



Perceptions of the Internet 2020

A COLMAR BRUNTON RESEARCH REPORT

DECEMBER 2020

Contents



1

Background and objectives

2

Key findings

3

How do New Zealanders use the Internet?

4

What are the benefits of the Internet?

5

What are New Zealanders concerned about?

6

Do New Zealanders feel safe online?

7

Flexible working

8

Awareness of InternetNZ

9

Understanding of the terms 'Internet for all' and 'Internet for good'

10

Appendix

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 1,000 New Zealanders online.

Respondents were sourced from 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, and region.

*NB. as our respondents are all 'online' and competent with completing online surveys they are therefore not representative of all New Zealanders' usage and views towards the Internet.



Fieldwork was conducted from 16th – 25th November, 2020.

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

The maximum margin of error on the total group n=1,000 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 in 2019 and 2020 we spoke to "consumers" as a whole (whether or not they also own a business). We have included the consumer only results from 2018 for comparison but caution should be taken when directly comparing results.

Key findings



Four things to take away...

1

Use of the Internet

Use of the Internet still has not peaked. Usage has increased again this year: 96% of New Zealanders are online daily in their home, and seven in ten New Zealanders use the Internet at least daily at work. Only one-percent do not use the Internet at least daily.

2

Impact of COVID-19?

This year's events appear to have affected some results:

- The Internet is associated with a greater number of social benefits this year, in particular online shopping and working from home.
- People are more significantly concerned about having poor Internet access in remote areas and limited access for some people from lower socio-economic backgrounds (among other things).
- There's an increase in people working from home more frequently. Not having a fast enough Internet speed is a top barrier preventing them from working from home more often (as well having too many face-to-face meetings and not having flexible working conditions).

3

New Zealanders' concerns

The top three online concerns for New Zealanders are:

- Children accessing inappropriate content (significant increase from last year)
- Cyber bullying (significant increase)
- Security of their personal data.

4

Safety and security

Privacy and security concerns are a high priority for New Zealanders and appear to be getting worse. Nearly two thirds are extremely or very concerned about the security of their personal data online, and 58% have decided not to use an online service in the past year because of security or privacy concerns.

Older New Zealanders in particular would benefit from easier access to information about keeping their personal information safe and secure online.

“

“I struggle with the Internet so have to wait for grandkids to return from school. I would like to be able to keep the kids safe but not sure how to do this.”

“

“I think these sorts of topics we should be talking about more, to also help keep people safe, but to offer another level of support...”

How do New Zealanders use the Internet?



New Zealanders are using the Internet more and more...

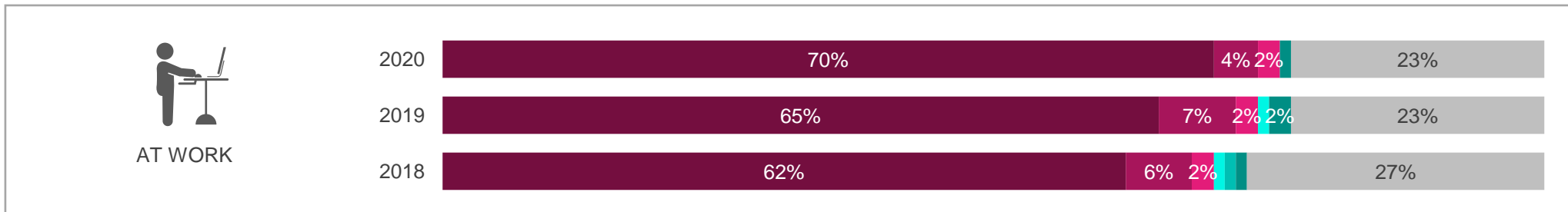
AVERAGE WEEKLY USE



6.8

6.7

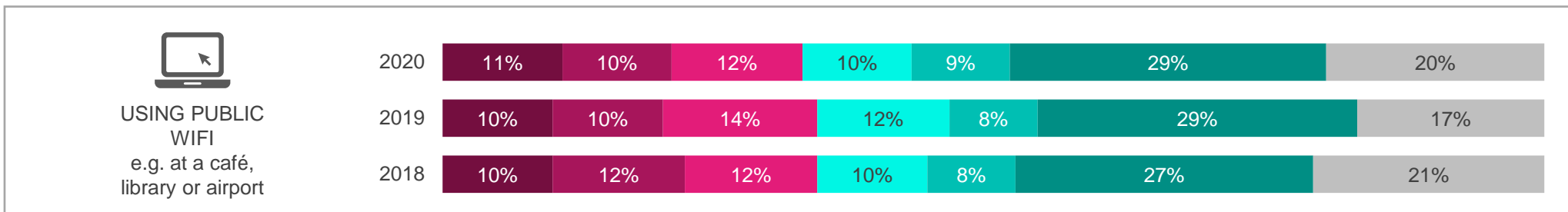
6.6



5.0

4.8

4.5



1.2

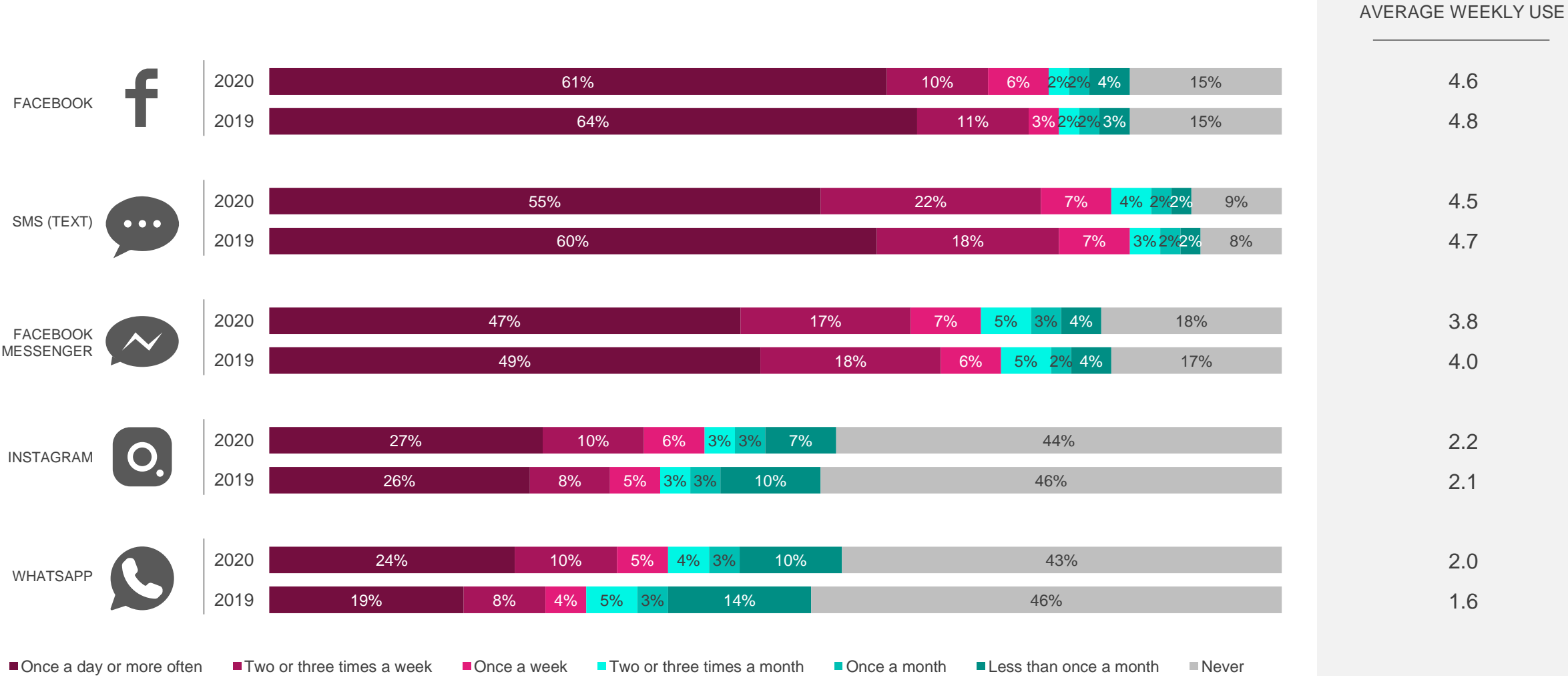
1.2

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)

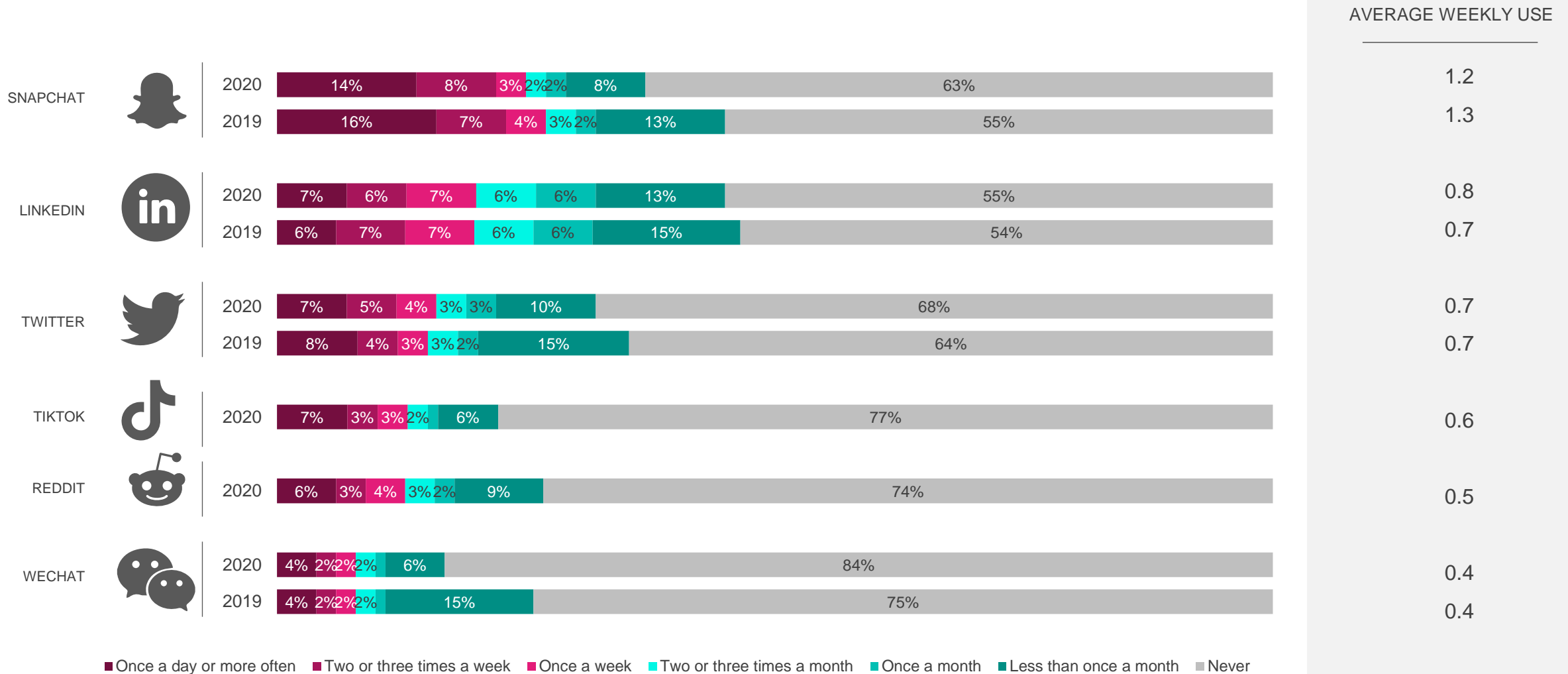
The unlabelled segments of each bar, each represent 1%.
 Q34. How often do you access the Internet in each of the following places?
 Base: 2019 All people 2020 n=1,000; 2019 n=1,001; 2018 Consumer only n=1,002

Overall, SMS (text) has the highest use (over eight in ten people use SMS at least weekly). However Facebook is the most frequently accessed channel, with six out of ten people using it daily.



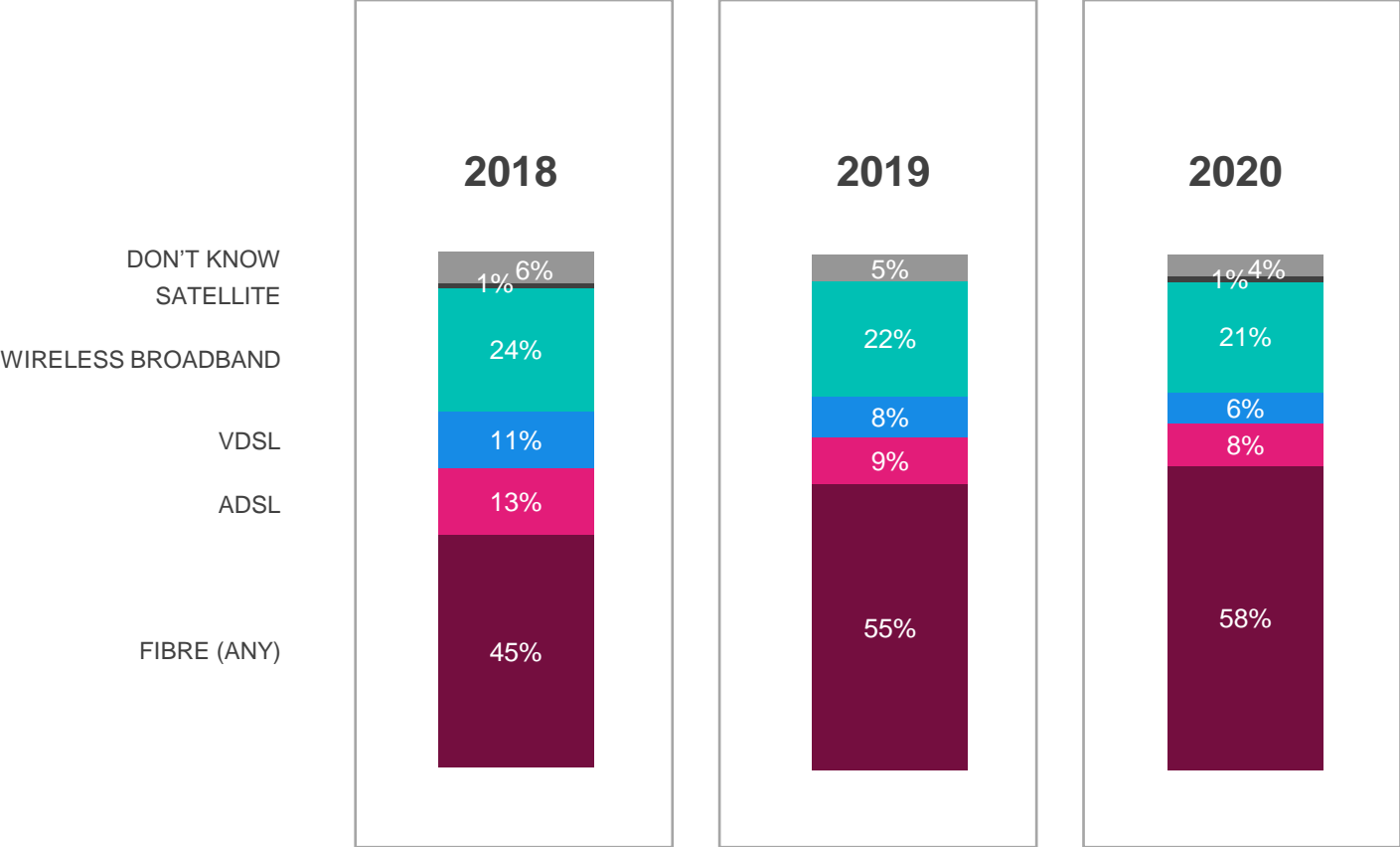
Q72. How often do you use the following social media channels or messaging services?
 Base: All people 2020 n=1,000; 2019 n=1,001

TikTok, Reddit, and WeChat are the least frequently used social media and messaging channels we asked about.



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 2020 n=1,000; 2019 n=1,001

There is an upward trend in having a fibre connection at home (to the detriment of the other types of Internet connection).



“

“WFH was made possible and easier due to Fibre being installed in my area post lockdown one. For the initial lockdown I was hot-spotting using my phone.”

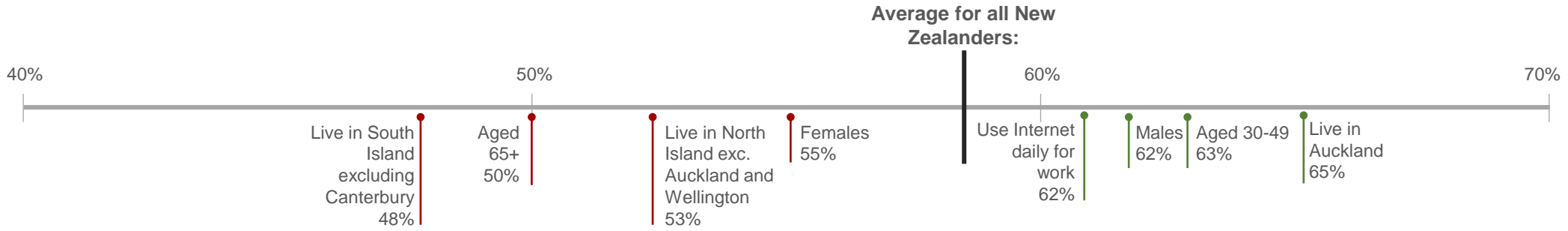
Q63. Which type of Internet connection do you have at home?
 Base: Consumers who access the Internet at home 2020 n=992, 2019 n=988; 2018 n=993

New Zealanders living rurally and/or are older are less likely to have a fibre Internet connection.

