



Digital Natives
May 2010 – April 2011

“The Danger of a Label”

Prepared by Roy Morgan Research

October 2011

Digital Natives:

- *Are people who have grown up in the digital world using technology as a way to communicate, record, educate, and understand society.*
- *Have had access to computers, cell phones, email, and other forms of technology since birth.*
- *Speak the language of technology and are as comfortable with technology as past generations have been with pen and paper.*



Roy Morgan Research New Zealand

Roy Morgan Single Source data incorporates over 12,000 interviews from a nationally representative sample of New Zealanders aged 14+.

1. Establishment Survey



Phone Interview

2. Brand Planner

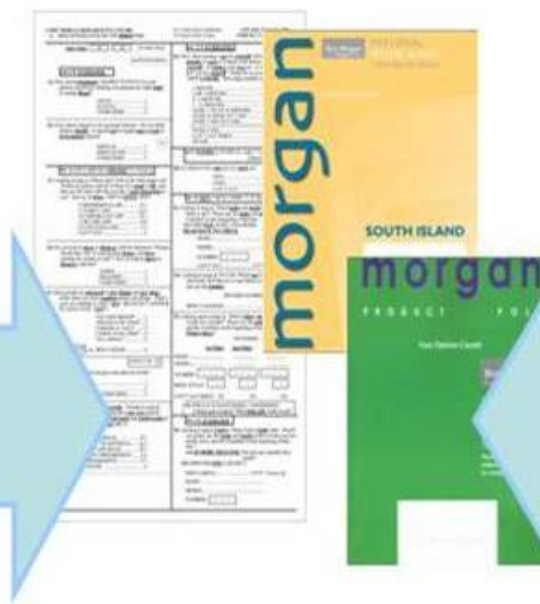
Self Completion



Establishment Survey

Sample over 25,000 per year

Information collected includes demographics, voting intentions, vehicle intentions and consumer confidence



Brand Planner

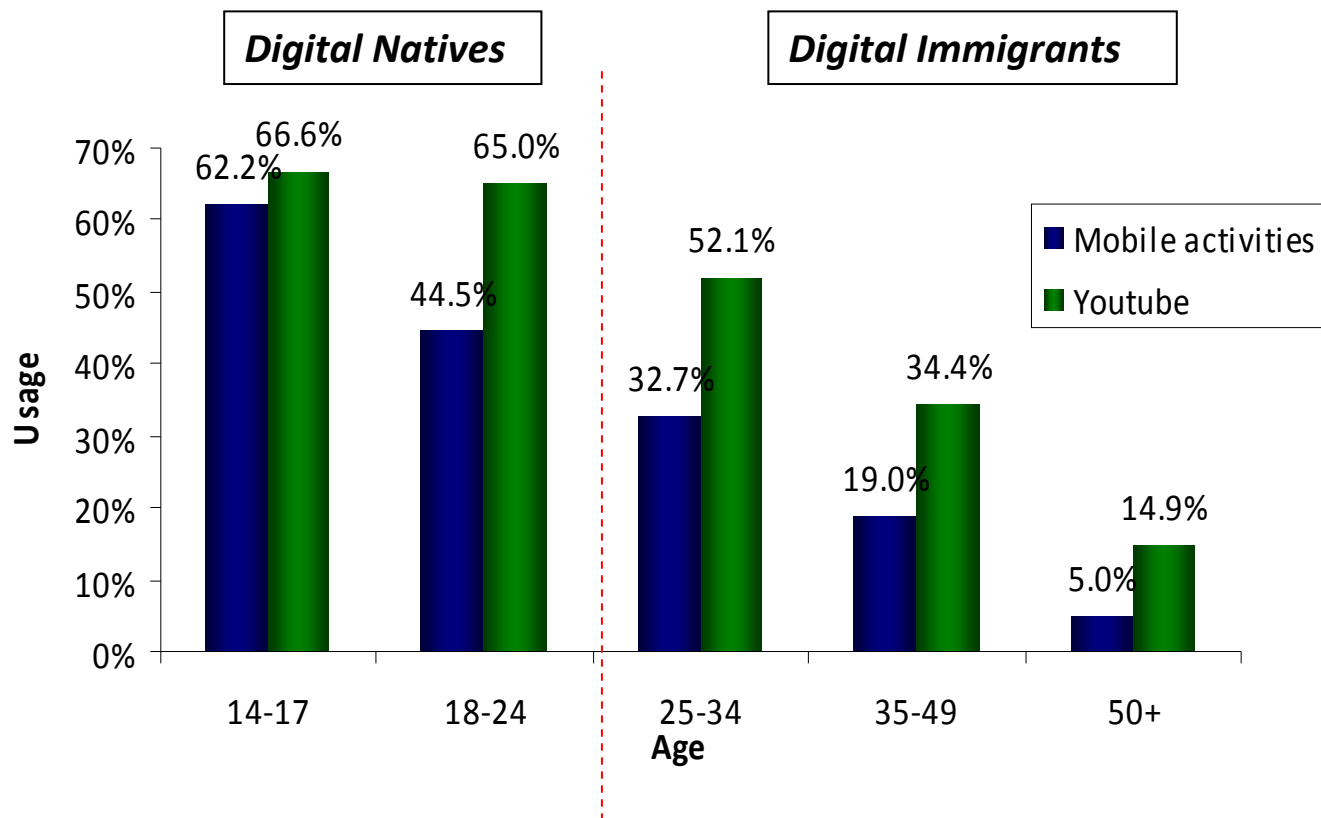
Sample over 12,000 per year

Information collected includes media, psychographics, detailed consumption habits, attitudes and retailer visitation

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How do we define a Digital Native?

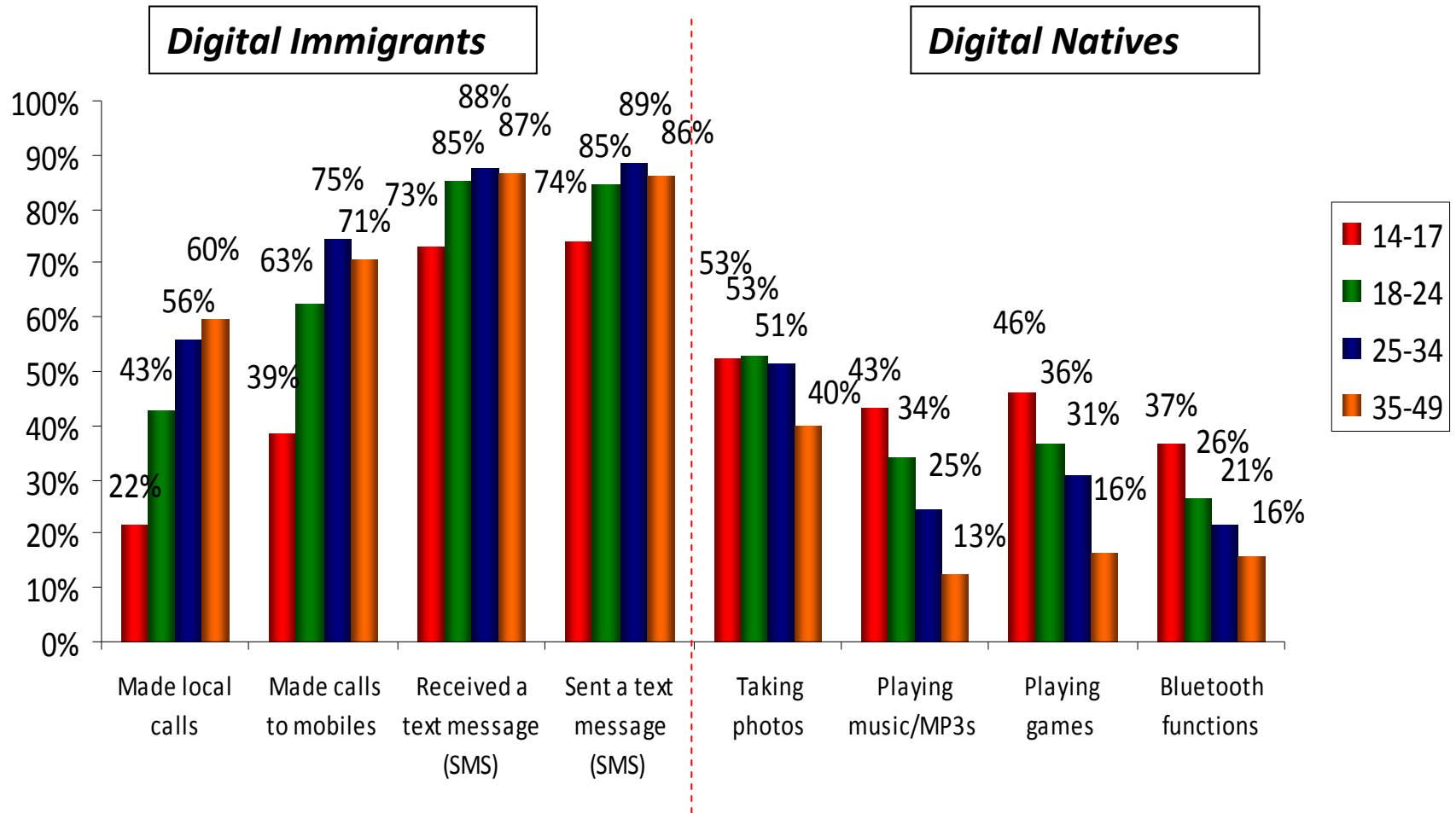
- Reviewed technological penetration, usage and historical trends
- Identified 14-24 year olds as Digital Natives



Base: May 2010 – April 2011.

