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WORLD INTERNET PROJECT NEW ZEALAND

2009 INTERNATIONAL RESULTS:

A New Zealand perspective

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Executive Summary

- This report outlines comparative 2009 findings from 10 of the countries participating in the World Internet Project (WIP), including New Zealand. The WIP is a longitudinal survey-based study undertaken within over 30 countries and regions, examining the social, political and economic impact of the internet.
- New Zealand has the second-highest internet usage rate (82%) among these 10 countries, below the United Arab Emirates at 94%, but similar to Australia, Sweden and the USA (all 80–82%). Mexico and Hungary had the lowest internet penetration at half New Zealand's level.
- In New Zealand, 53% of people aged 65 or over used the internet in 2009, second to the UAE. In some other countries such as Columbia, Hungary and Taiwan internet usage is steeply age-graded. In those nations fewer than 6% of older people were internet users, compared to over 80% of those aged 18–24.
- In 2009, New Zealand's broadband penetration (79%) was low compared with most countries, and conversely New Zealand had by far the highest prevalence of dial-up connections (20%). Note that in our latest, 2011 survey, broadband had risen markedly to 91%.
- In New Zealand at least 80% of users reported checking their email daily or several times per day, as did Australia, the UAE and the US. Online phone-calling (e.g. through Skype) was still a relatively uncommon activity for most WIP countries in 2009.
- New Zealand was at the lower end of the 10 countries for internet entertainment activities. 23% of New Zealand internet users reported playing online games at least weekly, similar to Australia and the UK, but lower than the USA (30%). New Zealand trails in online music consumption, with 25% of internet users downloading or listening to music online at least weekly, compared to 35% in Australia. New Zealanders spent more time browsing the web than most other countries, with 59% of users doing so at least daily, second only to Taiwan.
- New Zealand was in the leading group of countries for e-commerce and, after Australia, had the highest proportion of people using online banking (60% at least weekly in New Zealand, 62% in Australia). The USA was next highest at 50%. Online banking was very infrequent in the UAE (13%), Taiwan (8%), Sweden (3%) and Hungary (2%).
- New Zealanders were amongst the most trusting towards internet information, with 48% of respondents indicating that most or all information online is reliable. The internet was the first-ranked information source in all countries except Sweden. New Zealand and Australia are notable for downgrading the importance of traditional media as information sources compared to the internet.
- New Zealanders valued the internet for entertainment less than any other country. While all countries considered the internet more important for information than for entertainment, the difference was greatest in New Zealand (35%).
- Australians (66%) and New Zealanders (63%) were high in reporting that internet use increased contact with family. However, actual face-to-face time spent in person with family was likely to decrease as a result of internet use.

Introduction

This report outlines 2009 findings from 10 of the countries participating in the World Internet Project (WIP), including New Zealand. The WIP is a longitudinal survey-based study undertaken within over 30 countries and regions, examining the social, political and economic impact of the internet. The full International Report (available at www.digitalcenter.org) covers the results of the full survey, and includes additional countries that conducted their surveys in 2010. The intention of this report is to highlight some of the comparisons which are of particular interest from a New Zealand perspective. These include patterns of access, perceptions of the importance of various media as sources of information and entertainment, perceptions of the reliability of online information, and a range of comparisons of online activities.

The New Zealand findings are compared with those of the nine other countries that collected data in 2009. These countries are Australia, Colombia, Hungary, Mexico, Sweden, Taiwan, United Arab Emirates (UAE), the United Kingdom (UK) and the United States of America (USA). It should be noted that because the international report for 2009 was released after a significant time lag, there is now more recent data for New Zealand, from the survey conducted in 2011, the results of which are available at wipnz.aut.ac.nz.¹ This report refers to these newer findings in cases where there has been a notable shift in New Zealand's behaviour or attitudes since 2009. World Internet Project partner countries which did not contribute survey data in 2009 were: Canada, Chile, China, Cyprus, Czech Republic, Germany, Iran, Israel, Italy, Macao, Portugal, Singapore, South Korea and Spain.

