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WORLD INTERNET PROJECT NEW ZEALAND

INTERNATIONAL COMPARISONS 2008

Highlights from a New Zealand perspective

Allan Bell
Jennie Billot
Charles Crothers
Ian Goodwin
Karishma Kripalani
Kevin Sherman
Nigel Smith
Philippa Smith



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World Internet Project New Zealand
Institute of Culture, Discourse & Communication
AUT University
Auckland
New Zealand

www.wipnz.aut.ac.nz

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Introduction

This report outlines the first comparative set of findings from the World Internet Project (WIP) and highlights those issues which are of significance to the New Zealand context. The WIP is a longitudinal survey-based study undertaken within 30 countries and regions, examining the social, political and economic impact of the Internet. The findings presented within this report have been produced through the collaboration of 13 project member countries including New Zealand and provide the first comprehensive analysis of a broad range of issues relating to Internet access and use. In light of the current effects of the Internet, such as those related to communication, education, information-gathering and entertainment, this analysis provides not only a cross comparison of international Internet use, but also an opportunity to identify certain social implications for New Zealand.

The WIP measures the attitudes and perceptions of both users and non-users, in addition to identifying Internet usage information. Under the direction of the Institute of Culture, Discourse and Communication at AUT University, New Zealand's participation in this international project allows for the identification of areas of Internet use that are comparatively strong, weak and/or similar to those of the other project members. Moreover, it is the identification of these areas which may suggest the need for further research and exploration.

The international survey dataset is of a significant size, so this report highlights only those aspects which are identified as being of critical interest to New Zealand. These issues include patterns of access, perceptions in relation to other media, perceptions of reliability and importance, impact on social relationships, online safety issues and web 2.0 issues. How New Zealanders perceive and use the Internet in terms of the above areas is examined across the major demographic variables of gender, age, ethnicity, settlement type and household income. Findings indicate that New Zealand leads in the general usage rates, gender equality and educational use of the Internet. Other areas of high performance include online banking and email use. Conversely the low broadband penetration rate is an area of weakness. New Zealand has many similarities to other countries, including gaming patterns, music/video downloading, attitudes and impact on interpersonal contact.

As the first comprehensive study of its type in New Zealand, these national and internationally compared findings provide significant insight into key social changes related to the Internet. The on-going nature of the WIP enables monitoring of developments and trends in Internet usage both locally and internationally.

Project description

The WIP NZ survey contains 24 questions (including sub-questions) that are common to all WIP partners, to allow international comparisons, in conjunction with a set of 35 questions (including sub-questions) designed specifically for New Zealand. The international questions were agreed upon after discussion amongst all international WIP partners. The New Zealand-specific questions were developed by the WIP NZ team through a process that included a pilot survey. The questions asked in the WIP NZ survey are available from the WIP NZ website: <http://wipnz.aut.ac.nz>. The data was collected during 2007. The New Zealand findings are compared with those of 13 other countries, namely Australia, Canada, Colombia, the Czech Republic, Hungary, Israel, Macao, Singapore, Sweden, the United Kingdom, the United States and Urban China.

The New Zealand survey data was collected through a telephone survey, conducted on contract by a private research firm. A random sample of New Zealand adults was selected, together with a booster made up of Maori, Pasifika and Asian¹ 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. The analysed sample comprises 1430 respondents aged 16 years and above. For the overall sample, the 95% confidence interval (for percentages in the 30-70% range) is +/- 2.3%, and for the users subset +/- 3.4%.

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 may differ slightly from the figures as presented in Bell, Crothers, Goodwin, Kripalani, Sherman and Smith (2008)².

Profile of Use

In all 13 World Internet Project (WIP) countries and regions (except Hungary) the majority of people aged 18 and older are current Internet users. New Zealand shares with Canada the highest overall proportion of Internet users at 77%. New Zealand has the smallest gap between the use of the Internet by men and women, at 1%. The largest disparity between the overall proportion of men and women using the Internet is in Singapore, where 15% more men than women use the Internet. Only in the United States and Sweden do more women use the Internet than men. See Figure 1 below.