Digital Natives – Mobile Activities Skew Towards Entertainment

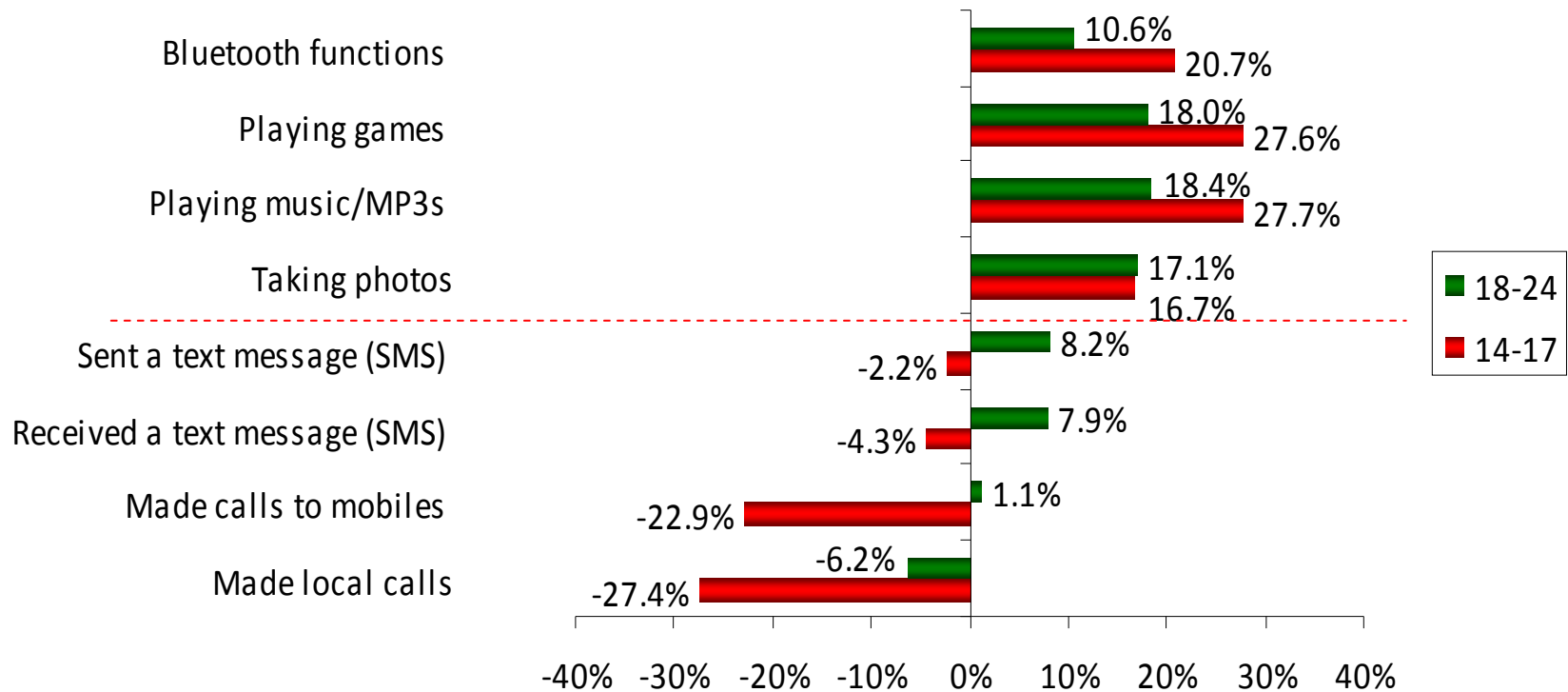
Mobile Activities Performed in Past 4 Weeks



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Younger Digital Natives Drive Mobile Entertainment Trend

Digital Natives - Mobile Activities Performed in Past 4 Weeks



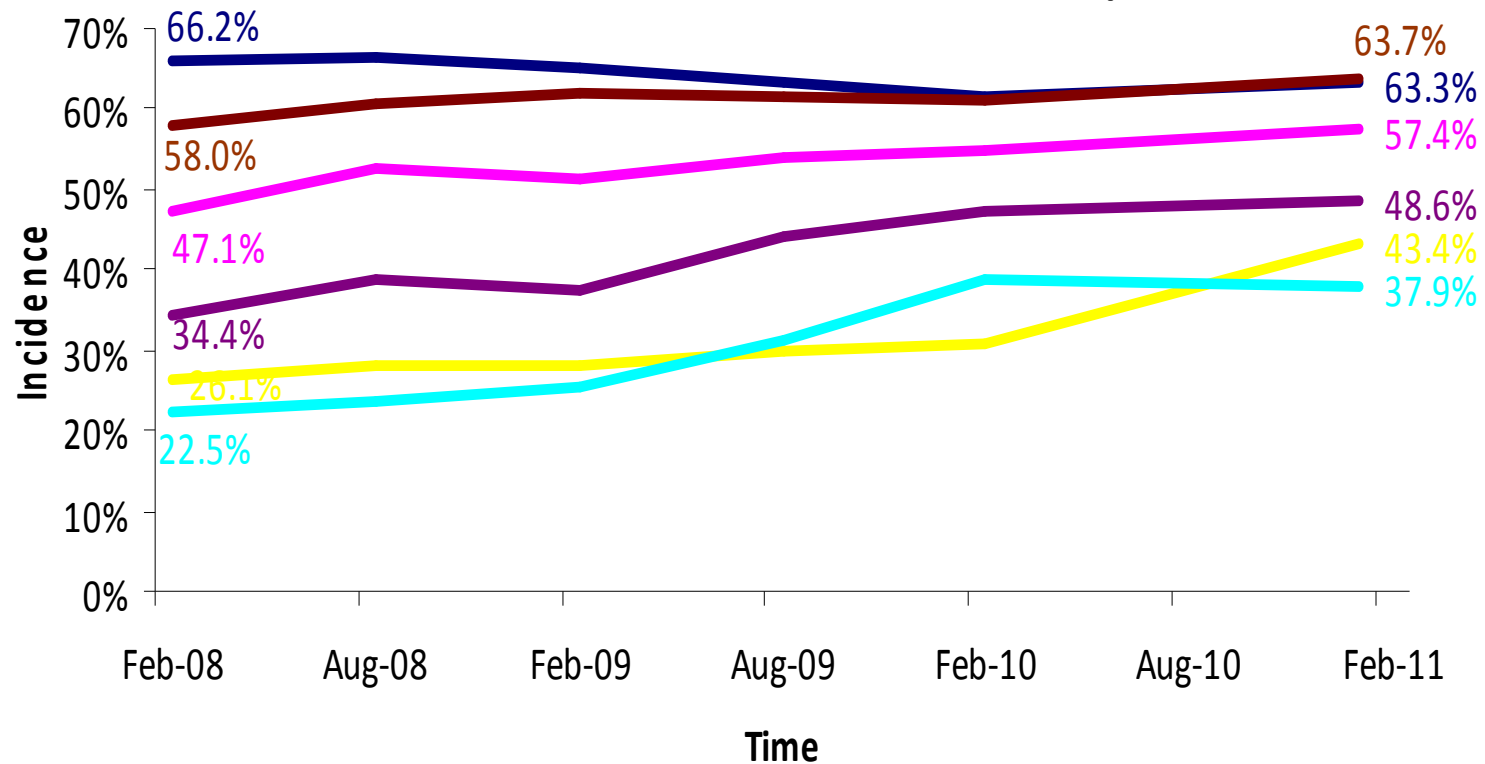
Digital Natives - Internet Quick Facts



- **77.7%** have broadband connection in their households in 2011 (cf. 30.2% in 2006);
- **92.2%** have a personal computer in their households in 2011 (cf. 77.5% in 2001);
- **87.8%** claimed to have accessed the internet in the past 7 days in 2011 (cf. 77.0% in 2003);
- Spent an average of **1,075** minutes per week online in 2011 (cf. 606 in 2003).