New Zealanders living rurally and/or older are less likely to have a fibre Internet connection.

FIBRE (ANY)

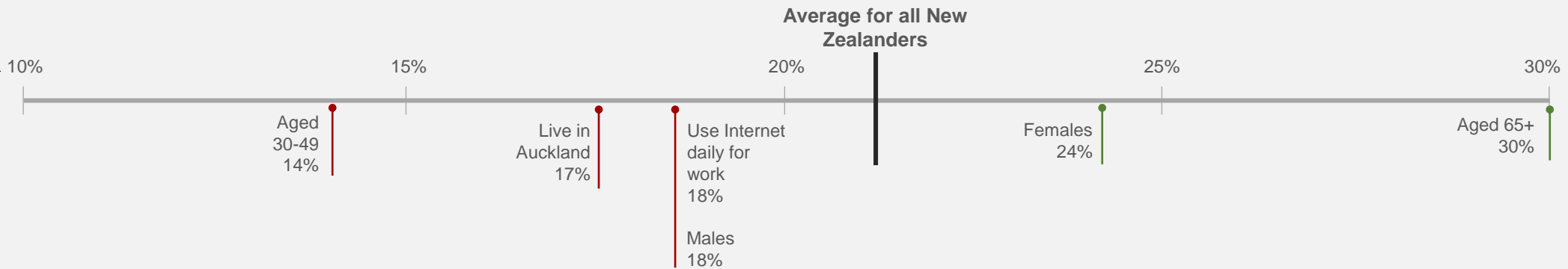
58%



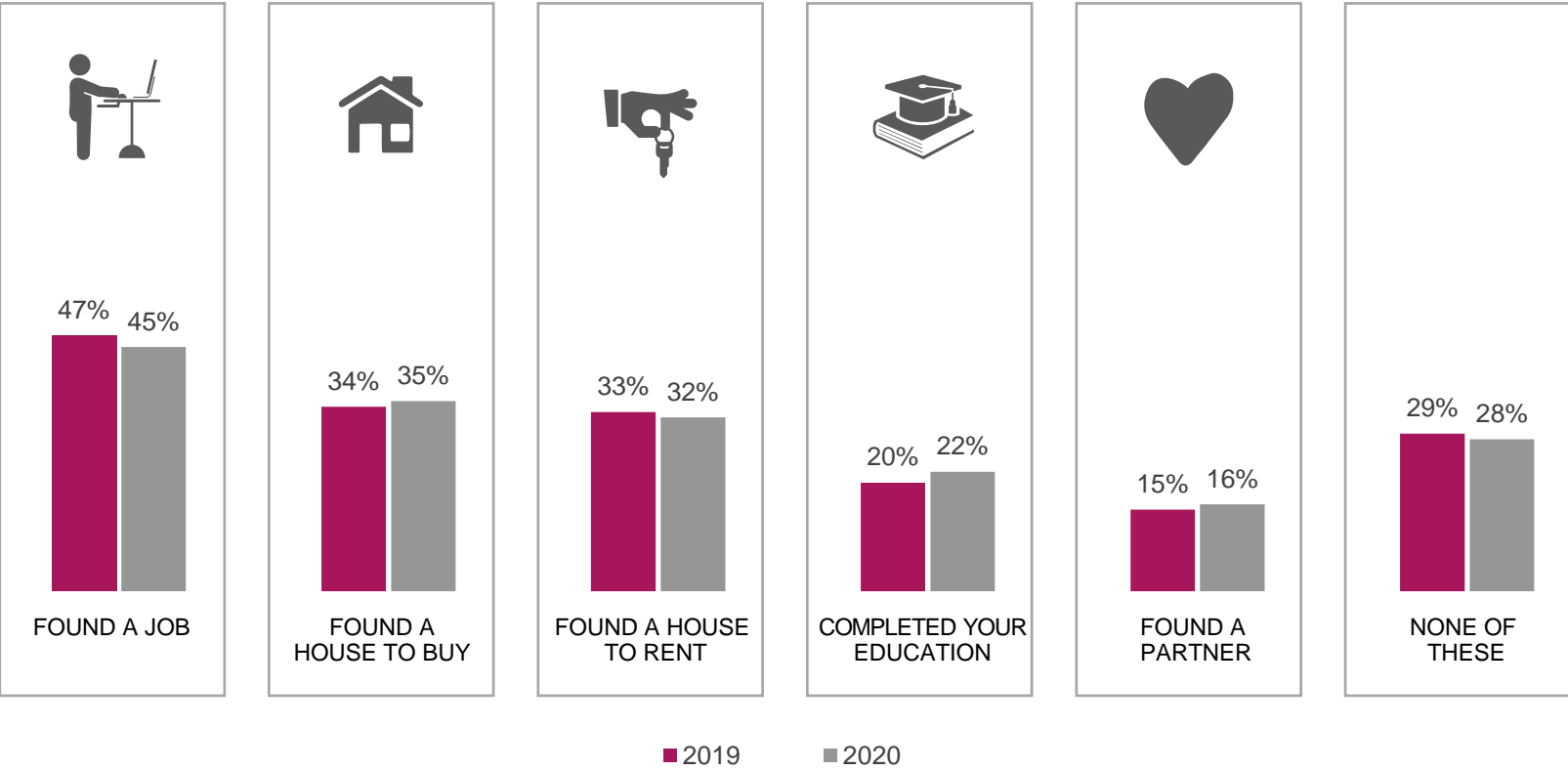
The following groups are less likely to have wireless broadband: aged 30 – 49 years; live in Auckland; use the Internet daily for work; men

WIRELESS BROADBAND

21%



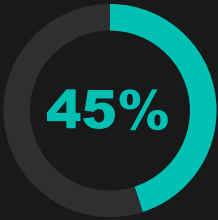
Forty-five percent of consumers have found a job online, and around a third have found a house to buy or rent.



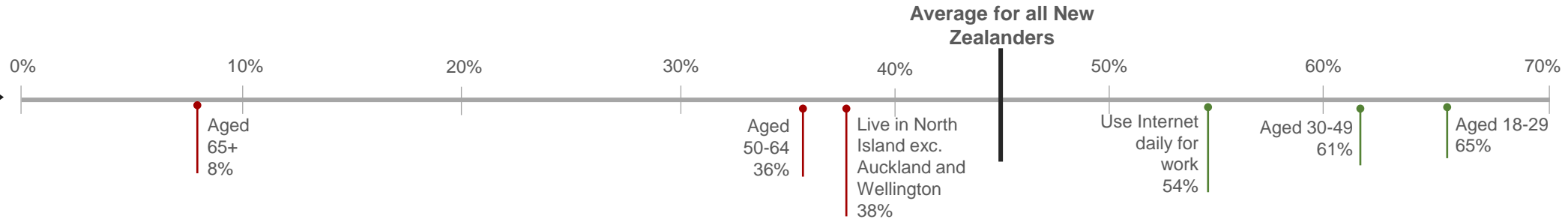
Q73. Which of the following have you done online?
 Base: All people 2020 n=1,000, 2019 n=1,001

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.

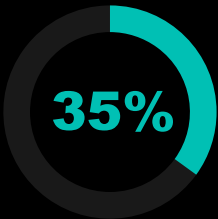
FOUND A JOB



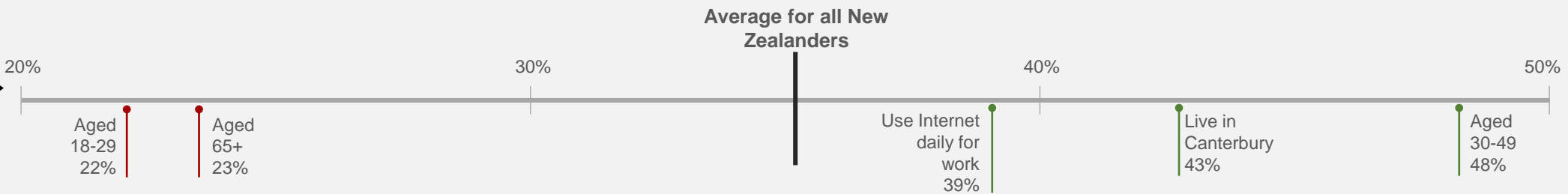
The following groups are less likely to have found a job online: older New Zealanders; live in North Island (exc. Auckland or Wellington)



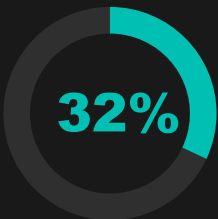
FOUND A HOUSE TO BUY



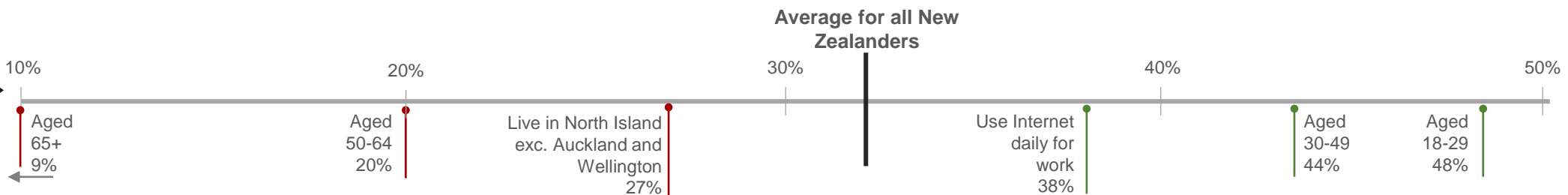
New Zealanders aged 18-29 are the least likely to have used the internet to buy a house, this is likely because a high proportion of this age group won't have bought a house yet.



FOUND A HOUSE TO RENT



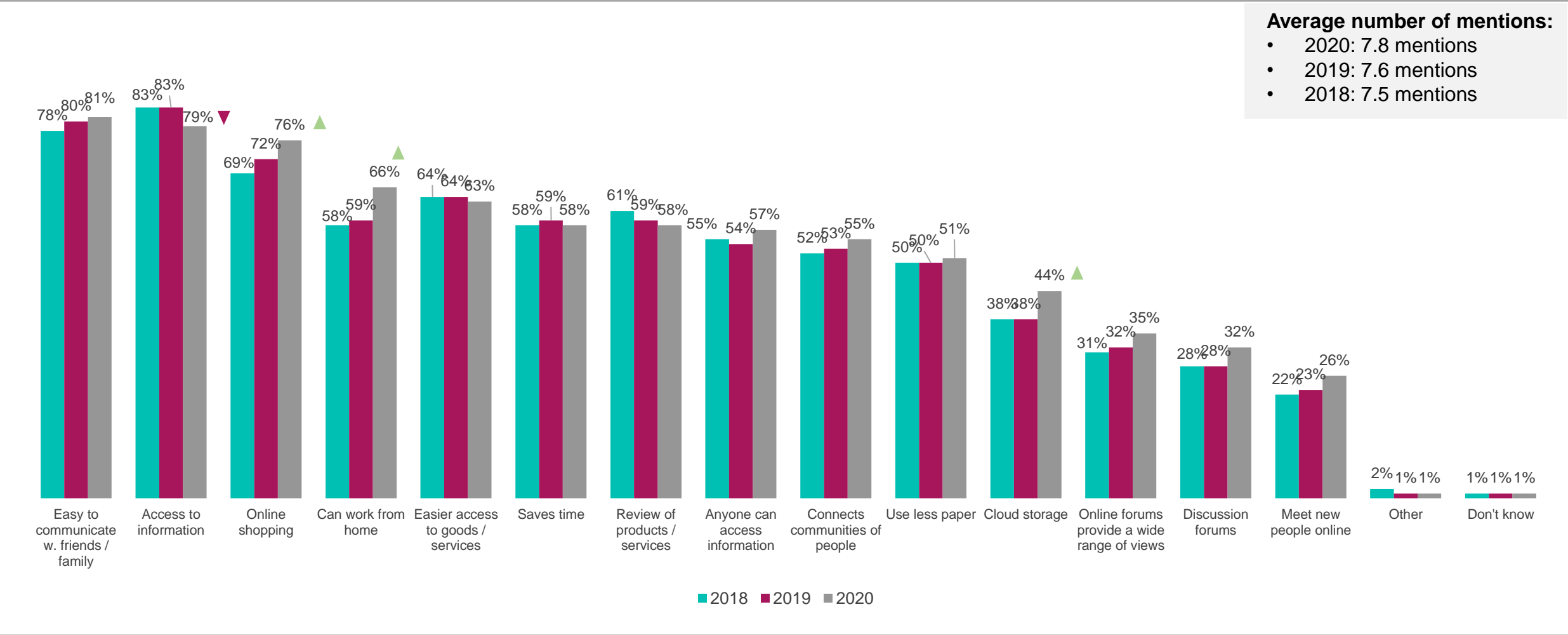
The following groups are less likely to have found a house to rent online: older New Zealanders; live in North Island (exc. Auckland or Wellington)



What are the benefits of the Internet?



Perhaps reflecting circumstances brought about by COVID-19 this year, New Zealanders are more likely to name a greater number of key social benefits of the Internet compared to previous years. There's a significant increase in recognising the benefit of the Internet for online shopping, enabling working from home, and for Cloud storage.

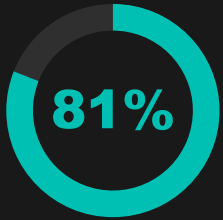


Q35. Which of the below do you think are the key benefits of the Internet? Please think about the key social benefits, regardless of whether or not you personally use the Internet for this reason.

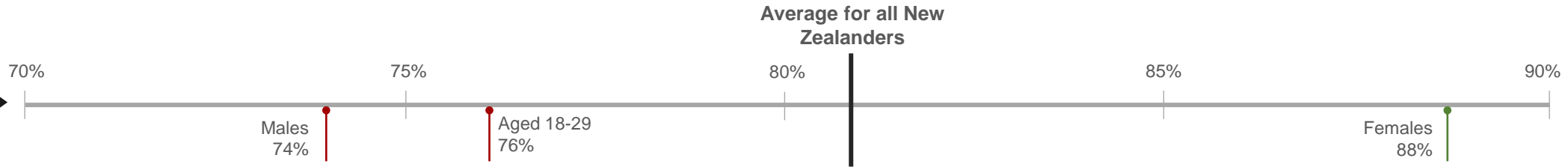
Base: All people 2020 n=1,000; 2019 n=1,001; 2018 n=1,859

Older New Zealanders are more likely to perceive benefits of the Internet – this may be because they didn't grow up with it and don't take it for granted. Also females are more likely to perceive benefits than males.

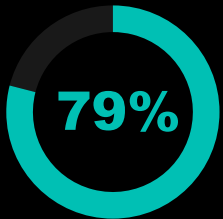
EASY TO COMMUNICATE



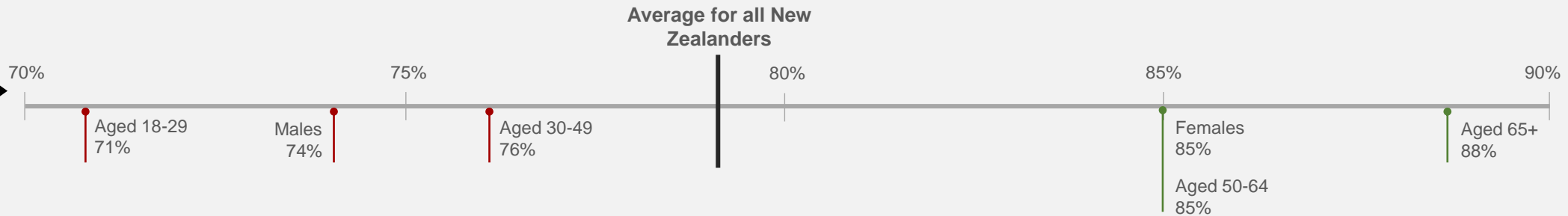
The following groups are less likely to say 'easy to communicate with friends/family' is a key benefit of the Internet: younger New Zealanders; men



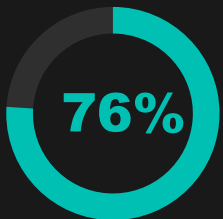
ACCESS TO INFORMATION



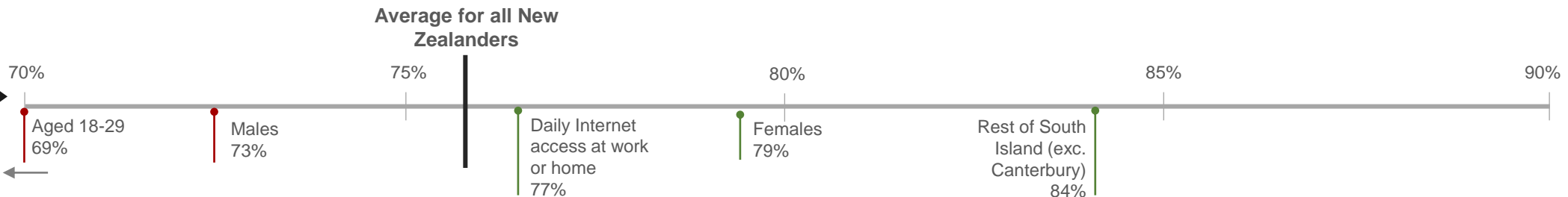
The following groups are less likely to say 'access to information' is a key benefit of the Internet: younger New Zealanders; men



ONLINE SHOPPING



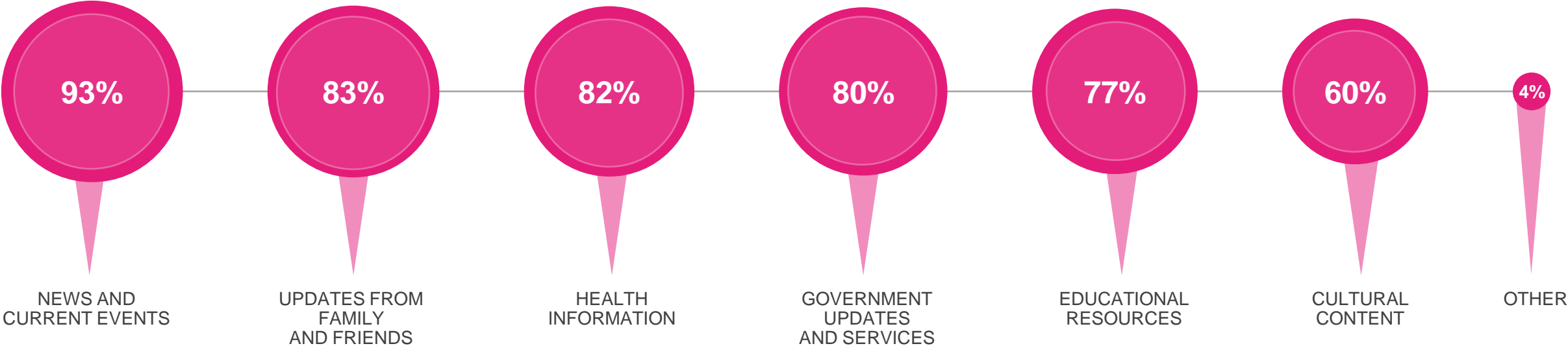
The following groups are less likely to say 'online shopping' is a key benefit of the Internet: younger New Zealanders; men



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 2019 n=1,001; 2018 n=1,859

The type of information New Zealanders see as particularly important to have access to also reflect COVID-19 circumstances: news, updates from friends/family, health information, and government updates.