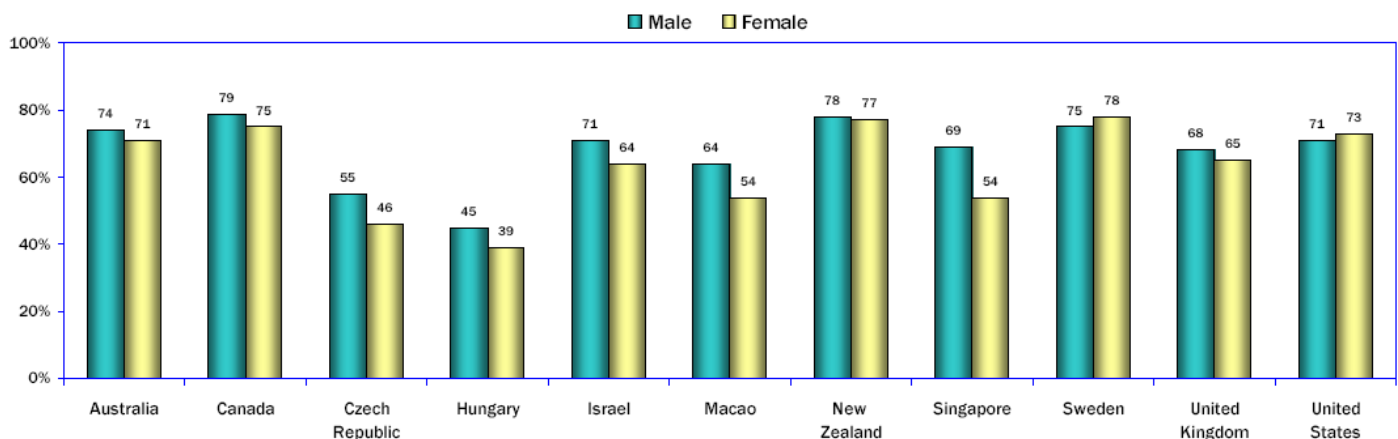


Figure 1: Percentage of each gender that use the Internet.

Source: The World Internet Project 2009, USC Annenberg School Center for the Digital Future

¹ This study followed Statistics New Zealand definitions for ethnic groups.

² Bell, A., Crothers, C., Goodwin, I., Kripalani, K., Sherman, K., Smith, P. (2008). *The Internet in New Zealand 2007. Final Report*. Auckland: Institute of Culture, Discourse & Communication, AUT University.

Some countries, including New Zealand, Australia, the United States and the United Kingdom, indicate a relatively gradual decline in usage across age groups, with young people using the Internet more than older people. In New Zealand, 39% of people aged 65 or over use the Internet. This proportion is only higher in the USA (42%) and Canada (45%). Other countries such as Israel, Hungary and the Czech Republic show a steeper decline across age groups. For example, in Macao and Hungary, only 5% of people aged 65 or over use the Internet. These patterns reflect the length of time Internet has been available. Where it has been available for a longer period, the decline in usage across age groups is less steep.

Why are people not online? In every WIP country other than the Czech Republic, Singapore, Sweden and the United States, “no interest/not useful” is the most-cited reason. The expense of going online is no longer a significant factor, with 10% or less of non-users in all of the countries except the Czech Republic indicating that going online is too expensive or they cannot afford the fees. New Zealand is similar to most countries in that having no interest or perceiving the Internet as not useful is cited by 45% of non-users as the main reason they do not use the Internet. Interestingly in Singapore, not knowing how to use the technology was the most frequently cited reason. See Figure 2 below.

