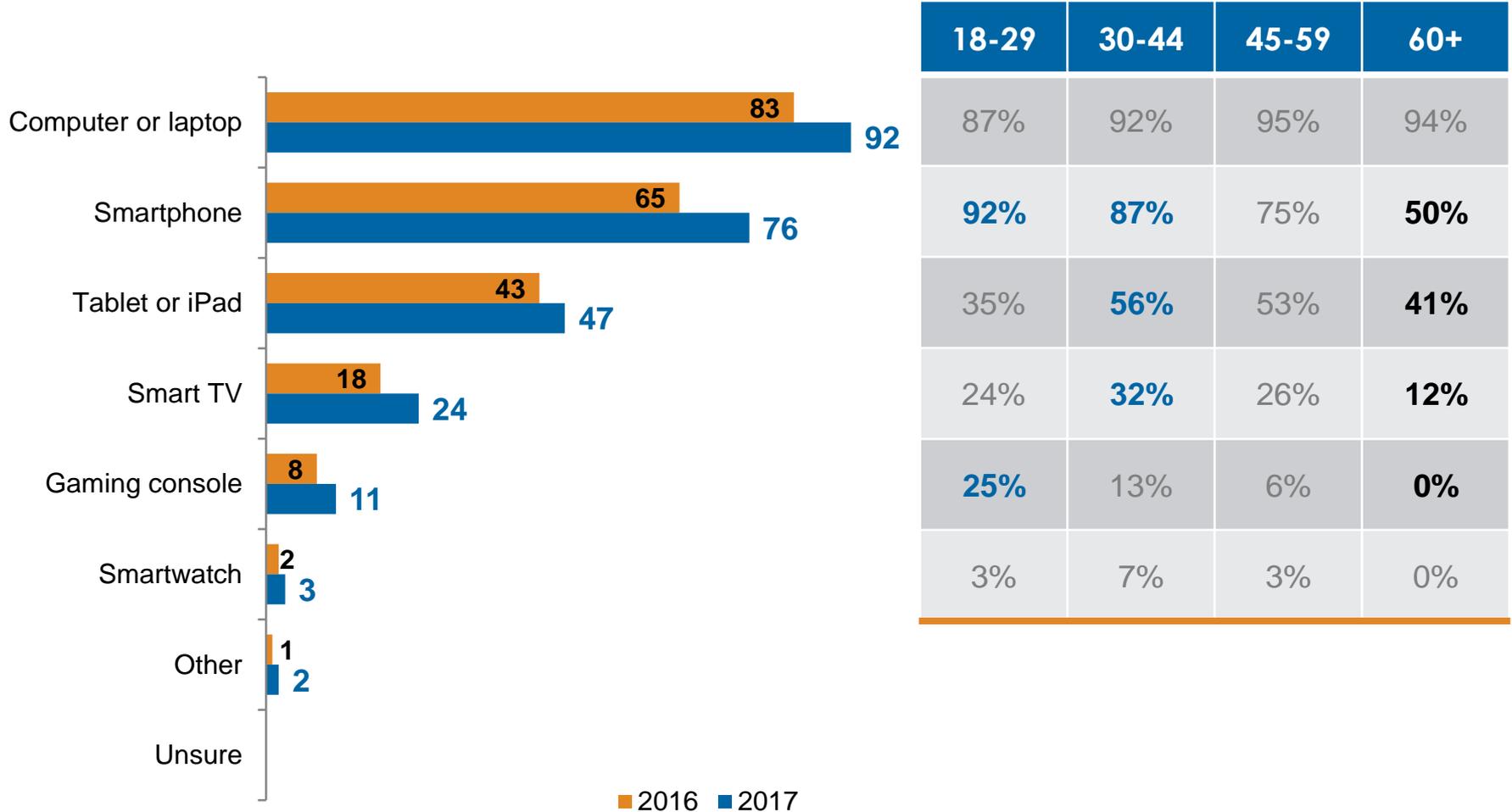
Internet access

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



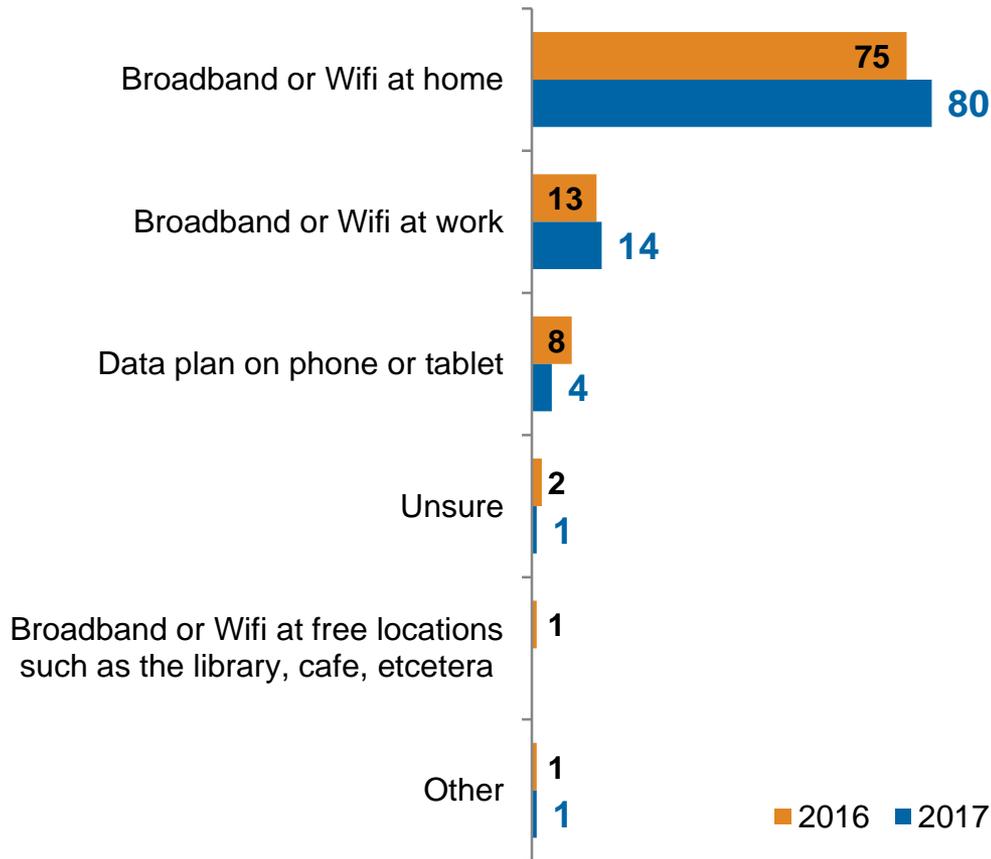
Ways we connect

Please let me know the ways you connect to the internet – do you use a...?