The 2009 New Zealand data was collected through a telephone survey, conducted on contract by a private research firm. A random sample of 1250 New Zealand adults was selected, together with a booster made up of Maori, Pasifika and Asian² populations, and 12–15 year olds. The data set was weighted to reflect both the sampling design and the characteristics of the New Zealand population at the 2006 census. Note that some WIP member country samples comprise respondents aged 18 years and above only. This resulted in the basis for comparisons across all countries being adjusted to match. As a result, New Zealand figures in the international comparisons presented in this report differ slightly from the figures as presented in the report of the 2009 New Zealand survey (Smith et al., 2010).³

Usage of the internet

In eight of the 10 World Internet Project (WIP) countries that collected data in 2009, the majority of people aged 18 and older said that they use the internet. Overall, New Zealand has the second highest usage rate (82%), below the UAE (94%), and similar to Australia, Sweden and the USA, all 80–82%. Mexico (39%) and Hungary (44%) had the lowest internet penetration levels of the group. New Zealand usage of the internet continued to grow since 2009, rising to 86% (for age 12 and over) in the 2011 WIPNZ survey.

Gender. In all countries, a higher proportion of males than females said they use the internet. New Zealand had the smallest gender gap, at 1%. The largest disparity between the overall proportion of men and women using the internet was in Mexico, where the difference is 18%. See Figure 1 below.

¹ Smith, P., Gibson, A., Crothers, C., Billot, J., & Bell, A. (2011). *The Internet in New Zealand 2011*. Auckland, New Zealand: Institute of Culture, Discourse & Communication, AUT University.

² This study followed Statistics New Zealand definitions for ethnic groups.

³ Smith, P., Smith, N., Sherman, K., Goodwin, I., Crothers, C., Billot, J., & Bell, A. (2010). *The Internet in New Zealand 2009*. Auckland, New Zealand: Institute of Culture, Discourse & Communication, AUT University.

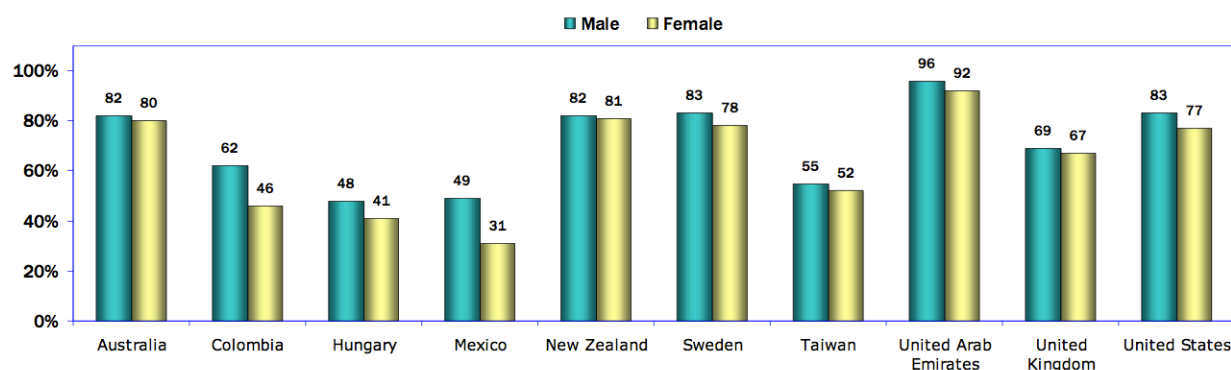


Figure 1: Percentage of each gender that use the internet

Source: World Internet Project International Report (third edition), 2012. USC Annenberg School Center for the Digital Future

Age. New Zealand is similar to Australia, Sweden, the United States and the United Kingdom, exhibiting a relatively gradual decline in usage across age groups, with young people using the internet more than older people. In New Zealand, 53% of people aged 65 or over used the internet in 2009. This proportion was higher only in the UAE (57%). Other countries such as Columbia, Hungary, Mexico and Taiwan showed a steeper decline across age groups. For example, in Colombia, Hungary and Taiwan, over 80% of those aged 18–24 used the internet, while 6% or less of those 65+ were internet users. These patterns reflect the length of time the internet has been available in particular countries. Where it has been available for a longer period, the drop in usage across age groups is less steep. See Figure 2 below.