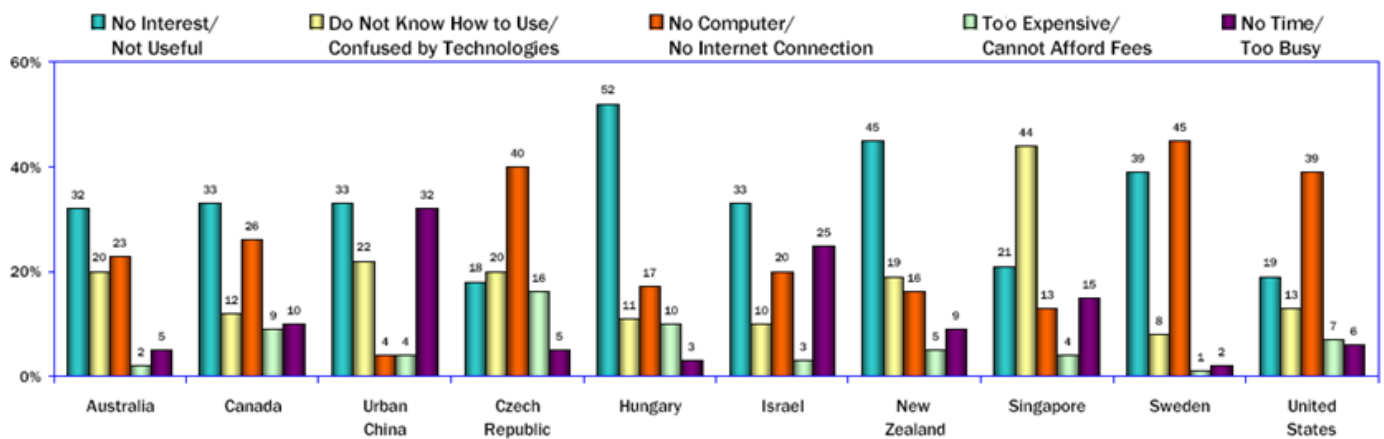


Figure 2: Reasons given for not using the Internet.
Source: The World Internet Project 2009, USC Annenberg School Center for the Digital Future

Profile of Access

In all participating countries and regions, the majority of users go online via a broadband connection. New Zealand’s broadband penetration (65%) is low compared with most countries, equal with Urban China and only ahead of Colombia (55%). Note that while broadband penetration in the UK (67%) and the USA (71%) is similar to New Zealand, in those countries, cell phone Internet access is beginning to account for a significant proportion of access.

Dialup continues to have significant presence in Colombia (44%) and New Zealand (35%). Australia (22%), the Czech Republic (24%) and the USA (22%) have smaller, but still significant proportions of users accessing the Internet via dialup. Internet access by cell phone is used by only a very small percentages of users, with the exception of the United Kingdom (21% of users), which reported the only double-digit percentage of online access by cell phone. See Figure 3 below.

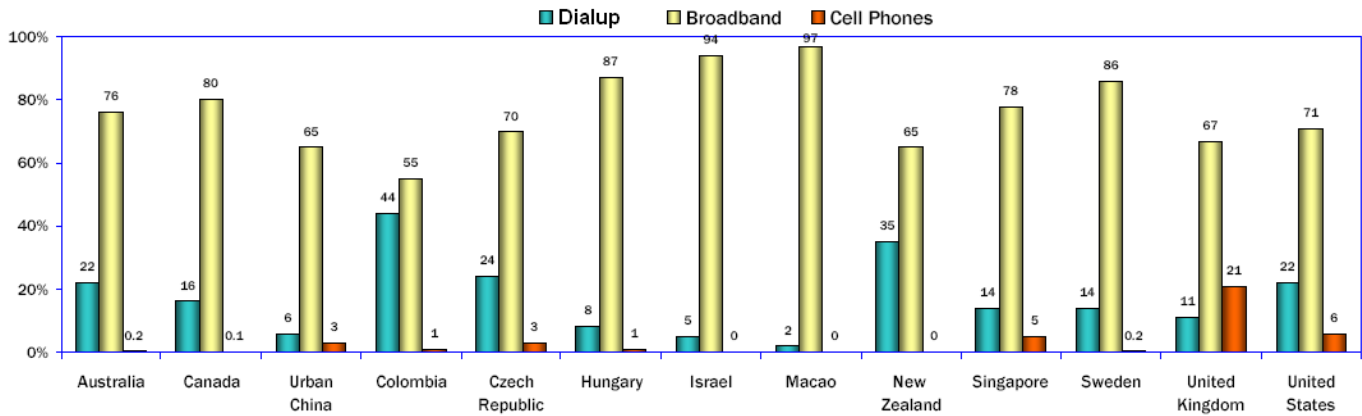


Figure 3: Type of Internet connection used at home.
 Source: The World Internet Project 2009, USC Annenberg School Center for the Digital Future

Activities online

Large percentages of users in most WIP countries check their e-mail at least daily. In Canada, New Zealand, and the United States, 80% or more of users report checking their e-mail daily or several times per day. The pattern of frequency of email checking in New Zealand is very similar to Australia, Canada, the Czech Republic and the UK. Only in Israel and the USA is the most common frequency of email checking several times a day. Although almost all Internet users check email sometimes, note the large minorities of users who do not use email at all in Urban China (19%), Macau (14%) and Israel (10%). See Figure 4 below.