Research & Information – Top Activity Amongst General Population

Activities Performed Online (Total Pop. 14+)

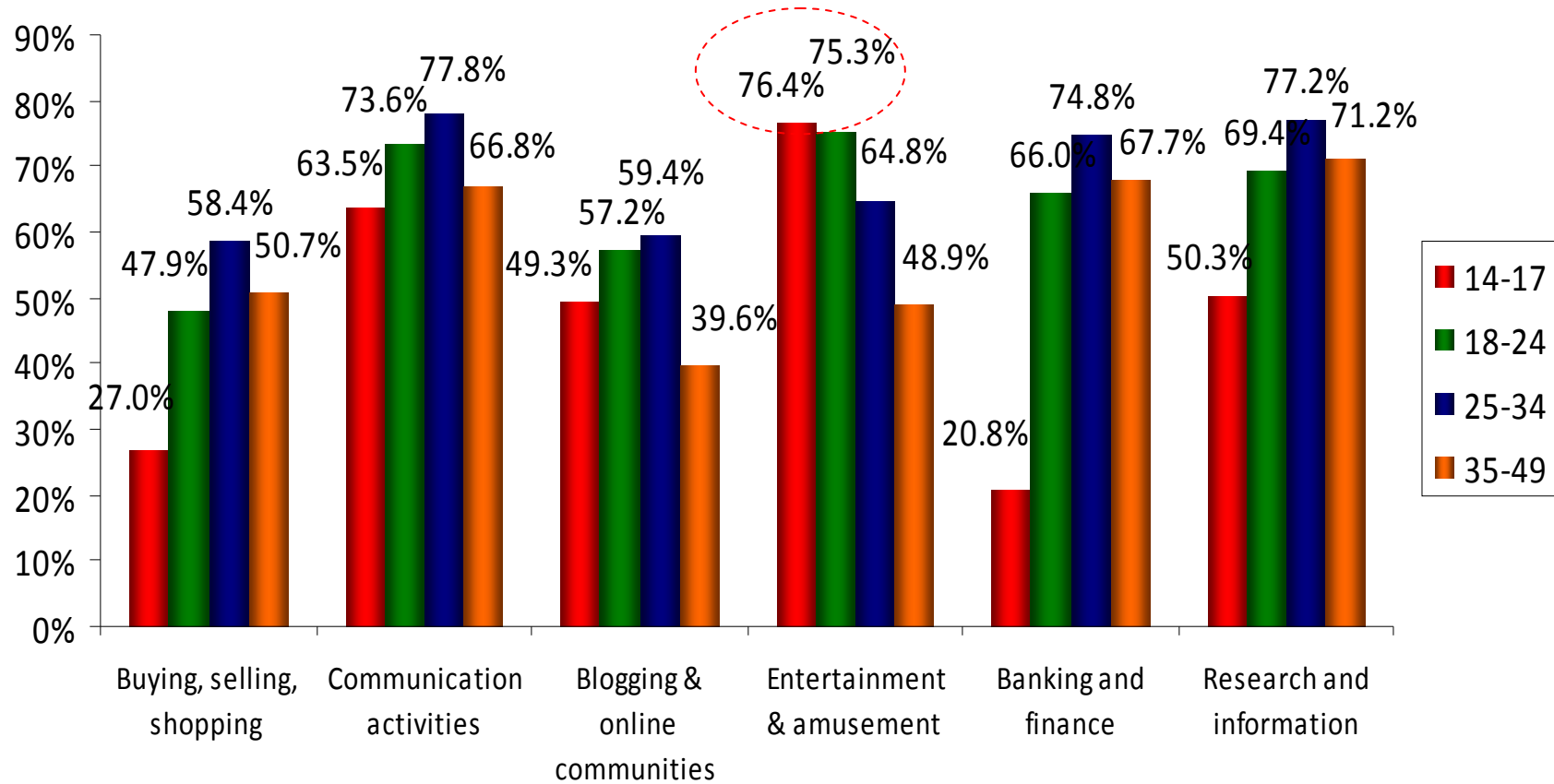


Base: Feb 2008 – January 2011.

u.c. = 11,840

Digital Natives – Top Internet Activity is Entertainment & Amusement

Activities Performed Online in Past 4 Weeks

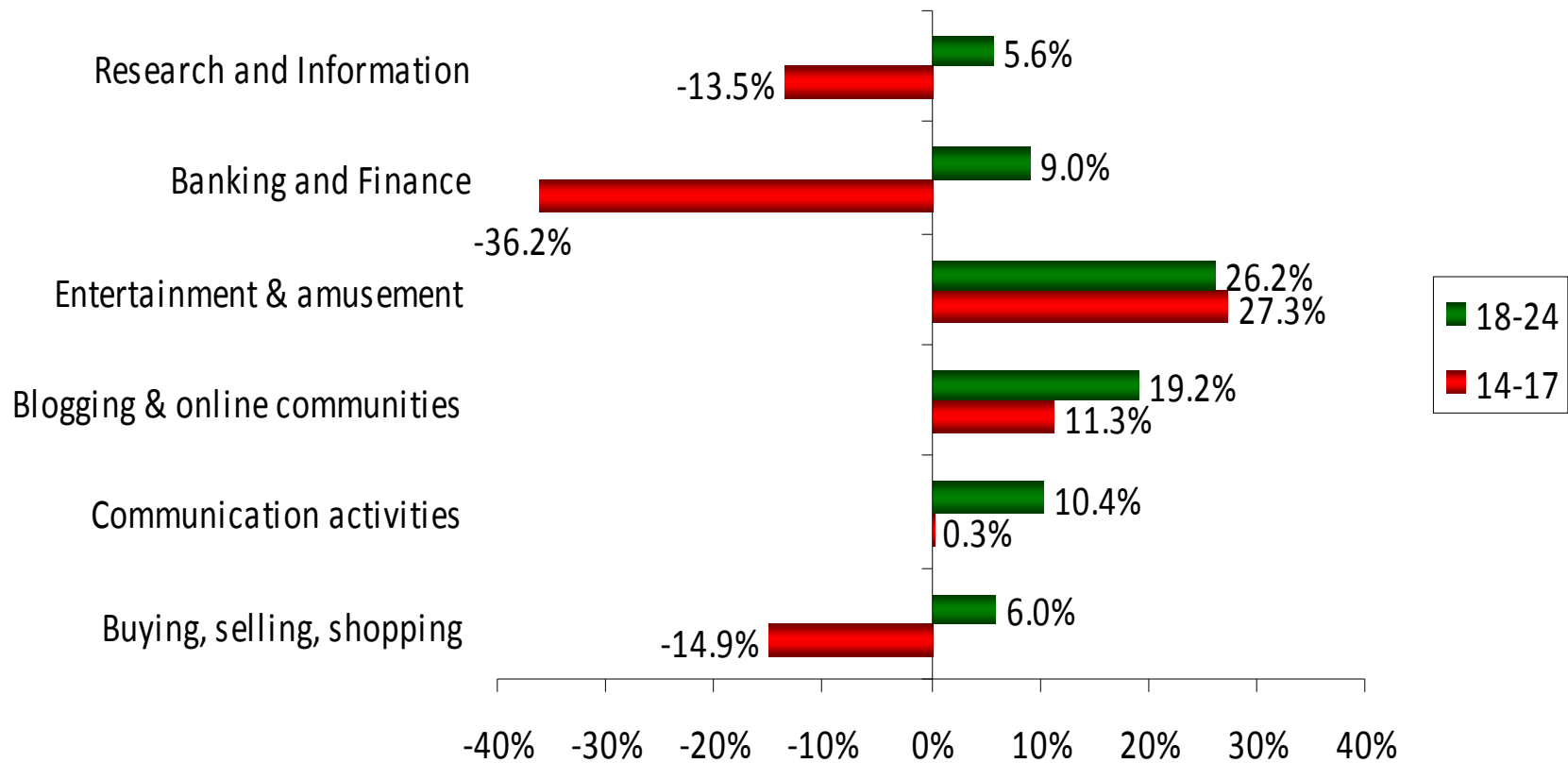


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Digital Natives – 2 Tribes Emerging