Income. In all countries except the UAE, there was a notable difference in usage according to household income. New Zealand had the second smallest income divide, with 74% of those with lower incomes being internet users, compared with 95% for those in the upper half of incomes. The largest divide was in the UK, where there was a 40% difference between the lower and the upper income brackets (48% and 88% of users, respectively).

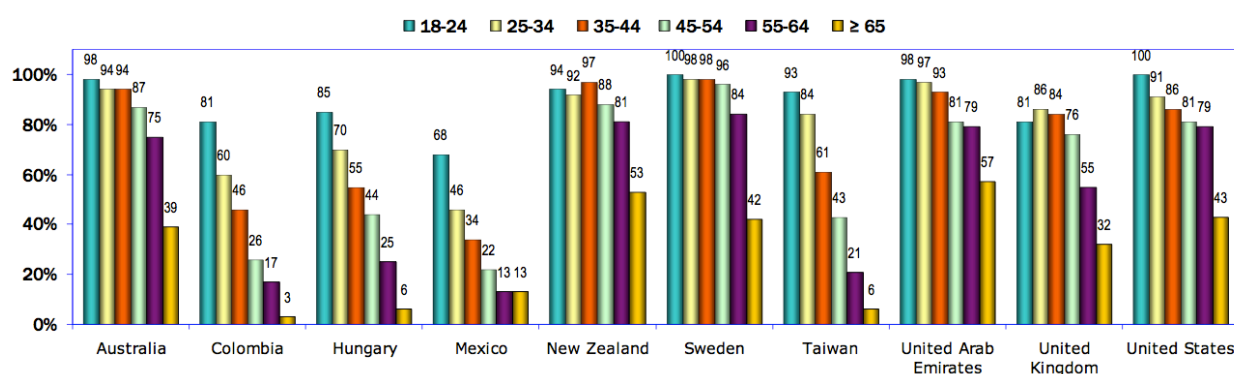


Figure 2: Percentage of each age group that use the internet

Source: World Internet Project International Report (third edition), 2012. USC Annenberg School Center for the Digital Future

Why are people not online? In every country except for Colombia and the UAE, ‘no interest/not useful’ was the most-cited reason for not being online. The expense of going online was not seen as a major obstacle by many non-users. Only 11% or less of non-users in all countries indicated a financial reason for not using the internet. In Colombia, not knowing how to use the technology was the most frequently cited reason (31% of non-users).

Connection type

In all participating countries and regions, the majority of users said they use a broadband connection when accessing the internet in their homes (Figure 3 below). In 2009, New Zealand's broadband penetration (79%) was low compared with most countries, while New Zealand had by far the highest prevalence of dial-up connections, at 20%. In Colombia, the UAE and the USA, 15% of users or more said they use a cell phone as the primary means of internet connection in the home. In 2009, the use of a mobile device as the primary means of internet connection at home was apparently non-existent in New Zealand. Note that connection types is one of the fastest-changing results in the WIPNZ survey. In 2011 dial-up connections dropped to 9% of home connections, while broadband was the primary means of home connection for 91% of users, well up from 2009.