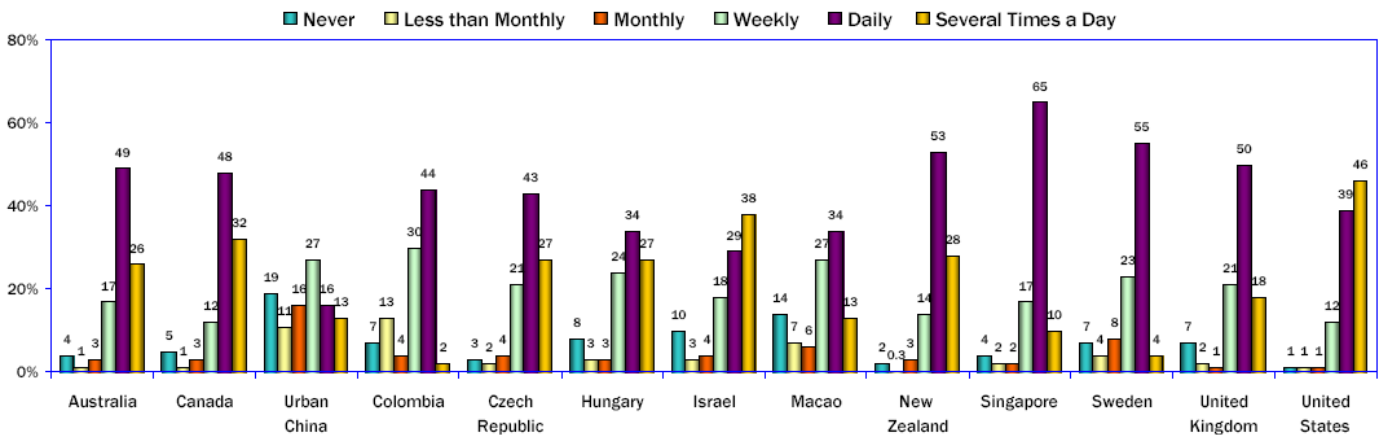


Figure 4: Frequency of email use.
 Source: The World Internet Project 2009, USC Annenberg School Center for the Digital Future

Relatively small percentages of users in all WIP countries and regions, including New Zealand, play games online or download music/videos. 17% of New Zealand Internet users play online games at least weekly. 19% download or watch video at least weekly. 25% download or listen to music at least weekly. New Zealand’s profile in these types of online activities is similar to most other countries at present, although Urban China stands out on all three activities as having higher proportions than other countries (for example 67% of Urban Chinese Internet users download or listen to music at least weekly).

The similarity of New Zealand’s profile to other countries and regions is interesting in the light of our internationally unusual proportions of dialup and broadband users. Further analysis of the data for New Zealand confirms that dialup users engage in high bandwidth activities less than broadband users. Despite this, New Zealand’s low broadband penetration rate is not yet adversely affecting our usage

patterns in high bandwidth activities compared to the international norms. However as high bandwidth activities become more commonplace, our low broadband penetration rate may emerge as a concern.

New Zealanders use the Internet to find travel information more frequently than many other countries, with the third highest proportion of at least monthly use of this type (56%), ranking behind Israel (57%) and the Czech Republic (66%). 22% of New Zealand users go on to actually make a travel reservation over the Internet at least monthly, which is the highest figure internationally. New Zealand is similar to most countries for accessing health and employment websites. However, along with Israel and Singapore, in New Zealand 20% or more of users go online at least monthly for religious or spiritual websites. This percentage is high internationally.

Reliability

On the reliability of the Internet, there remains some doubt amongst people in most countries. New Zealand is amongst the most trusting, with 49% of respondents identifying that most or all information online is reliable. Other more trusting countries included the Czech Republic (54%), Colombia and the United States (both 48%). See Figure 5 below.