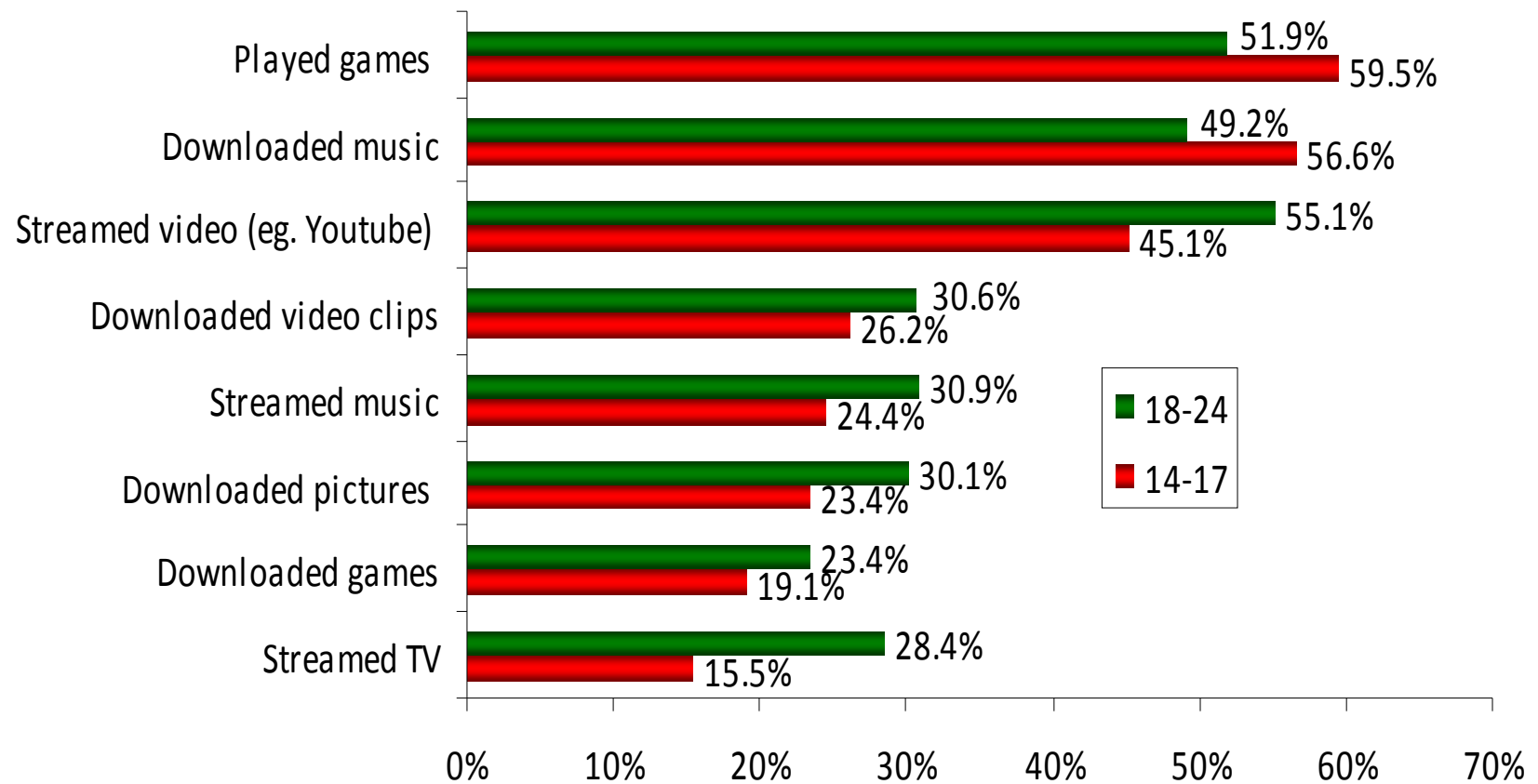
- Internet behaviour changes at 18.

Digital Natives vs. Total Population



Games, Music and Youtube Dominate

Digital Natives - Entertainment & Amusement Breakdown



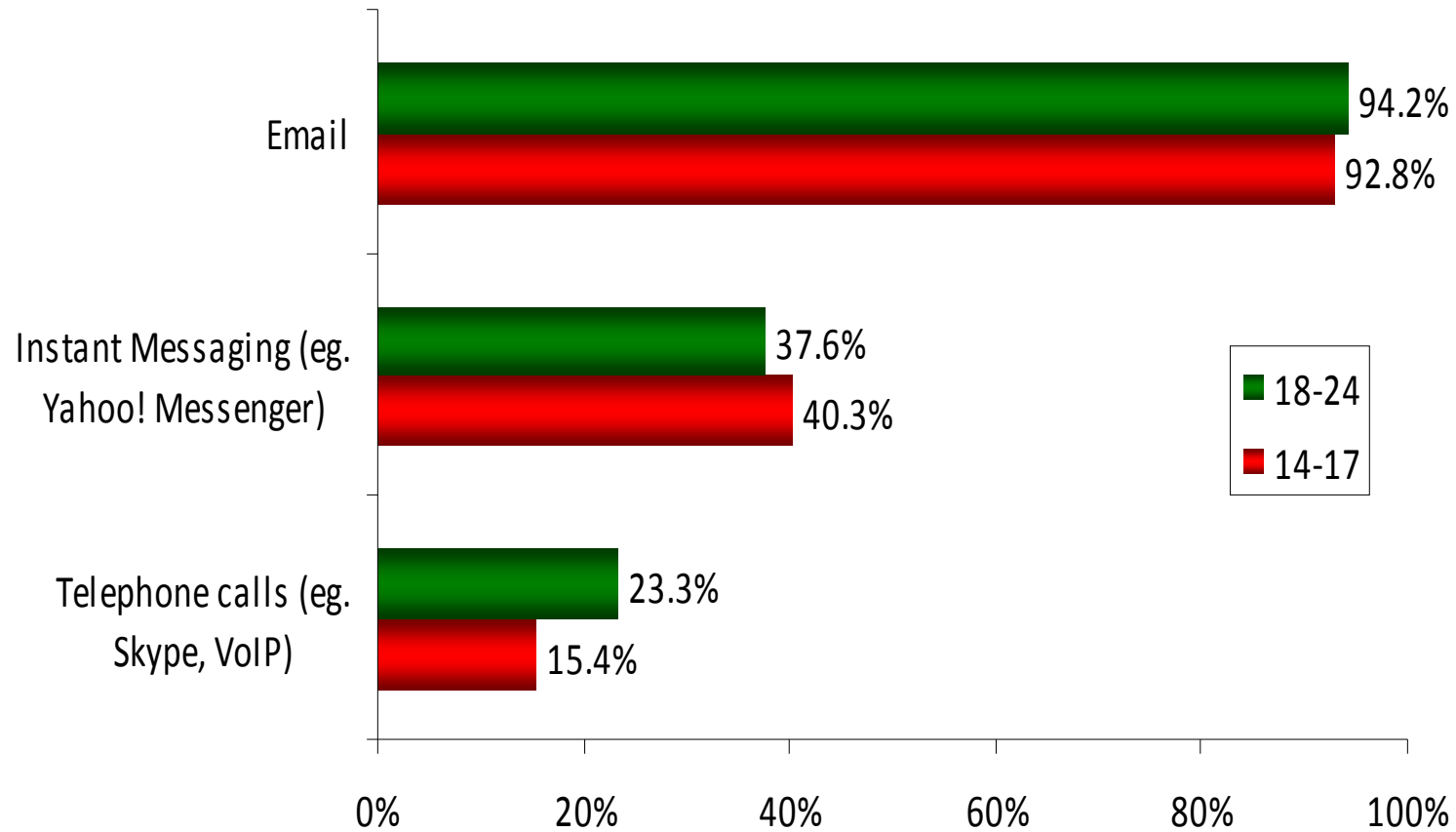
Base: 14-24 who used internet for entertainment and amusement in past 4 weeks,
May 2010 – April 2011.

