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CCi Digital Futures 2012

# The Internet in Australia

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Swinburne University of Technology**

## CCi Digital Futures 2012: The Internet in Australia

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## **Preface**

This report presents findings from the third survey of the Australian component of the World Internet Project. The survey was conducted in 2011.

This research is a project of the ARC Centre of Excellence for Creative Industries and Innovation at the Swinburne Institute for Social Research, Swinburne University of Technology.

This report provides an overview of the study, presenting a broad picture of the Internet in Australia, with comparisons to our earlier 2007 and 2009 studies, and to the international findings of our partners in the World Internet Project. At the end of each section we have added some further analysis, examining aspects of the Australian data in more detail, and providing some international context using results from the findings of our international research partners.

## **Acknowledgements**

Research for this project was supported by the Australian Research Council Centre of Excellence for Creative Industries and Innovation (ARC Grant no. CE0561908).

We would like to thank our colleagues in the ARC Centre. We are fortunate to have such a challenging and ambitious cross-disciplinary home for this project. Special thanks also to our colleagues in partner universities in the World Internet Project, who have done so much of the hard work in this field already; and to our colleagues at the Swinburne Institute for Social Research.

We would like to thank Jascha Zimmerman for his data analysis and presentation. Finally, for all her expert assistance with the administration of the survey, we would like to thank Gordana Bruce and her staff at Swinburne's Faculty of Life and Social Sciences CATI Centre.

## Highlights of the 2011 Report

### ***Australia is more and more a nation online ...***

The overwhelming majority of Australians are internet users, and uptake is still growing rapidly. When we spoke to them in 2011, 87% of Australians had used the internet in the past three months, up from 81% in 2009 and 73% in 2007. By international standards, Australia's level of internet use is very high. The vast majority of household connections are now broadband (96%), while the proportion of Australians accessing the net through a mobile device more than doubled between 2009 and 2011, from 15% to 37%.

Internet use still varies between different groups, although these differences are not as large as they were when we released our first report in 2007. Students, employed persons, younger people, higher educated and higher income individuals continue to be more likely to use the internet than retired people, home-makers, older people, lower educated and lower income individuals.

### ***... but there is still a digital divide, and affordable broadband is an issue.***

We have now reached a point where there is almost universal broadband access in Australia's more affluent households, but a large proportion of low-income households are still without home broadband access. Almost four in ten households in the lowest income group do not have home broadband. Further, those low-income households with access are more likely to describe the costs of connection as unaffordable. Households on lower incomes are not any more likely to be dissatisfied with the speed or reliability of their home connection, but they do appear to derive less benefit from their internet access. They are less likely to access government services or information online, less likely to see the internet as a fast and efficient means to access information, and more likely to see the internet as a frustrating technology.

### ***The internet is increasingly an everyday part of Australians' lives,***

Nine out of ten Australians now describe the internet as a 'very important' or 'important' part of their lives. In 2007, the proportion was eight out of ten.

### ***and Australians are doing more online all the time.***

Australian internet use is growing in three dimensions. First, as we've noted, the number of internet users continues to grow. Second, users are doing more online. Across many of the internet activities that we asked about, there was an increase in the proportion of people undertaking that activity. Third, the frequency of activity has also been increasing. These three elements help to explain the growth path of the internet overall. However, when we look at some specific internet applications, we find another pattern: rapid growth from 2007 to 2009, and then a levelling out from 2009 to 2011. Some activities — such as certain online social and entertainment applications — seem to be entering a mature phase.

### ***The internet is a social technology.***

Most Australians see the internet as a technology that increases people's contact with friends (68%) and family (62%). The proportion of people who felt that social contact had increased grew rapidly from our first survey in 2007 to our second in 2009 — a period coinciding with the emergence of social software. Our most recent 2011 survey shows a levelling off, or in some cases a slight decline, in those reporting increased contact. The same pattern appears in people's reported use of email, forums, and instant messaging: a sharp rise between 2007 and 2009, and then a slight decline in 2011. By contrast, the use of the internet to make phone calls is continuing to grow strongly, from 30% in 2009 to 39% in 2011.

### ***The internet changes the way people access and use the media.***

The internet is Australians' most important source of news and information and its importance has increased slightly in the last two years. Just over three quarters of users described the internet as 'important' or 'very important' for news and information in 2011. Around 7 in 10 users would go online if a large international or local news story was breaking.

A third of internet users say they watch less television since going online, and this impact is strongly related to age. The proportion of internet users who say they watch less broadcast television because they can download television programs has grown significantly, doubling between 2007 (10%) and 2011 (20%). It is interesting that the proportion of users saying they watched more broadcast television because of the ability to download increased as well, from 4% in 2007 to 8% in 2011.

The question of whether internet users are prepared to pay for journalism is topical, with many predictions of the demise of newspapers. We asked respondents whether and how much they would be prepared to pay to read an online newspaper. As in our earlier surveys, a clear majority of Australians said they would not

consider paying for an online newspaper (70% in 2011), and only 8% said they would be prepared to pay as much as the cover price of a hard copy newspaper.

***The internet helps people share creative work, and encourages some to produce it.***

The proportion of internet users posting pictures or photographs increased dramatically from 25 to 46% from 2007 to 2009, and then grew more slowly to 51% in 2011. By contrast, the proportion of users posting videos online has continued to grow strongly, from only 5% in 2007 to 18% in 2011. Almost half (47%) felt that the internet enabled them to share creative work they liked with others. Just over a quarter (26%) of users said that the internet had encouraged them to produce and share their own creative work. This proportion has not changed significantly since our earlier surveys.

***The internet is a major source of entertainment.***

The internet is an increasingly important source of entertainment, and is now challenging television as Australians' most important entertainment medium. In 2011, as in 2009, a higher proportion of users described the internet as a 'very important' source of entertainment than television. (Although if we look at sources of entertainment considered 'important' as well as 'very important', television moves ahead of the net.)

Some forms of popular online entertainment — such as downloading or listening to music online, and visiting sites dedicated to particular artists — recorded significant growth between 2007 and 2009, and then much slower growth from 2009 to 2011.

Other very popular activities, including looking for information about restaurants, and finding out information about food such as recipes, steadily continue to grow. The proportion of users who usually buy music online doubled from 2007 to 2009 (7% to 16%), and then doubled again in 2011 to 30%.

Some notable minority interests are also emerging: while fewer than one in twenty of our 2007 respondents used the internet to gamble, the figure in 2011 was one in ten.

***Australians love shopping online***

Australians are avid internet shoppers; among our comparison countries Australians are the most frequent online shoppers. Overall, price and the variety of goods available are equal drivers of online retail for Australian consumers. Consumers do recognise that there are limits to their ability to assess the quality of products online, and that returning goods can pose more difficulties online. They declare a strong preference for dealing with websites based in Australia, and they are concerned about the security of their financial and personal information when shopping online.

***The internet changes politics.***

A majority of both internet users and non-users agreed that the internet has become important for the political campaign process in 2011 (62% and 52% respectively).

In 2007 non-users were more sceptical than users about the internet's capacity to empower citizens. Perhaps more importantly, a sizeable proportion of non-users simply didn't know what impact the internet was having on politics. These differences between users and non-users on this question have since decreased, and non-users were less likely to answer 'don't know'.

Australians are sceptical about whether internet use can help people have a greater say in government policies.

***Most Australians support current regulation of the internet...***

The majority of Australians do not think that the internet is over-regulated. In both our 2011 and 2009 surveys, just over four in ten thought that the current amount of regulation was about right. A quarter would like more regulation. There is very strong support for restricting children's access to the internet. An overwhelming 84% felt there should be some restrictions, but almost all of these people felt that responsibility should be shared by parents, schools, government and internet service providers.

***and they also support freedom of expression online.***

In 2011 over a quarter of people (28%) were concerned about the government checking what they do online, up slightly from 2009 (26%).

***There is still strong support for the NBN.***

Just over two thirds of Australians now think the development of Labor's National Broadband Network is a good idea, down from three quarters in 2009.

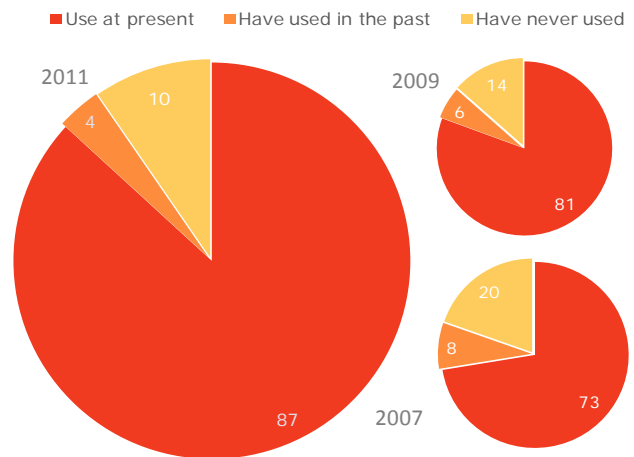
# 1 The basics of internet access

According to the ABS, in November 1998 just under one in five Australian households had access to the internet. This proportion had almost doubled two years later and has continued to climb steadily. In our survey undertaken in 2011 we found that 86% of Australian households had internet access.

This section investigates who now uses the internet and who doesn't. Since the popularisation of the internet and the advent of the world wide web, there has been considerable public policy interest in this issue. As the technology has matured and adoption has spread, interest has focused on where people access the net and the type of access they have.

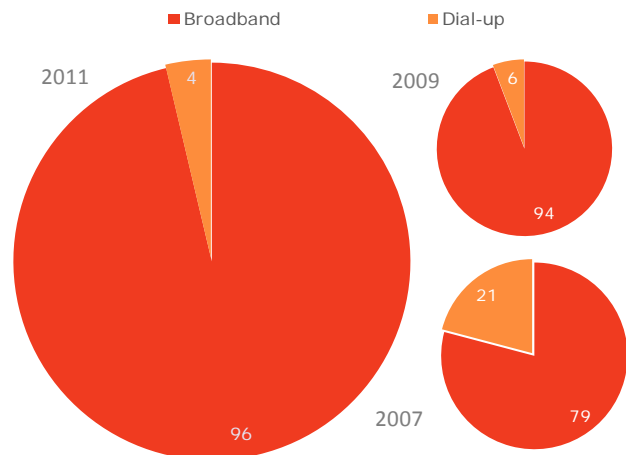
## 1.1 Current Users and Non-Users

In 2011, 86.8% of Australians said that they currently used the internet, up from 80.6% in 2009 and 72.6% in 2007. Just under one in ten of our respondents had never used the internet (down from one in five in 2007), while the proportion of ex-users had also fallen to 3.6% (5.9% in 2009 and 7.6% in 2007).



## 1.2 Connection Type in the Household

The vast majority of Australian households have internet access (86.0%). Almost all are broadband connections (96.3%). We have now reached the stage where dial-up access has all but disappeared. (For the purposes of this report broadband is defined as any connection that is not dial-up.)



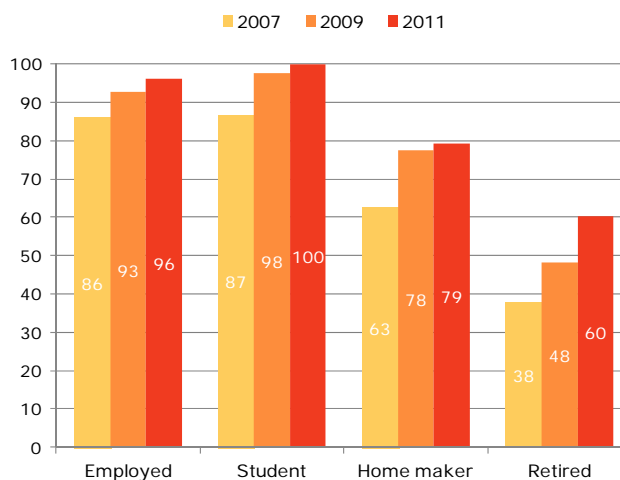
## Digital Divides: Users and Non-users

One of the most fundamental questions about the internet through its development phase has been who is online and who is not? While a significant minority of the population are still non-users, the relevance of this question remains; in fact, it may become more rather than less important as services of all kinds move online. This section examines the characteristics of the two groups.

### 1.3 Use by Lifestage

Lifestage is one aspect that influences internet use. The vast majority of the employed population (96.1%) and all students use the internet indicating that computer and internet skills have become essential for people's professional lives.

Around one in five homemakers and primary carers used the internet during the last three months while 90.2% of unemployed people use the internet. Retired people have the lowest user rate of 60.2% (up from 48.2% in 2011 and 37.9% in 2007).

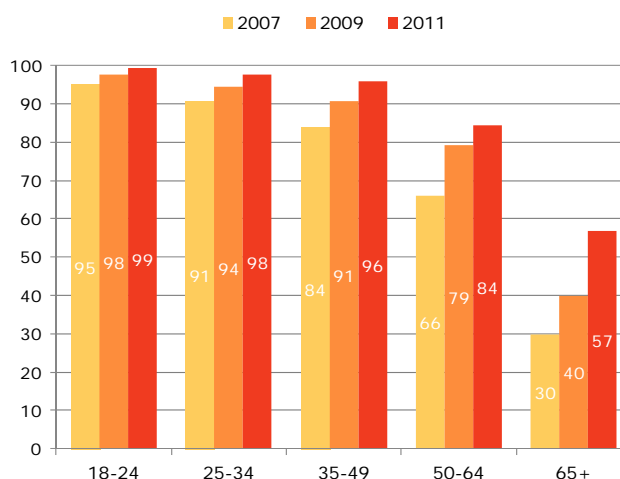


### 1.4 Use by Age

The likelihood that Australians use the internet on a regular basis decreases gradually with increasing age.

All but one of our respondents aged 18 to 24 was on-line as were 97.7% of 25 to 34 years old, and still the great majority of Australians in their mid-thirties to end-forties (95.8%).

Those aged 50 to 64 years had a usage rate of 84.4%. Less than six in ten of people aged 65 or more use the internet — although the proportion of internet users in this group has been growing rapidly (56.7% up from 40.0% in 2011 and 29.8% in 2007).



### 1.5 Use by Gender

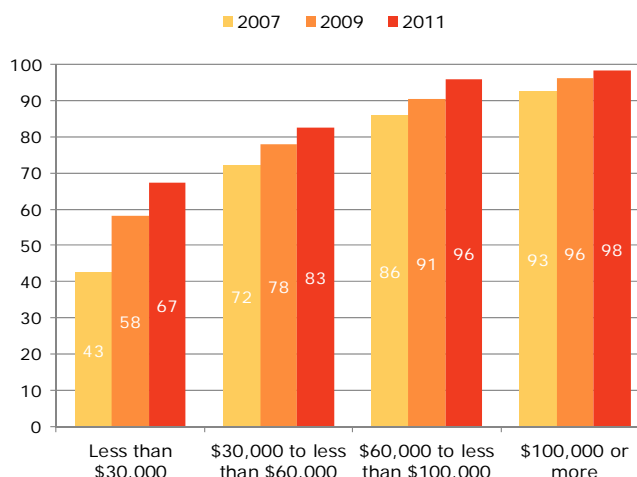
In 2011 we saw an unexpected widening of the gender gap in terms of internet use. In 2009 the difference between men and women's internet participation was minimal (81.7% for men and 79.5% for women). While both men and women's participation increased in 2011, men's increased more. Men's participation was 89.1% compared to women's 84.7%.