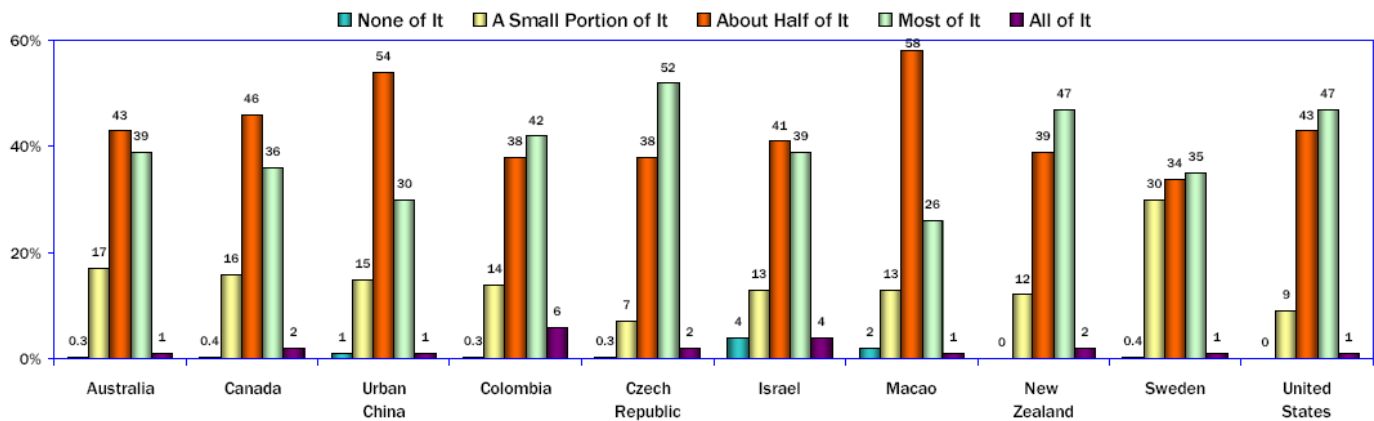


Figure 5: What proportion of online information is reliable?
 Source: The World Internet Project 2009, USC Annenberg School Center for the Digital Future

Perceptions of media sources

Most users say that television, newspapers and radio are important sources of information. However, users tend to rank the Internet more highly than these traditional media sources. As one would expect, non-users rate traditional media as more important than the Internet. Related to this is the finding that fewer users than non-users typically rate traditional media as important or very important. New Zealand is similar to most other countries in this regard. One departure from this trend is in North America, where radio and newspapers are considered important or very important by more users than non-users in both Canada and the USA.

This pattern is similar but less clear in relation to ratings of the Internet and other media as a source of entertainment. The diversity of entertainment available via the Internet and other media sources across the countries in the sample is likely a contributing factor here.

Time spent on media

In most countries, Internet users watch fewer hours of TV per week than non-users. This difference between users and non-users is largest in the United States (at 8 hours). In New Zealand it is 5 hours. Israel, Singapore and Sweden stand out as countries in which this difference is 1 hour or less. See Figure 6 below.