Main connection type

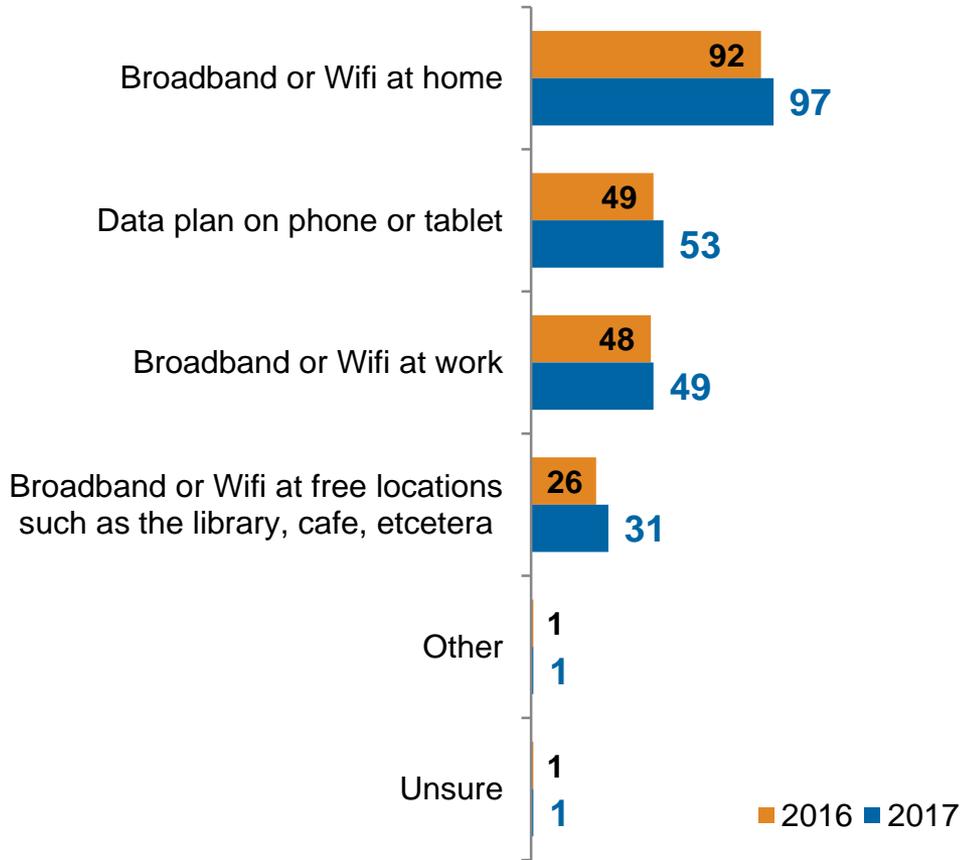
And which type of internet connection do you MAINLY use?



	18-29	30-44	45-59	60+
Broadband or Wifi at home	89%	71%	74%	87%
Broadband or Wifi at work	7%	18%	20%	8%
Data plan on phone or tablet	3%	8%	4%	3%

All connection types

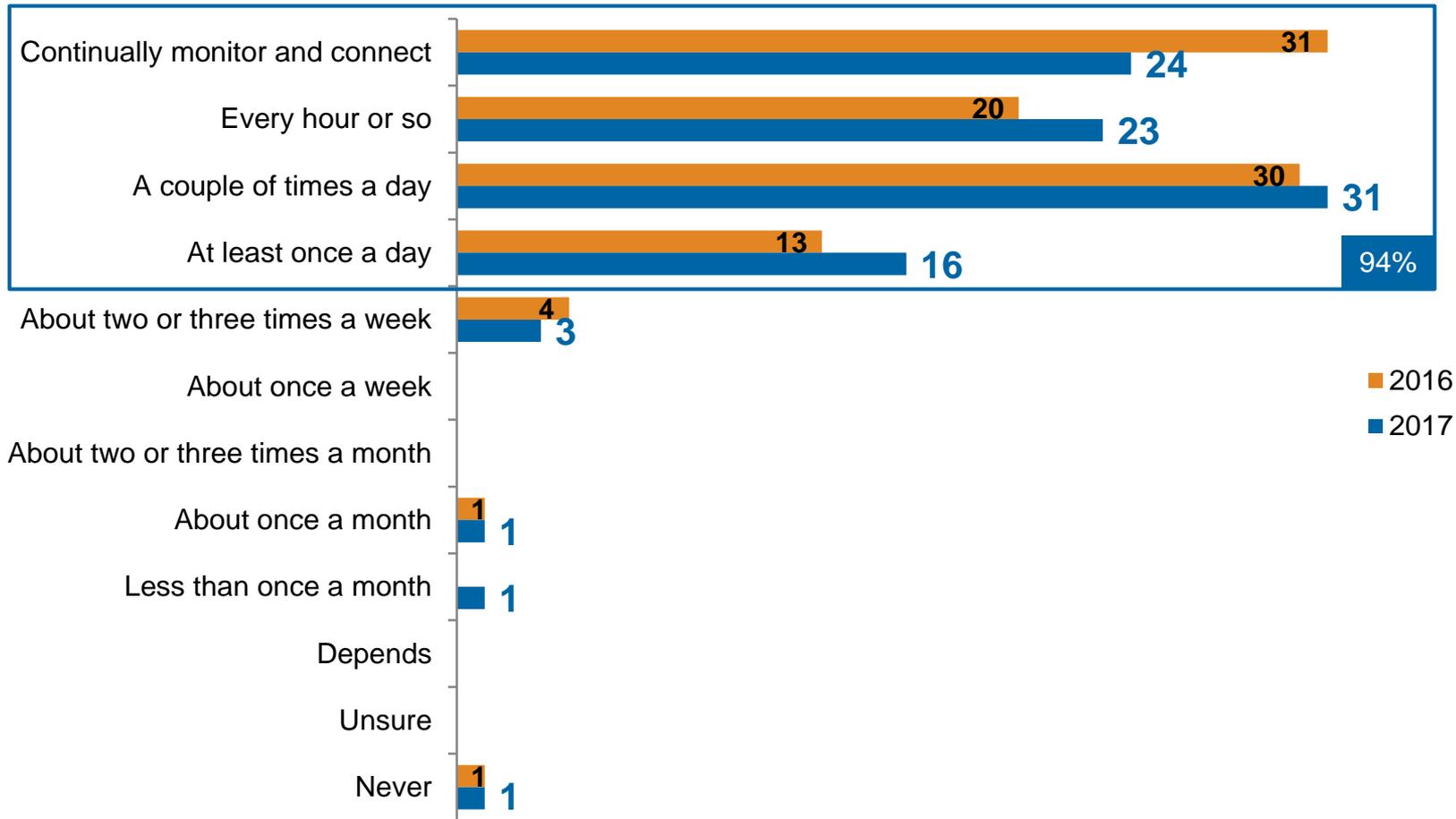
And what types of internet connections do you use?