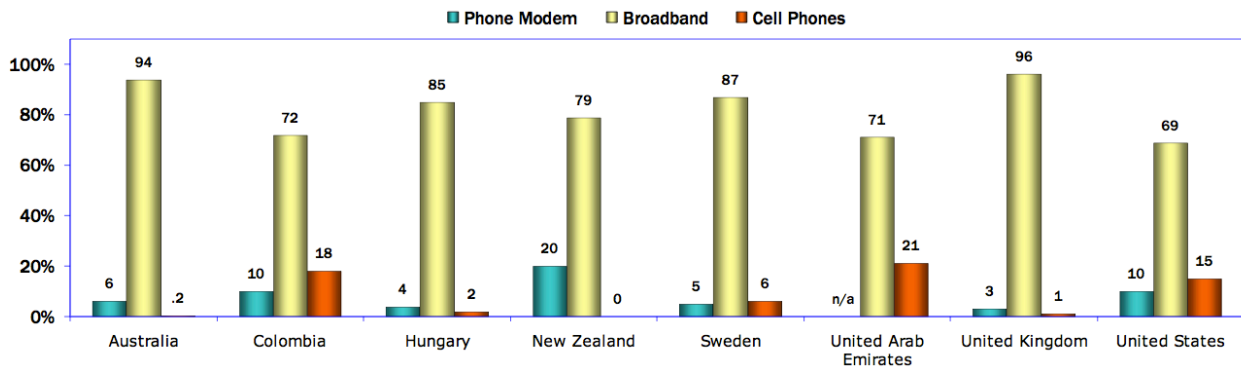


Figure 3: Type of internet connection used at home

Source: World Internet Project International Report (third edition), 2012. USC Annenberg School Center for the Digital Future

Online communication

Large percentages of users in most WIP countries said they check their email at least daily (Figure 4). In New Zealand, like Australia, the UAE and the United States, at least 80% of users reported checking their email daily or several times per day. New Zealand was very similar to Australia, with more people checking daily than several times per day. In the UAE and the USA, on the other hand, it was more common to check email several times a day. Although almost all internet users check email sometimes, note the large minority of users in Taiwan (16%) who said they do not use email at all. Online phone-calling (e.g. through Skype) was still a relatively uncommon activity for most WIP countries in 2009, the UAE being an exception, where 62% of internet users had made an online phone call. New Zealand had the next highest proportion of people that said they do online phone calling at least occasionally (32%), a figure comparable with Australia, Colombia and Hungary, but well above the USA (15%).

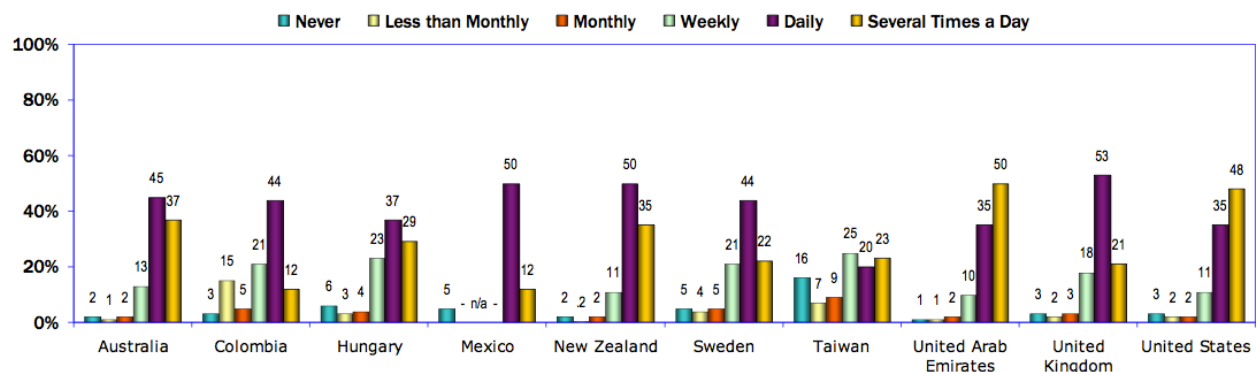


Figure 4: Frequency of email use

Source: World Internet Project International Report (third edition), 2012. USC Annenberg School Center for the Digital Future

Online activities

Taiwan, the UAE, and the USA were the most active in online gaming, and in downloading videos and music. New Zealand was at the lower end of the countries surveyed in terms of these entertainment activities. 23% of New Zealand internet users reported playing online games at least weekly, similar to Australia (23%), the UK (21%) and Colombia (21%), but lower than Taiwan (43%), the UAE (39%), Hungary (33%) and the USA (30%). Sweden had the lowest proportion of internet users that play games online at least weekly (14%).

