Appendix B of InternetNZ Submission:
Post-2020 Framework for Fixed Line Services

Broadband use and future needs

February 2017
Telephone Omnibus Survey
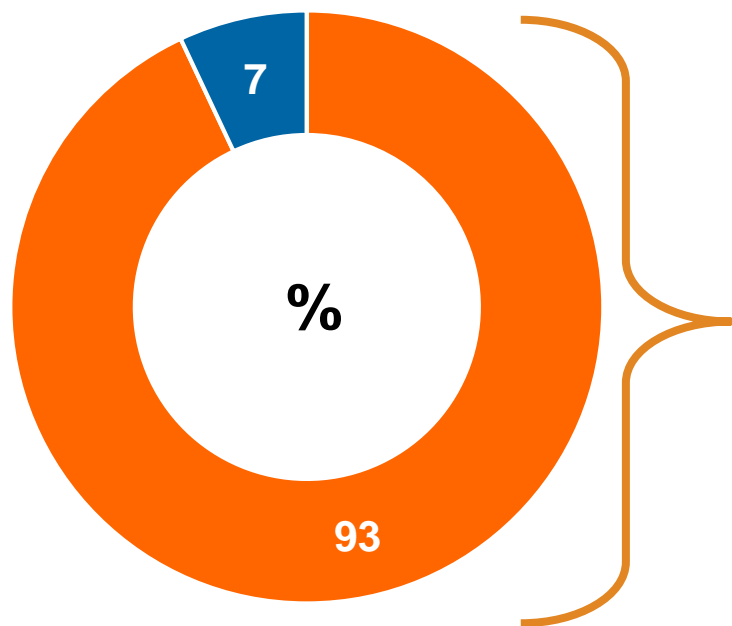
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Methodology

- Results in this report are based upon questions asked in the UMR Research nation-wide omnibus survey. This is a telephone survey of a nationally representative sample of 750 New Zealanders 18 years of age and over.

- Fieldwork was conducted from the 22nd of February to the 2nd of March 2017 at UMR Research's national interview facility in Auckland.

- The margin of error for a sample size of 750 for a 50% figure at the 95% confidence level is ± 3.6%.

Summary

- Around 9 in 10 (93%) respondents declared that their home is connected to the internet.

  - From those who have an internet connection, over half (56%) declared that their home is connected to the internet via a normal copper phone line and just under a third (32%) declared that they have ultra fast broadband (fibre connection).

- Nearly two thirds (65%) of respondents claimed that they use the internet more ('a lot more' + 'a bit more') compared to three years ago with only 7% declaring they use it less ('a lot less' + 'a bit less') now than three years ago.

  - Over two fifths (44%) declared that they use the internet 'a lot more' now than three years ago.

  - Older respondents (60 plus) were significantly less likely to say that they use the internet more compared to three years ago (41%) than respondents who are younger (74%).

  - Respondents who said that they were likely to want faster broadband in the future were also much more inclined (74%) to say that they use the internet more now than three years ago compared to respondents who are unlikely to want faster broadband (42%).

- Three quarters of New Zealanders confirmed that they are likely ('very likely' + 'somewhat likely') to want faster broadband in three years' time and just over a fifth (22%) were unlikely ('very unlikely' + 'somewhat unlikely') to want faster broadband.

  - Nearly half (46%) confirmed that they are 'very likely' to want faster broadband in three years' time.

  - Rural respondents were more likely to want faster broadband in three years' time (80%).

  - Older respondents (60 plus) were considerably less likely to say they would want faster broadband in the future (55%) compared to respondents who are younger (82%).

- 6 in 10 (61%) New Zealanders felt it is unfair that rural residents do not have access to ultra-fast broadband. Around a quarter (26%) felt that copper-based connections are good enough for rural users, and 13% were unsure.

  - Female respondents and Christchurch residents were more inclined to feel it is unfair for rural residents not to have access to ultra-fast broadband (68% and 71% respectively).

  - Respondents who already have a fibre connection were slightly more likely to feel it is unfair for rural residents not to have access to ultra-fast broadband (66%).

Home connection/type of connection

- Is your home connected to the Internet?