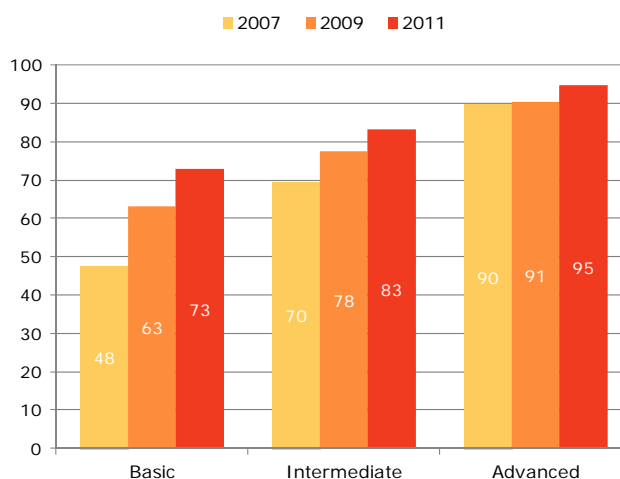
## 1.6 Use by Household Income

Internet use is directly related to household income. The higher the income the more likely a person is to access the internet regularly. Almost all those living households earning \$60,000 or more use the internet. For those living in households on less than \$30,000 per annum, internet use has increased strongly over the period of analysis although there was much greater growth 2007 to 2009 (42.6% to 58.3% or 36.9% growth) than 2009 to 2011 (58.3% to 67.2% or 15.3% growth). For those in the next income group up there has been steady and more even growth from a much higher base (72.2% to 77.9% to 82.5%).



## 1.7 Use by Education

Education level also influences internet usage although differences are diminishing. In 2011, 94.7% of those who had attended university were internet users. Seven out of ten respondents that finished high school and/or had undertaken vocational education were internet users.



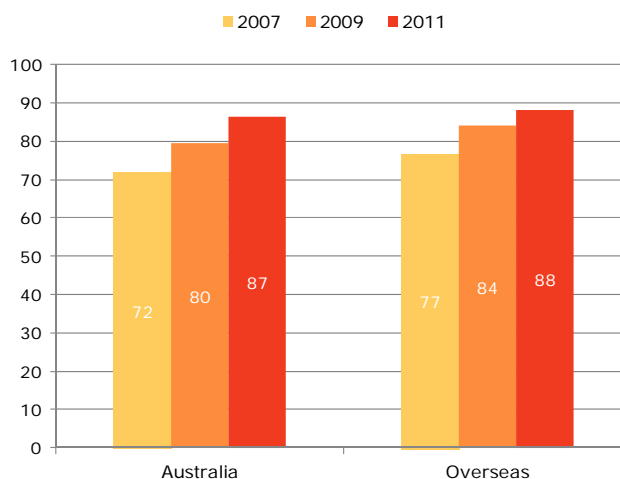
## 1.8 Use by Location: Urban-Rural Divide

There is still a divide between city and country people in terms of internet use. The gap between those living in capital cities and non-capital cities was maintained in 2011 with 89.6% of those living in capital cities using the internet compared to 81.8% of those living outside capital cities.



## 1.9 Use by place of birth

Whether people are born in Australia or overseas has little effect on internet use. In both 2007 and 2009 Australians born overseas were slightly more likely to use the internet than those born in Australia but by 2011 this difference is negligible (88.0% to 86.5%).

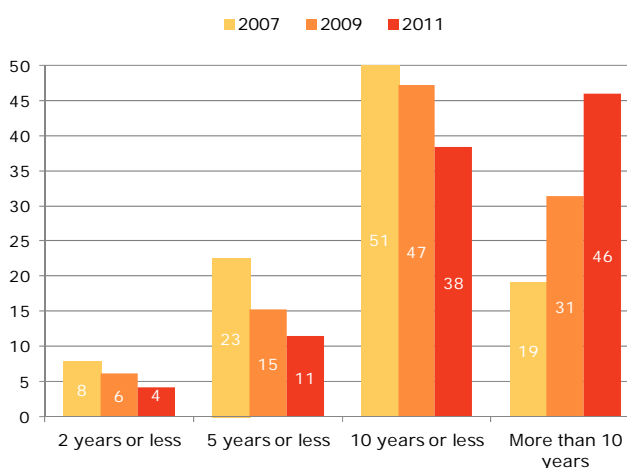


## Access and Use

This section provides some basic information about Australian internet use. We look at how long people have been accessing the net and in what ways. We also look at where in the house people use the internet, and the type of connection they have at home.

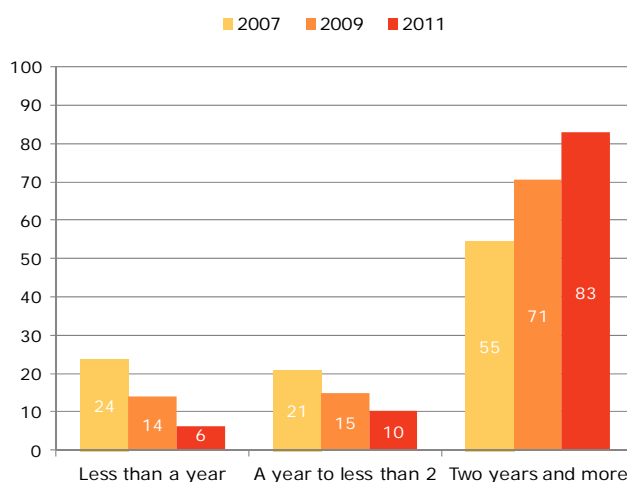
### 1.10 Years of Use

In 2011 we are approaching the point at which half of all internet users have been online for ten years or more (46.0%). Only 4.2% of our sample in 2011 had been using the internet for two years or less.



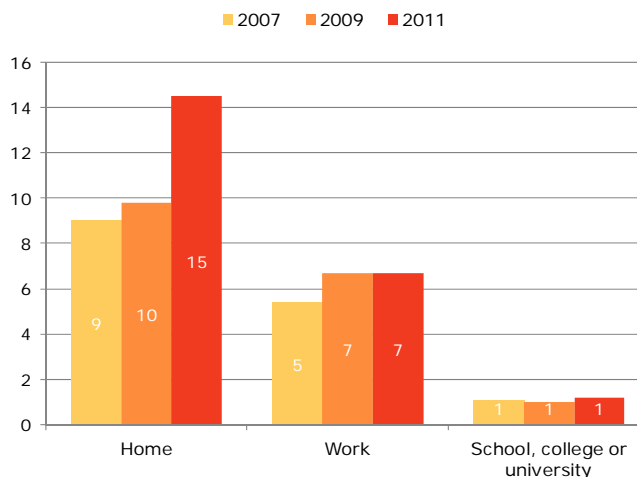
### 1.11 Years that Users have had Broadband Access

There is still broadband take-up but it is slowing. In 2007 a quarter (23.9%) of those respondents with broadband access had acquired it within the previous twelve months while this figure was 14% in 2009 and only 6.4% in 2011. More than eight in ten broadband households in 2011 have had this service for more than two years.



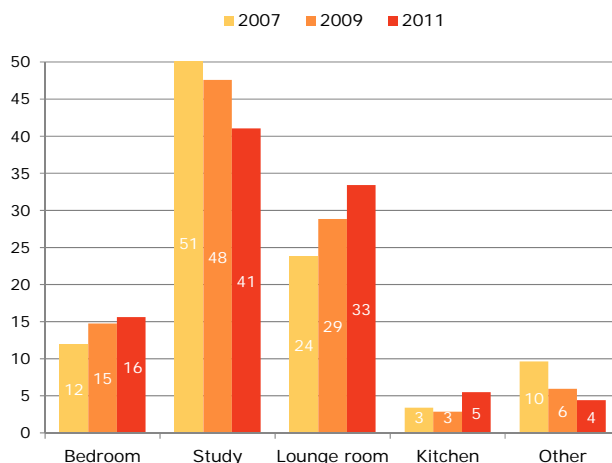
### 1.12 Locations of Use

Most internet use takes place at home and 2011 saw a large increase in home use with our users averaging fifteen hours per week from home (up 50% from 2009). Internet use at work remained steady at 7 hours (7 in 2009 and 5 in 2007). School, college or university access accounts for just over an hour on average amongst all users (at school or not).



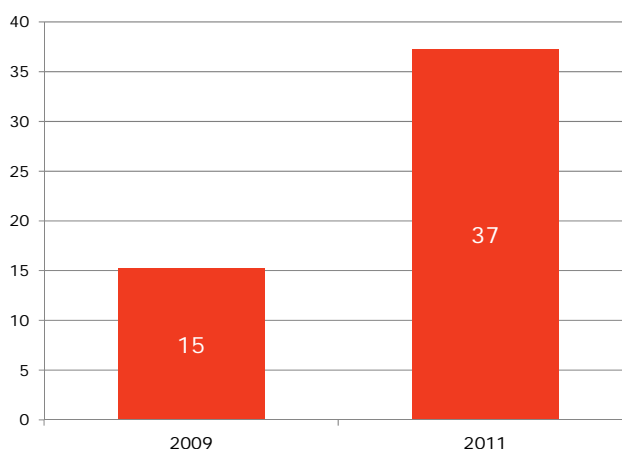
### 1.13 Where in the House

While four in ten of those accessing the internet at home do so in a room designated as a study, its primacy as the location for internet access in the home is under threat. A third of internet use took place in the living room in 2011 (33.4%) while the kitchen increased in popularity, as did the bedroom.



### 1.14 Accessing the internet through a mobile handheld device such as a mobile phone

The proportion of Australians accessing the internet through a mobile device more than doubled between 2009 and 2011, from 15.2% to 37.3%.

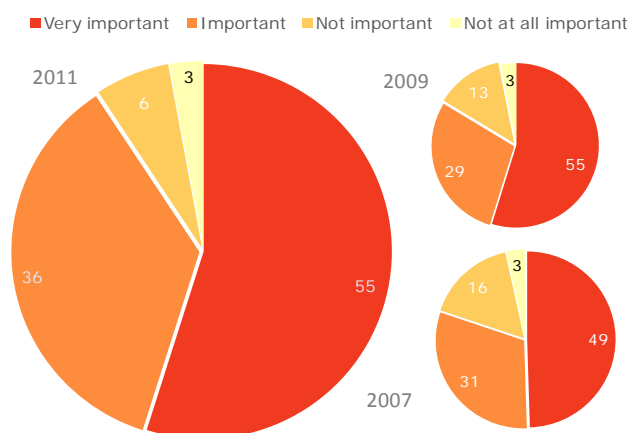


## Attitudes to the internet

This section presents findings on people's attitudes to the internet: its importance in daily life, its benefits and problems.

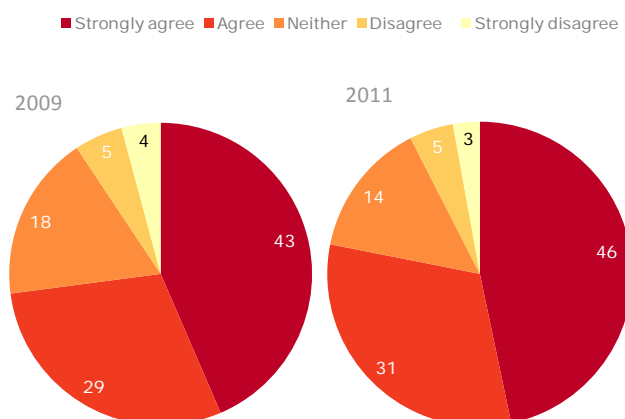
### 1.15 Importance of internet

The internet has very quickly become an important part of people's lives. Well over half of our sample described the internet as 'very important' (54.9%). The importance of the internet to users is increasing steadily. Exactly 80% rated it as 'very important' or 'important' in 2007. This increased to 83.6% in 2009 and to 90.7% in 2011.



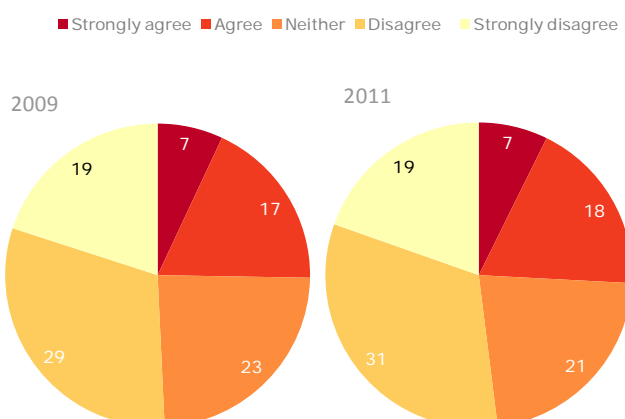
### 1.16 The internet makes life easier

Overall people are very positive about the effect of the internet on their lives. Respondents were slightly more likely in 2011 to agree that the internet makes life easier. Approaching half of our respondents strongly agreed that the internet makes life easier (46.1% in 2011 and 42.9% in 2009) while a further three in ten agreed with this contention (31.0% and 29.0%). Less than one in ten disagreed (2.8% strongly) while the remainder neither agreed nor disagreed (14.2%).



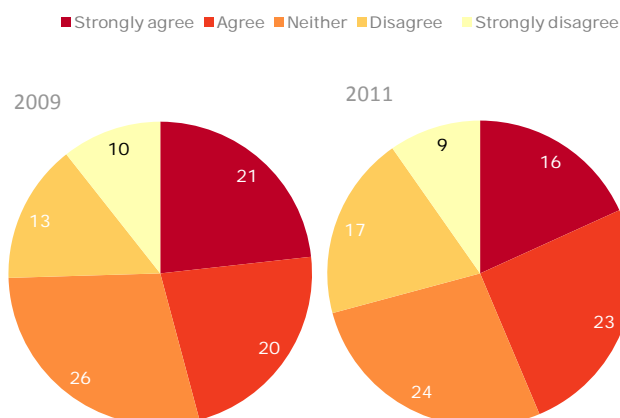
### 1.17 The internet is frustrating to work with

Half of Australians do not agree that the internet is frustrating to work with while a further quarter (21.3%) are ambivalent. A quarter do find it frustrating (24.8%), with 7.0% strongly agreeing that it is frustrating. There was almost no change for this question between 2009 and 2011.



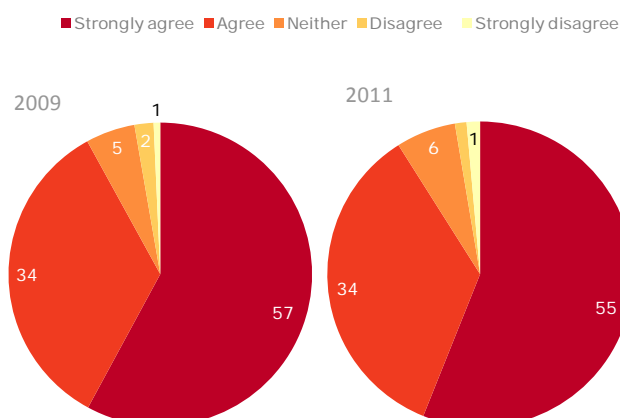
### 1.18 There is too much immoral material on the internet

A significant minority of Australians think that there is too much immoral material on the internet (38.6% in 2011 and 41.4% in 2009). More than one in ten (11.7%) say that they 'don't know' if this is case (9.7% in 2009). A quarter of our sample 'neither agree nor disagree' while a further quarter disagreed with this contention in 2011 (25.8%).



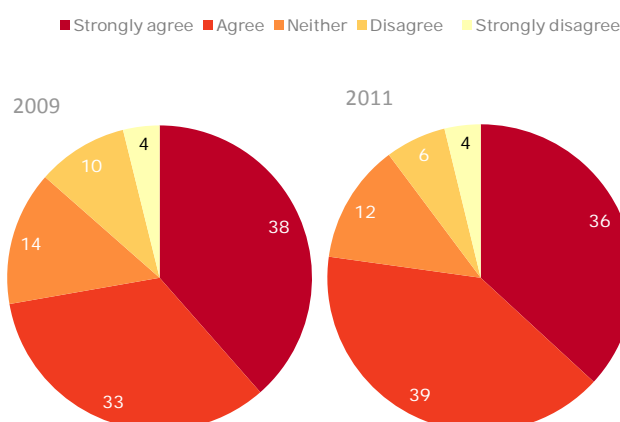
### 1.19 The internet is a fast and efficient means to gain information

There was almost unanimous agreement that the internet is a fast and efficient means to gain information. Well over half of our respondents 'agreed strongly' (55.0% in 2011) and overall 88.3% 'agreed' or 'strongly agreed'. Very few disagreed- 2.6% in total. There was little change over the period



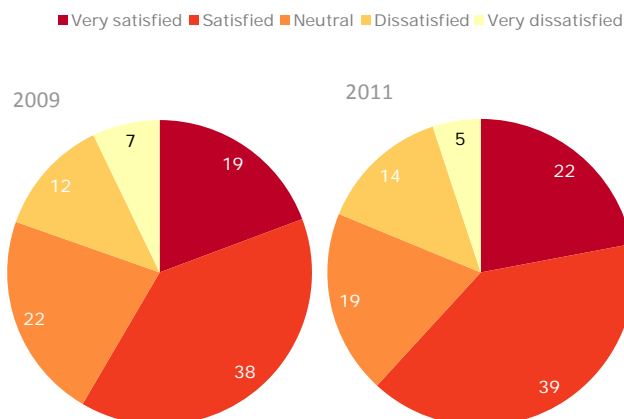
### 1.20 The use of the internet can be addictive

Three-quarters of our respondents agree that internet use can be addictive (74.8%) while one in ten disagree (9.9%). There was little change in responses to this question between 2009 and 2011.