“I have been on the Internet a lot this year as it’s the only company I have due to lockdowns, etc.”

“In these time of fake news, it is good to use the Internet to verify news from numerous sources.”

What are New Zealanders concerned about?

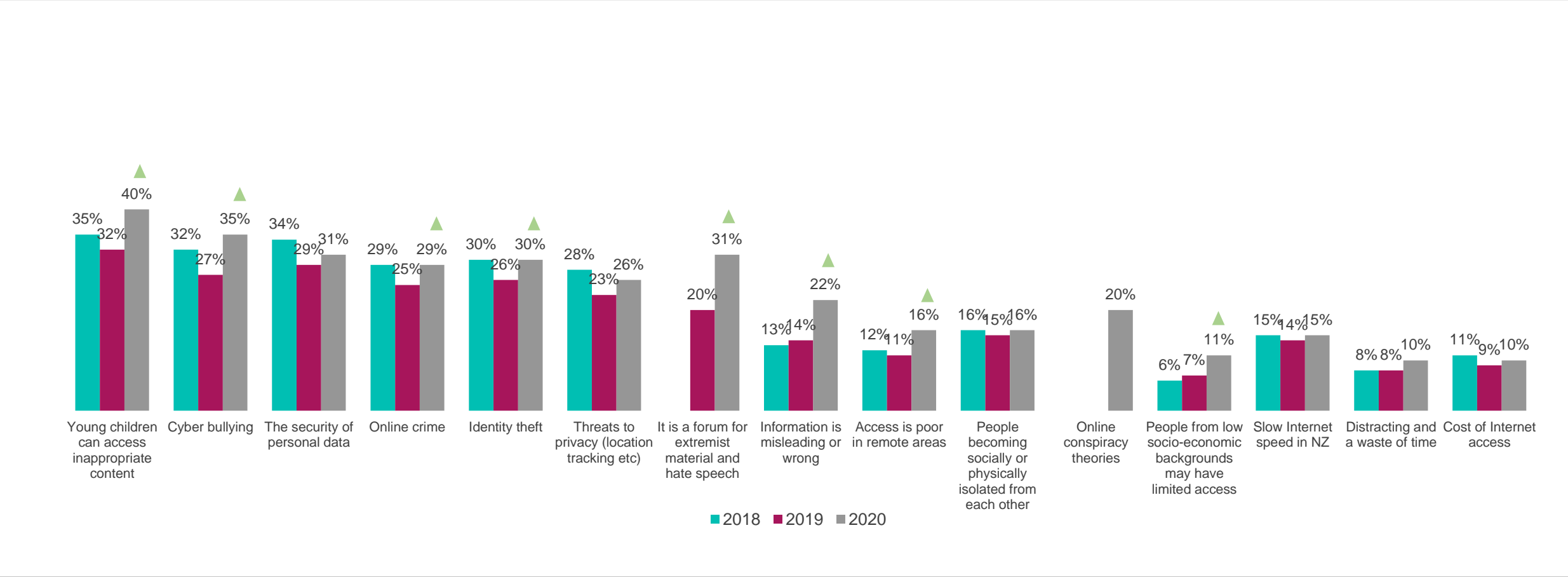
internetnz 



New Zealanders have higher levels of 'extreme' concern about a number of aspects of the Internet this year.



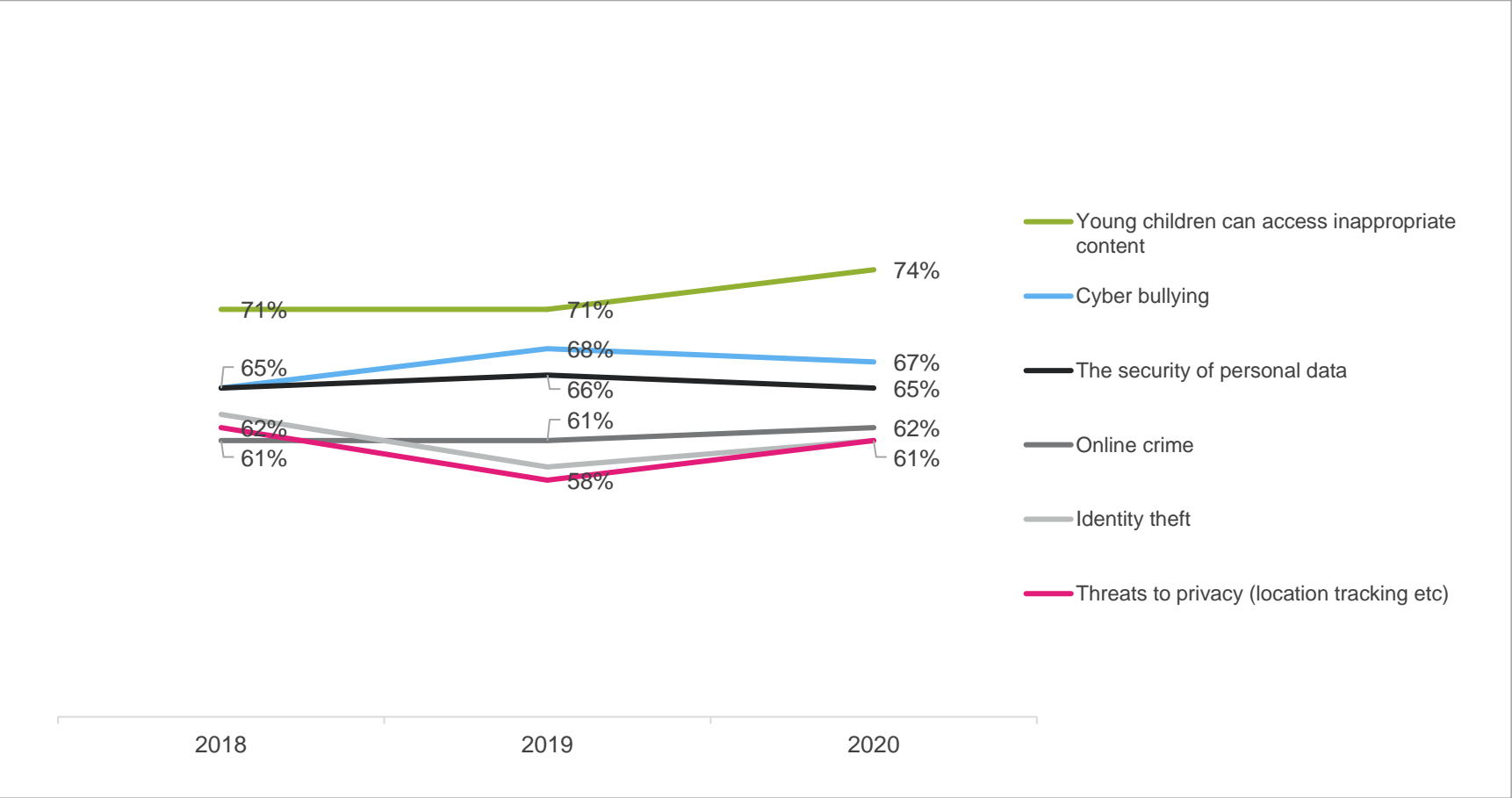
CONCERN ABOUT INTERNET ASPECT: EXTREMELY CONCERNED



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

At an overall level three quarters of people are worried about children accessing inappropriate material online. The other top concerns are cyber bullying and the security of personal data.

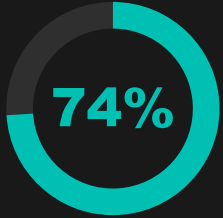
CONCERN ABOUT INTERNET ASPECT: EXTREMELY CONCERNED | VERY CONCERNED OVER TIME



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 2020 n=1,000; 2019 n≈1,001; 2018 Consumers n≈1,002. Excludes don't know.

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

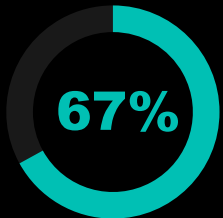
YOUNG CHILDREN CAN ACCESS INAPPROPRIATE MATERIAL



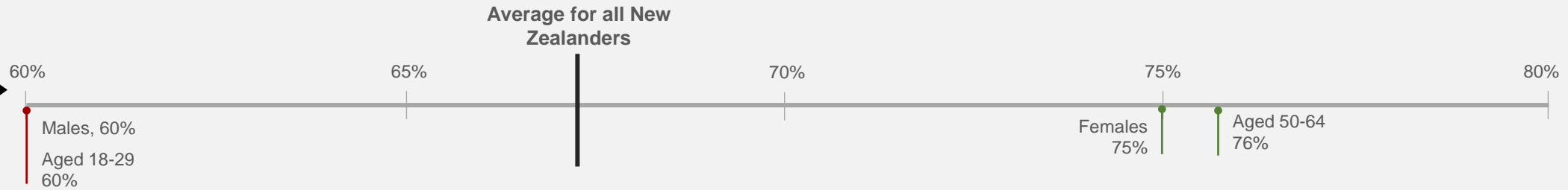
The following groups are less likely to be extremely / very concerned that young children can access inappropriate material on the Internet: younger New Zealanders; men



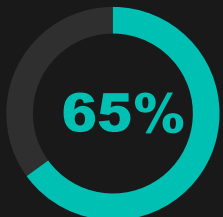
CYBER BULLYING



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 group are less likely to be extremely / very concerned about security of personal data on the Internet: younger New Zealanders; men

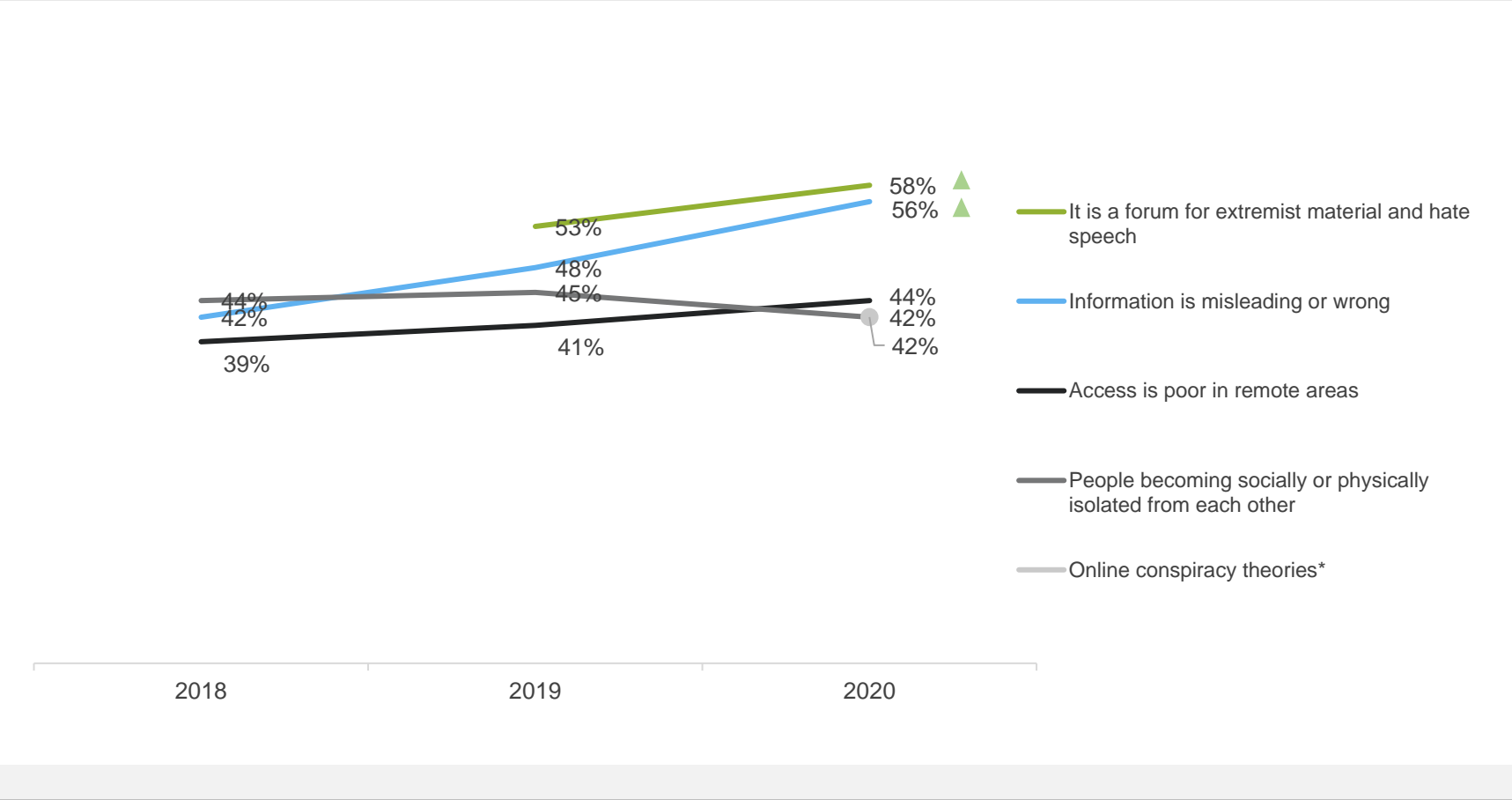


Q36. How concerned are you about each of the following aspects of the Internet? For each aspect please indicate on the scale your level of concern. Again, please think about society as a whole, rather than anything you may or may not have personally experienced.

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

New Zealanders are more likely to be concerned that the Internet is a forum for extremists and has misleading or wrong information this year.