- To the best of your knowledge does your home internet connection plug into a normal copper phone line, for example ADSL or VDSL. Or is it ultra fast broadband sometimes called fibre?
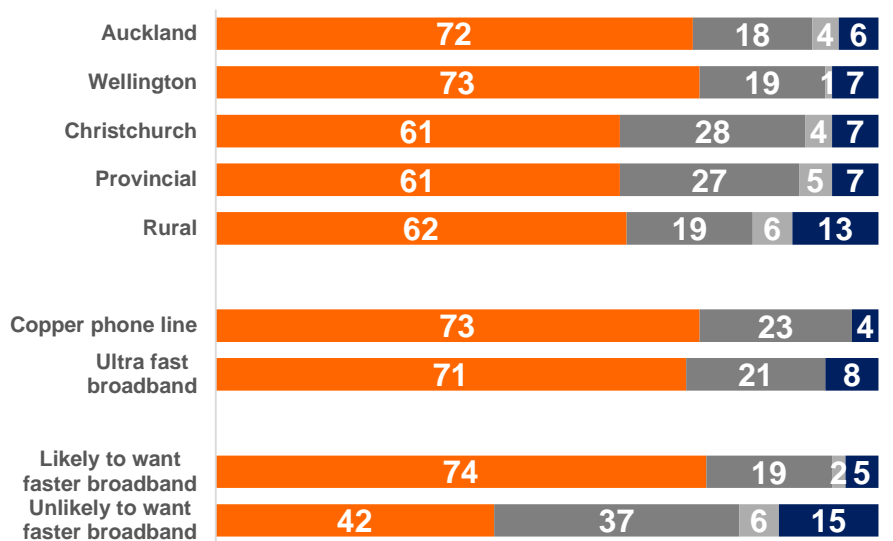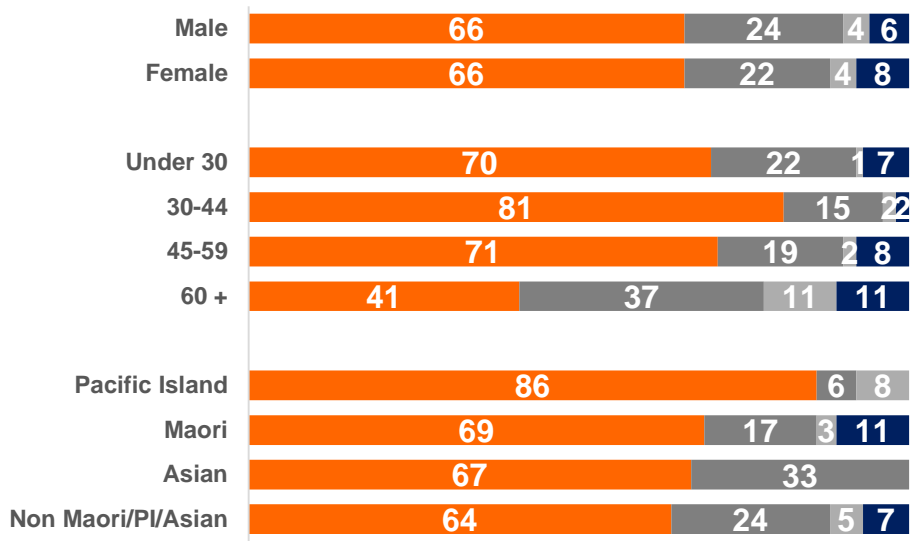
Copper phone line **Ultra-fast broadband**
Unsure **Other**

Yes 93%

7

93

%

Yes No Unsure

56

32

%

4

8

| 1% Wireless | 1% Wi fi | 1% Satellite | 1% Cable |

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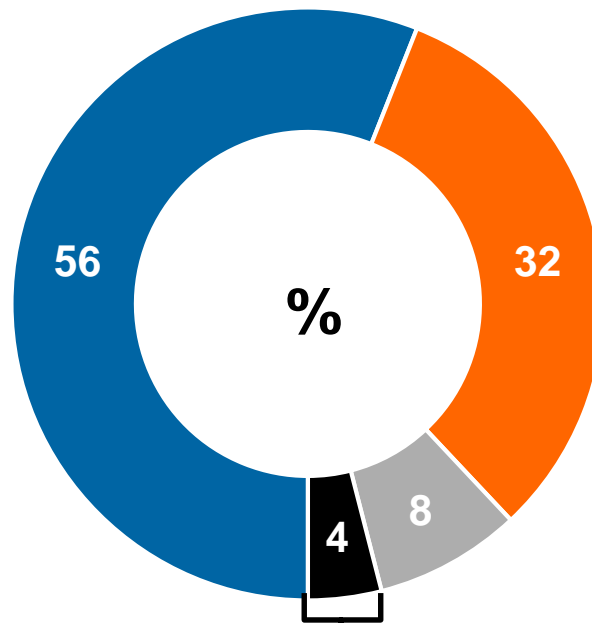
Internet usage

- Compared with three years ago, is your household using the internet a lot more, a bit more, about the same, a bit less or a lot less?