	18-29	30-44	45-59	60+
Broadband or Wifi at home	100%	96%	96%	96%
Data plan on phone or tablet	67%	63%	52%	31%
Broadband or Wifi at work	53%	61%	57%	22%
Broadband or Wifi at free locations such as the library, cafe, etcetera	42%	35%	28%	20%

Internet frequency of use

And about how often do you use the Internet – do you?

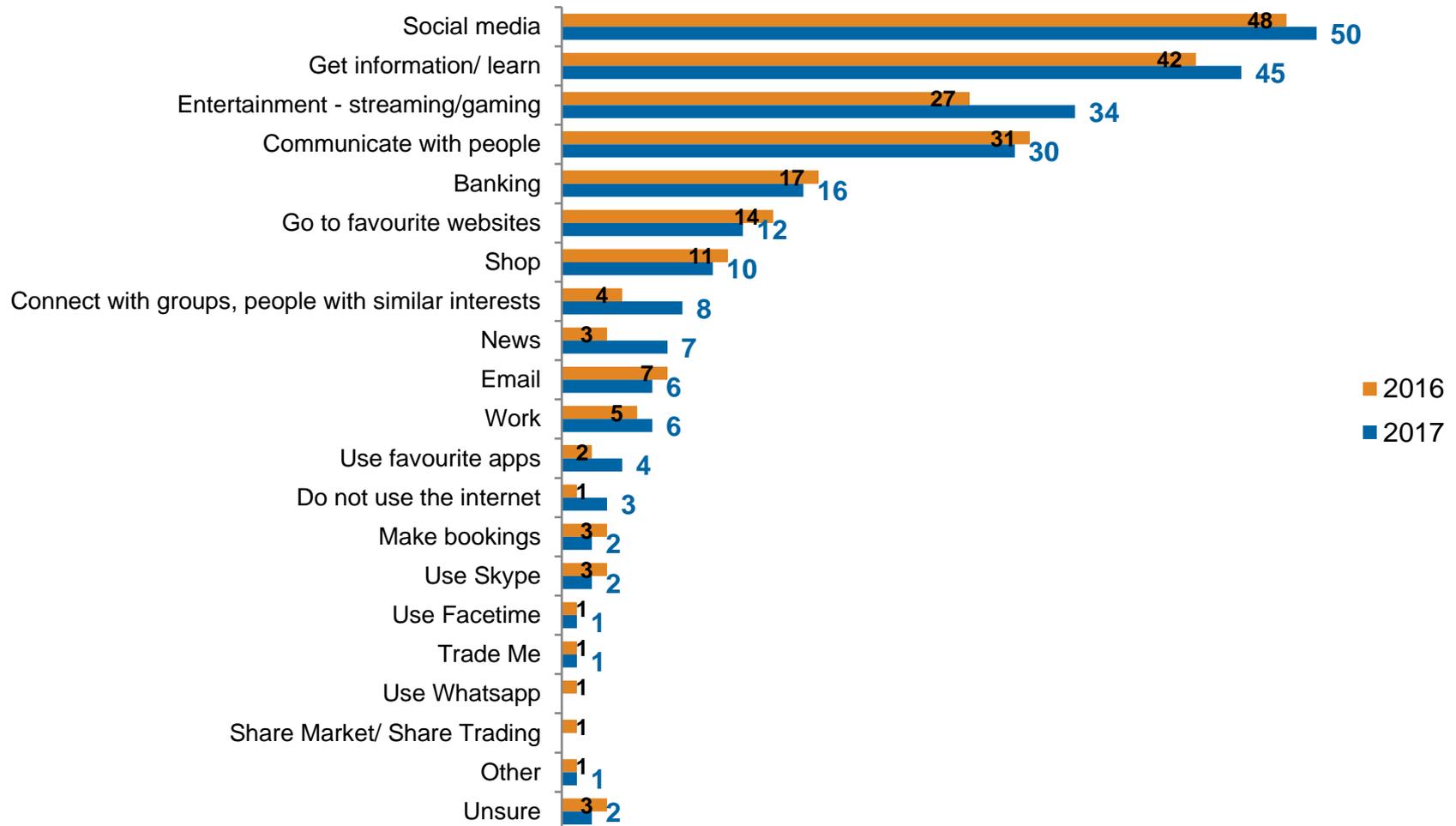