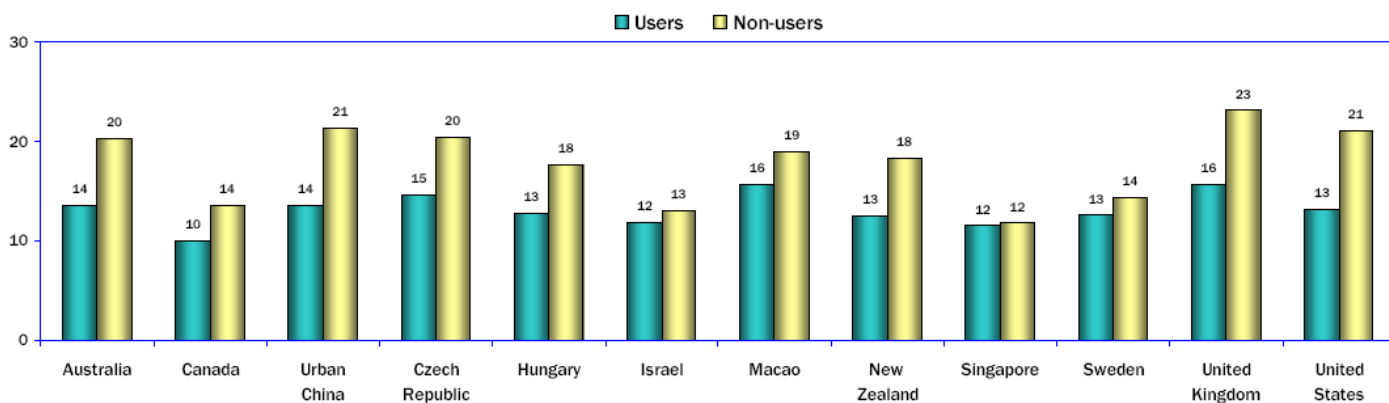


Figure 6: Average number of hours per week spent watching television.
Source: The World Internet Project 2009, USC Annenberg School Center for the Digital Future

A similar pattern exists when comparing hours spent listening to the radio offline for Internet users and non-users. Here, the largest differences were found in Australia (6 hours) and New Zealand (5 hours). In most countries there is no difference between users and non-users in the hours spent reading newspapers offline. Only in New Zealand and Australia is this difference greater than 1 hour (2 hours in both countries).

The Internet and education

Internet use at school is highest in Australia (at 7.2 hours per week). New Zealand (5.2 hrs) has the next highest rate of Internet use at school, ahead of the UK, USA and Canada. Urban China recorded the fewest hours per week (1.7 hrs) of Internet use at school. This pattern is mirrored for the frequency of accessing the Internet for school-related work. 51% of New Zealand students use the Internet for school related work at least daily. This figure includes a subset (20% of all students) who use the Internet in this way several times a day, which is the highest proportion internationally. It is interesting to note that, in contrast to New Zealand, no students in Australia access the Internet for school-related work several times a day. This is the case in no other country, which in conjunction with the other measures indicating Australia’s high engagement with the Internet for educational purposes, suggests a qualitatively different situation in Australia regarding the Internet and education. See Figure 7 below.

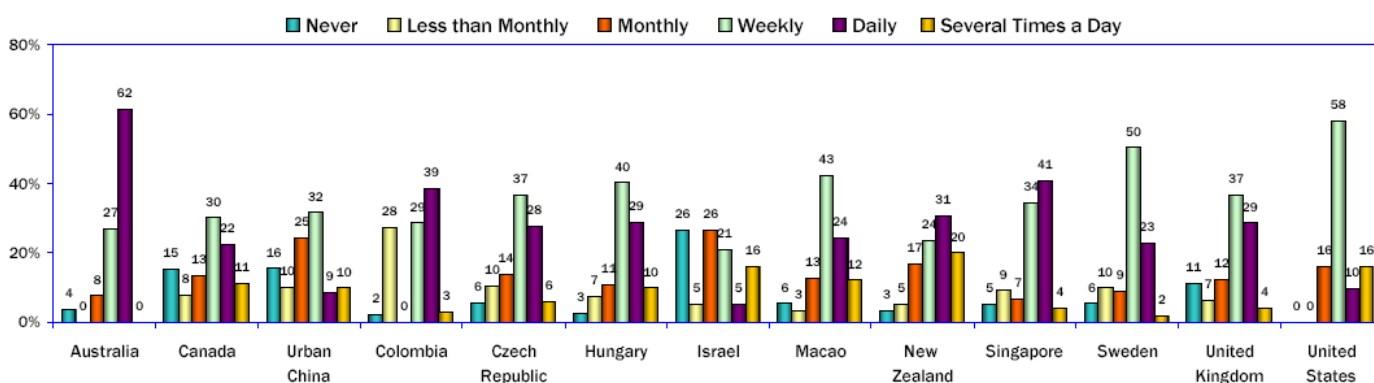


Figure 7: Frequency of Internet use for school related work.
Source: The World Internet Project 2009, USC Annenberg School Center for the Digital Future

Small percentages of Internet users go online to participate in distance learning for job training or an academic degree. However, internationally New Zealand has the highest proportion of people (at 21%)

using the Internet for distance education at least monthly. At the other end of the scale, Sweden has the lowest proportion (3%) of people accessing distance learning at least monthly over the Internet

The Internet and government

New Zealanders are fairly sceptical about whether the Internet increases an understanding of politics, increases political empowerment, increases engagement with public officials or increases involvement in government. On all these measures, New Zealanders were fairly evenly split between agreeing and disagreeing with the propositions put forward. Similar trends occur across most countries. It should be noted that more negative views towards the impact of the Internet on political participation are evident in some countries, such as Hungary, Israel, the Czech Republic and Sweden.