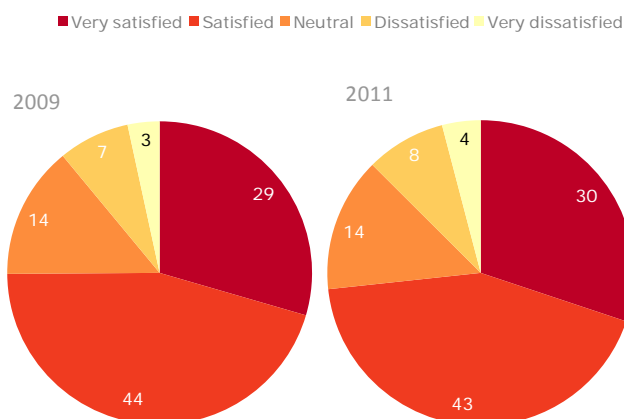
### 1.21 Satisfaction with speed of home internet connection

Around one in five Australians are unhappy with the speed of their home internet connection (18.5%). At the other end of the scale one in five (21.7%) are very satisfied and a further four in ten are satisfied (39.2%). There was little change over the period.



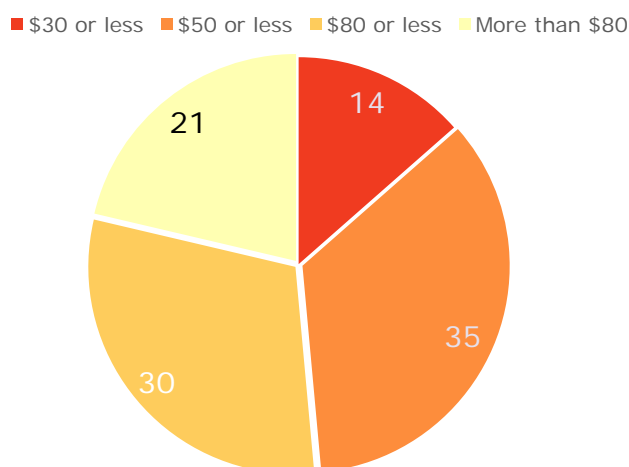
### 1.22 Satisfaction with the reliability of home internet connection

Reliability does not appear to be an issue for the majority of Australians with an internet connection at home. Three in ten are very satisfied (29.7%) with a further 42.5% moderately satisfied. Around one in eight are dissatisfied (12.3%) and of these around a third are very dissatisfied (4.0%).



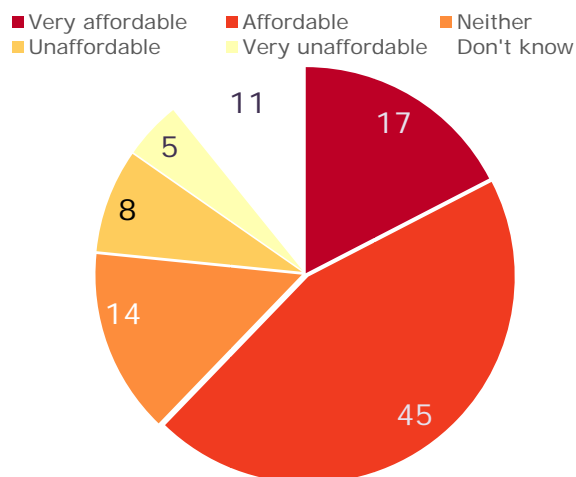
### 1.23 Monthly household expenditure on home internet access, 2011

A slight majority of Australian households with a home internet connection are paying more than \$50 per month for their connection (51.4%). More than one in five are paying more than \$80 per month (21.3%).



### 1.24 Home internet access affordability, 2011

Most Australians consider that their home internet access is affordable (62.2%). Just on one in eight households consider their access unaffordable, with one in twenty saying it is 'very unaffordable'. More than one in ten respondents did not know if their home internet access was affordable or not.

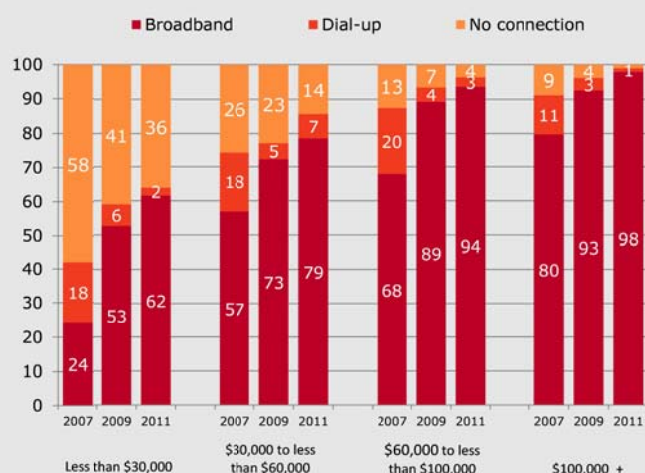


## Further Analysis

### 1.25 Home access by income, 2007-2011

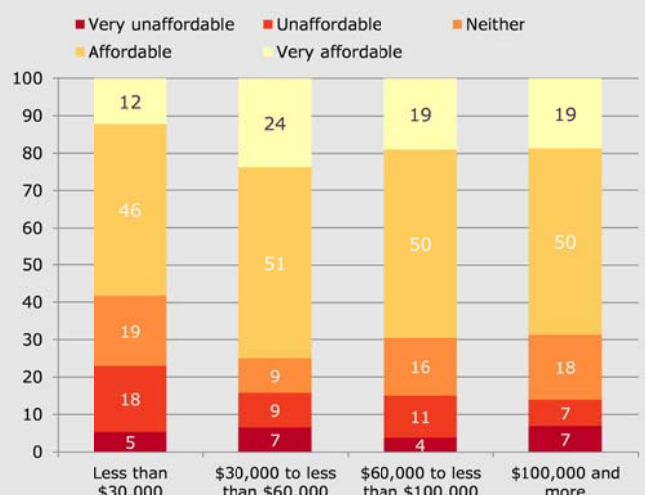
Examining home access by household income shows that the strongest growth in internet connection has been in the lower income households. In 2007 a quarter of households earning less than \$30,000 had broadband access while in 2009 this had increased to over half. In 2011 the figure was closing on two thirds but there did appear to be a tapering off.

We have now reached a point where there is almost universal broadband access in the two most affluent income groups but still a large proportion of those in lower income households are without home broadband access.



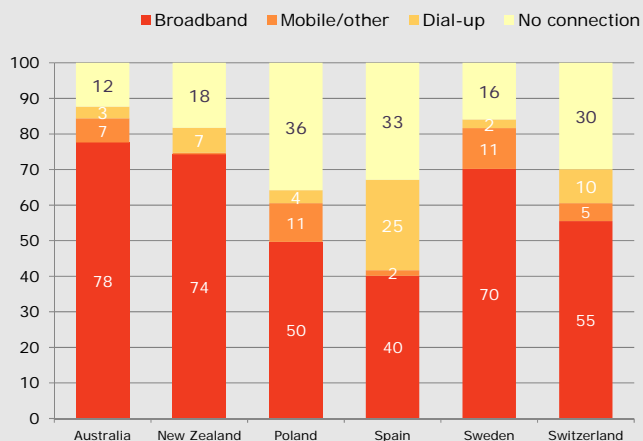
### 1.26 Affordability of home access by income, 2011

Not only are those households on very low incomes less likely to have broadband internet access. Those that have access are less likely to consider it to be affordable, and more likely to consider it unaffordable. Just under a quarter of those living in households on an income of less than \$30,000 considered their internet access to be unaffordable (23.0%) compared to 15.8%, 15.0% and 13.9% as you move up the income cohorts.



### 1.27 Type of home access, selected countries, 2011

Of the countries in the World Internet Project who undertook surveys in 2011, Australia has the highest proportion of households with a fixed, broadband connection (77.6%). Only four in ten of Spanish households had a broadband connection with a quarter using a dial-up connection and a third with no connection.





## 2 The internet and social networks

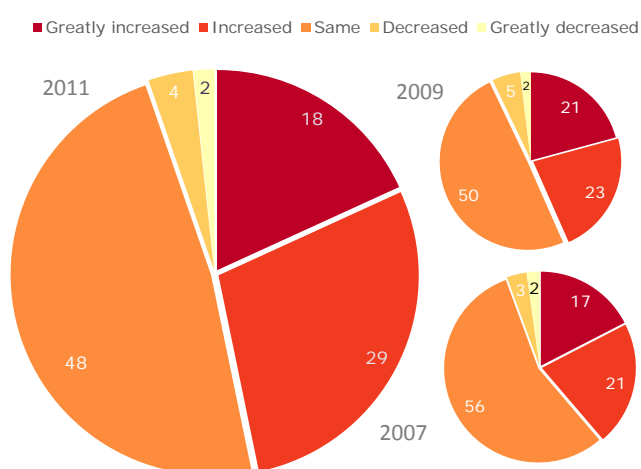
The impact of the internet on people's communication and social networks has been an area of great interest. Initially debate was polarised between those who saw the internet as a communication tool of extraordinary scope and those concerned with its possibly negative effects on face-to-face interaction. With the development of a multitude of platforms for social networking, debates have shifted to concerns about damaging uses of the network (such as cyber bullying) and the complex privacy issues raised by social software such as Facebook.

This section examines how people use the internet for communications and its impact on social networks.

### *Influence of the internet on social networks*

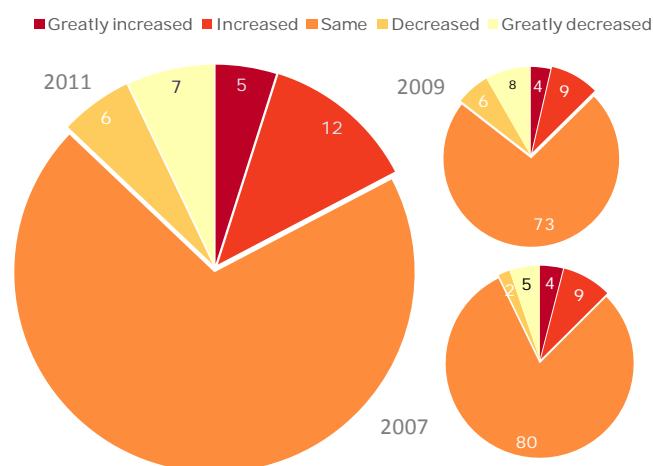
#### 2.1 How has internet access affected your contact with people who share your hobbies/ recreational activities?

The proportion of respondents who said that their contact with people who shared their hobbies or recreational activities increased again between 2009 and 2011. In 2007 38.7% of respondents noted an increase. This rose to 43.4% in 2009 and to 46.8% in 2011. Just under half our respondents (48.0%) said that it had remained the same.



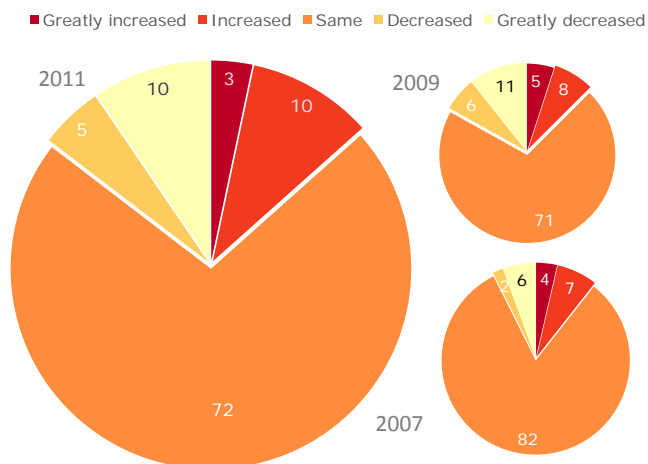
#### 2.2 How has internet access affected your contact with people who share your political interests?

In 2011, 17.3% of respondents felt that internet access had increased their contact with people who shared their political interests. This was a slight increase on 2009 (12.6%) and 2007 (12.5%).



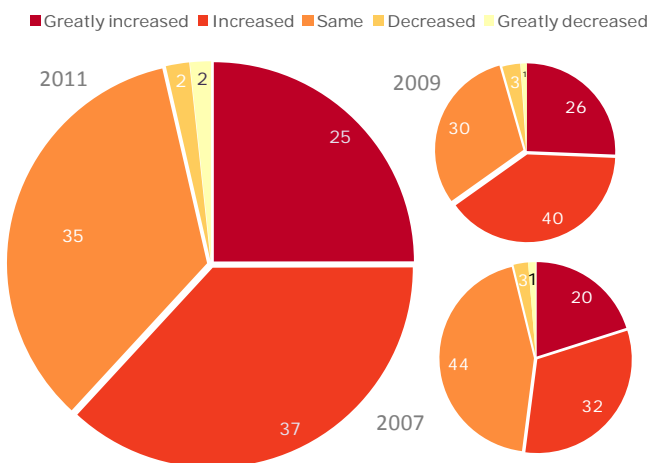
### 2.3 How has internet access affected your contact with people who share your religion?

The vast majority of those for whom the question was applicable felt that the internet had no effect on their contact with people who shared their religion in all three years. In 2011 13.4% felt that their contact had increased while a similar proportion (14.6%) thought that it had decreased.



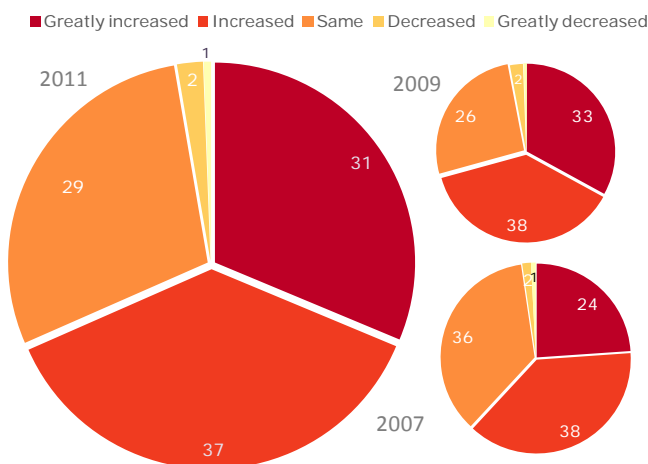
### 2.4 How has internet access affected your contact with your family?

The internet is still seen by most users as a technology that increases their contact with family. The proportion who felt that their contact had increased dropped slightly between 2009 (65.1%) and 2011 (61.9%), though was still well above the 2007 level (52.1%).



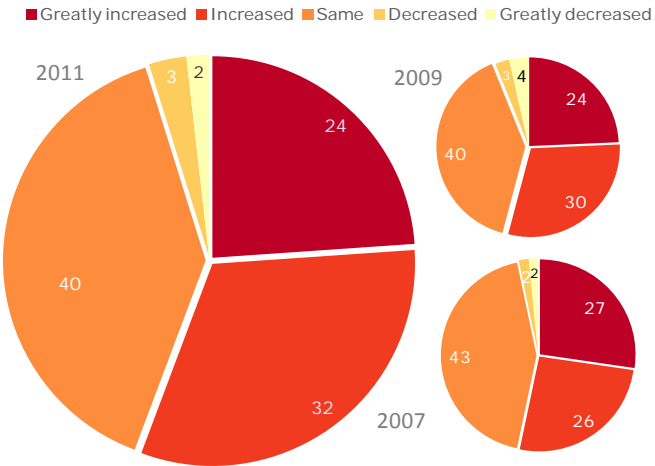
### 2.5 How has internet access affected your contact with friends?