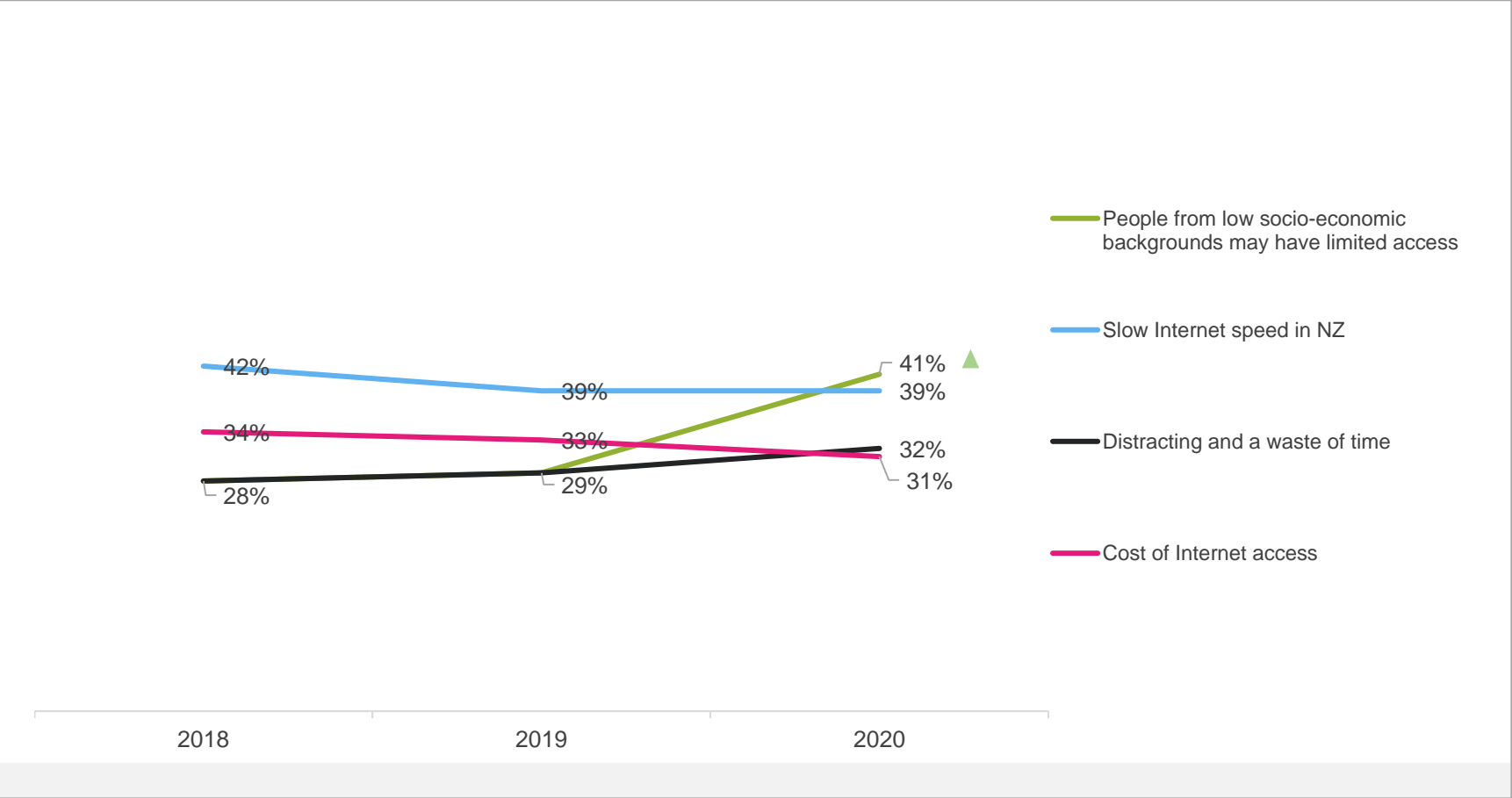
CONCERN ABOUT INTERNET ASPECT: EXTREMELY CONCERNED | VERY CONCERNED OVER TIME (CONT'D)



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

There is also an increase in concern that people from low socio-economic backgrounds may have limited Internet access.

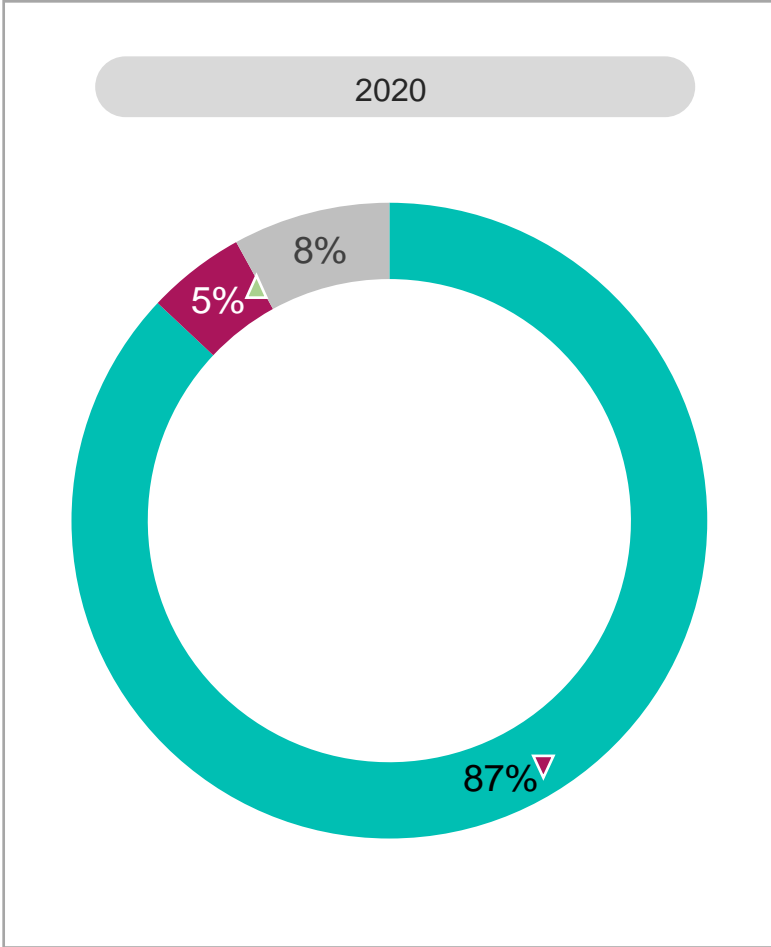
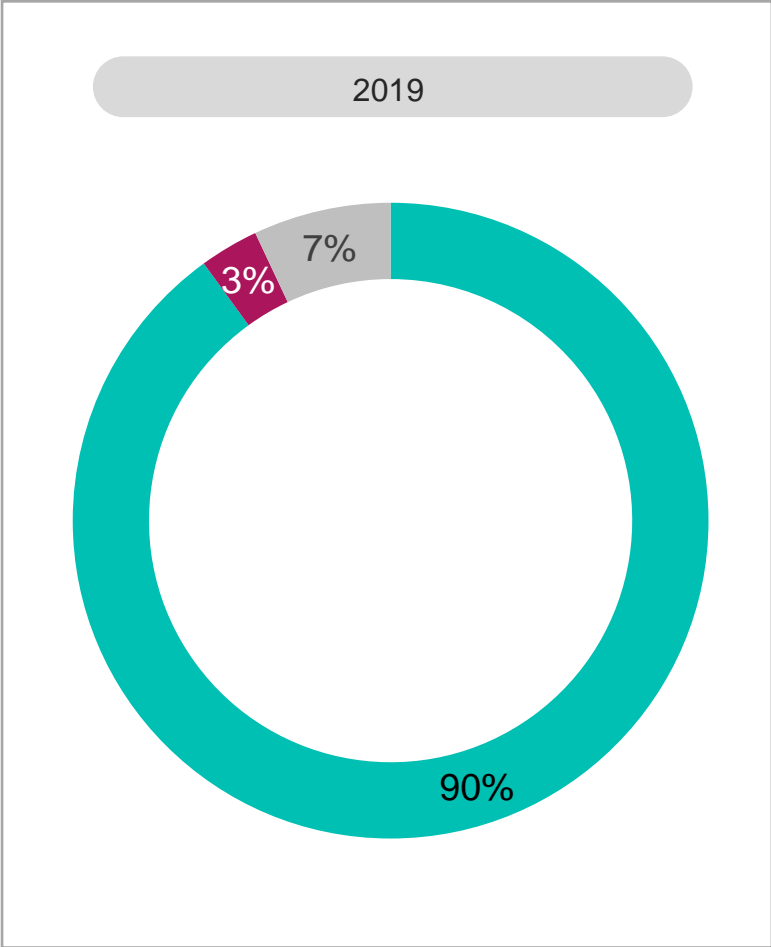
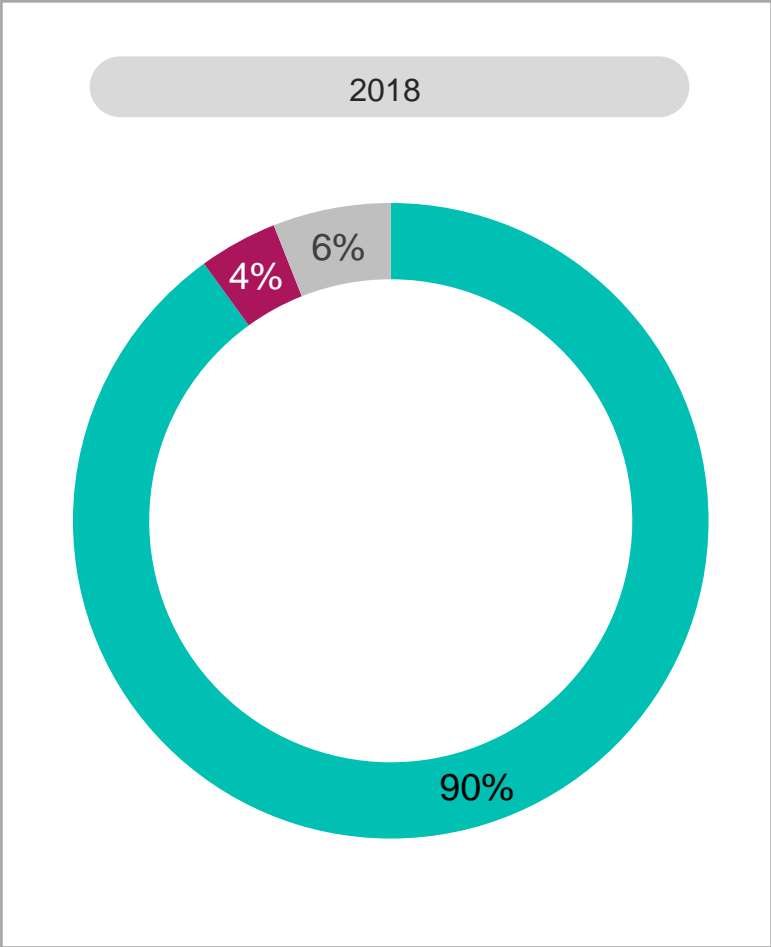
CONCERN ABOUT INTERNET ASPECT: EXTREMELY CONCERNED | VERY CONCERNED OVER TIME (CONT'D)



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 2020 n=1,000; 2019 n≈1,001; 2018 Consumers n≈1,002. Excludes don't know.

▲▼ Significantly higher / lower than previous year

Most people continue to think that the positives of the internet outweigh the negatives. However, there has been an increase in the small proportion who think the negatives outweigh the positives this year.



■ POSITIVES OF THE INTERNET OUTWEIGH THE NEGATIVES
 ■ POSITIVES DO NOT OUTWEIGHT THE NEGATIVES
 ■ DON'T KNOW

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

Do New Zealanders feel safe online?



Nearly six in ten New Zealanders have chosen not to use at least one online service because of security or privacy concerns in the past 12 months.



58%

Of New Zealanders have decided NOT to use an online service because of security or privacy concerns in the last year

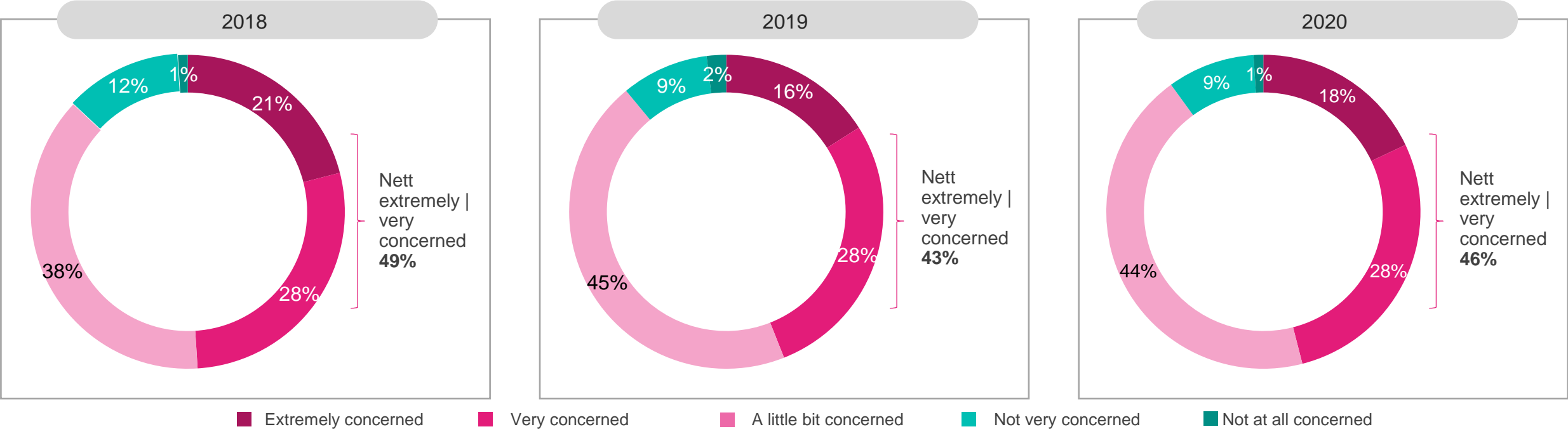
- 17% Have decided not to use an online service **many times** in last year
- 41% Have decided not to use an online service **one or a couple of times**
- 42% Have **never** decided not to use an online service because of security or privacy concerns in the last 12 months.

	Males	Females
Yes – many times	20% ▲	14%
Yes – one couple of times	37% ▼	46%
No	44% ▲	40%

“I think privacy, safety and security online is very concerning but I've just come to accept that it's the price we pay for all the benefits.”

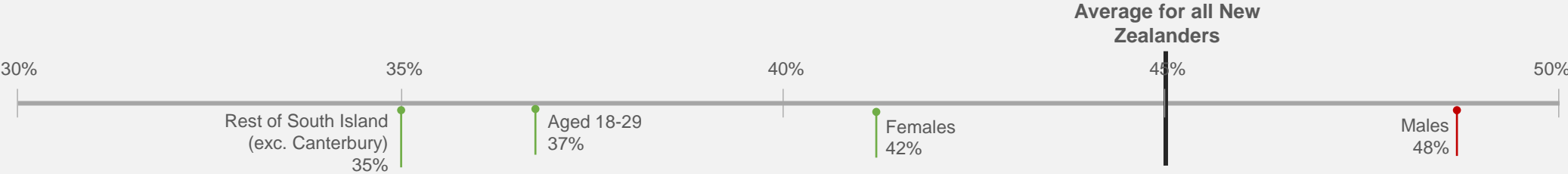
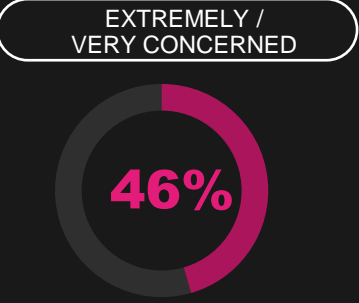
▲ ▼ Males significantly higher / lower than females (no other significant differences by subgroups analysed)

Levels of concern are in line with last year: nearly half of those who use their personal details online are extremely or very concerned about the security of their personal details.



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

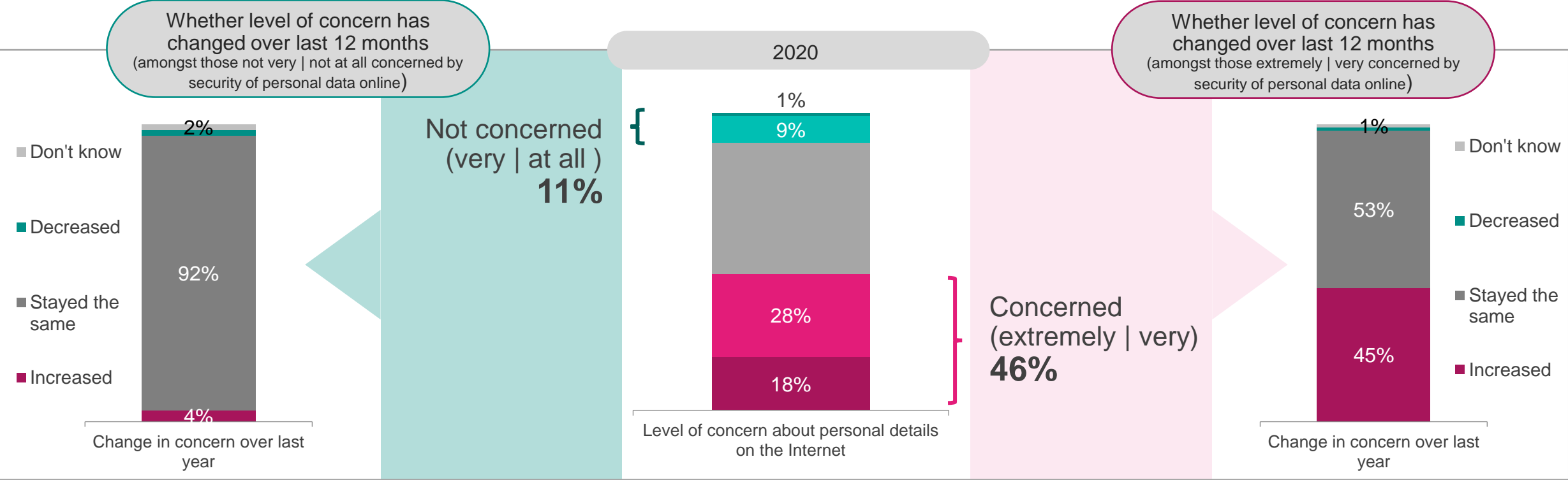
The following are more likely to be extremely / very concerned about security of their personal details when using them on the Internet: men



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) 2020 n=1,000; 2019 n=1,001; 2018 Consumers only n=1,002