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u.c. = 884

Email Dominates

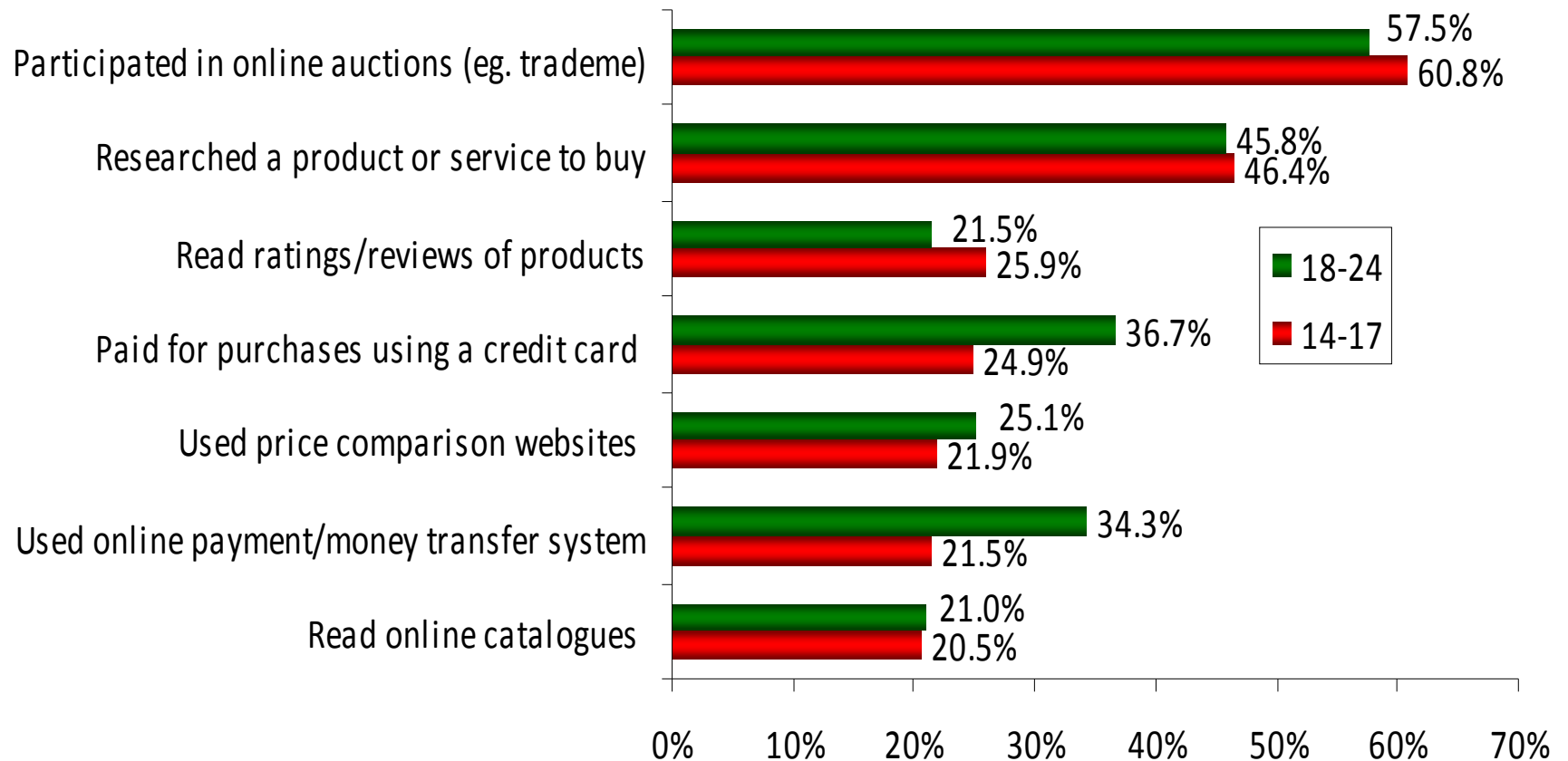
Digital Natives - Communication Breakdown



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Trademe Dominates, while 18-24 Year Olds Show Financial Independence

Digital Natives - Buying, Selling, Shopping Breakdown



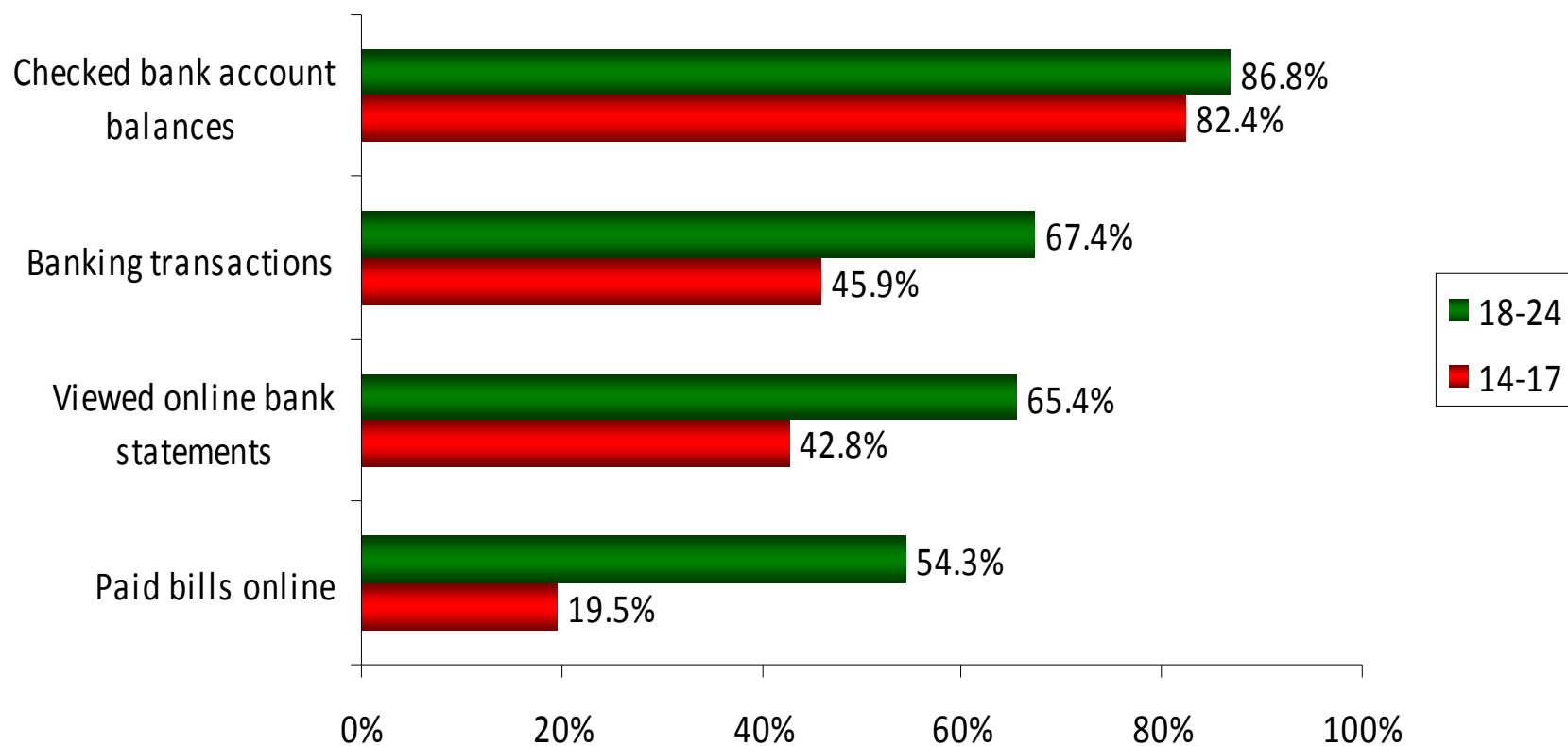
Base: 14-24 who used internet for buying, selling, shopping in past 4 weeks, May 2010
- April 2011.