After the proportion of people who thought their contact with friends had greatly increased jumped from less than a quarter in 2007 (23.9%) to a third in 2009 (33.0%) it fell slightly in 2011 to 31.3%. Very few people believe that internet access has decreased their contact with friends.



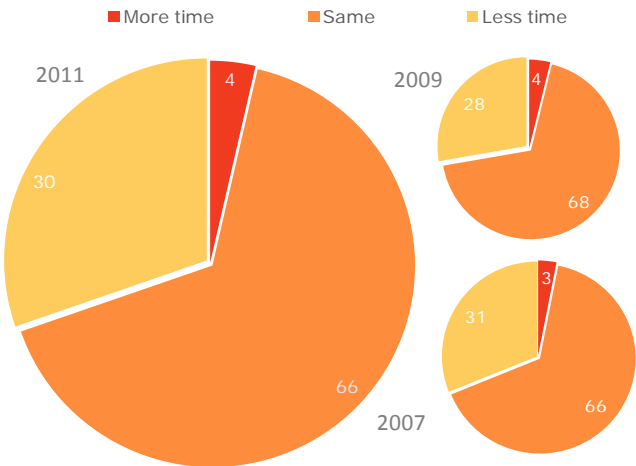
**2.6 How has internet access affected your contact with people in your profession?**

The majority of respondents for whom this question was applicable felt that the internet had increased their contact with people in their profession. There was very little difference across the three years.



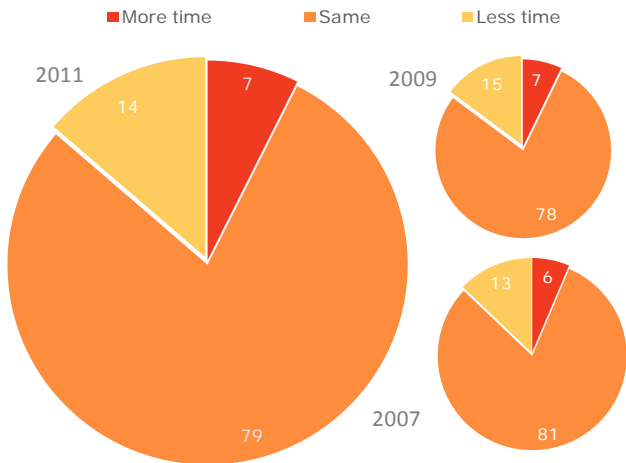
**2.7 Since being connected to the internet have you spent more or less time face to face with household members?**

There was little change over the three years for this question. Two thirds (66.1%) of respondents in 2011 said that face to face contact hadn't changed since connection while 30.3% said that it had decreased (31.1% in 2007 and 27.7% in 2009).



**2.8 Since being connected to the internet have you spent more or less time face to face with friends?**

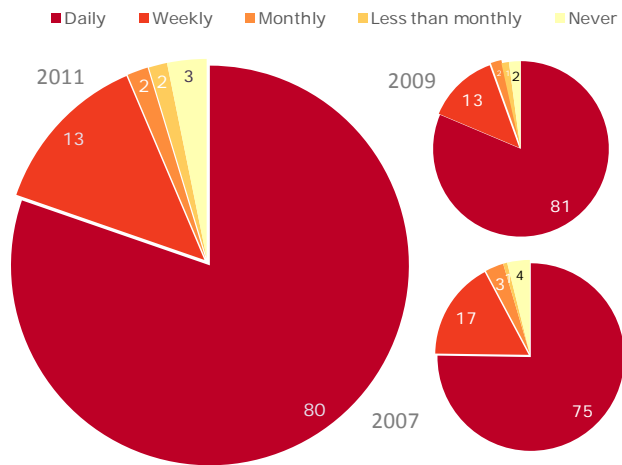
There was little change for this question as well. Much fewer respondents thought that their face to face interaction with friends had decreased since gaining internet access (13.7% in 2011) relative to members of their household. Just under eight in ten respondents said there had been no change (79.0%) while 7.4% said that they had seen more of their friends since access.



## Communicating online

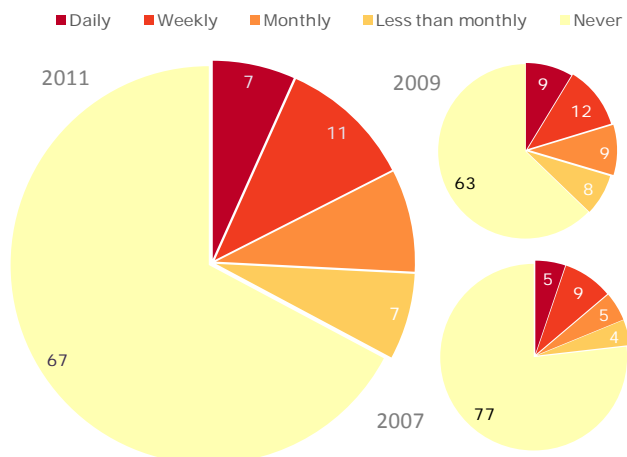
### 2.9 How often do you check your email?

There was little change in people's frequency of email checking between 2009 and 2011 after a slight rise in between 2007 and 2009. Eight in ten Australians check their email at least daily while only 3.2% do not use email.



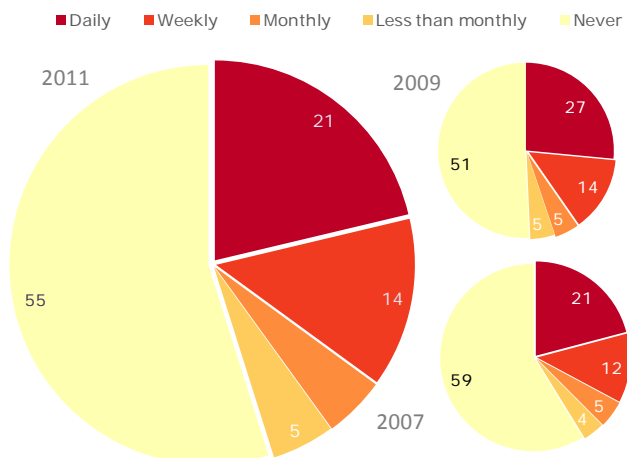
### 2.10 How often do you post messages on discussion or message boards?

While posting messages increased in popularity between 2007 and 2009, it fell slightly in 2011. Two thirds of users never posted messages (67.2% up from 62.8% in 2009) while 6.7% were posting daily (8.7% in 2009).



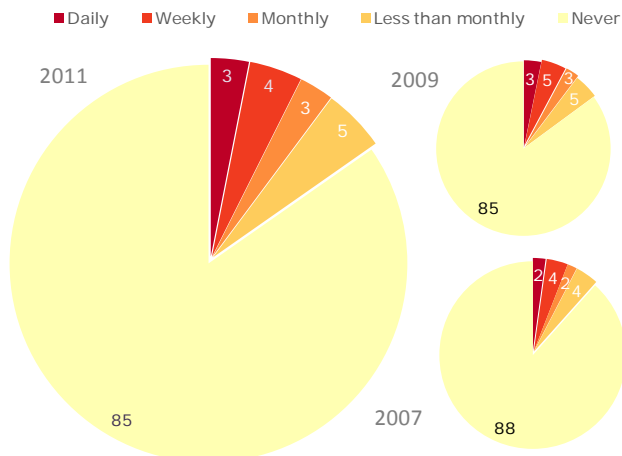
### 2.11 How often do you instant message?

A similar pattern was evident for instant messaging. Following an increase in activity between 2007 and 2009, there was a decrease in 2011. In 2011 45.1% used instant messaging (49.3% in 2009 and 41.2% in 2007). While more than a quarter of internet users were instant messaging daily in 2009 (26.5%), in 2011 just over one in five were (21.3%)



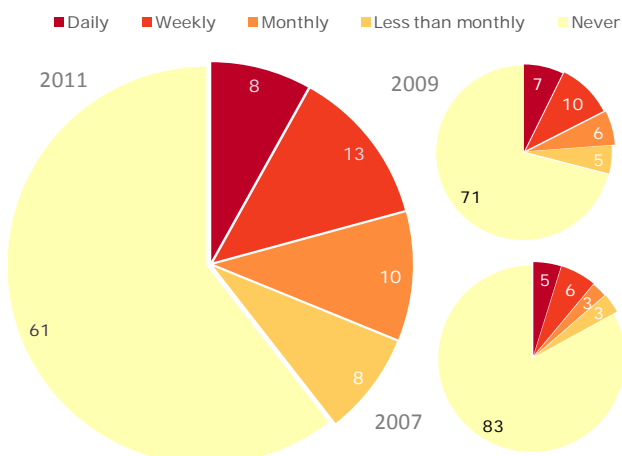
### 2.12 How often do you participate in chat rooms?

Most users do not participate in chat rooms. There has been little change over the period of analysis.



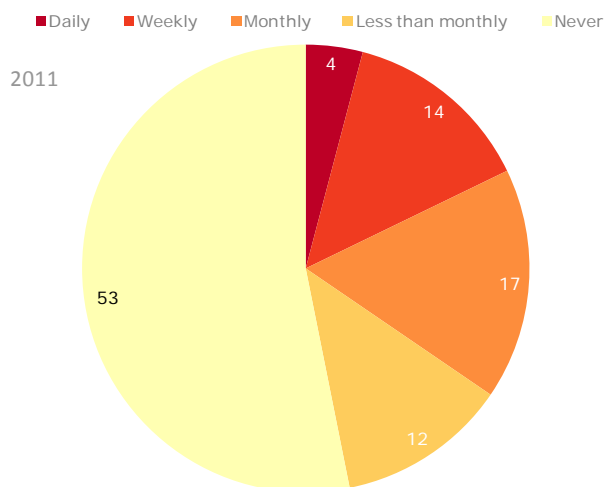
### 2.13 How often do you make or receive phone calls over the internet?

There was a strong increase in the use of the internet to make and receive telephone calls over the period of analysis. In 2007 only 17.2% of internet users were using a VOIP service but this jumped to 29.2% and jumped again to 39.4% in 2011. In 2011 20.8% of users made a phone call over the internet at least once a week and 8.1% did so daily.



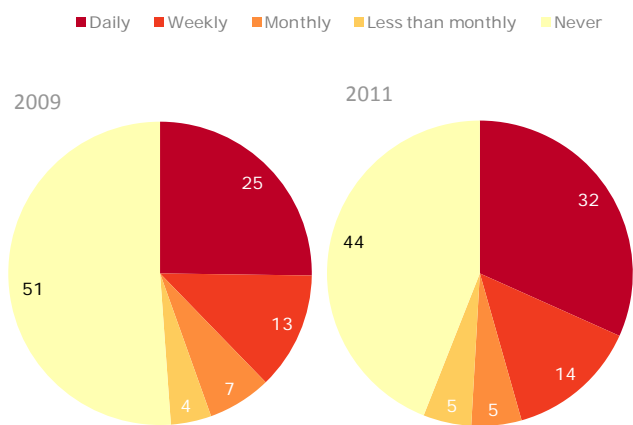
### 2.14 How often do you use video communication such as skype?

People report that they are more likely to use video communication than make phone calls online. In 2011 47.9% of people were using skype or a similar video communication service with 4.1% doing so daily and a further 13.7% weekly.



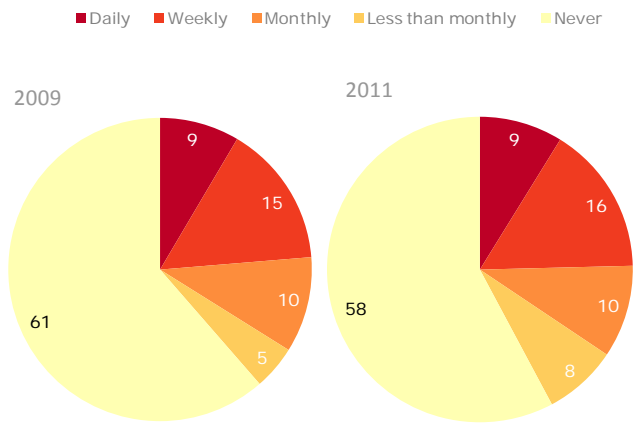
**2.15 How often do you visit social networking sites?**

Use of social networking sites grew between 2009 and 2011. In 2009 just under a half of Australian internet users accessed a social networking site (48.9%), growing to 56.0% in 2011. Those visiting daily grew from a quarter (25.2%) to almost a third (31.7%).



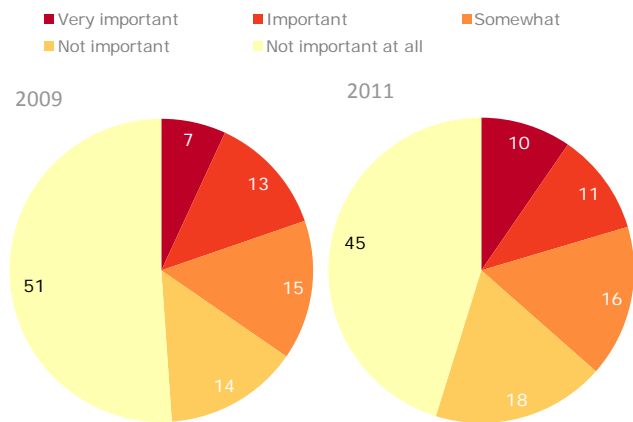
**2.16 How often do you update your status on a social networking site?**

While people were more likely to be members of a social networking site they were not significantly more likely to be updating their status. In 2009 38.6% of internet users did so, growing slightly to 42.2% in 2011. Most of this growth was by people who were updating less than monthly.



**2.17 How important is social networking?**

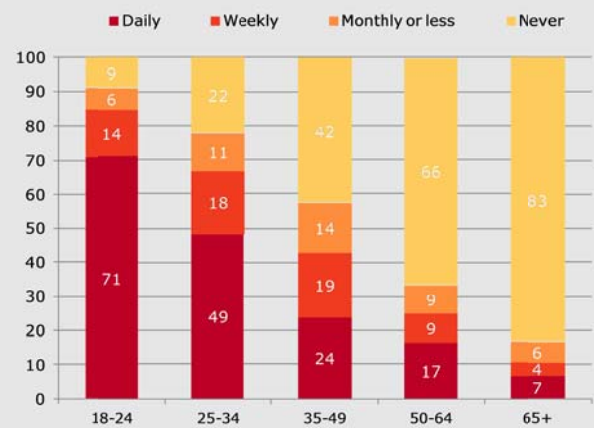
In 2011 just on one in ten internet users describe social networking as 'very important' (9.6%) with a further 10.8 saying it is important (6.9% and 12.8% respectively in 2009).



Further analysis

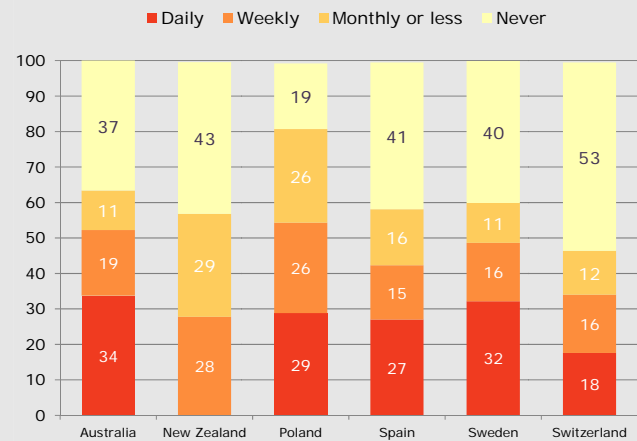
2.18 How often do you visit a social networking site by age, 2011

Younger age groups enthusiastically embrace social networking. More than seven in ten 18-24 year olds visit a social networking site daily. This proportion falls steadily as we move through the older age groups. Only 7% of those aged 65 and more visit a social networking site daily and 83% never do so.