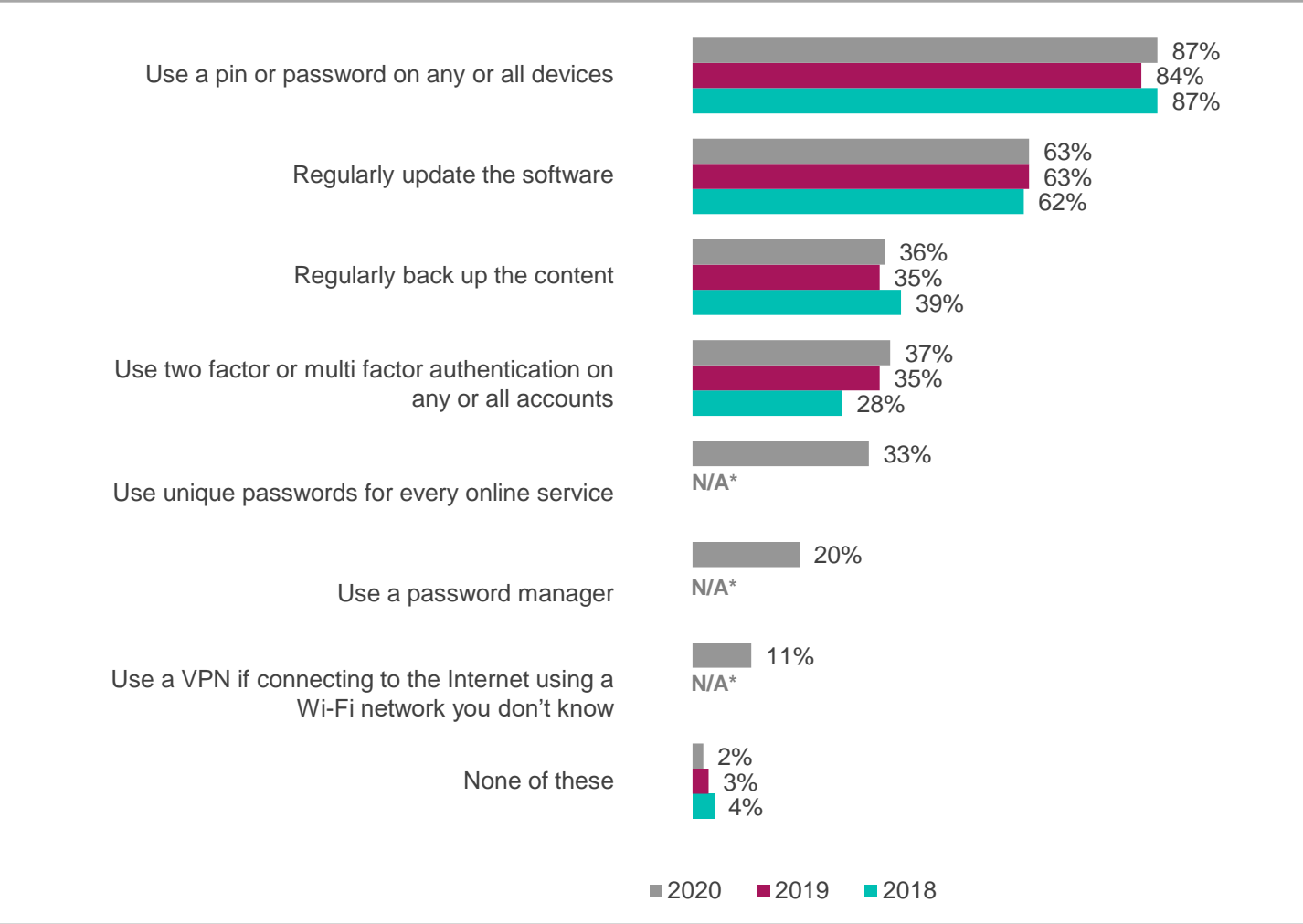
The level of concern has increased in the last year for nearly half of those people who are extremely or very concerned about the online security of their personal details.

WHETHER CONCERN HAS CHANGED IN LAST YEAR BY LEVEL OF CONCERN ABOUT SECURITY OF PERSONAL DETAILS



Q39. How concerned are you about the security of your own personal details when you use them on the Internet? Q40. How has your level of concern changed over the last 12 months?
 Base: Q39 All people n=1,000; Q40 People who are extremely | very concerned n=451; People who are not very | not at all concerned n=105

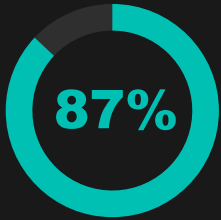
To stay safe online over four out of five New Zealanders use a pin or password on their devices. There continues to be an upward trend in the use of two or multi factor authentication.



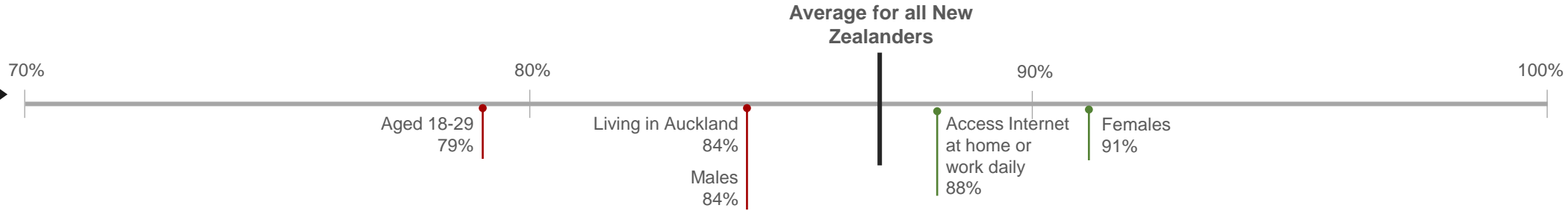
*New statements 2020.
 Q42. Which of the following security precautions do you take with your own devices?
 Base: All people 2020 n=1,000; 2019 n=1,001; 2018 Consumers only n=1,002

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

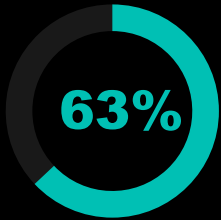
USE A PIN OR PASSWORD ON ALL DEVICES



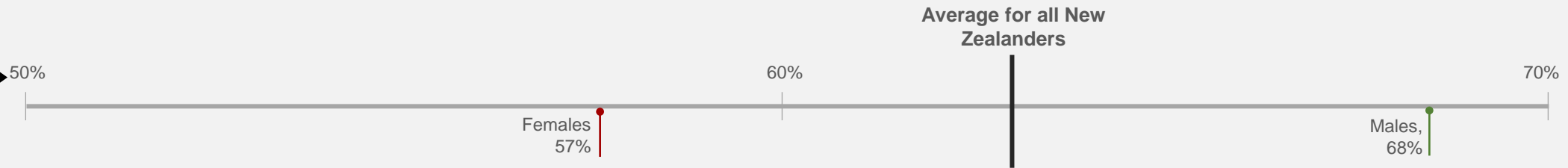
The following groups are less likely to use a pin or password on all their devices: younger New Zealanders; men; live in Auckland



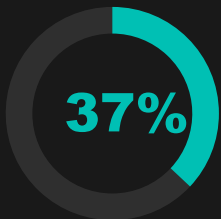
REGULARLY UPDATE SOFTWARE



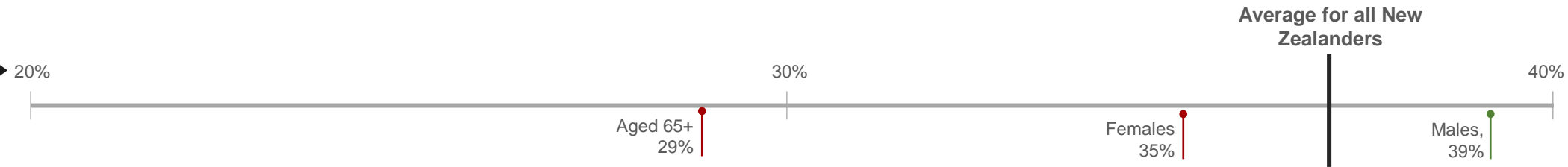
The following group are less likely to regularly update software: women



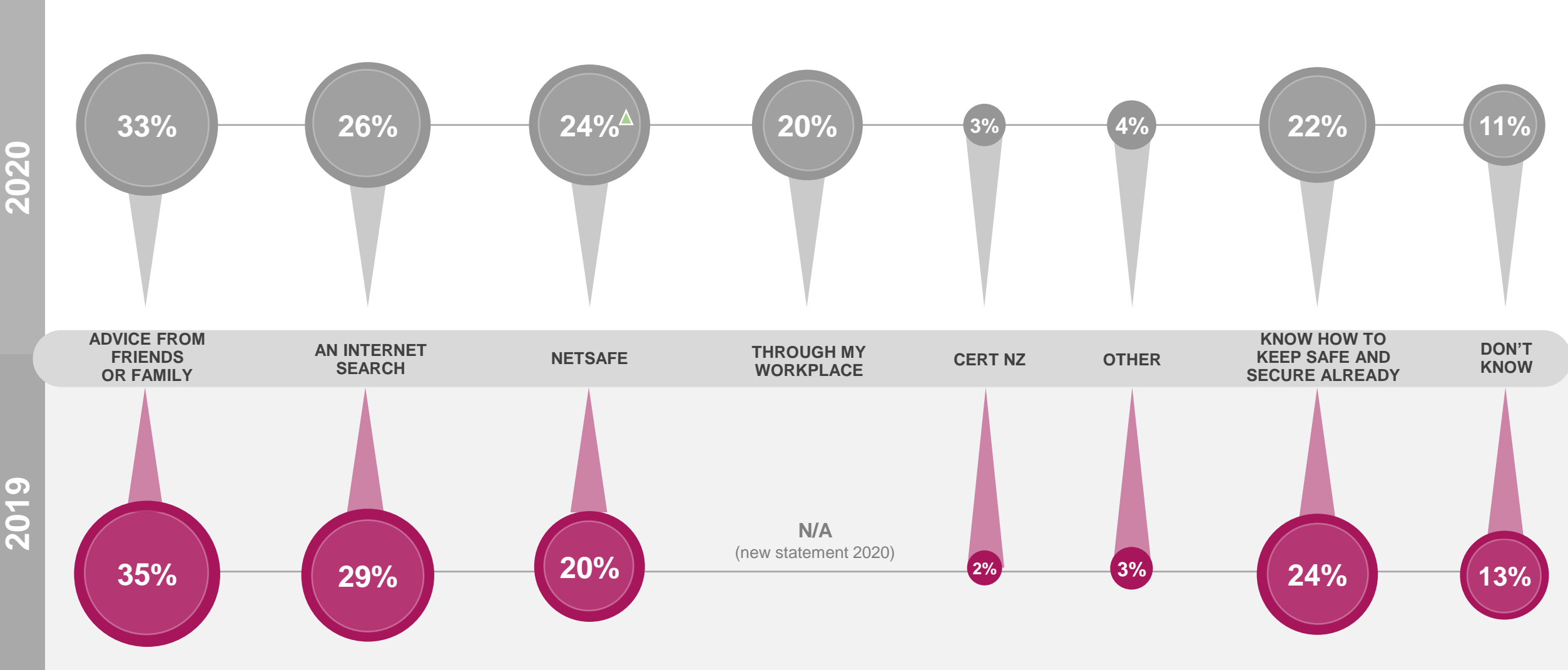
USE TWO / MULTI FACTOR AUTHENTICATION



The following group are less likely to use two / multi factor authentication on any or all accounts: older New Zealanders; women



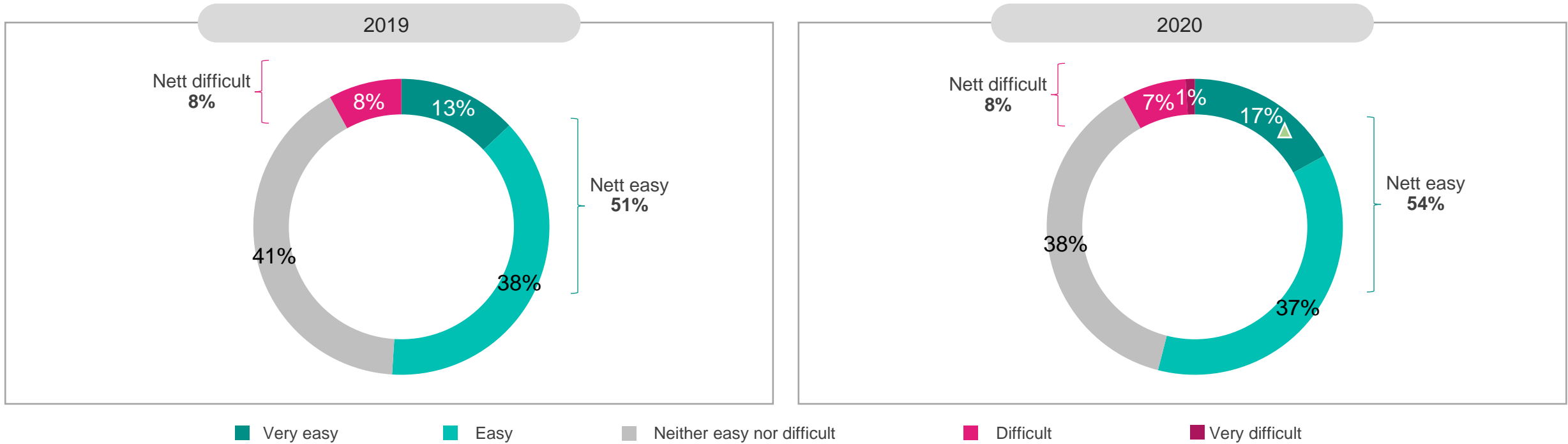
A third of people take advice from friends or family about keeping safe and secure online. This year significantly more New Zealanders say they visit Netsafe for relevant information.



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

▲ ▼ Significantly higher / lower than previous year

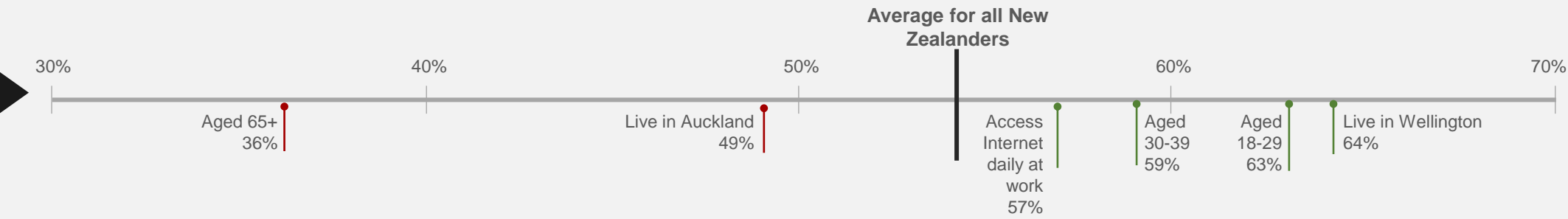
Just over half of people say it's easy for them to access information about keeping their personal information safe and secure on the Internet, which is a slight increase compared to 2019.



The following are less likely to say it's easy to access information about keeping personal information secure online: older New Zealanders; those living in Auckland

VERY EASY / EASY

54%

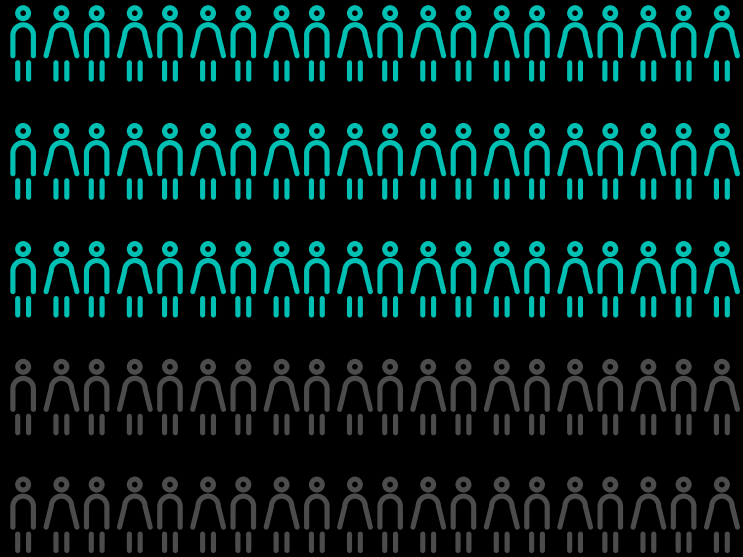


Q68. How easy is it for you to access information about keeping your personal information safe and secure online?
Base: All people 2020 n=1,000; 2019 n=1,001. Excluding don't knows.