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u.c. = 473

Banking Activities Increase for 18-24 Year Olds

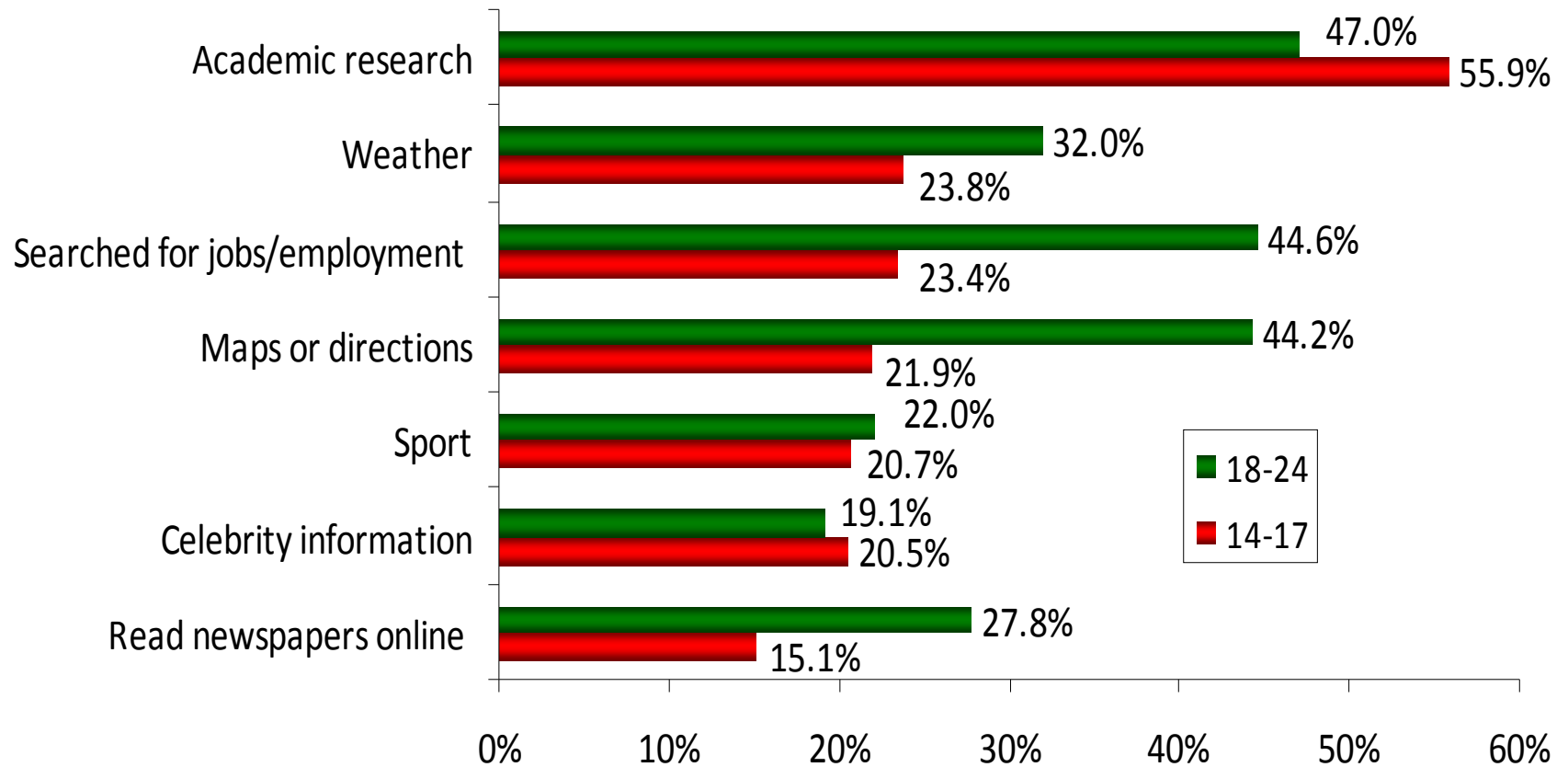
Digital Natives - Banking & Finance Breakdown



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18-24 Year Olds Activities Change to Reflect Coming of Age

Digital Natives - Research and Information Breakdown



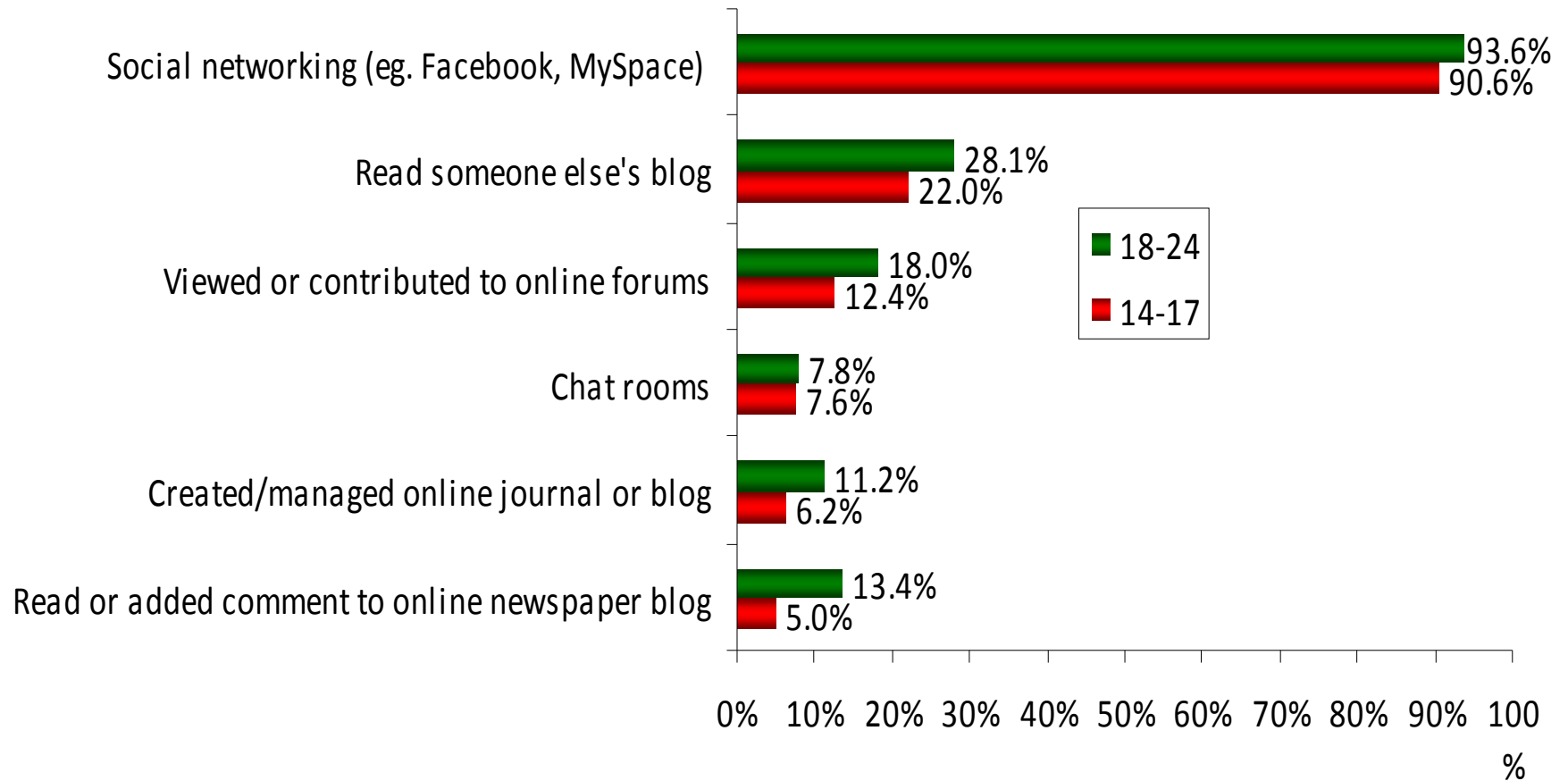
Base: 14-24 who used internet for research and information in past 4 weeks, May 2010
- April 2011.

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u.c. = 752

Social Networking Dominates Digital Native Online Communities

Digital Natives - Blogging & Online Communities Breakdown



Base: 14-24 who used internet for blogging and online communities in past 4 weeks,
May 2010 – April 2011.