2.19 How often do you visit a social networking site, selected countries, 2011

Aside from Switzerland, a majority of internet users in all the countries who undertook a WIP survey in 2011 accessed a social networking site. Australia had the largest proportion doing so daily.



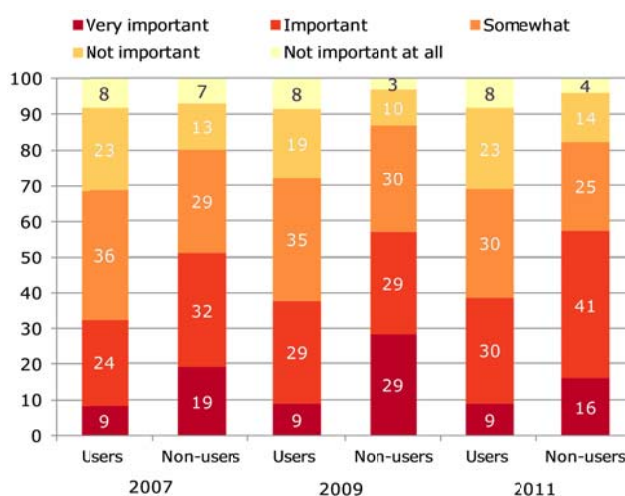
### 3 The internet and the media

One of the major debates sparked by the development of the internet has been the future of the traditional media industries. At present there is much concern regarding the future of newspapers and considerable activity in trying to develop business models to support quality online journalism. This section examines these issues and makes comparisons between internet users and non-users in their off-line behaviour.

To place the role of the internet as an information source in context, we asked participants about the importance of different kinds of media as a source of information. This section assumes a clearer delineation between internet consumption and that of traditional media than exists in practice. Where respondents are asked about newspaper reading or television watching they are referring to their off-line behaviour. As the internet continues its development, this distinction will become increasingly difficult to make.

#### 3.1 For information in general how important is television?

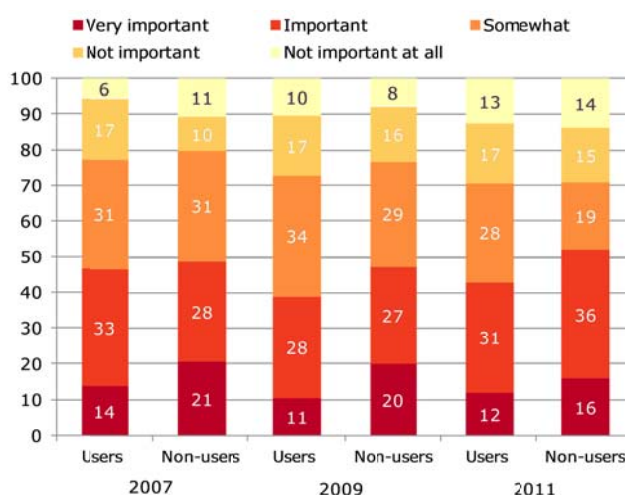
Television is an information source for a majority of people whether they are internet users or not, although it is less important for internet users. The main change between 2009 and 2011 is that fewer non-users described television as a 'very important source of news' (15.9% down from 28.5%). The importance of television for information has not changed greatly from 2007 to 2011.



#### 3.2 For information in general how important are newspapers?

The proportion of internet users who described newspapers as important, or very important, sources of information dropped slightly between 2007 and 2009 (46.7% to 39.0%) and then rose slightly in 2011 to 43.1%.

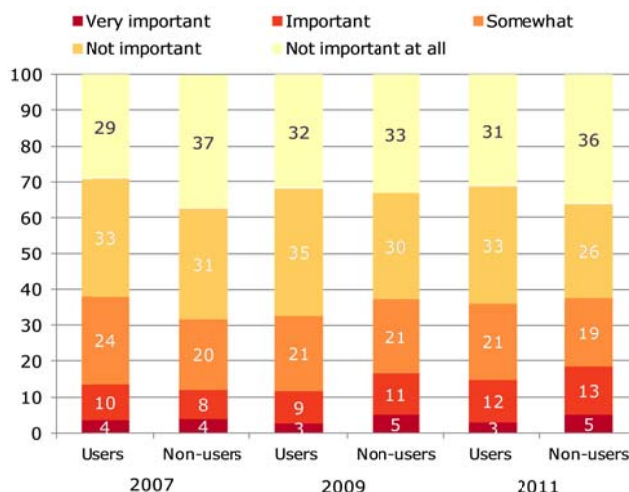
For non-users, opinions on the importance of newspapers polarised in 2011. Those who considered them 'not important at all' increased from 7.7% in 2009 to 13.7% in 2011 while those who considered them 'important' jumped from 27.3% to 35.9%.





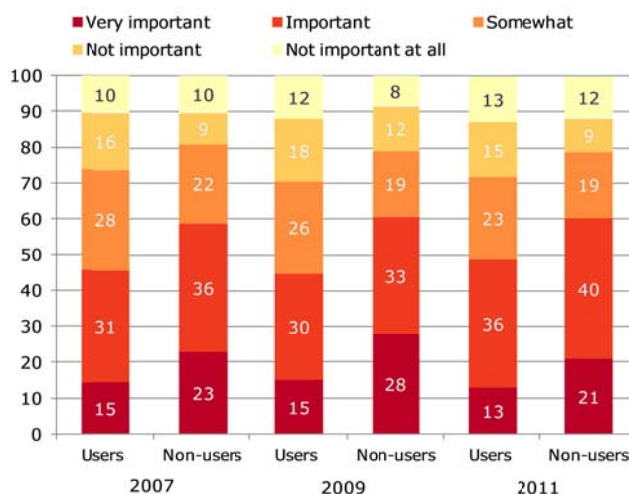
### 3.3 For information in general how important are magazines?

Magazines were not considered an important information source by a majority of respondents.



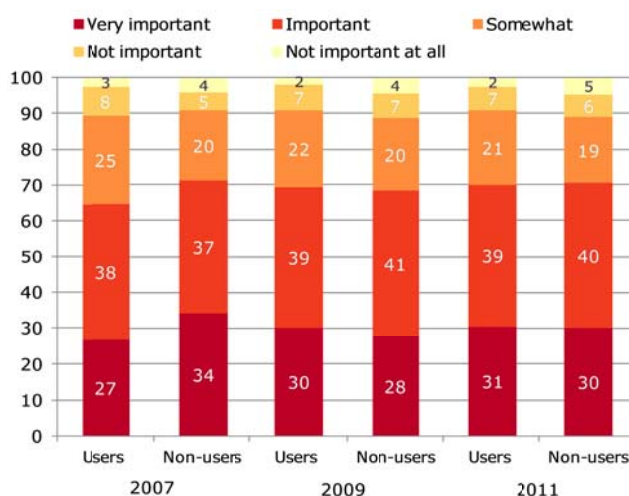
### 3.4 For information in general how important is radio?

The results for radio changed very little over the period of analysis. In 2011 just over six in ten non-internet users (60.4%) considered radio an 'important or very important' information source compared to 48.8% of users.



### 3.5 For information in general how important are interpersonal sources?

There was little change over the period. Around nine in ten users and non-users in 2007, 2009 and 2011 regard interpersonal sources as at least 'somewhat important' sources of information.

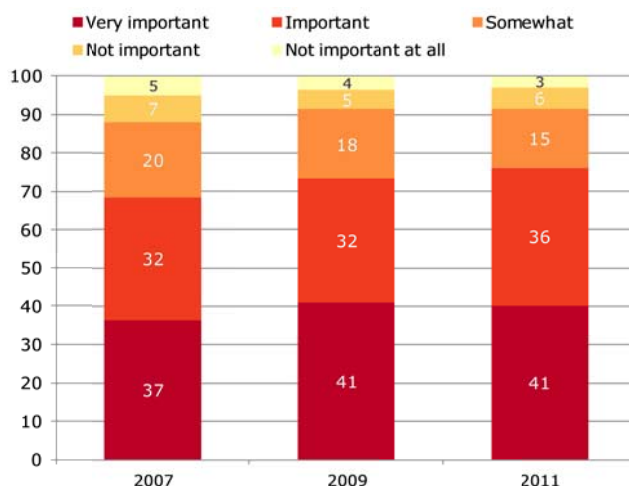


### 3.6 For information in general how important is the internet?

For users, the internet has become a very important source of information. It is more important than the traditional media of newspapers, radio and television. Just over three quarters of users described the internet as 'important' or 'very important' (76.3%) in 2011.

For television the corresponding figure is 38.8%, for newspapers 43.1% and for radio 48.8%.

The difference is even more marked when we look just at the 'very important' rating. The proportion of users rating the internet as 'very important' (40.5%) is more than three times that for radio (13.0%) and newspapers (12.1%) around four times greater than for television (8.9%).

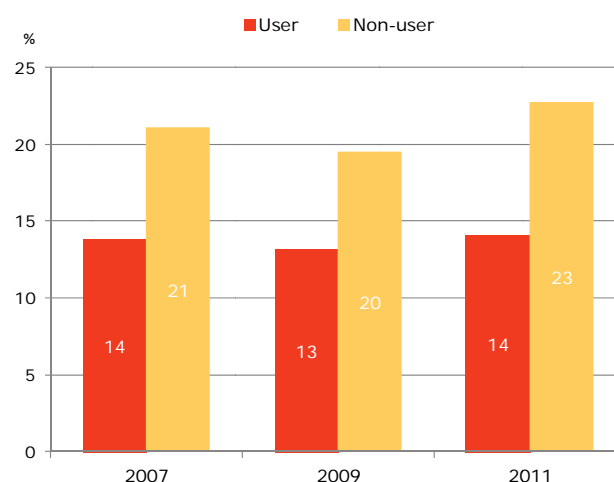


### Time spent on media

This section examines the amount of time people devote to various media during a week and how internet users think that internet access has affected their use of various media.

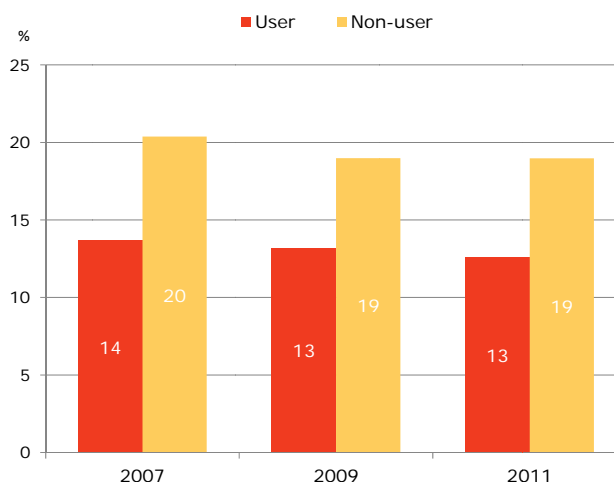
### 3.7 On average how many hours a week do spend watching television?

On average, internet users spend around a third less time than non-users watching television and this stayed very consistent over the three periods. Non-users recorded an increase in time watched from nineteen and a half hours to twenty-two and three quarters between 2009 and 2011.



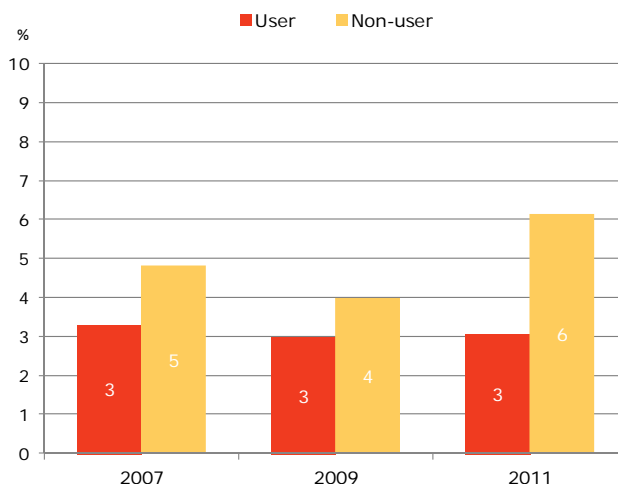
### 3.8 On average how many hours a week do spend listening to radio?

The pattern for listening to radio is very similar to that for watching television with non-internet users listening to around a third more radio on average. In 2011 users listened to an average of just over twelve and a half hours while non-users listened for just under 19 hours a week.



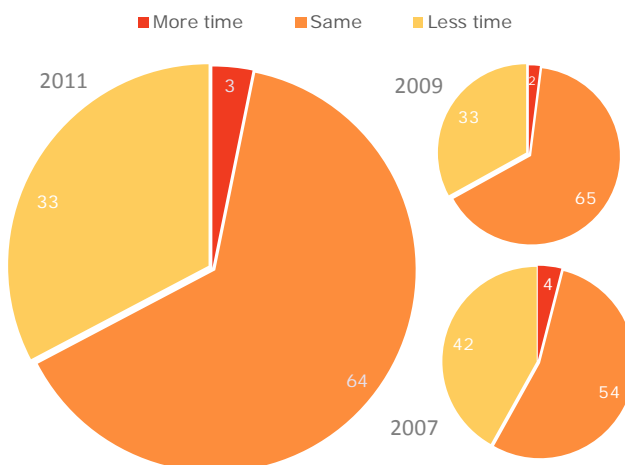
### 3.9 On average how many hours a week do spend reading newspapers?

Offline newspaper reading amongst internet users has fallen slightly over the period from three and a third hours in 2007 to just under three hours in 2011. For non-users, newspaper reading has 'bumped around', up from just under five hours in 2007 to four hours in 2009 and over six hours in 2011. In 2011 non-users spent twice as long reading newspapers as internet users.



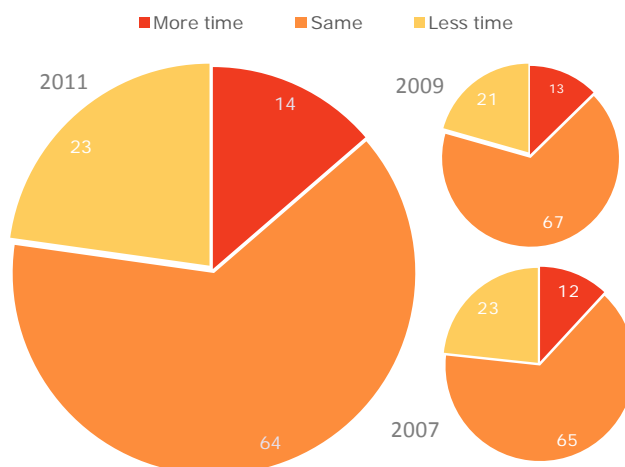
### 3.10 How has being connected to the internet changed the amount of television you watch?

The proportion of internet users who feel that they watch less television since becoming connected dropped between 2007 and 2009 (41.9% down to 33.0%) and remained at this level in 2011 (32.7%).



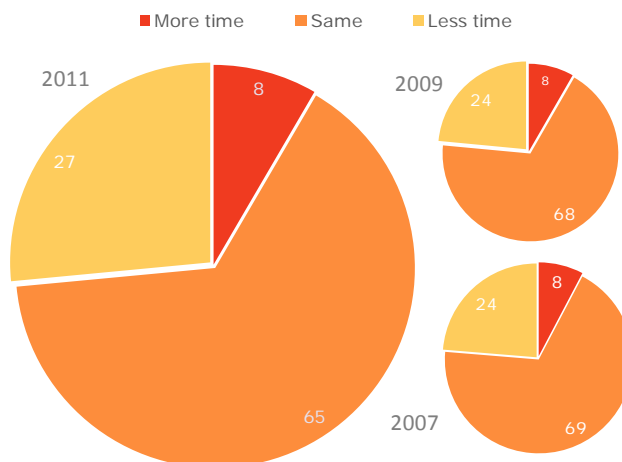
### 3.11 How has being connected to the internet changed the amount of time you spend reading books?