Flexible working



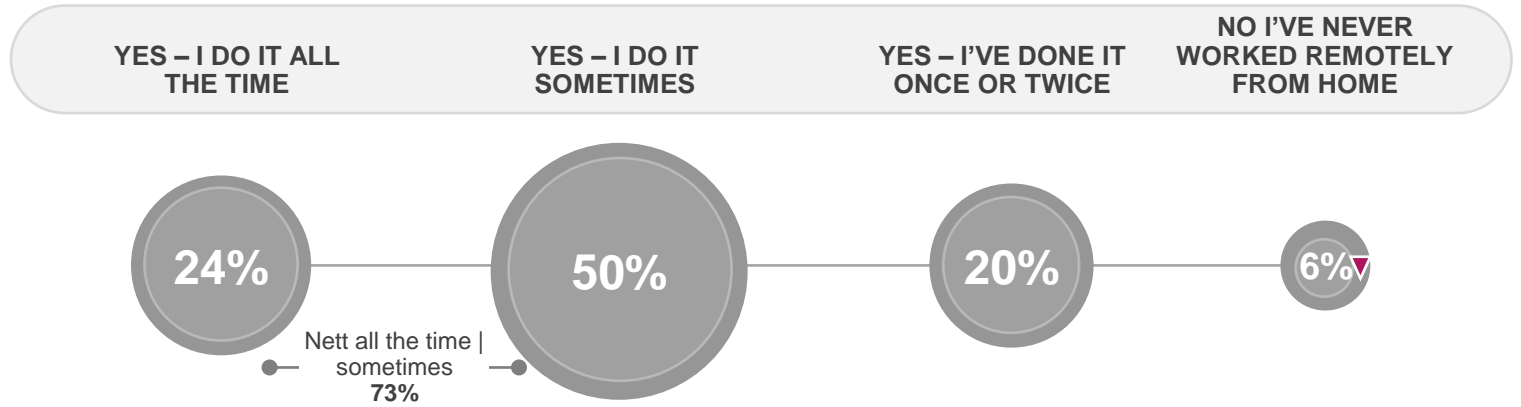
Perhaps unsurprisingly given 2020's COVID-19 lockdowns, there's an increase in the frequency people work from home (amongst those who can work from home).



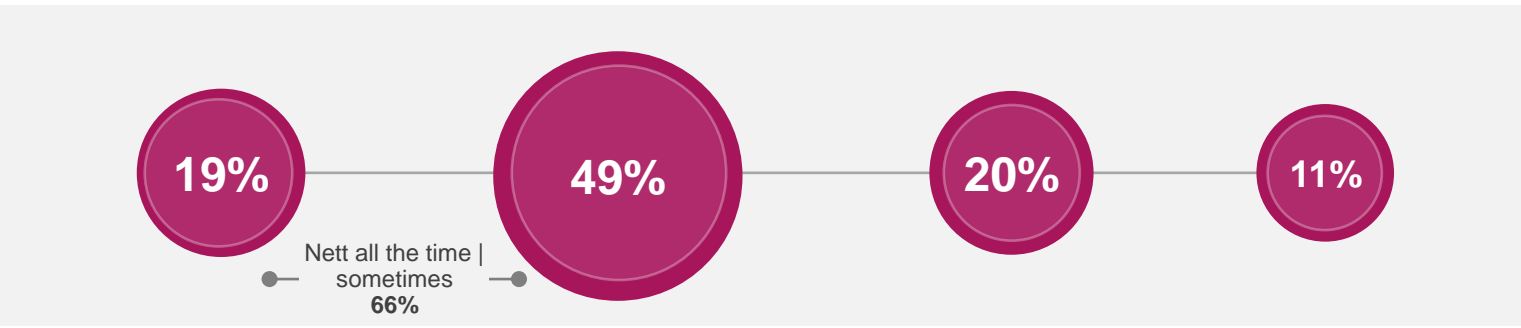
60%

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

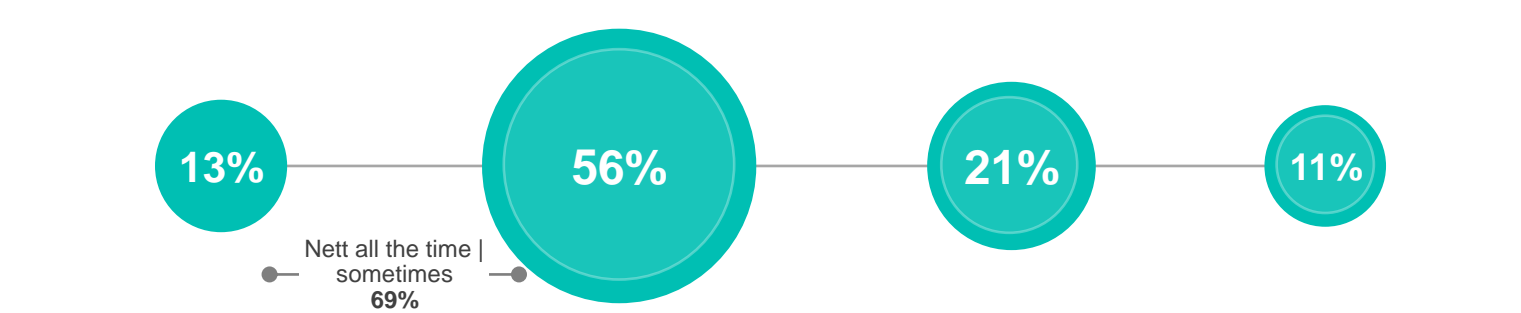
2020



2019



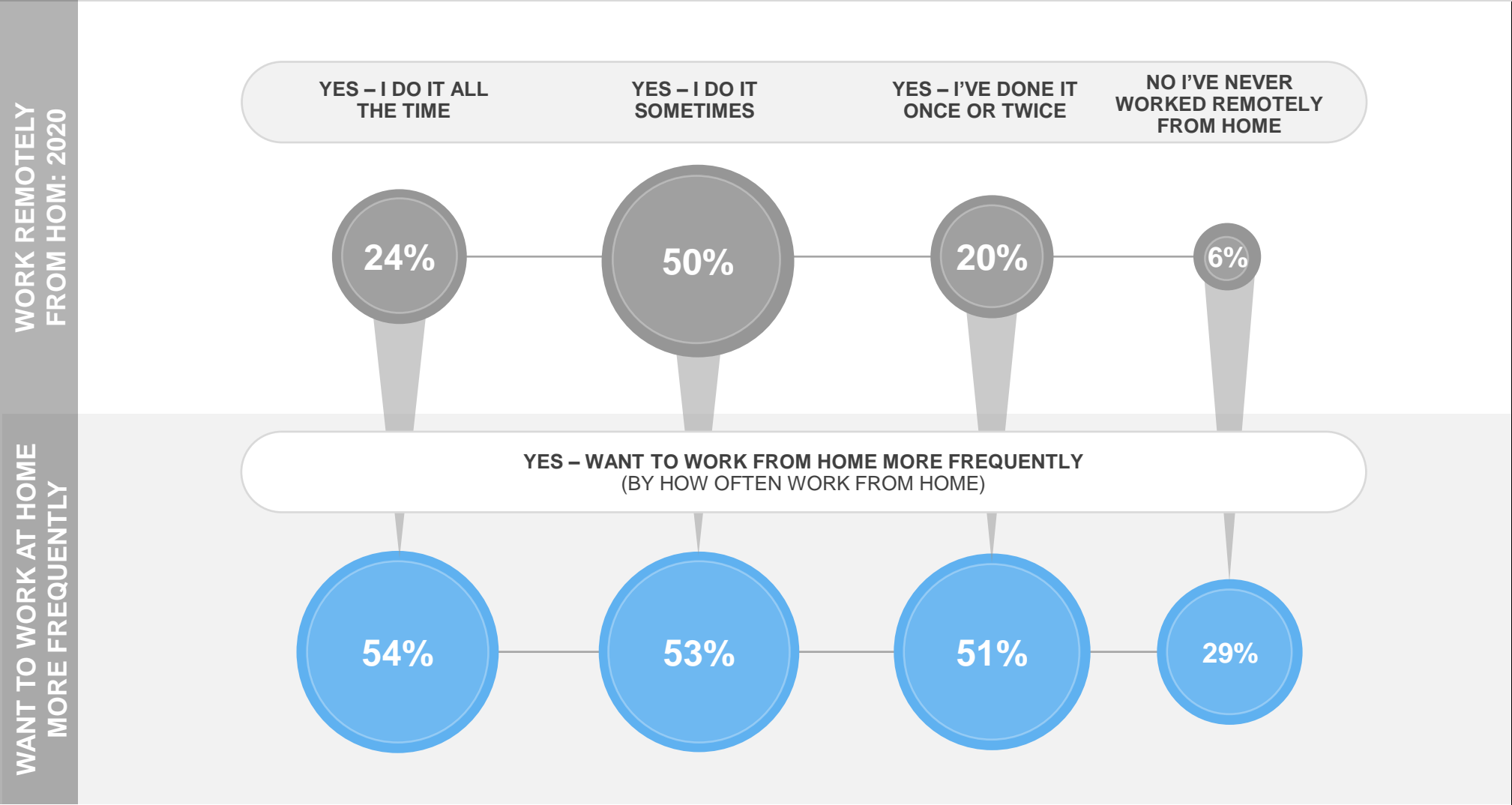
2018



Q49. Does the type of work that you do allow you to work 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 2020 n=403; 2019 n=467

▲▼ Significantly higher / lower than previous year

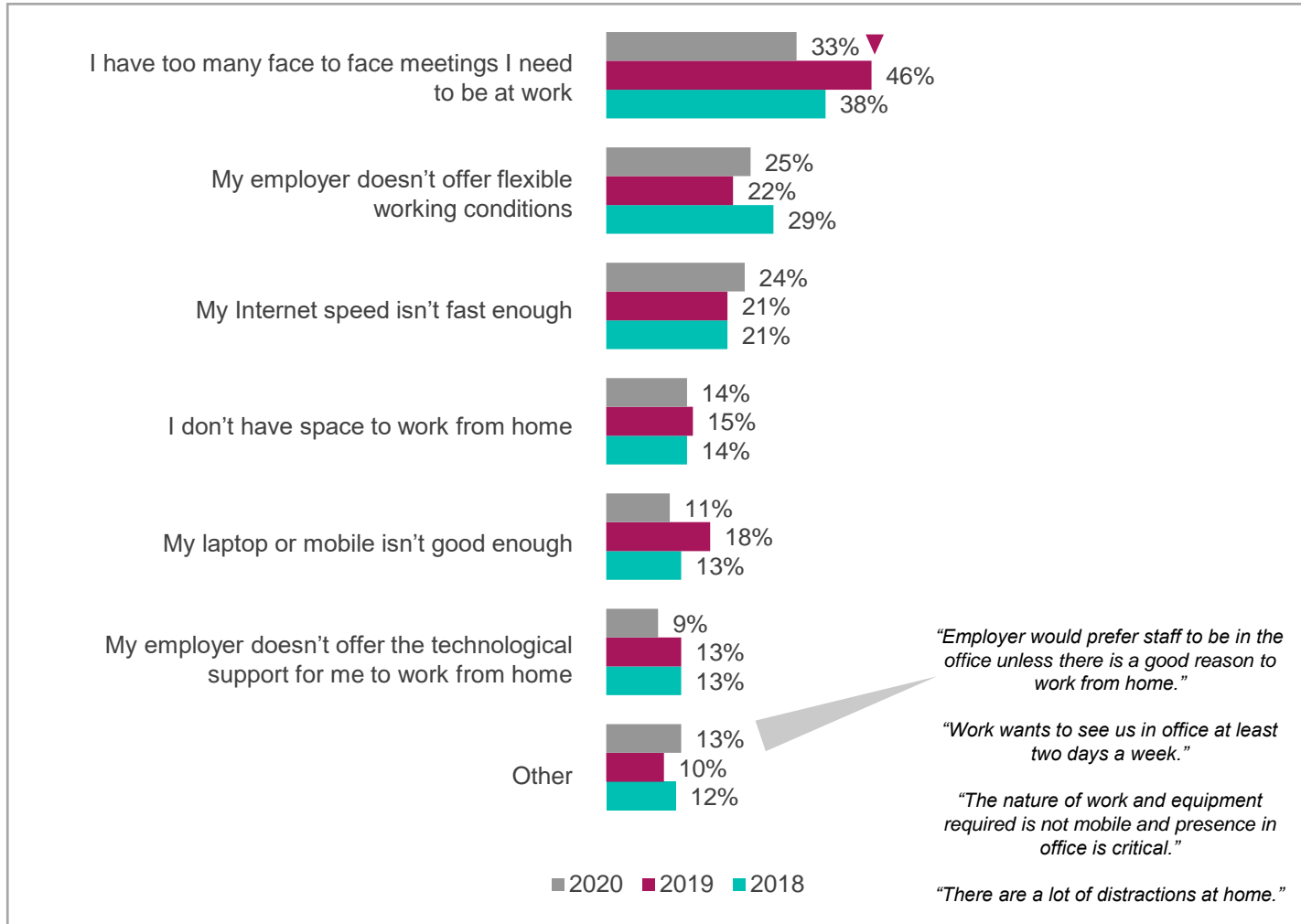
Overall 51% of people who are able to work from home would like to do so more frequently than they currently do (53% in 2019 and 54% in 2018).



“Employer is old school and prefers to see you in the office. No actual reason to be there except old executives that still believe they need their own office while the rest of the staff sit in open plan.”

Q51. Would you like to work from home more frequently than you currently do?
 Base: People who do the type of work that allows them to work from home and access the Internet for work 2020 n=399

The three main reasons preventing people from working from home more often are: having too many meetings necessitating them physically being at work, not having flexible working conditions, not having a fast enough home Internet.

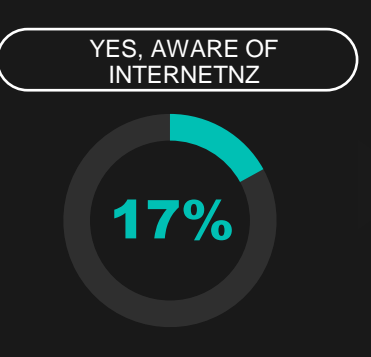
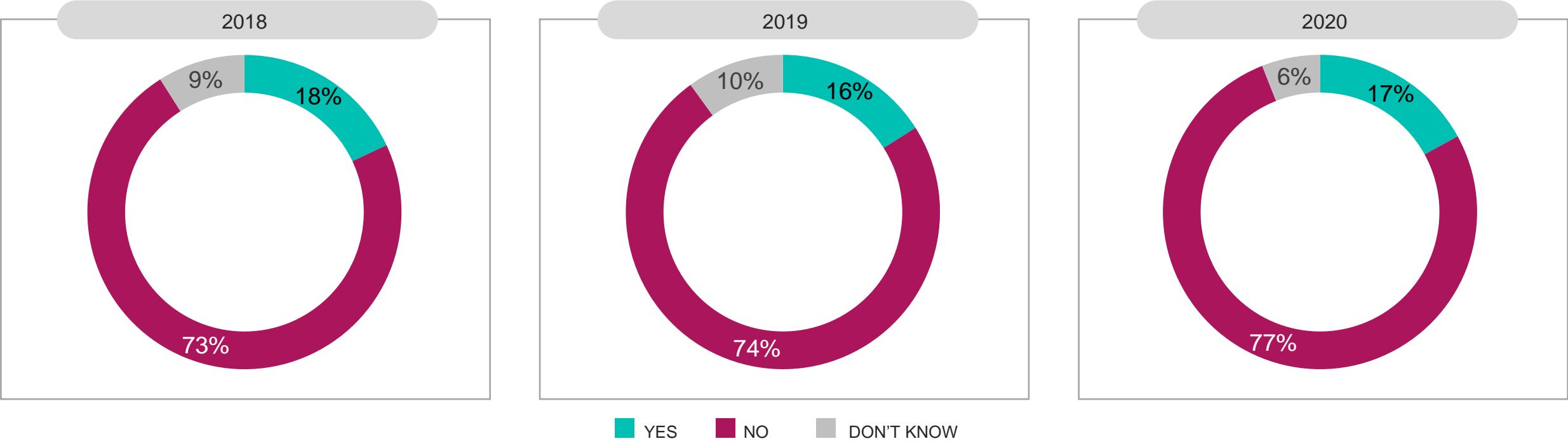


Q52. Which of the below are barriers for you working from home more often?
 Base: Consumers who would like to work from home more often 2020 n=207; 2019 n=229

Awareness of InternetNZ



Seventeen percent of New Zealanders are aware of InternetNZ, which is in line with previous years.