Views of the internet

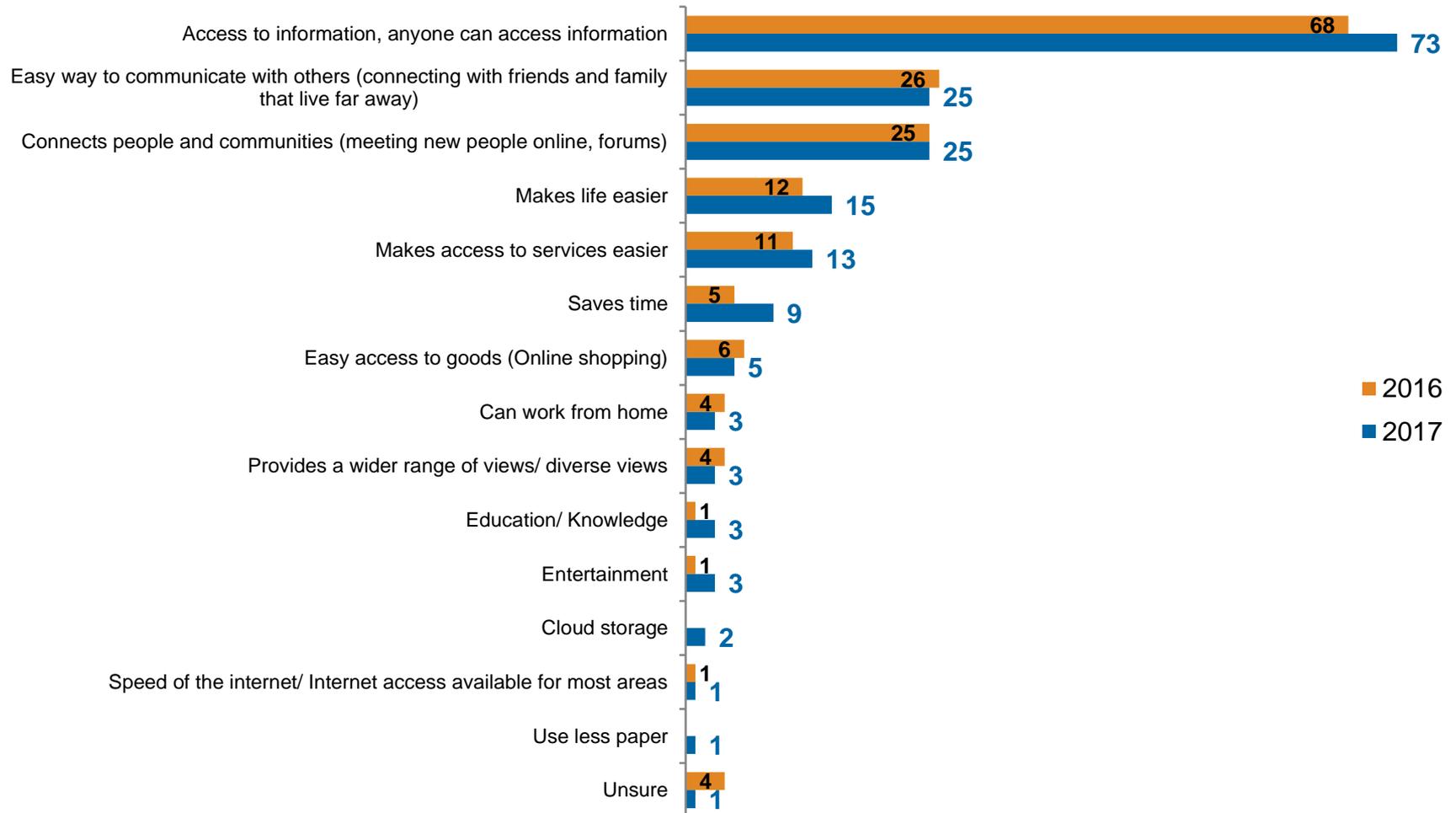
Main internet uses

Regardless of whether you use the internet for work or personally, what are the main activities you personally do on the internet?



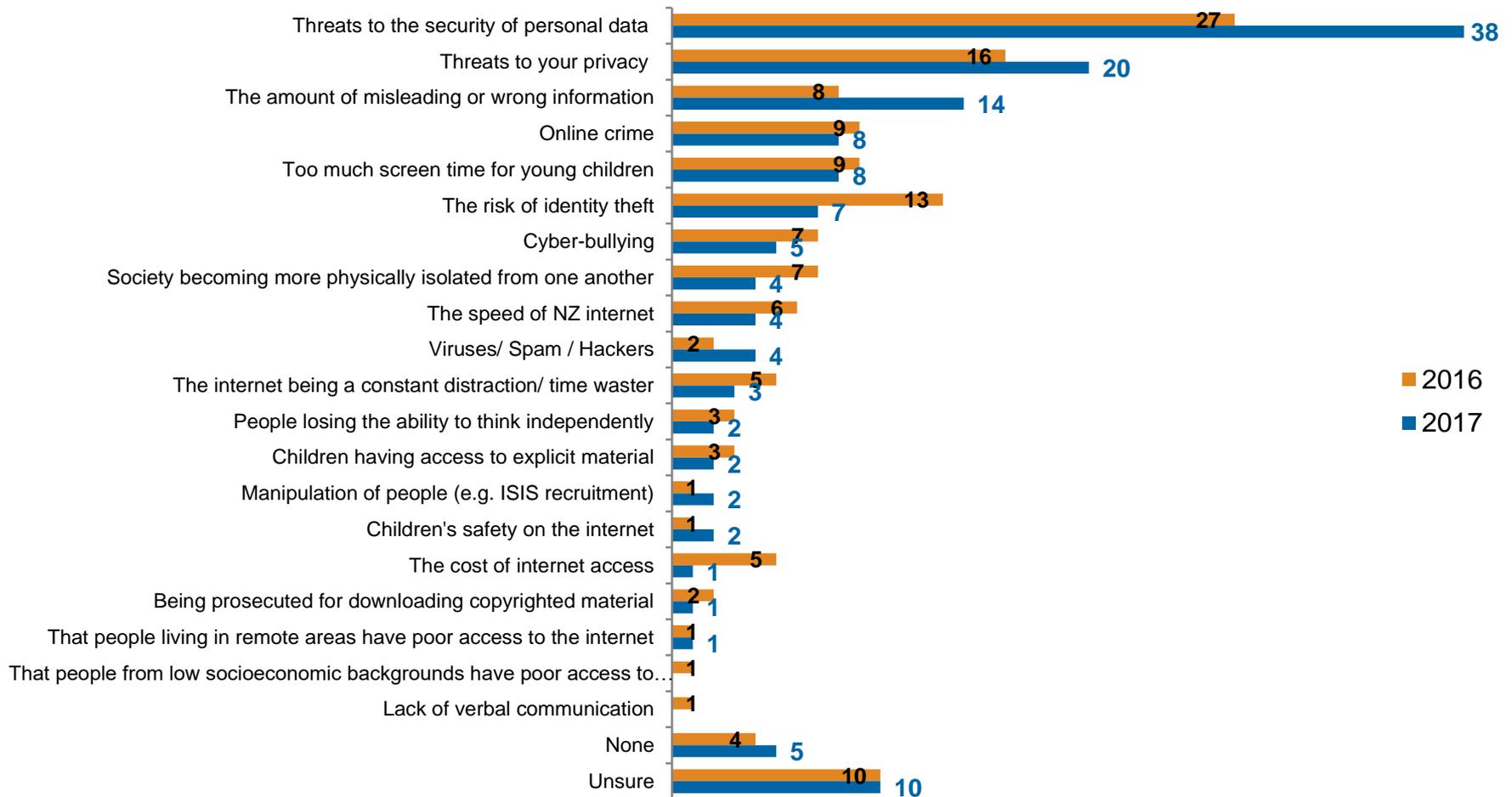
Main internet benefits

What do you think are the main benefits of the internet?