There was very little change between 2007 and 2011. Around two thirds of internet users in the three periods believe that they spend the same amount of time reading books as they did before accessing the net. More than one in ten believe it has increased while just over a fifth (23.3% in 2007, 20.6% in 2009 and 22.8%) think that they read less often.



### 3.12 How has being connected to the internet changed the amount of time you spend reading newspapers and magazines?

There was almost no difference in responses to this question over the period of analysis. Over two thirds of internet users felt that they spent the same time reading newspapers (off-line) since internet connection (65.1% in 2009). Just over a quarter (26.5%) felt they spent less time reading newspapers and magazines and 8.4% thought their newspaper and magazine reading had increased.

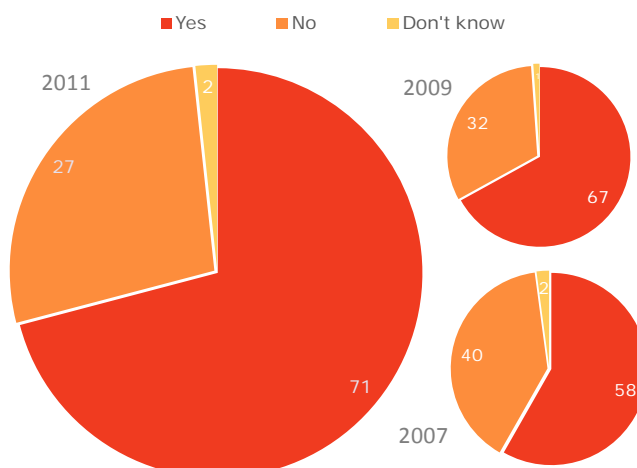


### Use of the internet for information seeking

This section looks at how people seek information online.

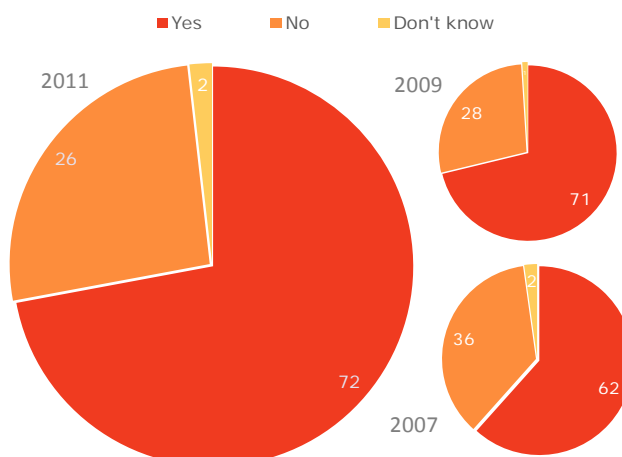
### 3.13 If a large local story was breaking, would you visit an online news service to get information?

The role of the internet as a news source for users has strengthened over the period. While in 2007 a clear majority of internet users (58.3%) would use the internet to find information on a large local news story that was breaking, by 2009 this had grown to over two thirds of users (67.0%) and increased again in 2011 to 70.9%.



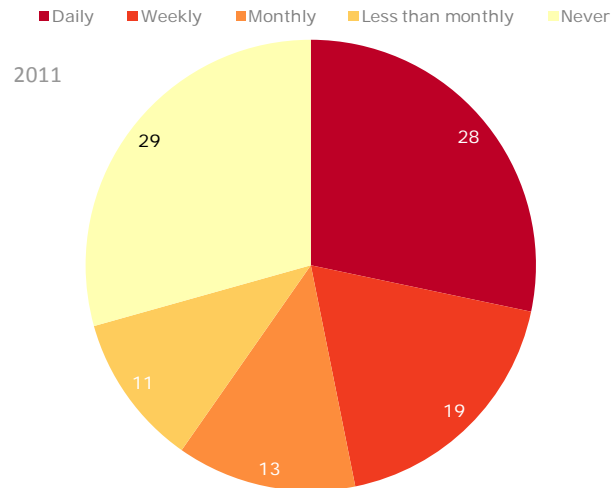
### 3.14 If a large international story was breaking, would you visit an online news service to get information?

A similar pattern as that for local news. In 2007 more than 6 in 10 internet users would visit an online news service to get information on a breaking international story. This proportion grew to more than 7 in 10 in 2009 and 2011 (71.2% and 72.0% respectively). This highlights the growing importance of the internet as a global news source.



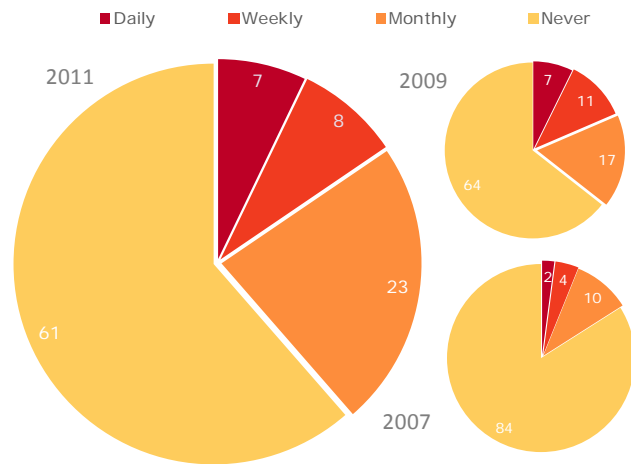
**3.15 How often do you visit an official news site?**

Almost 3 in ten Australian internet users visit an official news site daily with a further one in five visiting weekly. One in three never visit an official news site.



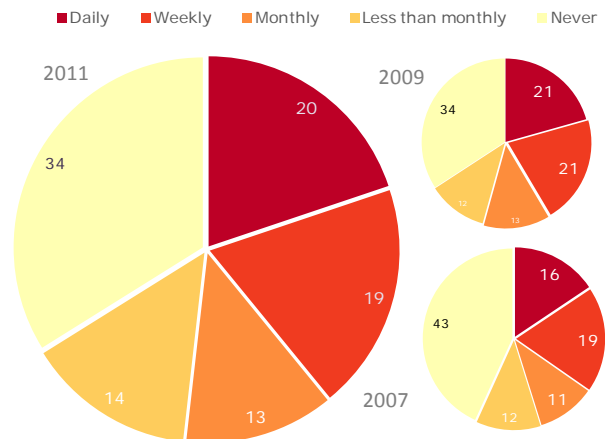
**3.16 How often do you visit a news blog?**

Visiting news blogs grew slightly between 2009 and 2011. Australians are much likely to visit an official news site than a news blog however.



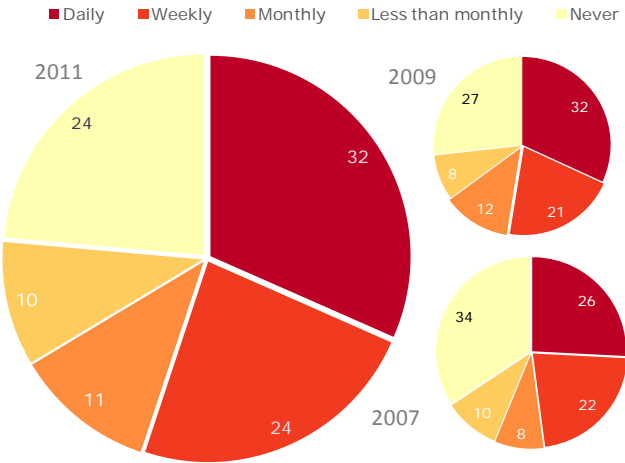
**3.17 How often do you look for local community news on the Internet?**

While a majority of users looked for local community news on the net in 2007 (56.8%), by 2009 this figure had grown to just under two thirds of users (65.8%) and maintained this level in 2011 (66.1%). Just less than four in ten now do so at least weekly (39.1%), with one in five looking on a daily basis (19.8%).



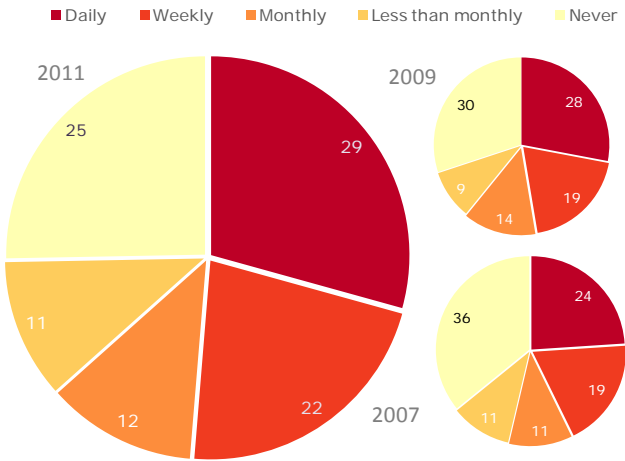
### 3.18 How often do you look for national news on the Internet?

In 2007 two thirds of users looked for national news on the internet (65.7%). In 2009 this had grown to nearly three quarters (73.3%) and was again at this level in 2011 (76.4%). Those looking daily grew from 25.8% in 2007 to 31.5% in 2011.



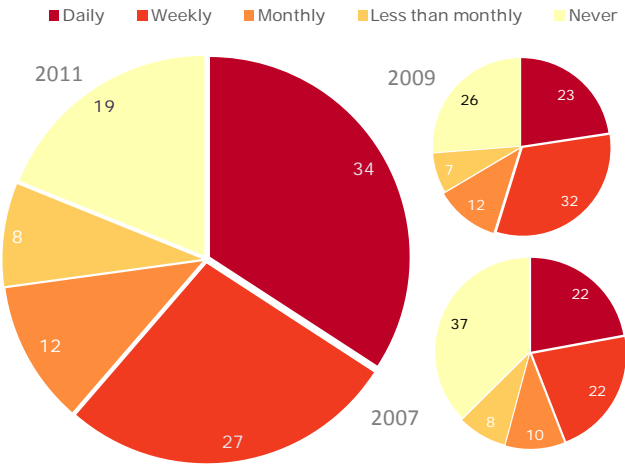
### 3.19 How often do you look for international news on the Internet?

The pattern for international news is very similar to that for national and local with a small increase in the proportion of people looking online (64.1% to 69.9% and 74.7%). In 2011 nearly three in ten searched on a daily basis with a further 22.0% looking weekly.



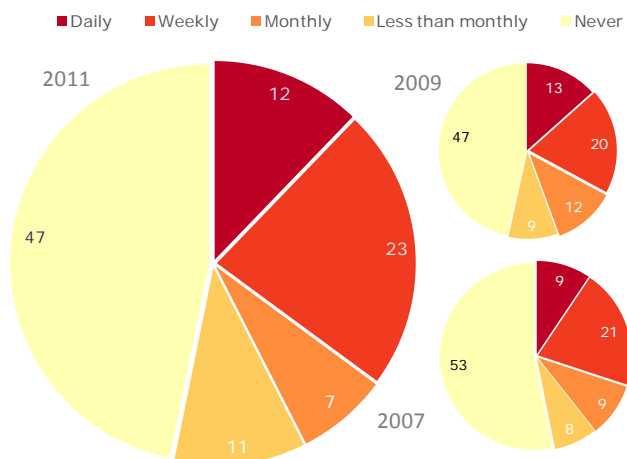
### 3.20 How often do you check weather forecasts on the Internet?

The proportion of internet users checking weather forecasts online has grown strongly in both of the periods: 81.1% up from 73.8% in 2009 and 62.6% in 2007). A third check daily (34.2% up from 22.6% in 2009).



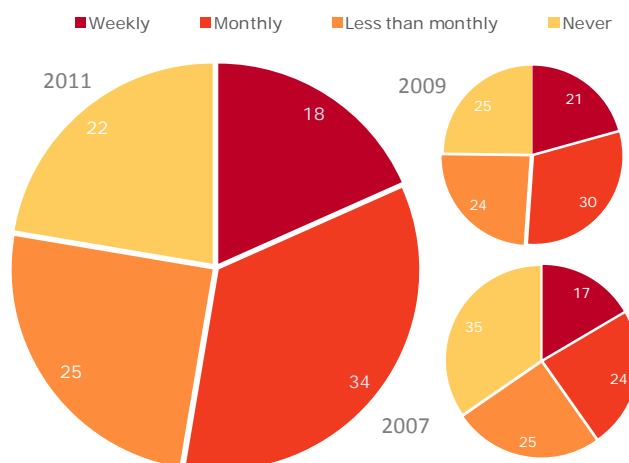
### 3.21 How often do you look for sports information on the Internet?

There was an increase in the proportion of people who used the internet to check sports information between 2007 and 2009 (from 46.8% up to 53.5%) with little change to 2011. In 2011 the proportion looking daily increased was 12.2% while the proportion checking weekly was 22.9%.



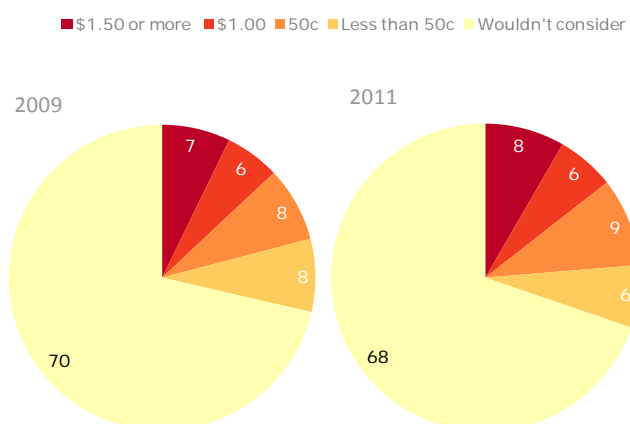
### 3.22 How often do you look for health information on the internet?

In 2007 just under two thirds of users looked for health information online, this rose to just over three quarters in 2009 and rose slightly to 78.7% in 2011.



### 3.23 How much would you be prepared to pay to read an online newspaper?

The uncertain future of newspapers and the search for an online business model is a continuing public policy concern. To investigate this issue we asked respondents whether and how much they would be prepared to pay to read an online newspaper. Australians are resistant to paying for newspapers online and this did not change between 2009 and 2011. A clear majority of Australians would not consider paying for an online newspaper (69.8% in 2011) and only 8.2% would pay the cover price of a hard copy newspaper.

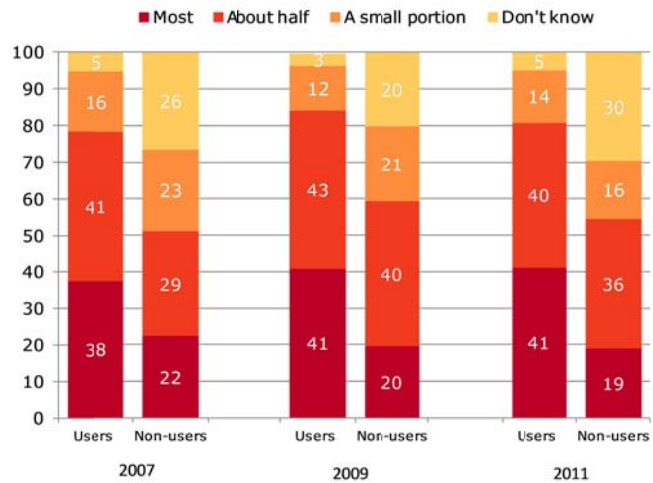


## Trust in media

The ease with which information can be posted on the net by large numbers of people raises the issue of reliability and trust. This section examines this issue by looking at internet users' and non-users' perceptions of the reliability of information on the web and on other forms of media.

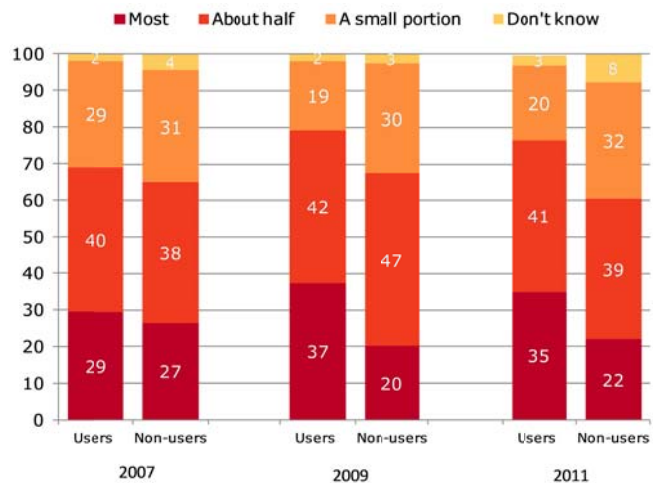
### 3.24 How much of the information on the world wide web is reliable?