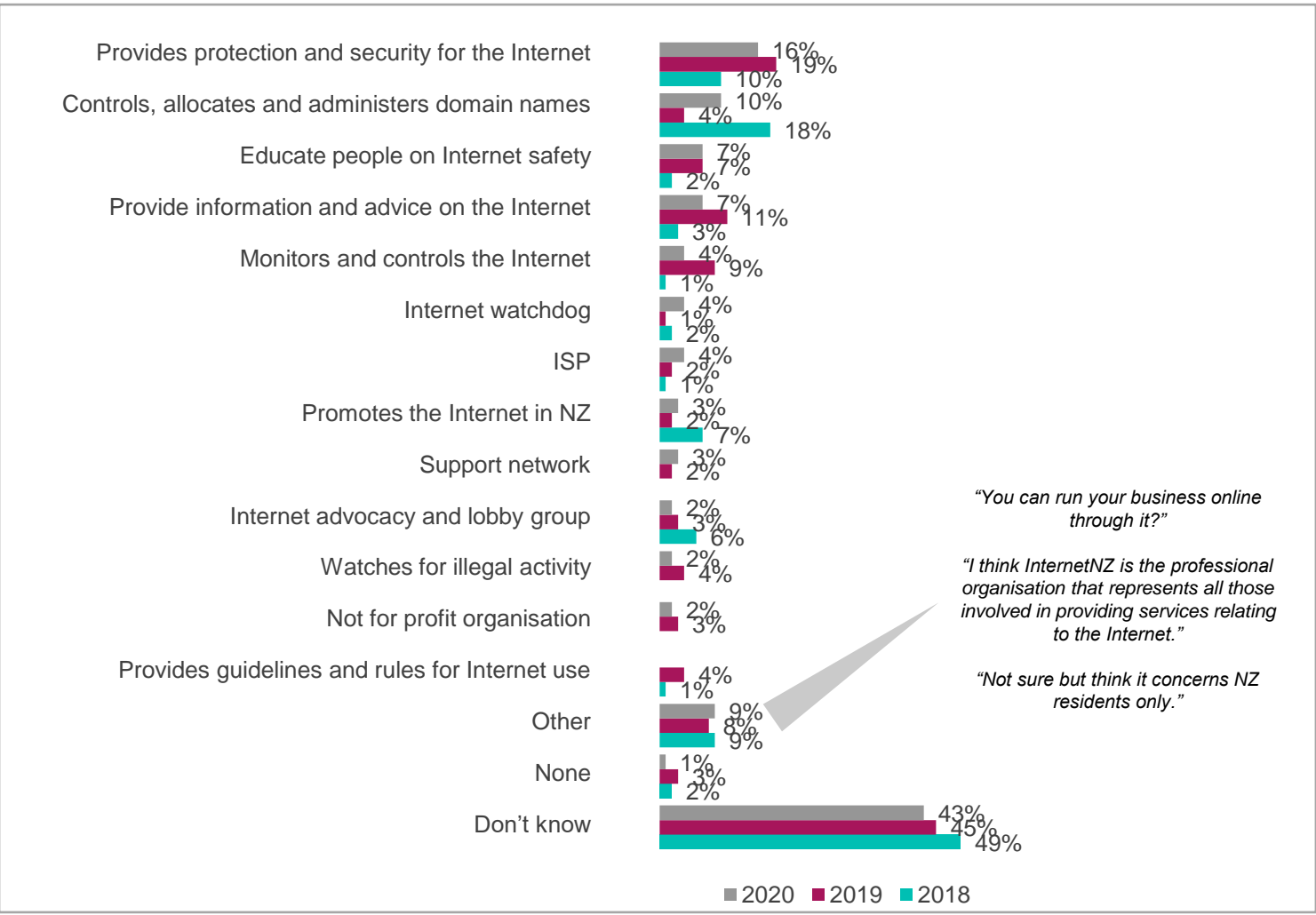


The following are less likely to be aware of InternetNZ: women



Q60. Have you heard of an organisation called InternetNZ?
Base: All people 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, allocating and administering domain names, Internet safety education, and providing information advice on the Internet.



"You can run your business online through it?"

"I think InternetNZ is the professional organisation that represents all those involved in providing services relating to the Internet."

"Not sure but think it concerns NZ residents only."



Q61. What is your understanding of the role or function of InternetNZ?
 Base: Consumers aware of InternetNZ 2020 n=168; 2019 n=154; 2018 n=181

Some of the comments about the perceived role of InternetNZ...



“

“InternetNZ is responsible for managing .nz domain names, funds Internet research and projects, and works with government to fight for a free and secure Internet for everyone in Aotearoa.”

“

“InternetNZ is a not for profit entity in NZ dedicated to protecting and promoting the Internet in NZ as well as protecting the dot (.) NZ name.”

“

“To provide true information about access, cyber-crime, resources to use the Internet safely.”

“

“I believe they work to create an Internet for all New Zealanders that is safe. This includes researching how the Internet is being used, supporting Internet-related projects and hosting events to bring the New Zealand Internet community together..”

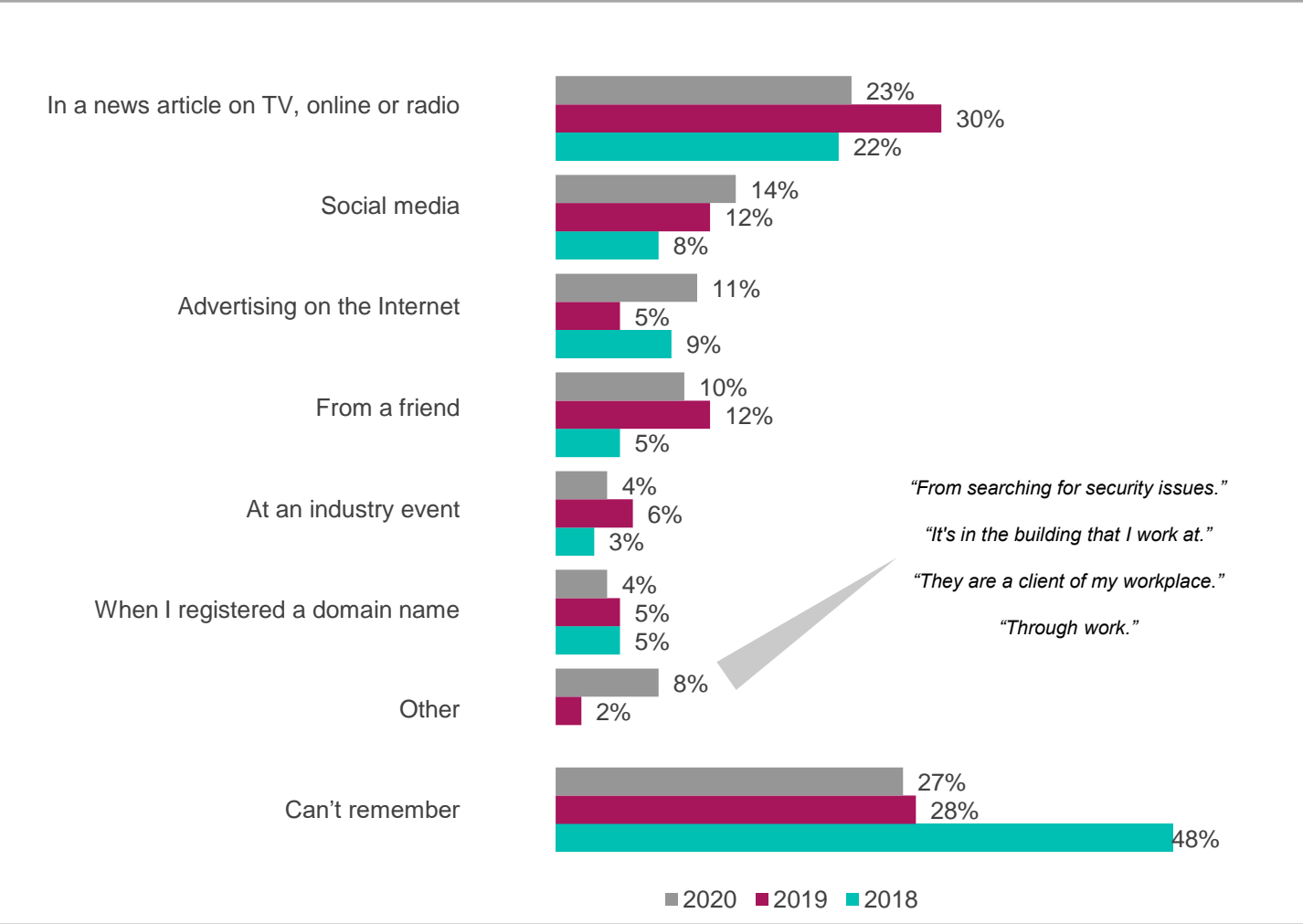
“

“Advocacy of Internet policy in New Zealand as well as the registrar of the .nz domain.”

“

“Guardians for the .nz domain and intend to create an open and secure service for New Zealanders.”

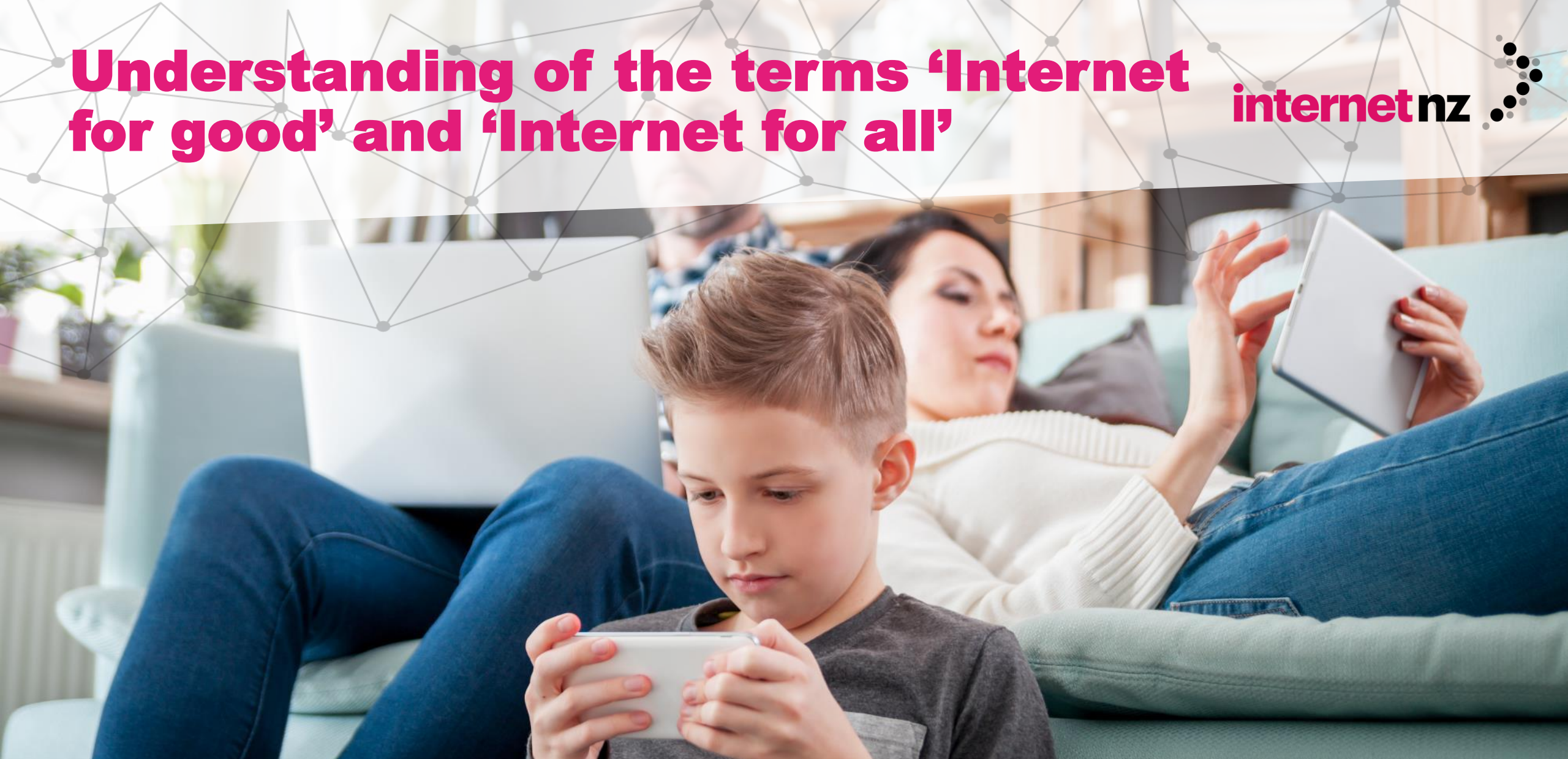
Compared to last year New Zealanders are more likely to have heard about InternetNZ through online advertising and social media, but less likely to be aware of them through news articles or friends.



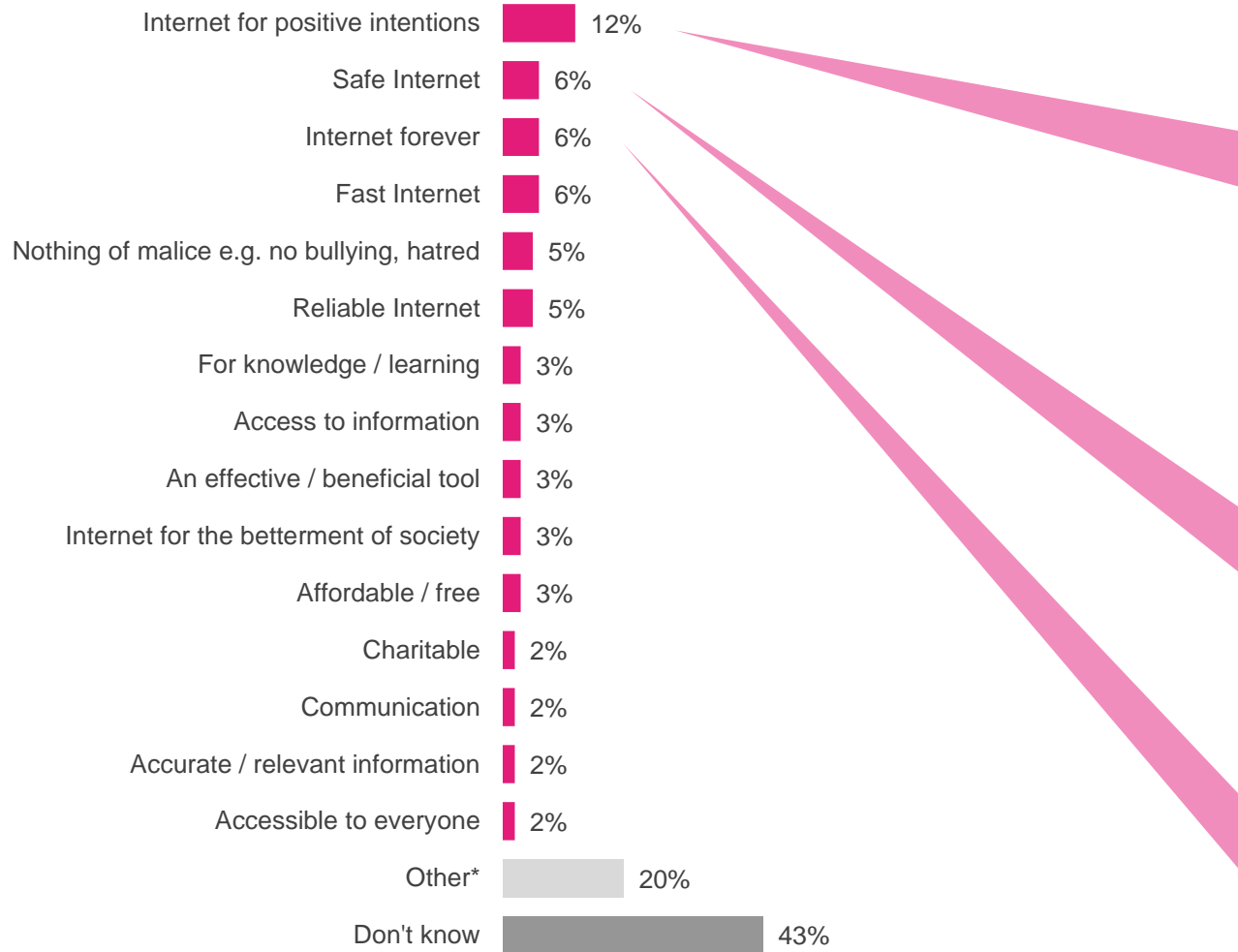
Q62 How did you first hear about InternetNZ?
 Base: Consumers aware of InternetNZ 2020 n=168; 2019 n=154; 2018 n=181

Understanding of the terms 'Internet for good' and 'Internet for all'

internetnz



Perceptions of an 'Internet for good'.



“Where everyone who uses the Internet has a positive experience and no one is harmed or exploited as a result.”

“The Internet being a tool that can be used for positive reasons and positive outcomes.”

“Using the Internet to do good things - promote a positive message, crowdfund for charity, find a lost dog, etc.”

“Using the resource for good, not bullying or keyboard warriors.”

“An Internet that is crime free and doesn't disseminate porn or false news, or incite violence and hatred.”

“An Internet that is Safe, Secure, and Private.”

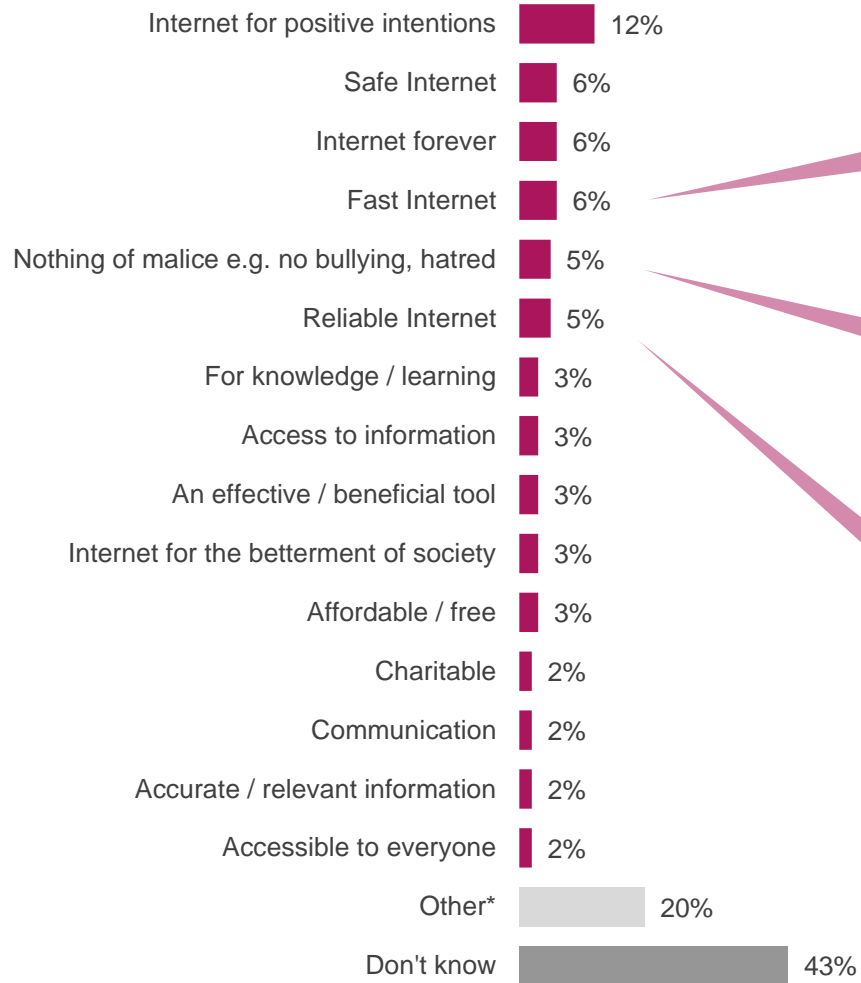
“Protection from scammers and predators. Access to ideas and information.”