The Internet and economic activity

New Zealand is in the leading group of countries in this category, including having the highest proportion of people using online banking (56% at least weekly). In contrast, in Colombia and Hungary, over 77% of people never use online banking services. New Zealand has above average levels of online purchasing, less than that of the USA and UK, but ahead of Canada and Singapore. This is reflected in figures measuring both the frequency of online purchasing (40% at least monthly - see Figure 8 below) and the specific number of purchases made per month (1.2 per month). A similar situation exists in relation to paying bills online, where New Zealand’s online bill paying activity parallels Australia, Canada and the USA in having more than 50% of users doing this at least monthly.

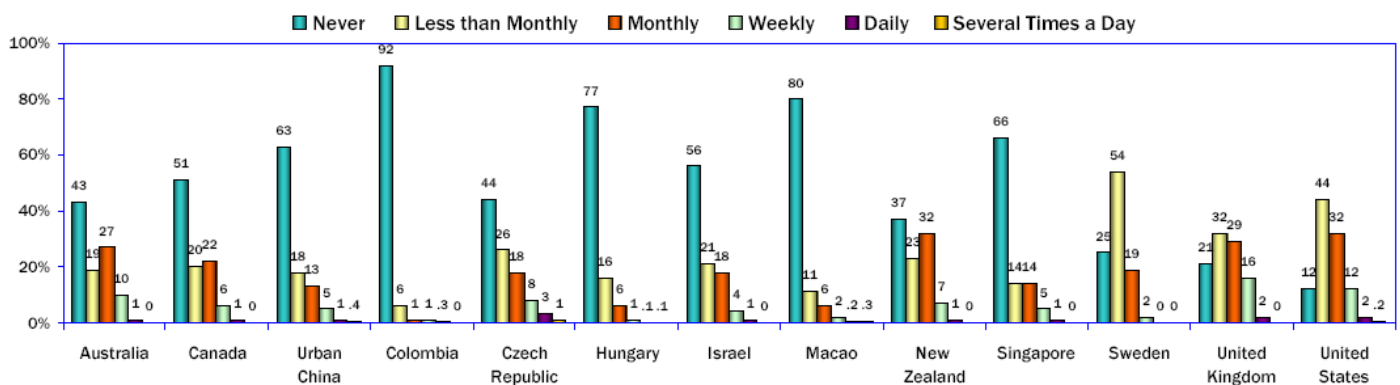


Figure 8: Frequency of purchasing online.
Source: The World Internet Project 2009, USC Annenberg School Center for the Digital Future

Most respondents in all WIP countries and regions, except Sweden, reported that having Internet access at work has improved their performance or productivity. In New Zealand, 62% of respondents held this view. While the proportions of people reporting that having Internet access has worsened productivity were small in all countries, this proportion (8%) was highest in New Zealand and Sweden.

Interpersonal contact

In all member countries and regions, use of the Internet is reported to increase contact with family and friends. However, specifically in terms of face to face contact, more people report spending less time with family than report spending more time as a result of their Internet use (although the large majority report no change in face to face time). Large differences were reported in the United States (32% reporting less time vs. 0% reporting more time), the Czech Republic (31% vs. 2%), Sweden (24% vs. 2%), Australia (31% vs. 3%), and Israel (29% vs. 4%). In New Zealand the disparity is 23% (less time) vs. 4% (more time). See Figure 9 below. A similar but less striking pattern exists for time spent with friends.