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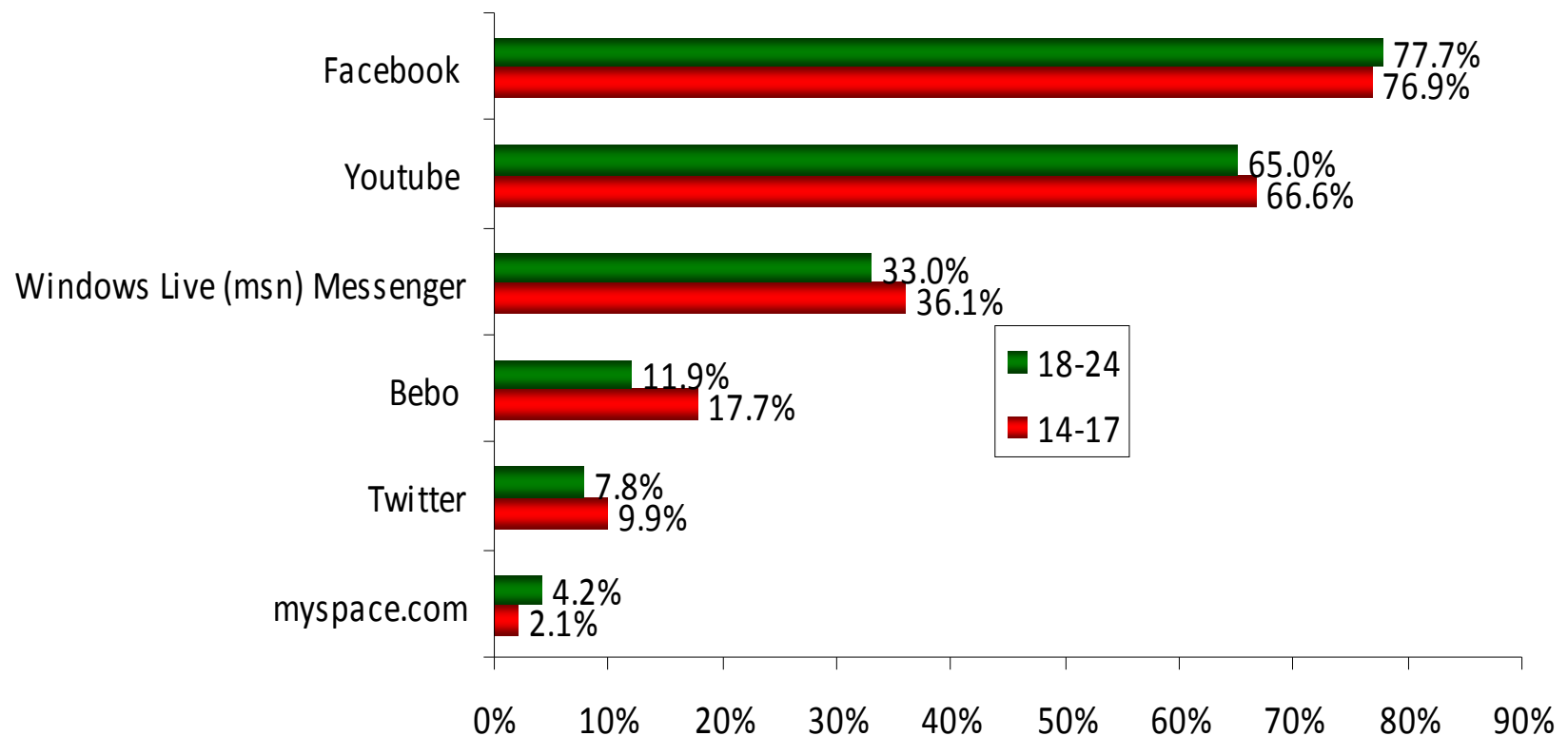
u.c. = 678

%

Facebook Drives Social Networking

- Facebook usage amongst Digital Natives at 77.4% in April 2011 (cf. 8.1% in Nov. 2007)

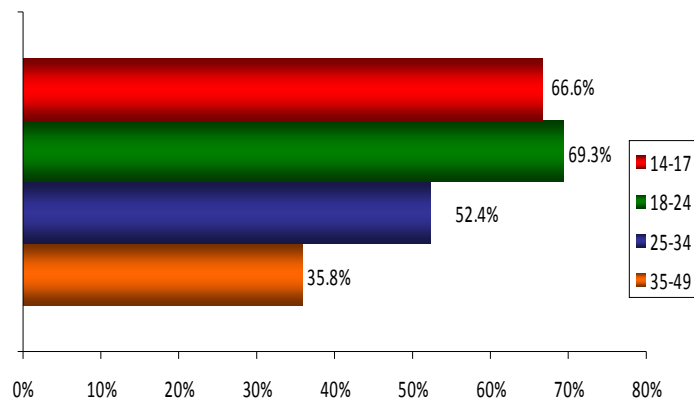
Digital Natives - Social Network Sites Visited in Past 4 Weeks



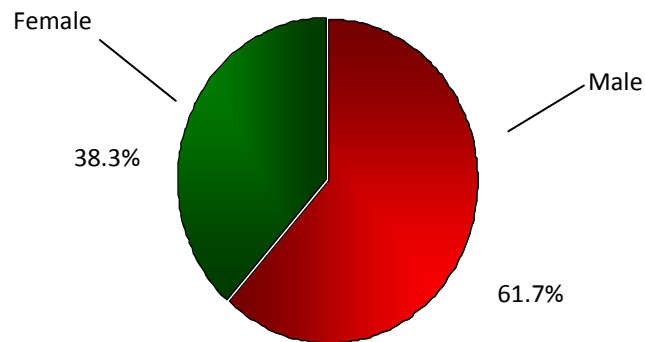
Base: 14-24, May 2010 – April 2011.

Digital Natives & Gaming

Do You Play Video Games?



By Gender



- The Digital Natives are much more likely to be into gaming compared to the Digital Immigrants.

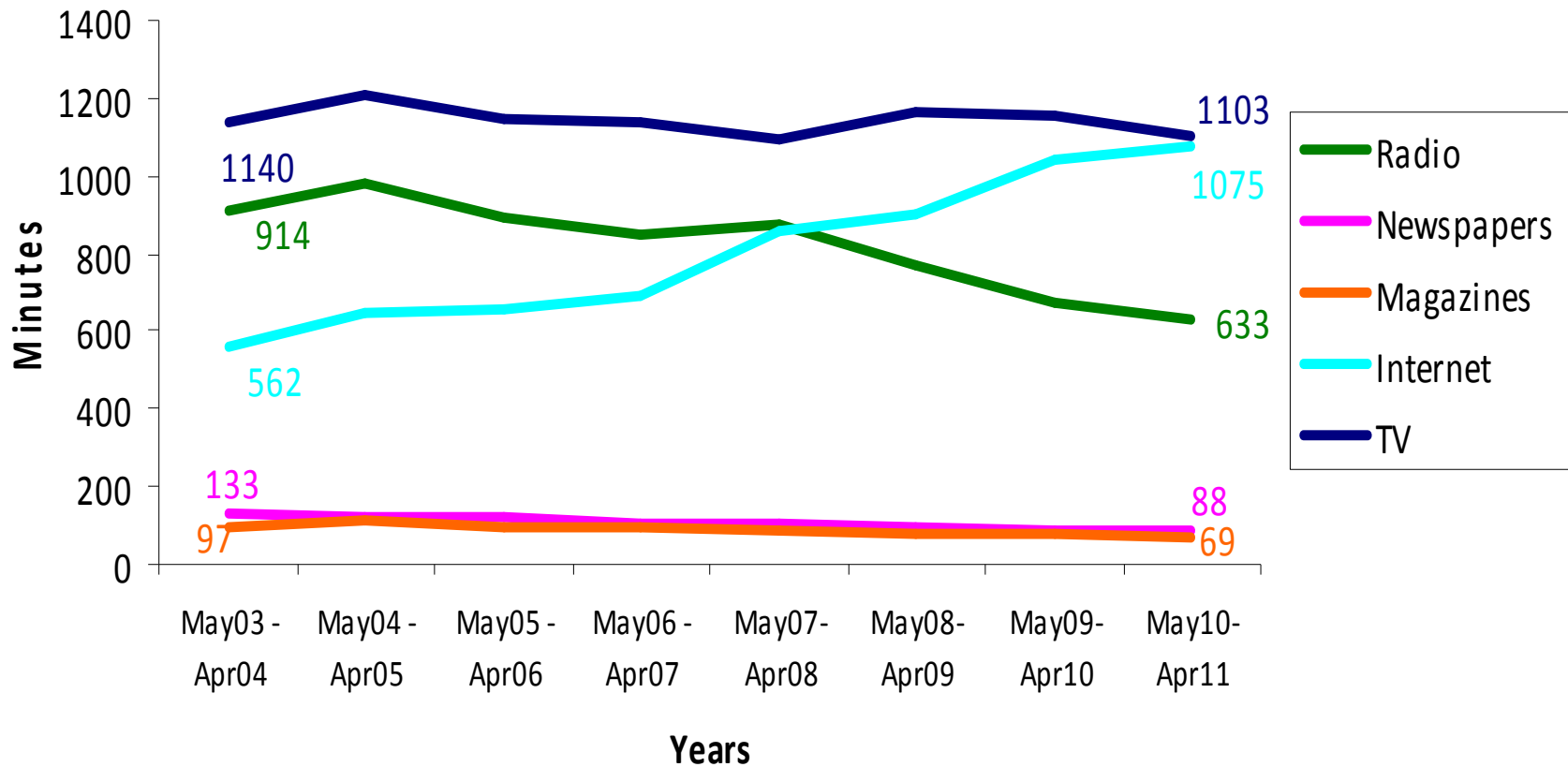
- This trend is heavily driven by the male Digital Natives.