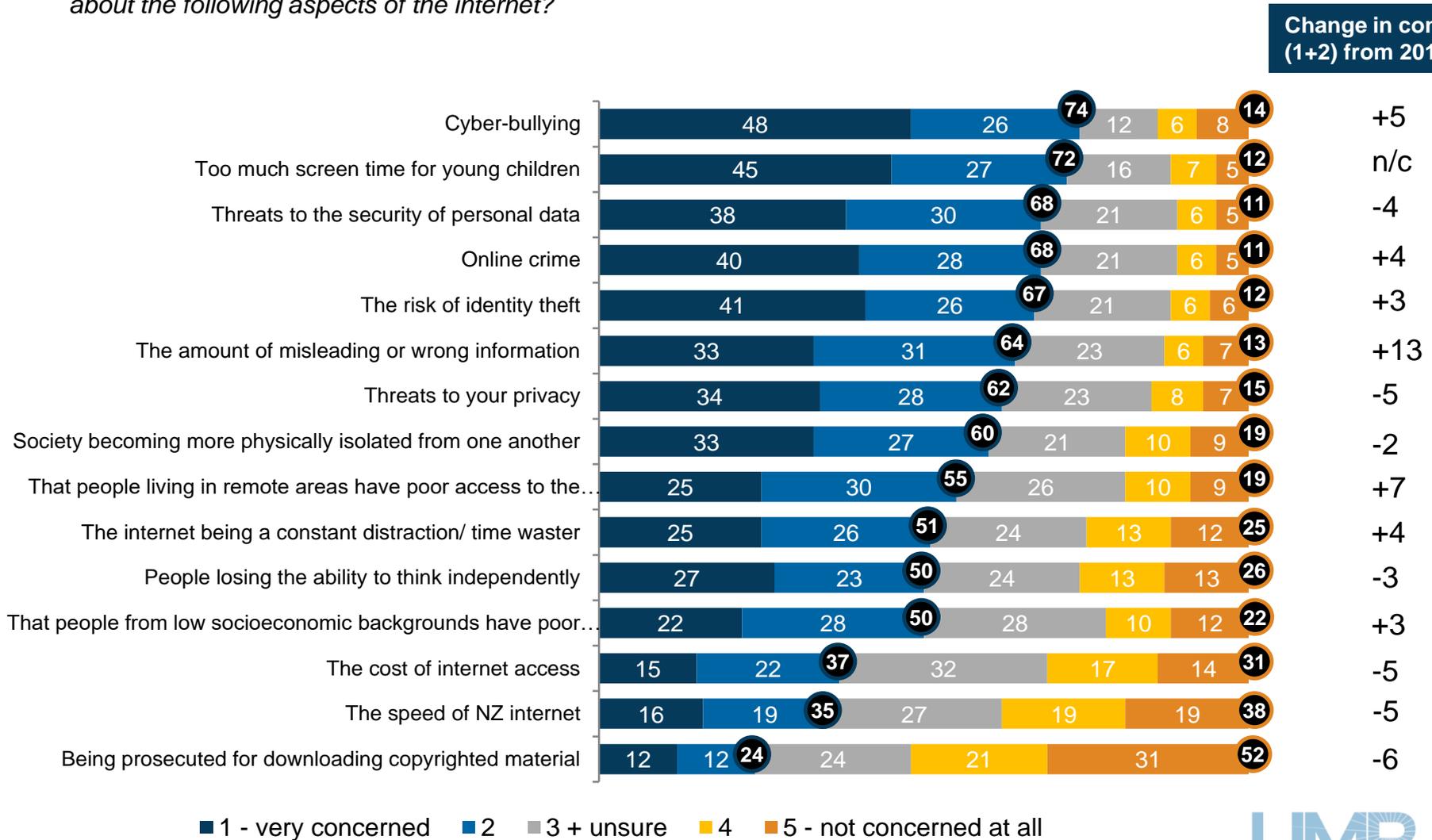
Internet concerns - unprompted

What are your main concerns about the internet?



Internet concerns – prompted

Using a 1 to 5 scale where 1 means very concerned and 5 means not concerned at all – how concerned are you about the following aspects of the internet?

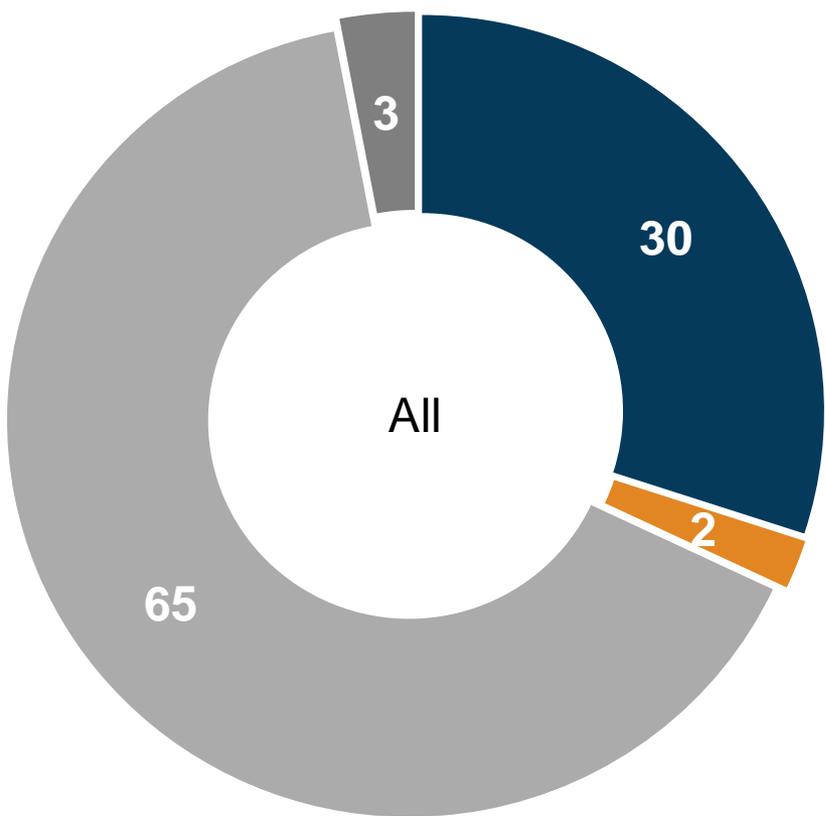




Concern for personal security

Concern for personal security

Has the level of concern you have about threats to personal security when using the internet increased, decreased or remained the same in the last 12 months?