On at least a weekly basis, 23% of internet users in New Zealand said they download or watch videos online (Figure 5), a rather lower proportion than in Australia (31%), Colombia (33%), Taiwan (30%) and the USA (30%). The UAE stands out in its high levels of video watching, with 55% doing so at least weekly. As in gaming, Sweden had the lowest levels of video use, with only 13% downloading or watching online video weekly. The patterns found for online music consumption were similar – New Zealand trails, with 25% of internet users downloading music or listening to it online at least weekly, compared to 56% in the UAE, and 35% in Australia. New Zealand's position on these measures will have been in part due to its lower level of broadband penetration. On the other hand, the 2011 WIPNZ survey results show a leap in broadband penetration accompanied by only a small increase in the consumption of music and video.

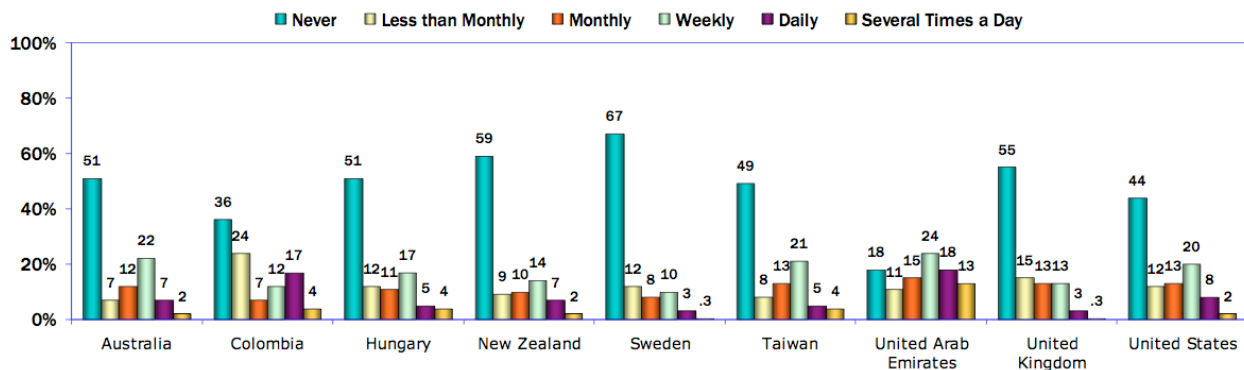


Figure 5: Frequency of internet use to download or watch videos

Source: World Internet Project International Report (third edition), 2012. USC Annenberg School Center for the Digital Future

New Zealanders reported using the internet to find travel information more frequently than many other countries, with 55% of internet users doing this at least monthly, a similar proportion to the UAE (55%), Australia (54%) and Taiwan (52%), but more than Sweden (39%), the USA (36%) and other countries such as Colombia (22%). In terms of actually booking travel online, New Zealand ranked lower than other countries. 20% of New Zealand users said they go on to actually make a travel reservation over the internet at least monthly, compared to 33% in the UK, 31% in Australia, 29% in the UAE, 23% in Sweden and 16% in the United States .

New Zealanders reported spending more time browsing the web than most other countries, with 59% of internet users doing so daily or several times a day. This was second only to Taiwan (74%), and similar to the USA (57%) and the UAE (55%). See Figure 6.