“The Internet is going to be around us forever.”

“That it is going to keep doing what I want for as long as I need it.”

*All mentions 1% or lower included in 'other'.
 Q1Gi. First, what does 'an Internet for good' mean to you?
 Base: All people 2020 n=782

Perceptions of an 'Internet for good' (verbatim cont'd)



“Internet that is fast and accessible.”

“Fast unlimited Internet at low cost.”

“Using the Internet for good, positive actions that help others not for actions that bring others down.”

“Where people are not exploited, bullied, scammed. Where any profit made goes into making a positive difference for the most vulnerable in society.”

“An Internet without the bullying, lying, scamming, hate etc., that it seems full of at present.”

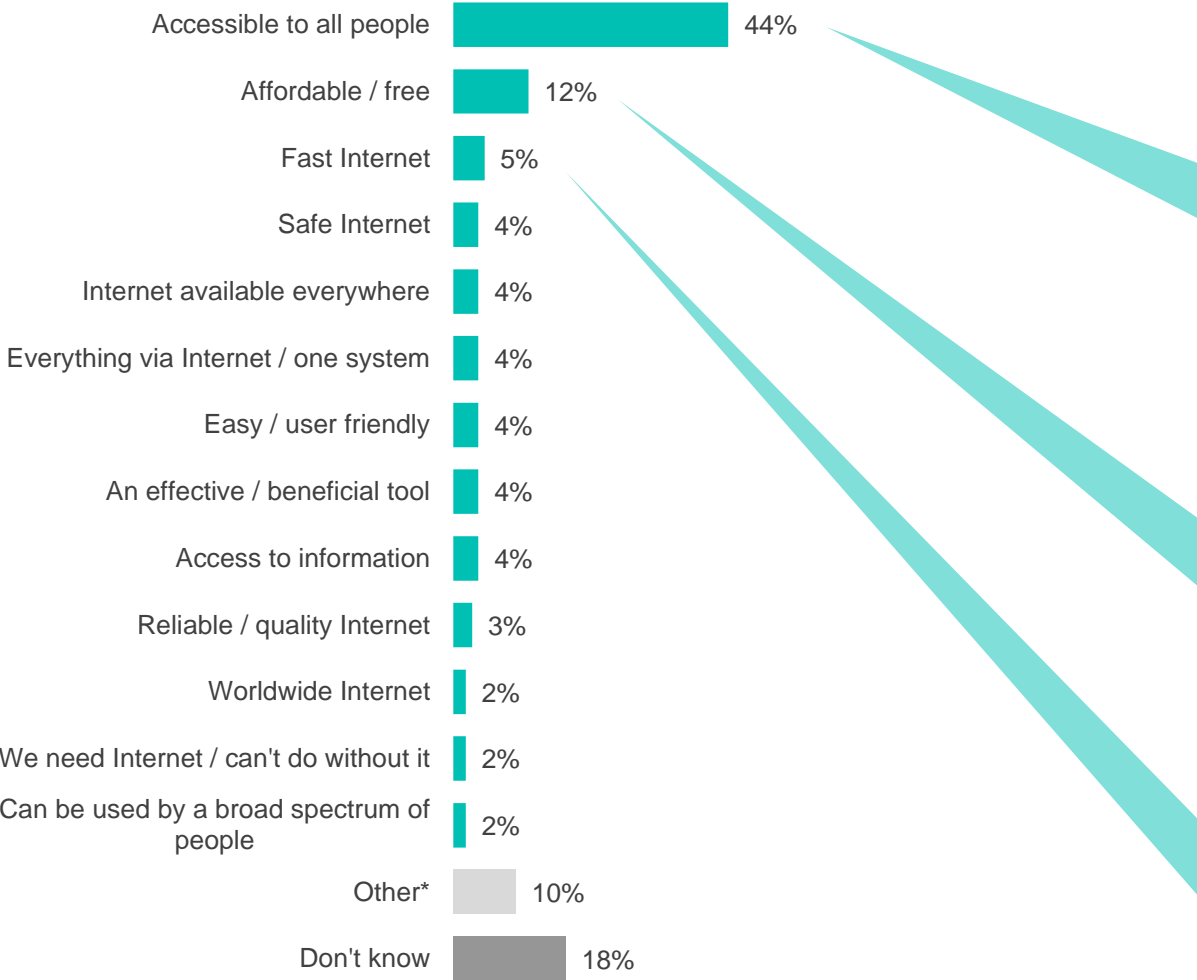
“A Internet that only has items that are correct and able to be researched properly. Not an outlet for porn/crime or other illegal topics.”

“Fast, easy to connect to and reliable.”

“An Internet that is stable and doesn't go down.”

*All mentions 1% or lower included in 'other'.
 Q1Gi. First, what does 'an Internet for good' mean to you?
 Base: All people 2020 n=782

For over four in ten New Zealanders an ‘Internet for all’ is an Internet that everyone can access.



“The Internet is physically and financially accessible for everybody.”

“Making sure everyone has access especially all children and we strive to make it safer for them.”

“Internet available regardless of income.”

“All NZers can access the Internet.”

“It is a basic human right and should be made available to everyone, regardless of socio-economic status.”

“Internet access that is affordable to everyone and available everywhere, also Internet content that is safe and appropriate for all audiences.”

“Accessible Internet for everyone. Available all places at the same quality. Plus very cheap or free.”

“No censorship and everyone has access to high speed Internet.”

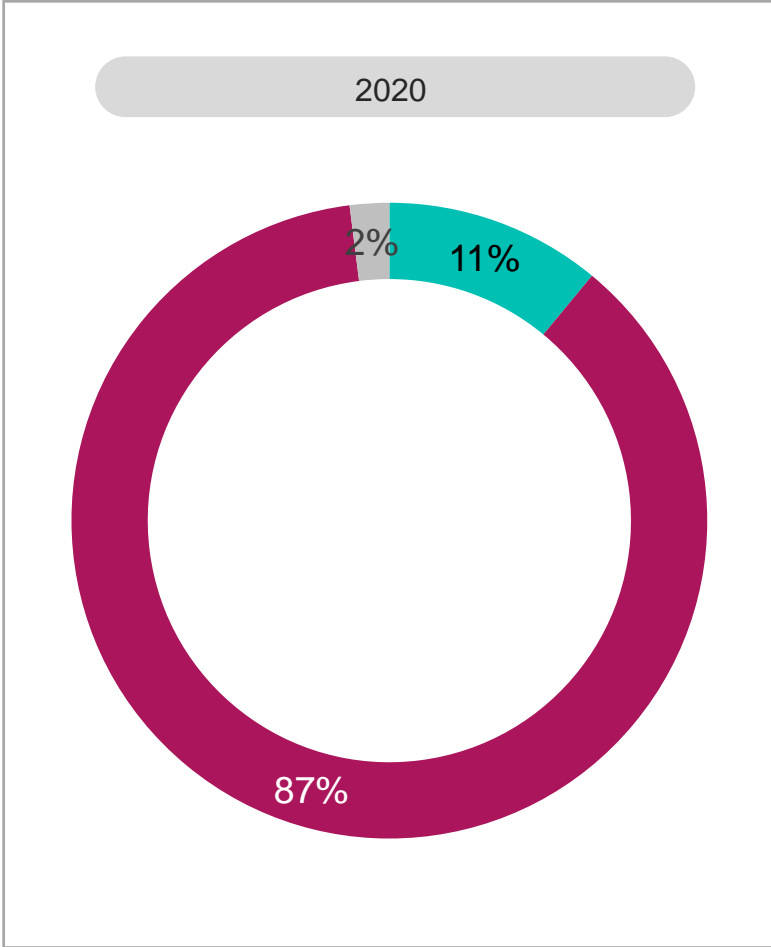
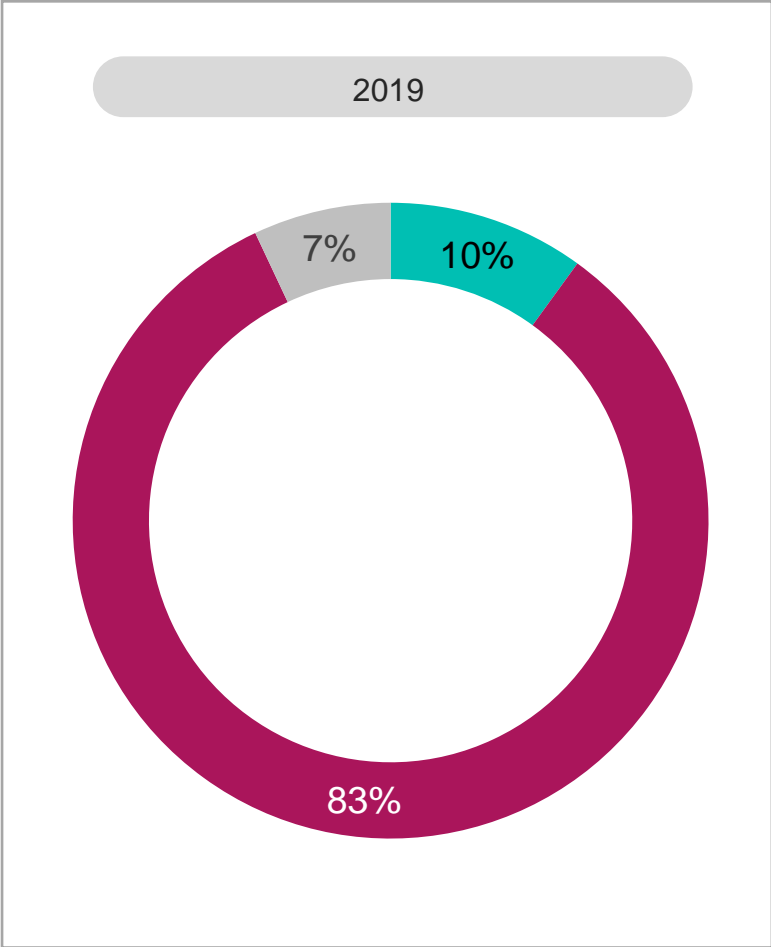
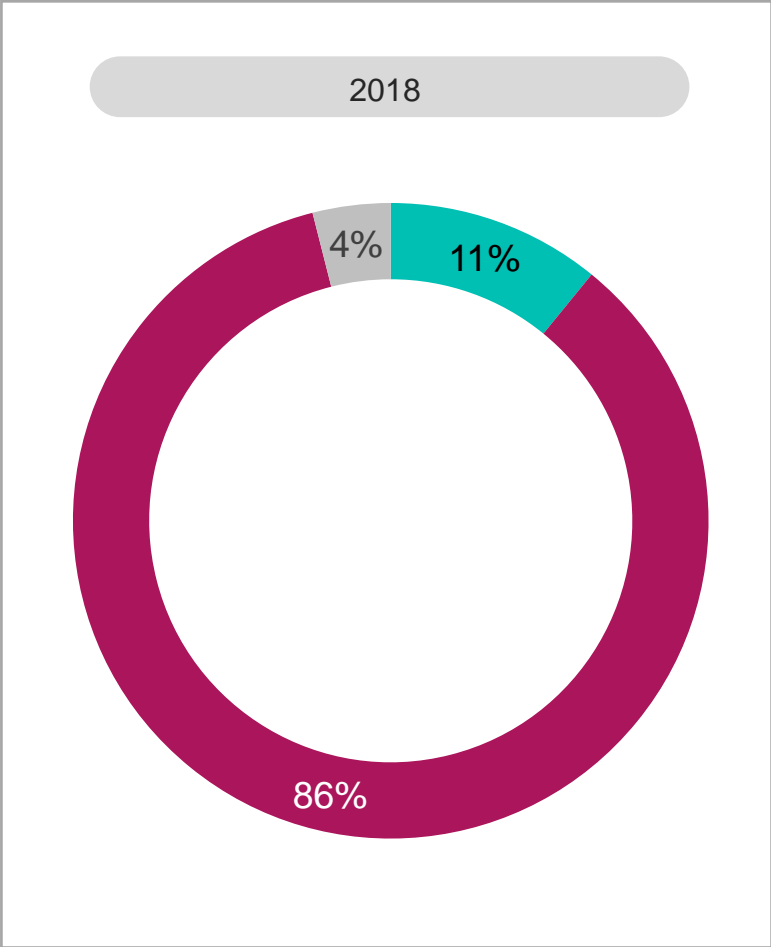
“Access to high speed Internet regardless of where you live.”

*All mentions 1% or lower included in 'other'.
 Q1Gi. First, what does 'an Internet for all' mean to you?
 Base: All people 2020 n=218

Appendix



Around one in ten people are aware of the National Broadband Map, which is in line with previous years



YES NO DON'T KNOW

Q66. Have you heard of the National Broadband Map?
Base: Consumers who access the Internet at home 2019 n=988; 2018 n=993

Significantly higher / lower than previous year

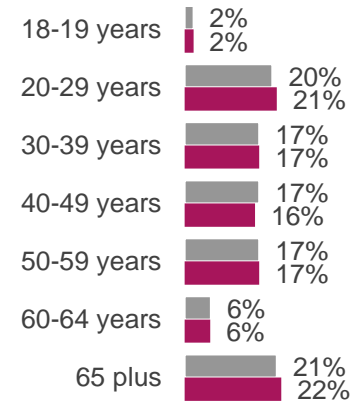
Respondent profile



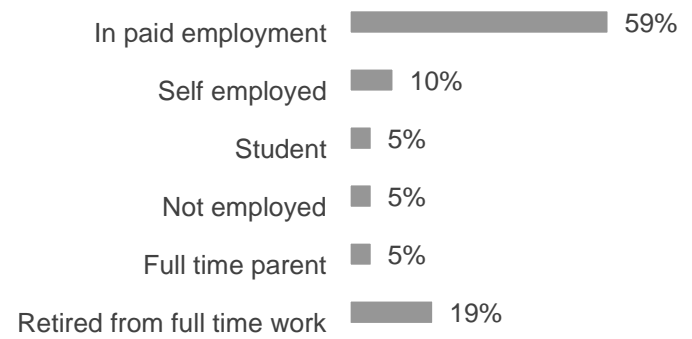
GENDER



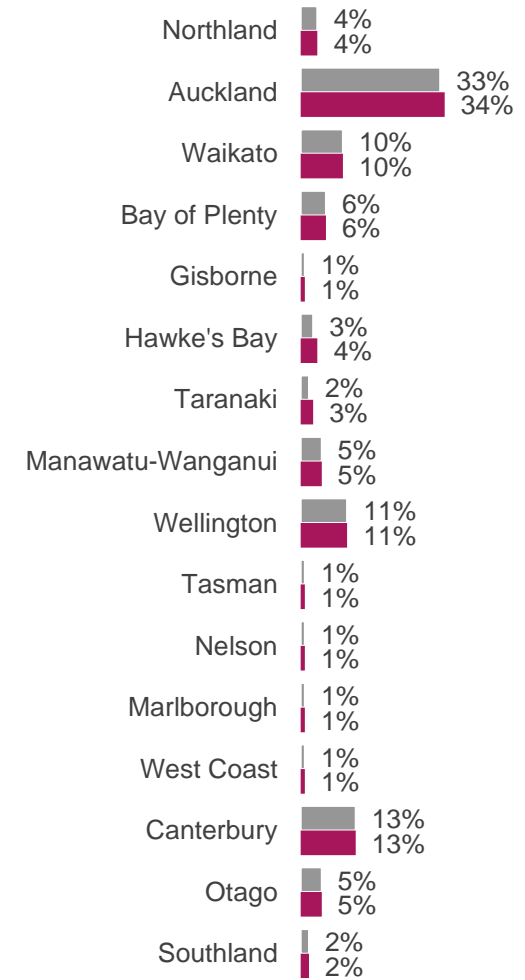
AGE



EMPLOYMENT



REGION





FOR FURTHER INFORMATION PLEASE CONTACT

Ellen Parkhouse | Michael Dunne

Colmar Brunton, a Kantar Company
Level 9, 101 Lambton Quay
Wellington 6011
Phone (04) 913 3000
www.colmarbrunton.co.nz