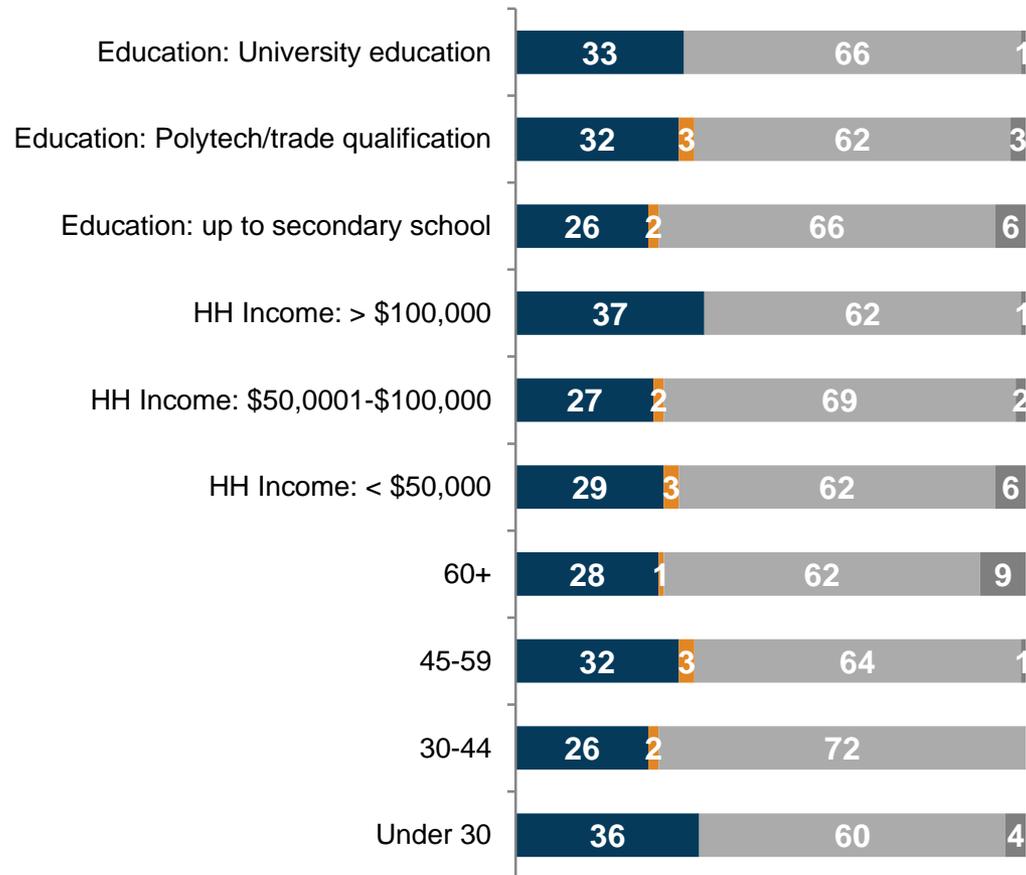


■ Increased

■ Decreased

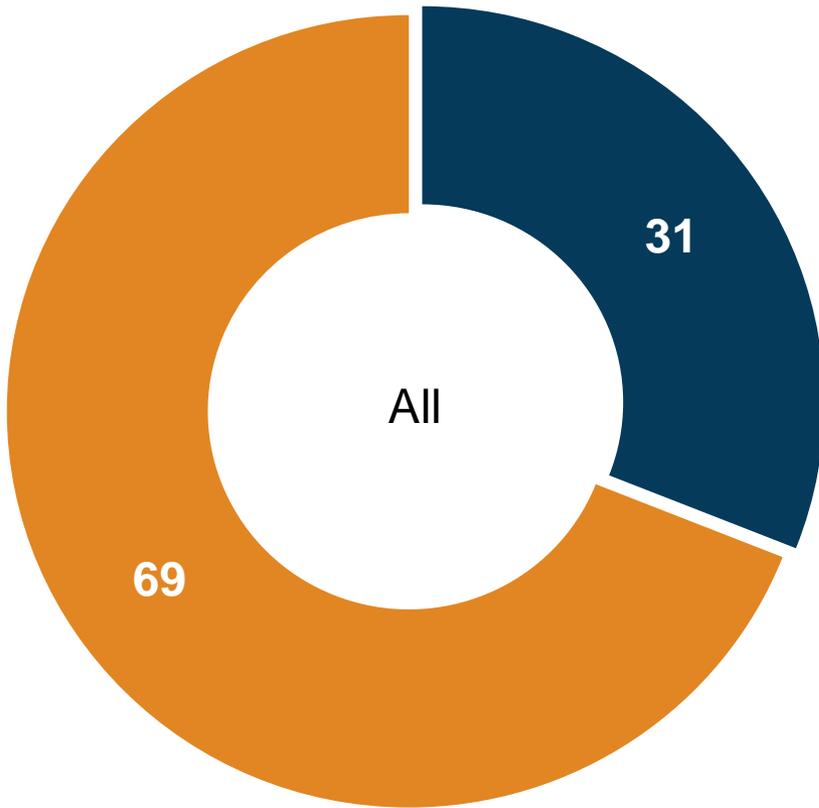
■ Remained the same

■ Unsure



Online behaviour – Increased concern

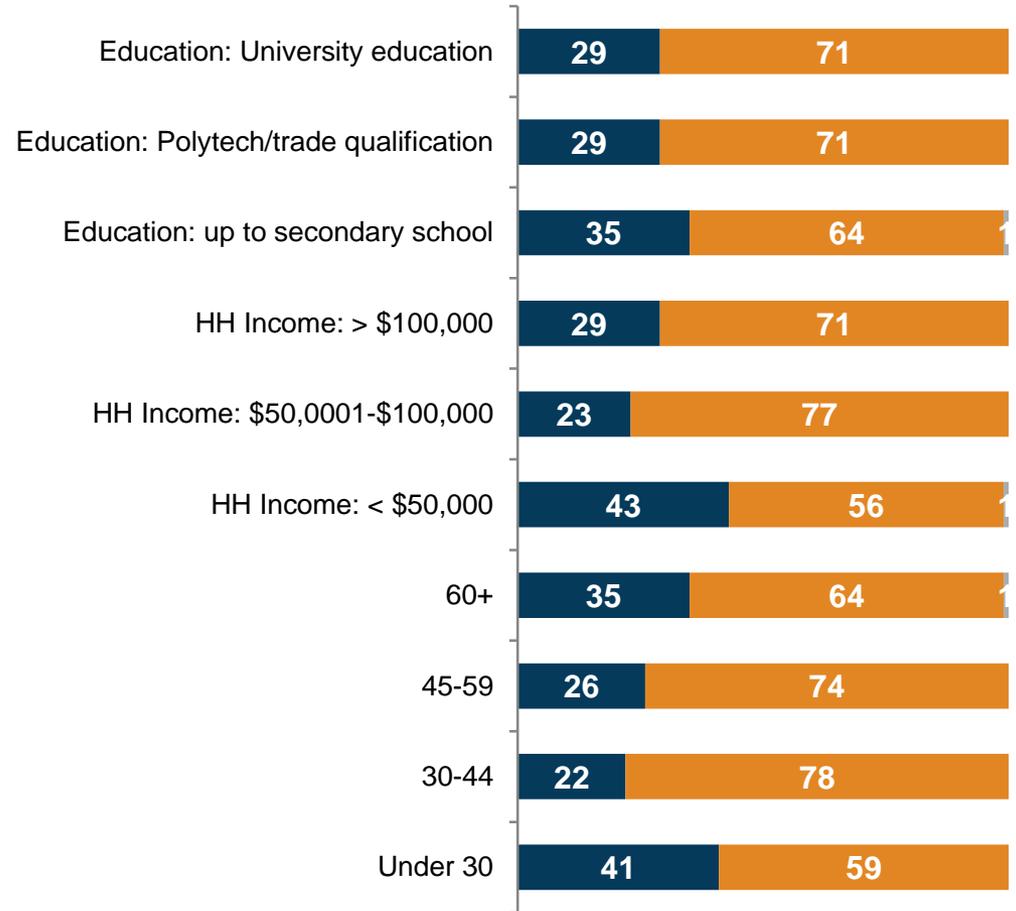
Have you changed how much you do online because of this increased concern?