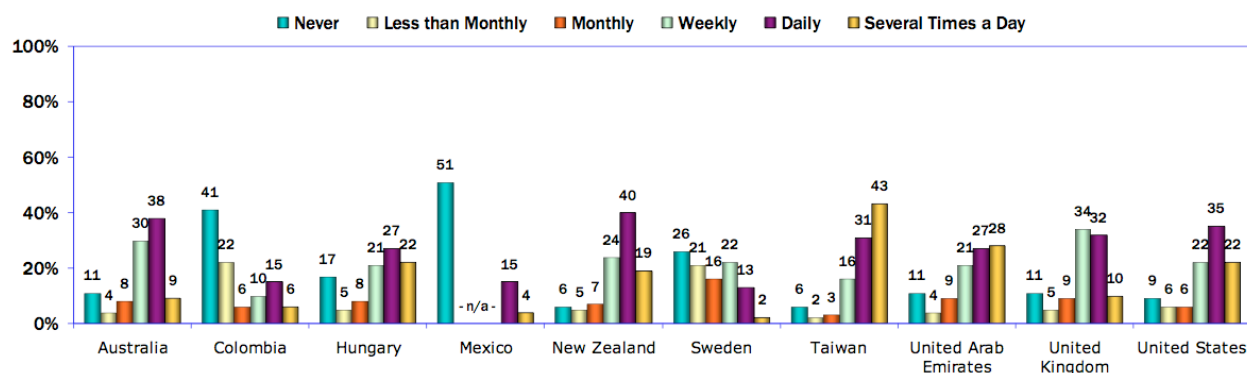


Figure 6: Frequency of surfing or browsing internet sites

Source: World Internet Project International Report (third edition), 2012. USC Annenberg School Center for the Digital Future

The internet and economic activity

New Zealand was in the leading group of countries in this category, and after Australia had the highest proportion of people using online banking (60% at least weekly in NZ, 62% in Australia). The USA was next highest (50%). Online banking was low in the UAE (13% at least weekly), Taiwan (8%), Sweden (3%) and Hungary (2%). In the related activity of paying bills online, Sweden stood out, with 76% of internet users paying a bill online at least monthly. It was followed by Australia (66%), the United States (59%), New Zealand (58%) and the UK (40%).

37% of New Zealand internet users purchase something online at least monthly, a lower proportion than that reported in Australia (52% at least monthly), the USA (49%), and the UK (47%), but ahead of all the other countries. See Figure 7 below.

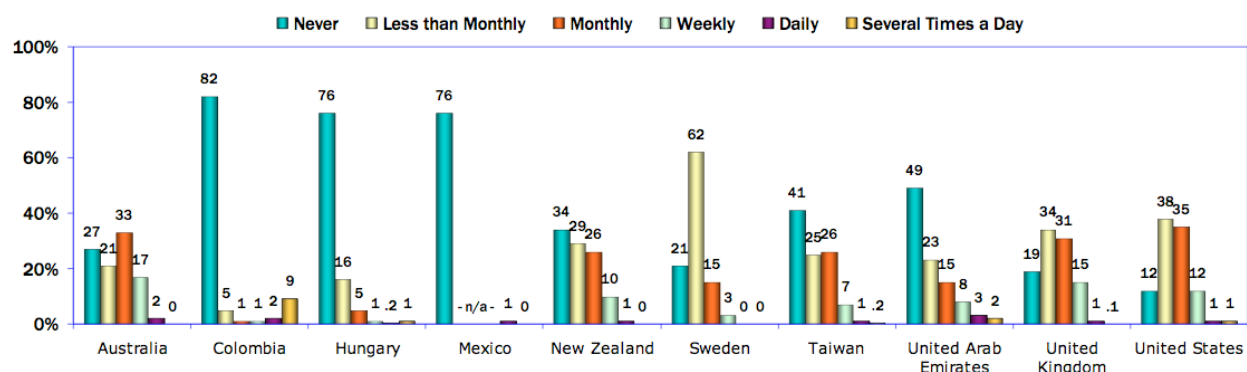


Figure 7: Frequency of purchasing online

Source: World Internet Project International Report (third edition), 2012. USC Annenberg School Center for the Digital Future

The majority of respondents in all countries except for Sweden and the UK reported that having internet access at work has improved their performance or productivity. In New Zealand, 64% of respondents held this view.

Perceptions of media sources

In most countries, there is a fair amount of scepticism about the reliability of information found on the internet. New Zealand was amongst the most trusting, with 48% of respondents identifying that most or all information online is reliable. Only Hungary was higher, with 58%. See Figure 8 below.