There has not been a great deal of change in the response to this question over the period of analysis. Non-users are more likely to say that they don't know (29.5%) and less likely to think that 'most of the information' on the web is reliable. In 2011 40.3% of users chose this response compared to just 17.4% of non-users. Users and non-users were just as likely to think that only 'a small portion' of information on the web was reliable.



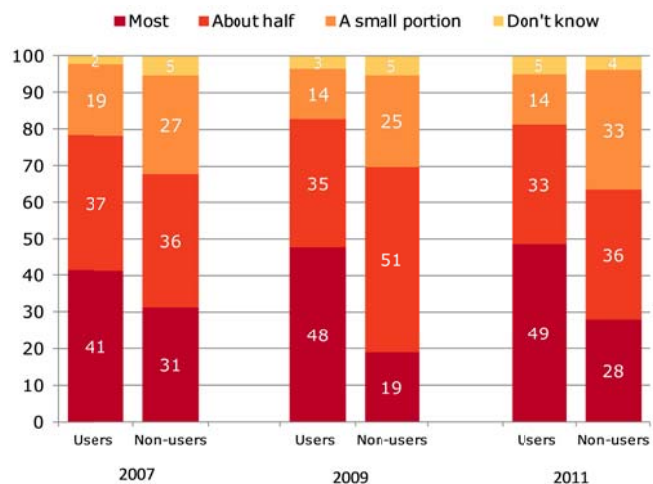
### 3.25 How much of the information on the television is reliable?

While in 2007 there was very little difference between internet users and non-users in their perception of the reliability of information presented on television, in 2009 internet users had become a little more trusting and non-users less so. This pattern was replicated in 2011. More than a third of users felt most of the information on television was reliable compared to just one in five non internet users (34.1% to 20.2%). At the other end of the scale, 28.8% of non-users thought that only 'a small portion' of the information on television was reliable compared to 18.9% of internet users.



### 3.26 How much of the information in newspapers is reliable?

Internet users are much more likely than non-users to think that most of the information in newspapers is reliable (46.8% to 26.5% in 2011). This has been consistent over the three periods.

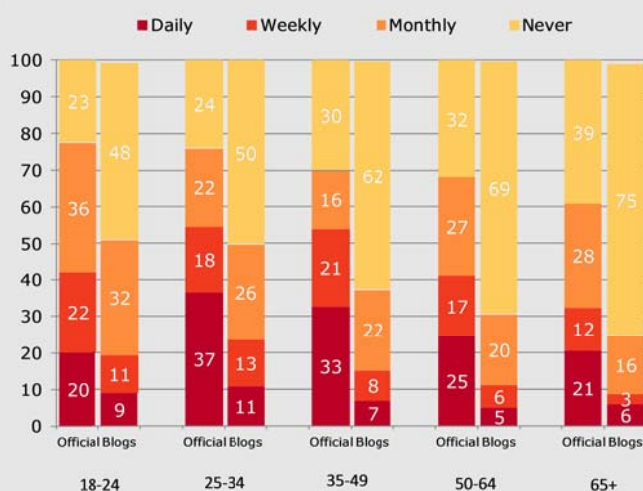




## Further analysis

### 3.27 Visiting official news sites and news blogs by age, 2011

News blogs are a much more important part of the news gathering behaviour of younger Australians than older Australians. Around one in five 18-24 year olds visit an official news site daily compared to just under one in ten visiting a news blog. A slightly higher proportion of those aged 65 and over visit an official news site daily but only 5.9% visit a news blog daily.



### 3.28 Media combinations considered important or very important, selected countries, 2011

The internet was the most important source for those who had only a single source of news in every country in our analysis. In Australia nearly one in five internet users nominated only the internet as an important source of news and information.

Switzerland was the only country in the analysis that recorded more combinations including newspapers than the internet. Overall Australia has the lowest reliance on newspapers as an information source and a relatively high reliance on radio.

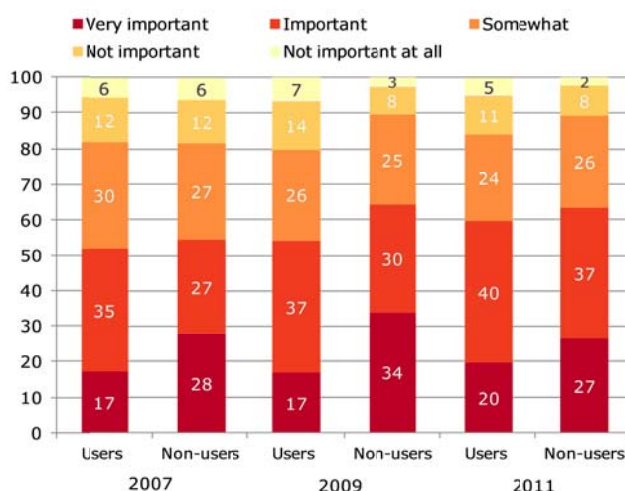
	Aust	Mex	NZ	Pol	Sp	Swe	Switz	UK
None	8	4	4	3	14	8	6	1
Internet only	19	16	14	2	10	10	6	8
Television only	2	3	3	1	1	2	2	1
Newspapers only	2	1	2	1	3	2	3	0
Radio only	5	1	2	1	5	2	1	1
Internet and television	6	18	11	9	4	8	4	9
Internet and newspapers	7	6	9	1	4	7	5	10
Internet and radio	10	4	6	1	5	2	2	4
Television and newspapers	1	1	3	1	1	4	2	1
Television and radio	2	2	2	2	1	4	3	1
Newspapers and radio	2	2	3	1	8	2	7	1
Internet, television and newspapers	6	9	8	6	5	10	5	11
Internet, television and radio	5	7	8	10	3	8	4	11
Internet, newspapers and radio	7	4	7	2	10	4	5	6
Television, newspapers and radio	3	2	5	4	5	9	10	2
All media	14	19	14	55	20	21	31	33
<b>Combinations including internet</b>	<b>76</b>	<b>84</b>	<b>76</b>	<b>87</b>	<b>62</b>	<b>68</b>	<b>65</b>	<b>93</b>
<b>Combinations including newspapers</b>	<b>43</b>	<b>44</b>	<b>50</b>	<b>70</b>	<b>56</b>	<b>56</b>	<b>70</b>	<b>64</b>

## 4 The internet and entertainment

The emergence of YouTube and other online video services has underlined the importance of the internet as an entertainment medium. This section looks at how Australians are using the internet to entertain themselves and pursue various hobbies and recreational pursuits.

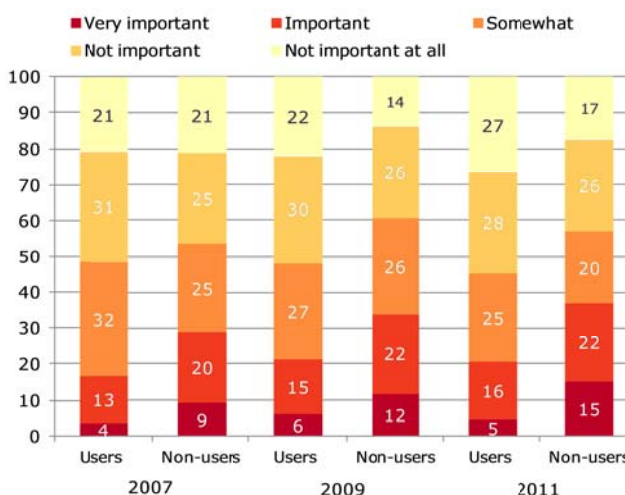
### 4.1 For entertainment in general how important is television?

Television's role as an entertainment source has changed very little for both internet users and non-users. Between 2009 and 2011 the importance of television for internet users grew a little, so that there was less difference between users and non-users. Around one fifth of internet users describe television as 'very important', compared to just over a quarter of non-users. 40% of users say it is important compared to 37.1% of non-users.



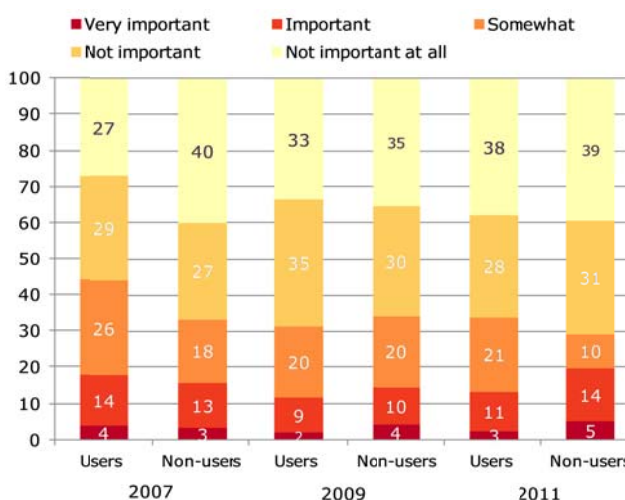
### 4.2 For entertainment in general how important are newspapers?

Non-users continue to be more likely to consider newspapers as an 'important' or 'very important' entertainment source than internet users. In 2011 one in five users thought newspapers were an 'important' or 'very important' entertainment source compared to 37.2% of non-users.



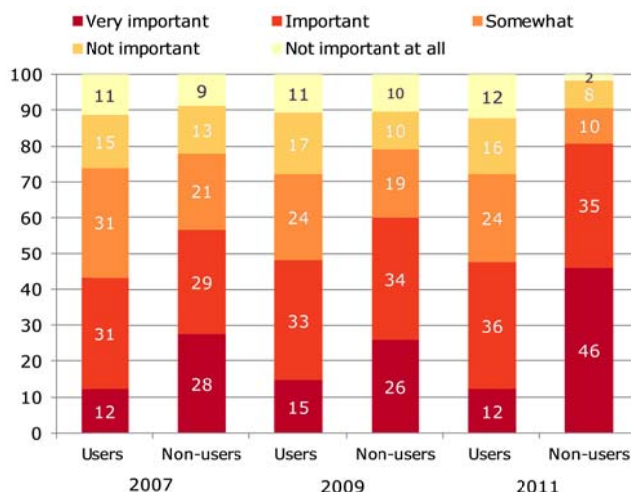
### 4.3 For entertainment in general how important are magazines?

Magazines were not considered important for entertainment by a majority of respondents. In 2011 13.2% of internet users considered them 'important' or 'very important' entertainment source compared to 19.7% of non-users.



#### 4.4 For entertainment in general how important is radio?

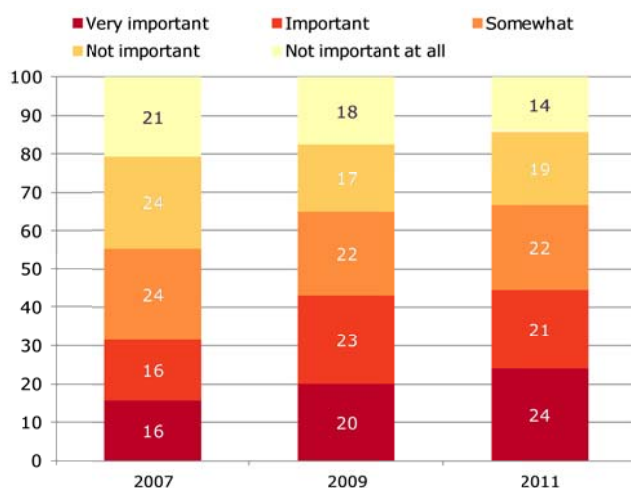
Again there was little change in the pattern of response for this question - radio is still an important source of entertainment for people with almost a half of non-users describing it as 'very important' (46.2% up from 25.9% in 2009). While not as important for internet users (only 12.3% consider it very important), almost three-quarters of users consider radio as at least somewhat important (72.0%) for entertainment.



#### 4.5 For entertainment in general how important is the internet?

The internet is becoming a more important source of entertainment. In 2007 just under a third of users considered the internet 'important' or 'very important' (31.5%). In 2009 this figure was 43.2% and grew very slightly to 44.7% in 2011. Within that group, however, the proportion of users who considered the internet 'very important' for entertainment continues to grow steadily, and in 2011 this group is again greater than that for television (24.2% to 19.7%).

At the other end of the scale however, users are much more likely to rate the internet as 'not important at all' (14.2%), than they are to rate television this way (4.9%).

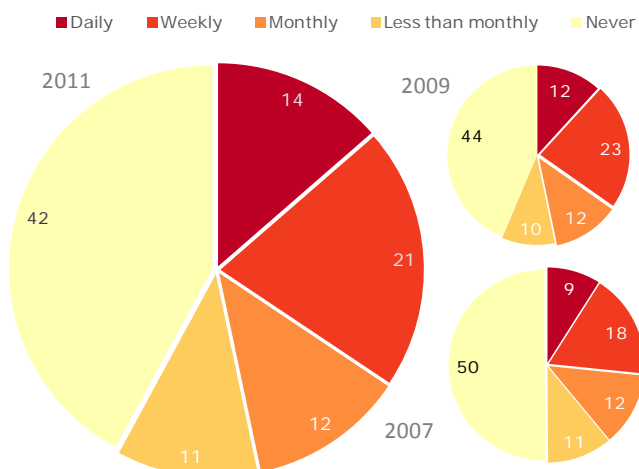


### *The internet as entertainment*

This section looks at how people use the internet for entertainment purposes.

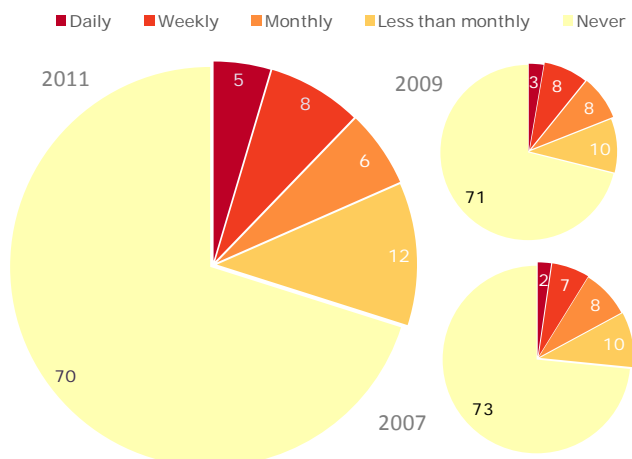
#### 4.6 How often do you download or listen to music online?

There was little change in downloading or listening to music between 2009 and 2011. In 2011 more than half of users downloaded or listened to music online (57.9%) with 13.6% doing so daily.



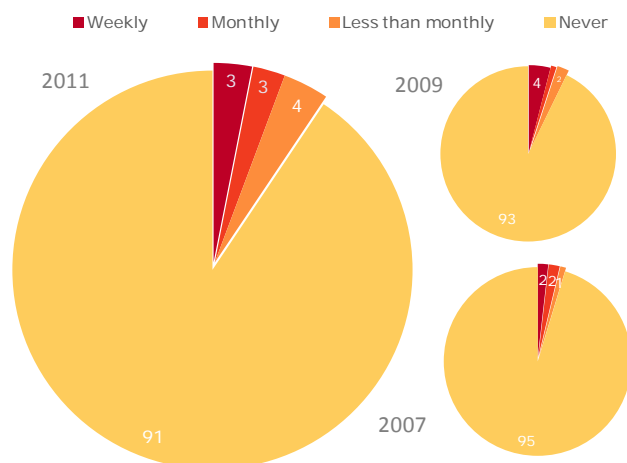
#### 4.7 How often do you listen to a radio station online?

Use of the internet to listen to the radio has not changed a great deal over the period of analysis. While more than a quarter of users listened to a radio station online in 2007 (26.6%) this had increased three in ten by 2011. Few people listen regularly – only 4.6% of users listened on a daily basis and 7.6% listened weekly.