■ Yes

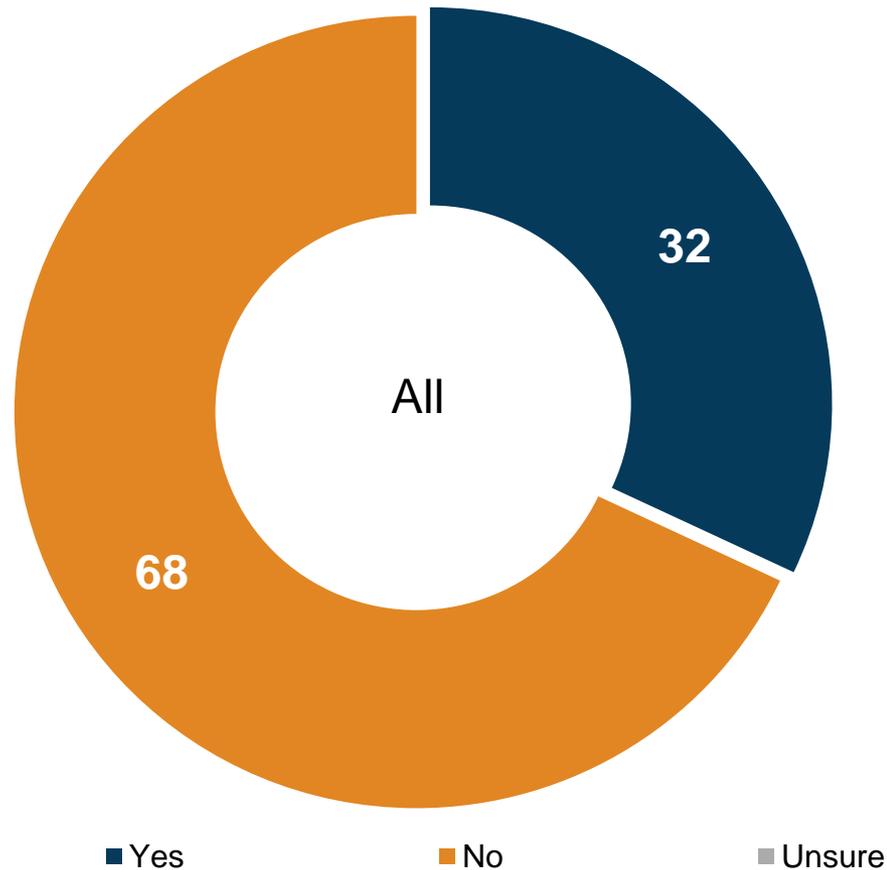
■ No

■ Unsure



Online behaviour – Decreased concern

Have you changed how much you do online because of this decreased concern?