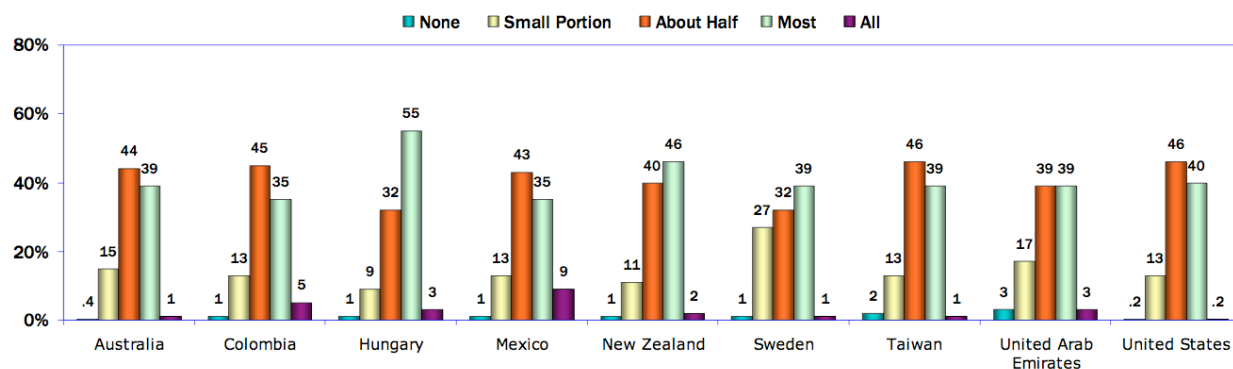


Figure 8: Proportion of online information deemed to be reliable

Source: World Internet Project International Report (third edition), 2012. USC Annenberg School Center for the Digital Future

Table 1, below, shows the proportion of people in each country that rated various media as an important source of information. While television, newspapers and radio were an important source of information to the majority of users in most countries, the internet was considered to be important by a far greater majority than these traditional media sources. The internet was the first-ranked information source in all countries except Sweden. New Zealand, along with Australia, is notable for the relative lesser importance of traditional media as information sources.

Table 1: Proportion of internet users rating various media as an 'Important' or 'Very Important' source of information

Source: World Internet Project International Report (third edition), 2012. USC Annenberg School Center for the Digital Future

	Internet	Television	Newspapers	Radio
2009				
Australia	73	41	40	49
Colombia	89	69	73	70
Hungary	74	69	59	53
Mexico	74	58	54	51
New Zealand	73	53	52	44
Sweden	55	66	60	54
Taiwan	81	67	62	38
United Arab Emirates	83	64	61	36
United States	79	68	56	56

A rather different picture emerges when considering ratings of the internet and other media as sources of entertainment (Table 2 below). Television was the most popular entertainment medium, above the internet, in all countries except Mexico. It is particularly noticeable that New Zealanders valued the internet for entertainment less than any other country. This is in line with the findings for online game playing and consumption of videos and music reported above. The internet was deemed more important

for information than for entertainment in all reporting countries. This difference was greatest in New Zealand, with a 35% difference between ratings of the internet as a source of information vs. entertainment. As mentioned above, this could be regarded a result of the late uptake of broadband connectivity in New Zealand as compared to most other countries in the sample. However, the 2011 WIPNZ survey found that New Zealanders' ratings of the internet as a source of entertainment had actually decreased since the 2009 survey not increased, even though broadband penetration has spread dramatically.

Table 2: Proportion of internet users rating various media as an 'Important' or 'Very Important' source of entertainment.

Source: World Internet Project International Report (third edition), 2012. USC Annenberg School Center for the Digital Future

	Internet	Television	Newspapers	Radio
2009				
Australia	43	56	23	50
Colombia	73	74	42	57
Hungary	56	72	48	57
Mexico	62	60	28	43
New Zealand	38	56	37	44
Sweden	42	66	25	31
Taiwan	63	70	42	29
United Arab Emirates	72	78	32	39
United States	63	78	29	59

Time spent on media

In most countries, internet users watched fewer hours of TV per week than non-users. This difference between users and non-users was largest in the UK (at 9 hours). In New Zealand, Australia and the USA it was 5 hours (see Figure 9 below). A similar pattern exists when comparing hours spent listening to the radio offline for internet users and non-users. Here, the largest difference was found in Australia (19 hours for non-users vs. 13 hours for users). In New Zealand, non-users listened to the radio for 15 hours per week, 3 hours more than users. In most countries, there was a small difference between users and non-users in the hours spent reading newspapers offline.