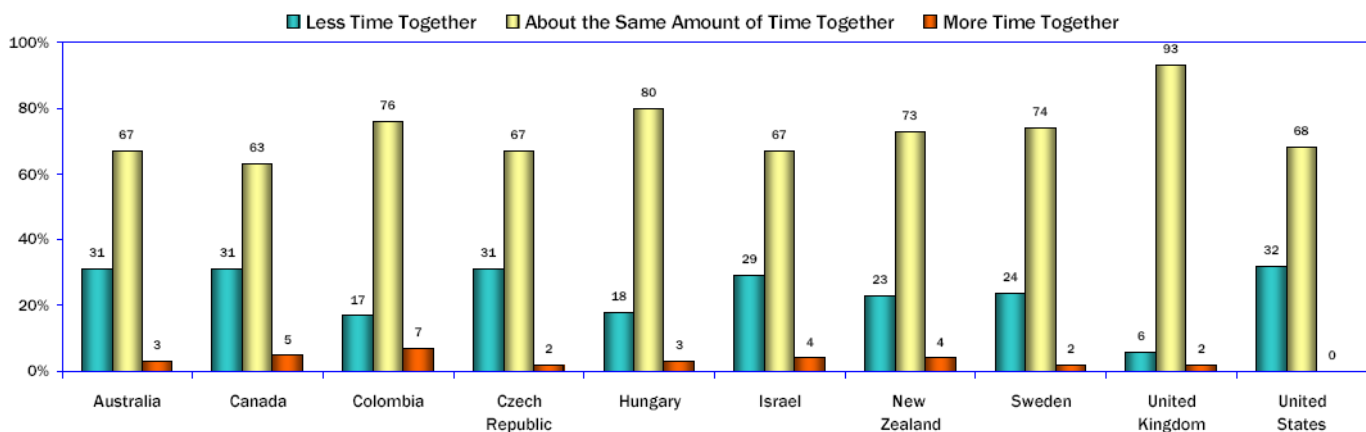


Figure 9: Perceptions of impact on face-to-face time with family since being connected to the Internet.
Source: The World Internet Project 2009, USC Annenberg School Center for the Digital Future

Conclusions

This first internationally comparative set of results shows how New Zealand is positioned in relation to a selection of other countries in terms of the social impact of the Internet. Key areas where New Zealand either leads or is in the leading group of countries include general usage (with 77% of people using the Internet), educational uses (with high Internet use at school and for distance education) and consumer behaviour. The latter category includes banking, purchasing, paying of bills and accessing travel information and making travel bookings. Furthermore, there are a higher proportion of users in New Zealand who access the Internet for information on religious and spiritual issues. New Zealanders are amongst the highest (at 49%) within the research group for believing that most or all online content is reliable.

The most significant area of weakness is the low broadband penetration in New Zealand with a corresponding high proportion of people using dialup to access the Internet. There is also a very small percentage of users who access the Internet by cell phone. As with most WIP countries and regions, a relatively small percentage of New Zealanders frequently use the Internet for entertainment. 17% play games, 19% download music/videos and 25% download or listen to music at least weekly.

It is noteworthy that New Zealand is similar to many other countries on a wide variety of measures, from attitudes towards the Internet through to the impact that it has on patterns of socialising. Almost all participating WIP partners had similar rankings on the use of the Internet for accessing information as being more important than traditional media sources. In addition, all research locations, including New Zealand, indicate scepticism as to the use of the Internet for increasing political awareness and involvement. These similarities are a reminder that New Zealanders, in many respects, are experiencing the Internet in broadly similar ways to people in other countries.

New Zealand's position amongst the leading countries in the world on several measures confirms that New Zealanders are eager to engage with the opportunities presented by the Internet. This pattern indicates how the Internet is implicated in social change. As in other countries, the Internet may act as both a leveller and a differentiator in society. The disparities across demographic groups are moderate in New Zealand compared with other countries, so it is a timely reminder to ensure that new trends and developments do not exacerbate the existing differences in Internet use across the population.

The World Internet Project currently includes Australia, Canada, China, Colombia, Czech Republic, Hungary, Israel, Macao, New Zealand, Singapore, Sweden, United Kingdom, and the United States. As of 2009, also included in the project are Chile, Cyprus, Germany, Iran, Italy, Japan, Mexico, Portugal, South Korea, Spain, and United Arab Emirates. For highlights of the 2009 World Internet Project Report from a New Zealand context, visit <http://wipnz.aut.ac.nz>. To order a copy of the complete report, visit <http://www.digitalcenter.org>.