65 **7**

Usage	A lot more	A bit more	About the same	Unsure	A bit less	A lot less
	44	21	23	5	4	3

Legend: ■ A lot more ■ A bit more ■ About the same ■ Unsure ■ A bit less ■ A lot less

	More	About the same	Unsure	Less
Male	66	24	4	6
Female	66	22	4	8
Under 30	70	22	1	7
30-44	81	15	2	2
45-59	71	19	2	8
60 +	41	37	11	11
Pacific Island	86	6	8	
Maori	69	17	3	11
Asian	67	33		
Non Maori/PI/Asian	64	24	5	7

	More	About the same	Unsure	Less
Auckland	72	18	4	6
Wellington	73	19	1	7
Christchurch	61	28	4	7
Provincial	61	27	5	7
Rural	62	19	6	13
Copper phone line	73	23		4
Ultra fast broadband	71	21		8
Likely to want faster broadband	74	19	2	5
Unlikely to want faster broadband	42	37	6	15

Legend: ■ More (A lot more + a bit more) ■ About the same ■ Unsure ■ Less (A lot less + a bit less)

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Need for ultra-fast broadband in the future

- Thinking about how your household might use the internet in the future, in about three years' time how likely is it that you will want a faster internet connection?

75   **22**

Usage

46	29	3	13	9

- Very likely
- Somewhat likely
- Unsure
- Somewhat unlikely
- Very Unlikely

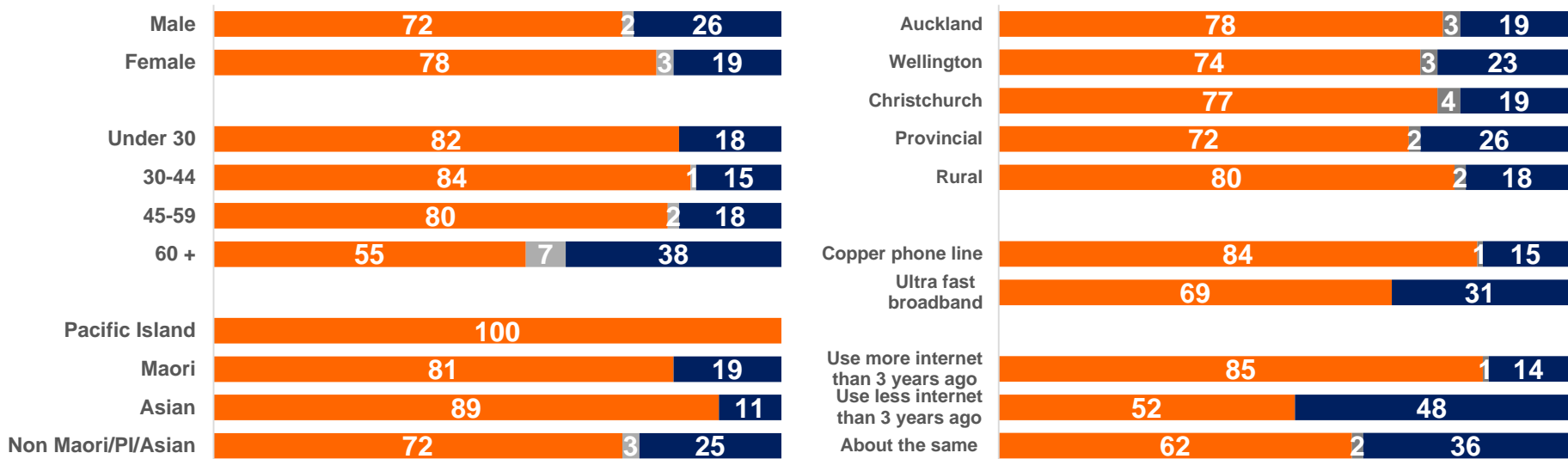|	Likely	Unsure	Unlikely
Male	72	2	26
Female	78	3	19
Under 30	82		18
30-44	84	1	15
45-59	80	2	18
60 +	55	7	38
Pacific Island	100		
Maori	81		19
Asian	89		11
Non Maori/PI/Asian	72	3	25