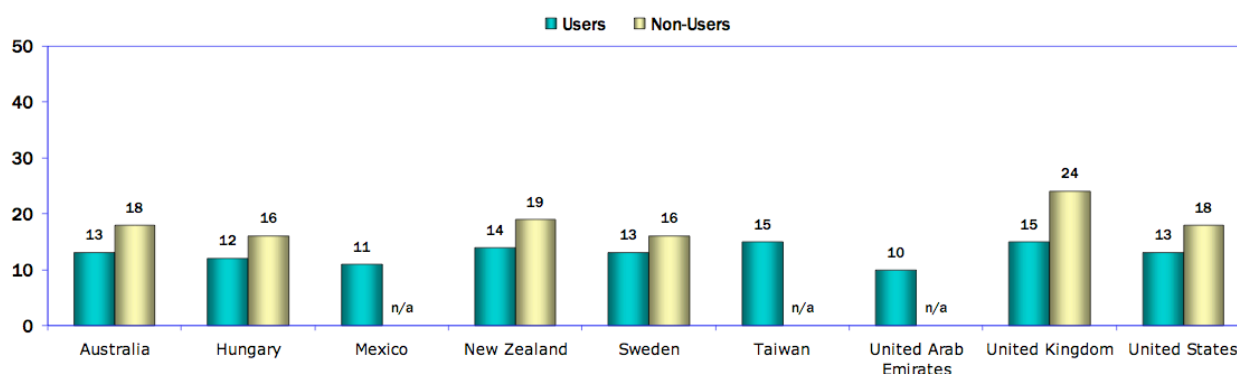


Figure 9: Average number of hours per week spent watching television for internet users and non-users

Source: World Internet Project International Report (third edition), 2012. USC Annenberg School Center for the Digital Future

Interpersonal contact

In almost all of the countries that surveyed in 2009, use of the internet was reported to increase contact with family. This was particularly true for New Zealand (63% report an increase), Australia (66%), and the UAE (67%). However, when asked specifically about face-to-face contact, respondents were more likely to report a decrease than an increase in time spent in person with family as a result of their internet use. Large differences were reported in the United States (32% reporting less time vs. 2% reporting more time), Sweden (31% vs. 3%), Australia (29% vs. 4%), New Zealand (24% vs. 4%) and Taiwan (20% vs. 2%). A similar pattern exists for relationships with friends: the internet has tended to increase overall contact, but was more often reported to have caused a decrease rather than an increase in time spent face to face.

Conclusions

This international comparison of results shows how New Zealand's relation with the internet is positioned compared to ten other countries, including several with which we are most generally comparable: Australia, UK, US and Sweden. Key areas where New Zealand either led or was in the leading group of countries included general usage, online communication and consumer behaviour.

The most significant area of weakness has been the relatively low broadband penetration in New Zealand with a corresponding high proportion of people using dialup (but note that our 2011 survey showed broadband access had risen to 91%). There was also a very small percentage of users who access the internet by cell phone. Perhaps related to the relatively low broadband level, New Zealand had lower levels of internet use for entertainment purposes than might be expected, and a low proportion of New Zealanders rate the internet as an important source of entertainment. *How fast* and *how much* broadband New Zealanders get remains an issue which has not been directly addressed in our survey.

The similarities to other countries are a reminder that New Zealanders have, in many respects, experienced the internet in broadly similar ways to people elsewhere. New Zealand is similar to Australia in moving away from traditional media towards the internet as a source of information.

We await the international comparisons of the countries, including New Zealand, who conducted a survey in 2011, to see how we are placed in the international setting now that we see a much higher uptake of both broadband and mobile internet access.

- For the latest results on New Zealanders' internet usage and attitudes, visit wipnz.aut.ac.nz to access our 2011 WIPNZ survey report.
- To view the complete international report from which these highlights are drawn, visit www.digitalcenter.org.