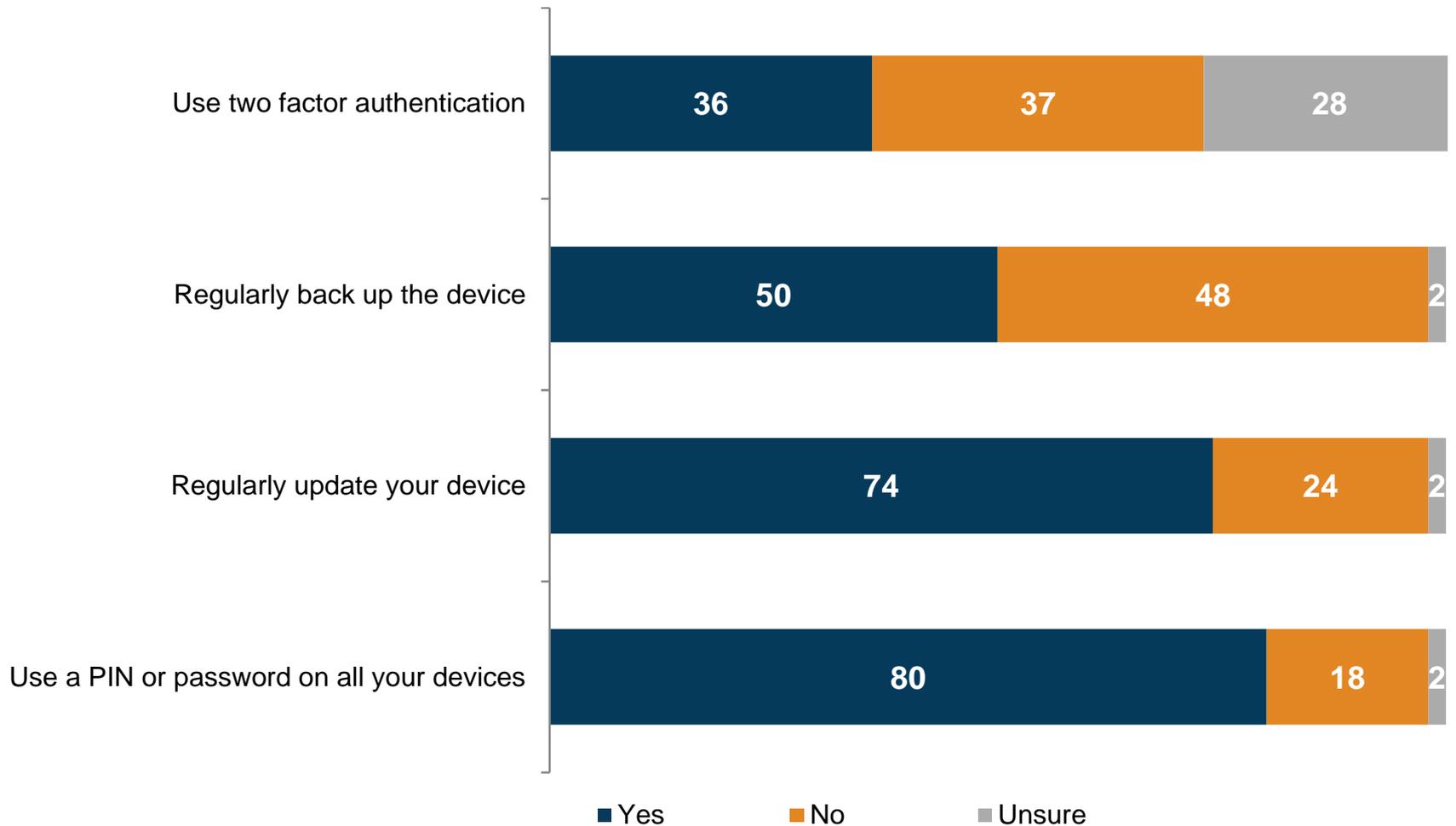


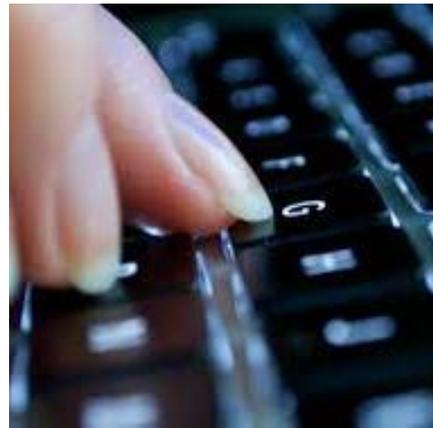
*Caution small sample size, thus demographics have not been included.

Base: those who believe the risk to personal security has decreased (n=11).

Security and backing up

Which of the following do you do? If you do not know what I mean just say so. Do you.....?

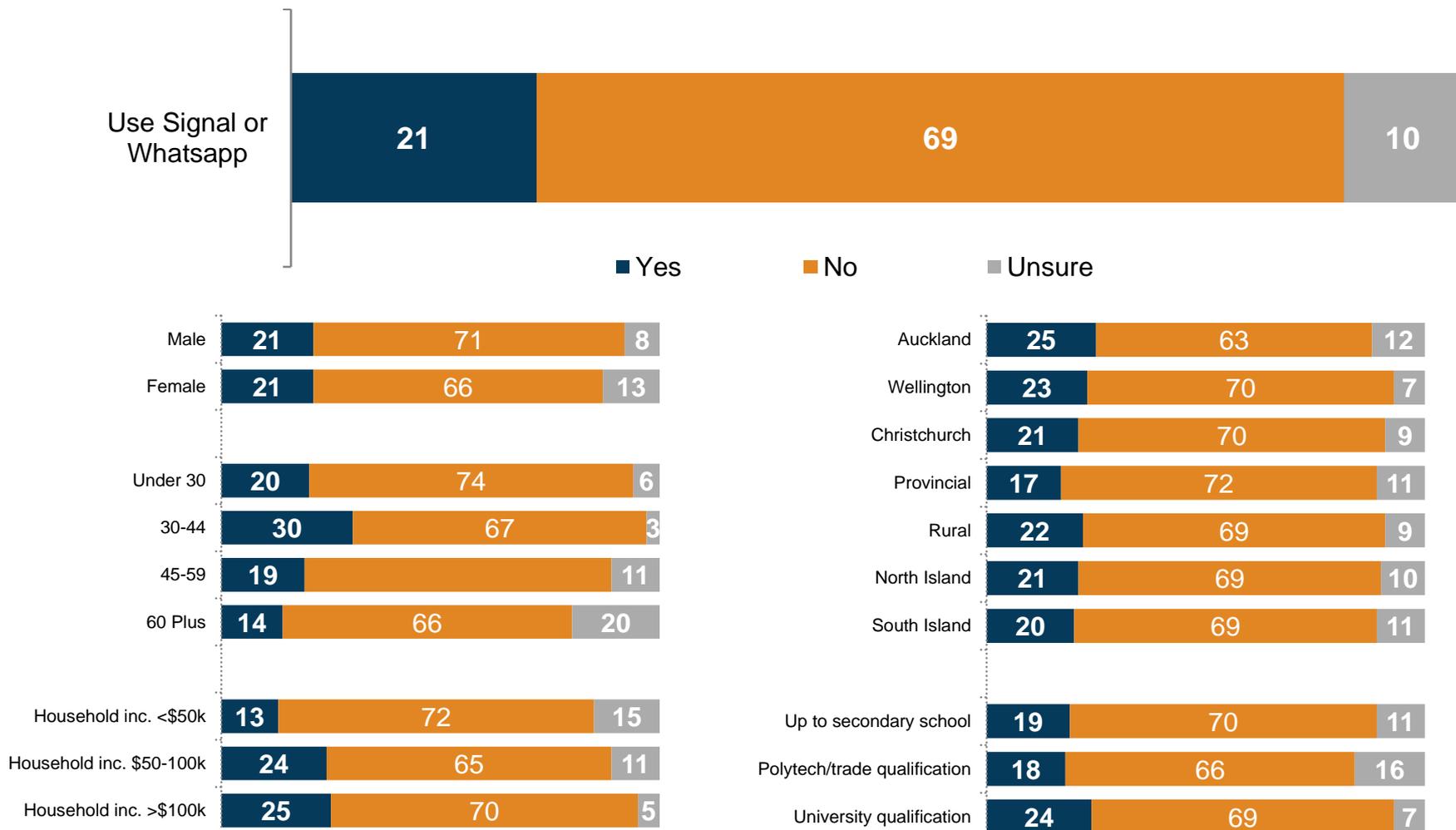




Use of Signal or WhatsApp

Signal or WhatsApp use

Which of the following do you do? If you do not know what I mean just say so. Do you.....?





Overall view of the internet

Overall view of the internet

There are positives and negatives to the internet – but overall do you think the benefits outweigh the negatives?