- Of those Digital Natives who play video games, roughly a quarter (24.7%) of them connect to the internet while gaming.

TV & Internet Neck & Neck for Digital Natives

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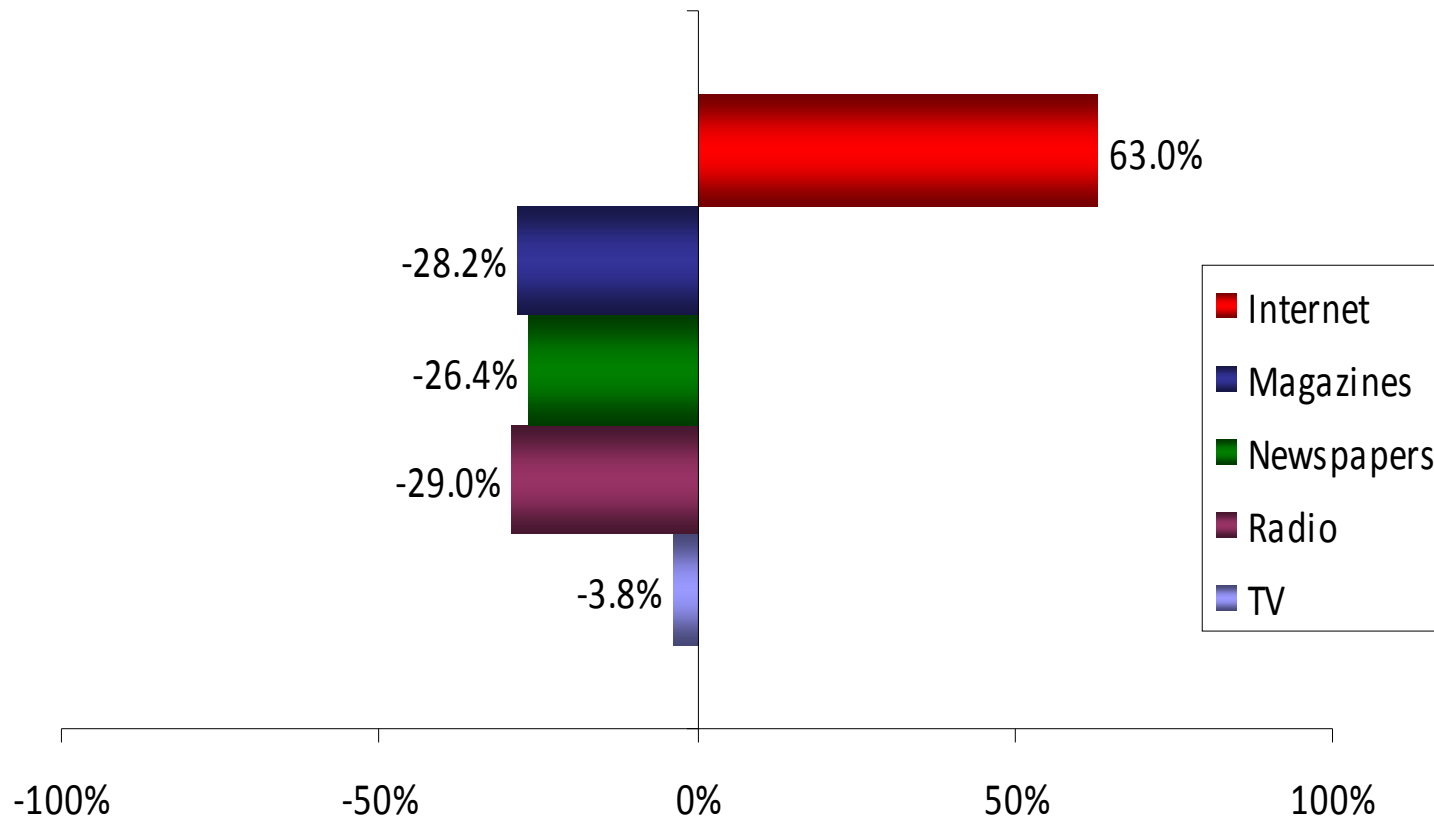
Time Spent with Media (Minutes)



Base: 14-24, May 2003 – April 2011.

Internet Dominates Growth over Last 5 Years for Digital Natives

Changes in Media Consumption (2006 - 2011)

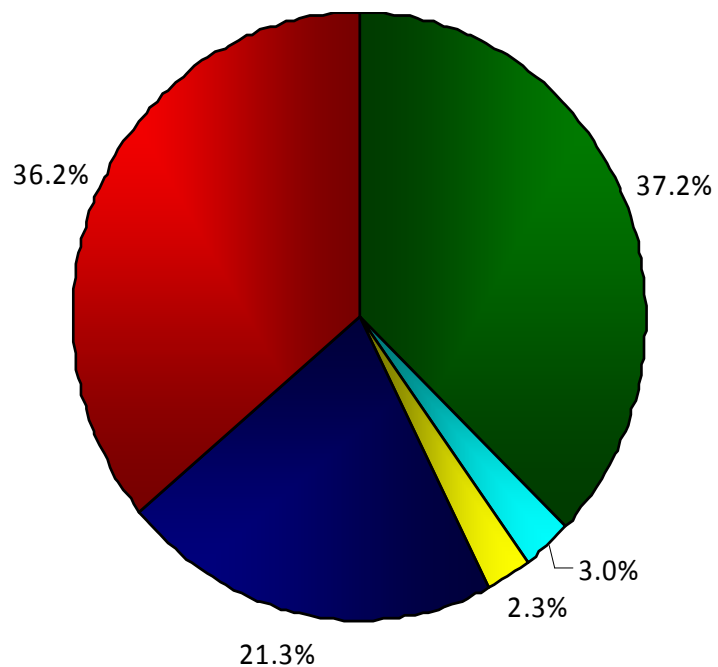


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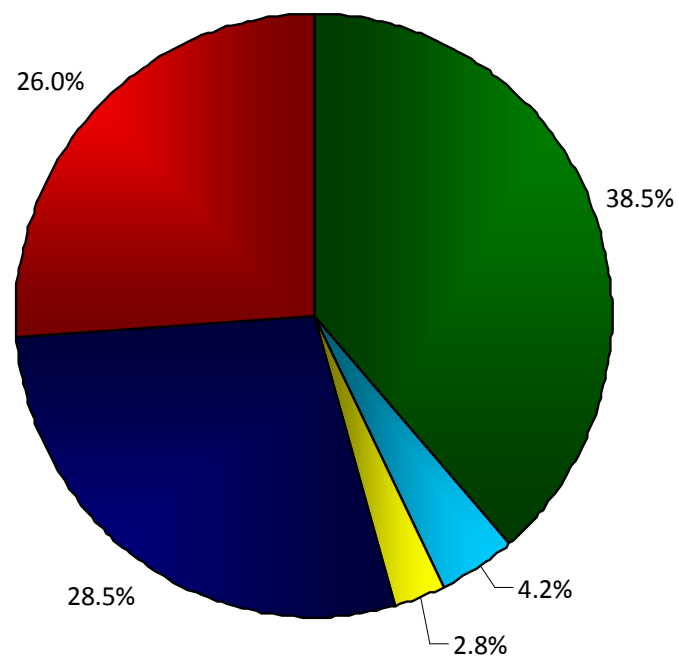
Digital Natives – Time Spent with Media

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14-24



25-49



■ TV ■ Newspapers ■ Magazines ■ Radio ■ Internet

Base: 14-24, May 2010 – April 2011.

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u.c. = 1,192

Key Takeouts

- ***Clear differences in how Digital Natives use technology compared to Digital Immigrants***
- ***2 distinct groups within Digital Natives***
 - ***14-17***
 - ***18-24 (Everyone has to grow up)***
- ***Changing Media Consumption***

Thank you!

For further information, please contact:

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