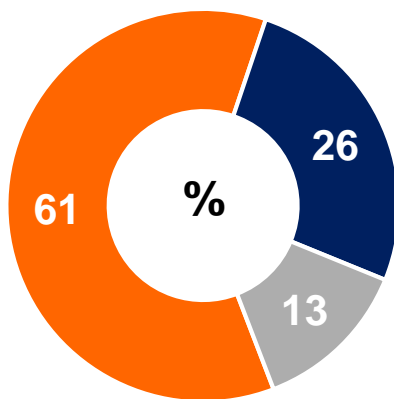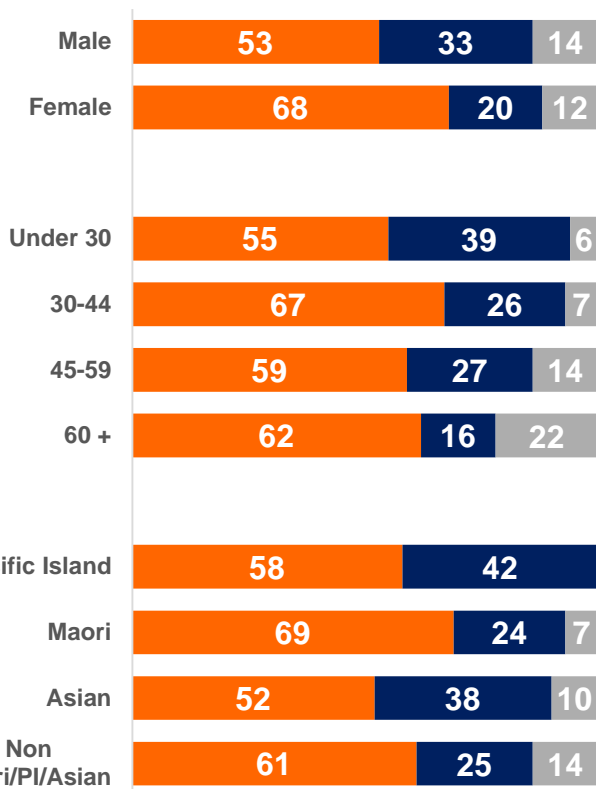|	Likely	Unsure	Unlikely
Auckland	78	3	19
Wellington	74	3	23
Christchurch	77	4	19
Provincial	72	2	26
Rural	80	2	18
Copper phone line	84	1	15
Ultra fast broadband	69		31
Use more internet than 3 years ago	85	1	14
Use less internet than 3 years ago	52		48
About the same	62	2	36

- Likely (Very likely + Somewhat likely)
- Unsure
- Unlikely (Very likely + Somewhat likely)

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Do rural areas need fibre?

- Which of the following is closest to your view even if not exactly right?
- *The fact that many rural users have to put up with often slower and less reliable copper based internet connections **isn't fair** when compared to the better connectivity options available for urban New Zealanders.*
- *While they might be slower and less reliable, copper services are generally **good enough** for rural users.*

	"Isn't fair"	"Good enough"	Unsure
Male	53	33	14
Female	68	20	12
Under 30	55	39	6
30-44	67	26	7
45-59	59	27	14
60 +	62	16	22
Pacific Island	58	42	
Maori	69	24	7
Asian	52	38	10
Non Maori/PI/Asian	61	25	14

Donut chart: 61 "Isn't fair", 26 "Good enough", 13 Unsure

	"Isn't fair"	"Good enough"	Unsure
Auckland	57	31	12
Wellington	57	25	18
Christchurch	71	18	11
Provincial	62	25	13
Rural	59	30	11
Copper phone line	61	31	8
Ultra fast broadband	66	23	11
Likely to want faster broadband	63	29	8
Unlikely to want faster broadband	57	19	24
Use more internet than 3yrs ago	64	29	7
Use less internet than 3yrs ago	64	19	17
About the same	57	23	20

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