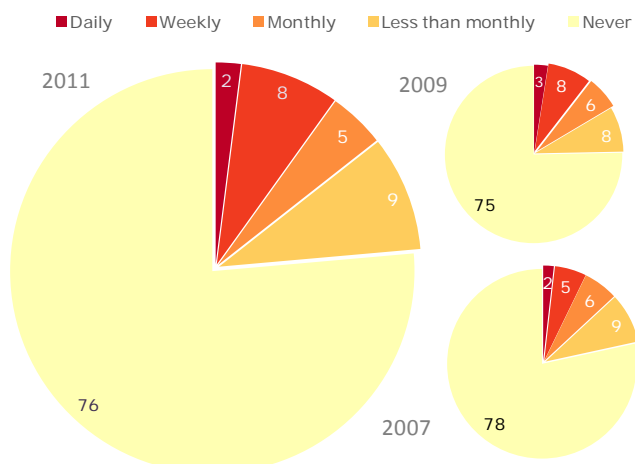
#### 4.8 How often do you bet, gamble or enter sweepstakes on the internet?

Less than one in twenty of our respondents used the internet to gamble in 2007 (4.7%), and this increased to 7.2% in 2009, and almost one in ten in 2011 (9.9%). Compared to the six other WIP countries that undertook the survey in 2011 Australians' participation was around the middle. Poland had the highest participation at 16.0% with Mexico the lowest at 2.8%.



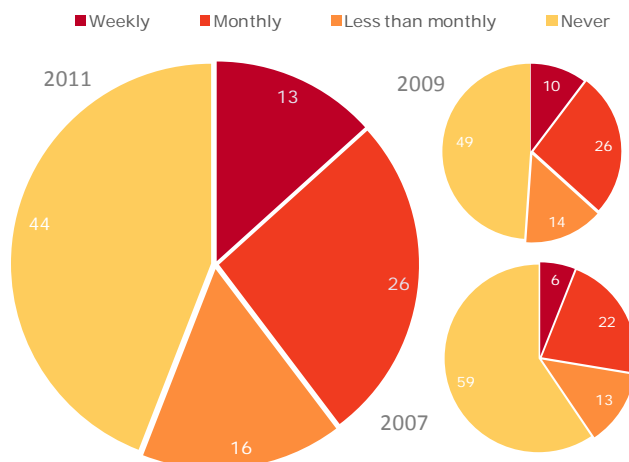
#### 4.9 How often do you look at sites with sexual content?

A quarter of our respondents (23.6%) report that they look at internet sites with sexual content. Just on one in ten do so at least weekly. There has been very little change over the three periods. Compared to the six other WIP countries that undertook the survey in 2011, Australia had one of the higher rates of use for this activity but the differences were not large. Mexicans were the least likely to look at sites with sexual content (13.3%) and the Polish were the most likely (26.6%).



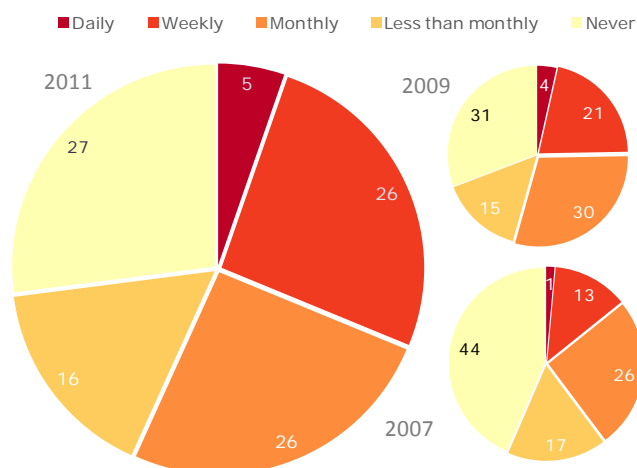
#### 4.10 How often do you look up information about restaurants on the internet?

This is an activity that has grown substantially since 2007. In 2007 four in ten respondents looked up information about restaurants, by 2009 it was just over half and in 2011 65.9%. The proportion doing so at least weekly grew from 6.0% to 10.3% up to 13.3% in 2011.



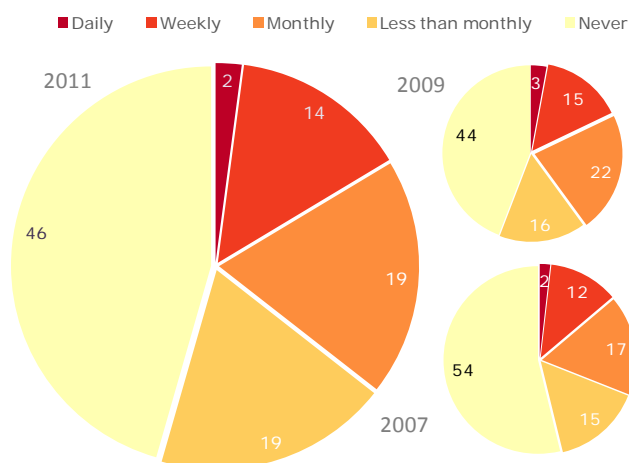
#### 4.11 How often do you find information about food such as recipes?

While over half of our sample had used the internet to look for information about food in 2007 (56.5%), by 2009 this had grown to more than two-thirds (69.2%) and grew again in 2011 to 73.0%. Frequency also increased with 31.4% looking weekly in 2011 compared to 24.7% in 2009 and 14.2% in 2007.



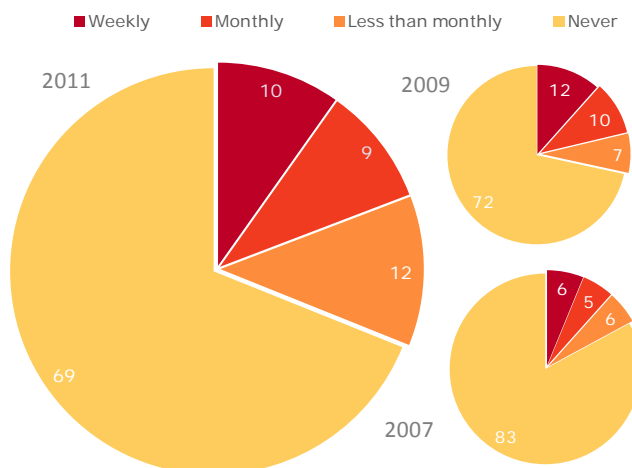
#### 4.12 How often do you visit sites dedicated to your favourite artists (eg authors, musicians)

Just under half of our sample had used the internet to visit a site dedicated to a favourite artist (46.3%) in 2007, while in 2009 well over a half had done so (55.8%). This fell slightly in 2011 to 54.4%.



#### 4.13 How often do you download or listen to podcasts?

Downloading or listening to podcasts has increased over the period of analysis from 17.1% of users in 2007 to 28.4% in 2009 and 31.1% in 2011. Weekly listeners comprised 9.8% of internet users in 2011 (11.6% in 2009 and 6.2% in 2007).

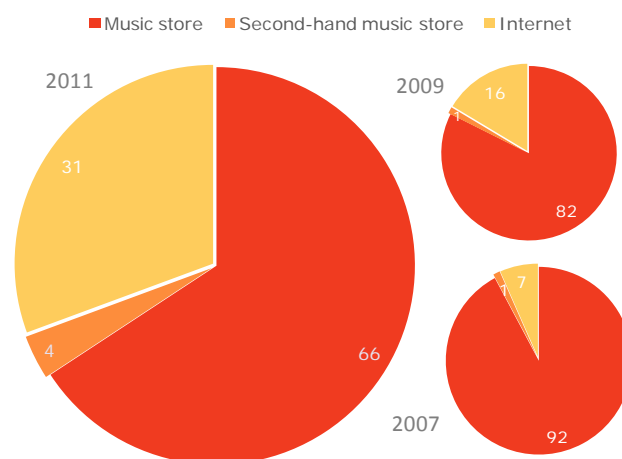


### Downloading entertainment

This section presents findings from a series of questions that asked respondents in more detail about their consumption of online music, movies and other entertainment.

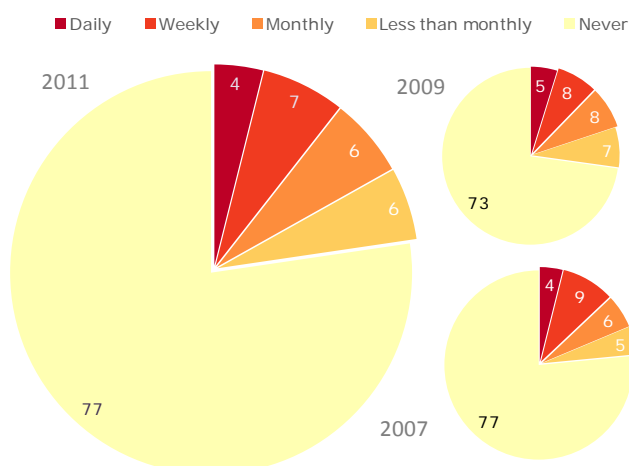
#### 4.14 Where do you usually buy your music?

The proportion of users who usually buy online doubled from 2007 to 2009 (6.6% to 16.4%) and then doubled again in 2011 to 30.2%. The majority of internet users still usually buy their music from a 'bricks and mortar' store (68.5%).



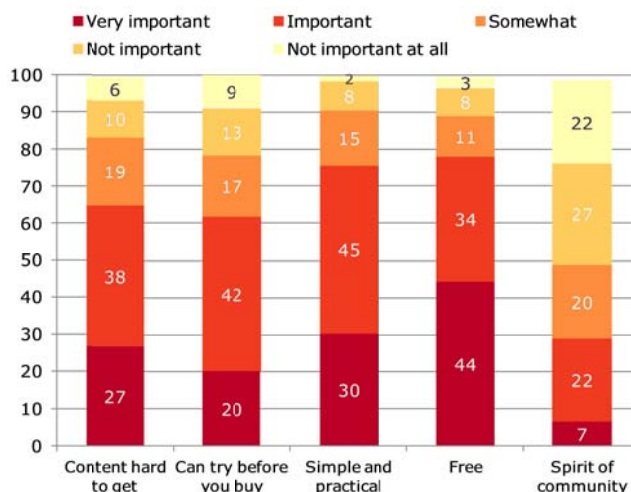
#### 4.15 How often do you use file-sharing services like bitTorrent?

The use of file-sharing services increased very slightly between 2007 and 2009 (23.6% to 27.8%) but decreased again in 2011 to below the 2007 level (22.6%). This may partly reflect greater awareness of the illegality of some of this activity.



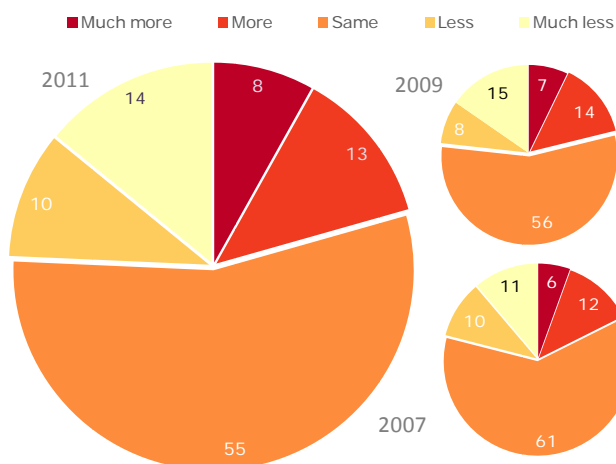
#### 4.16 Why do you use file-sharing services?

There was little change in the most important reasons for using file sharing services; that they are free and simple and practical to use. While the proportion nominating 'free content' as very important fell slightly in 2011 it was still the most nominated at 44.3%. Just under a third cited 'simple and practical' as very important. Accessing hard to get content (26.8%) was considered very important by a quarter of users while being able to try before you buy was 'very important' for one in five using file sharing services (20.1%)



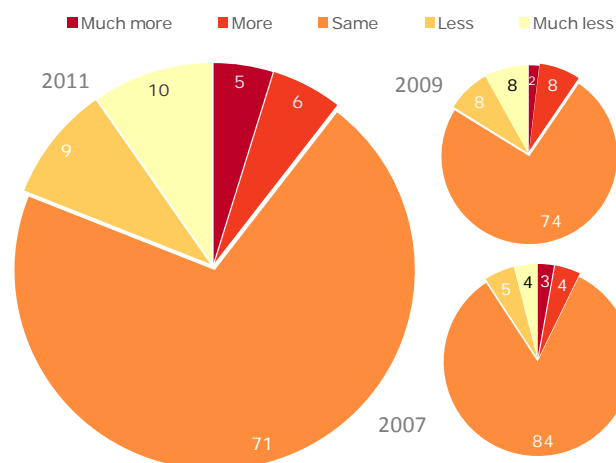
#### 4.17 How has the ability to download music from the internet influenced your purchases of music?

There has not been much change on how people's ability to download music has influenced their purchases of music since 2007. In 2007 one in five users (21.0%) said they bought less and this had increased to a quarter in 2011 (24.3%). On the other hand, in 2007 17.6% said they now bought more which rose to 20.6% in 2011. Most users reported that there was no change (55.1% in 2011).



#### 4.18 How has the ability to download movies from the internet influenced your total consumption of movies via purchase from stores, video rental and visits to cinema?

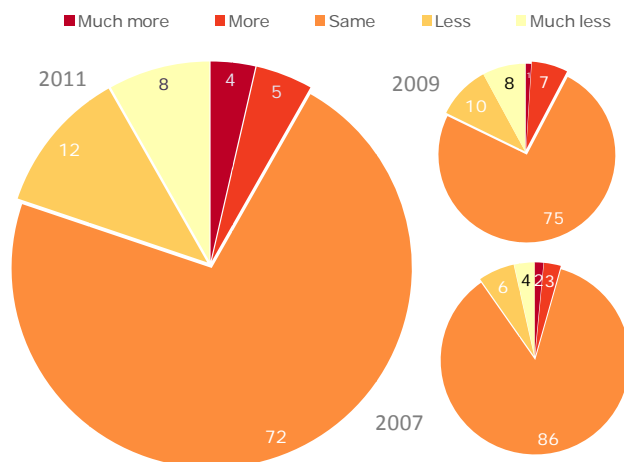
There was more change for this question than for music consumption. In 2007 83.5% of users reported that the opportunity to download did not influence their purchasing of movies, but this fell to 74.3% in 2009 and 70.5% in 2011. Mostly this change was people buying less (9.2% to 16.2% to 19.0%) although in 2011 one in ten said they now bought more (10.5%).





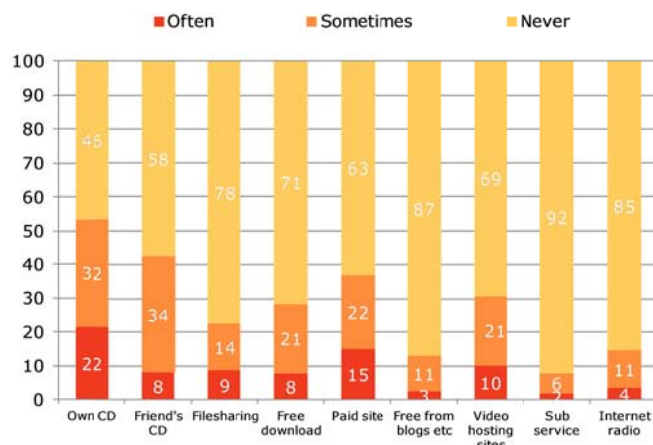
#### 4.19 How has the ability to download television programs from the internet influenced the amount of time you spend watching broadcast television?

The proportion of users who felt that they watched less broadcast television due to being able to download television programs has doubled between 2007 and 2009. In 2007 one in ten internet users said that the ability to download television programs had decreased the amount of broadcast television they watched. This increased to 17.7% in 2009 and one in five in 2011 (19.8%). The proportion who said that they watched more increased also from 4.4% in 2007 to 8.2% in 2011.



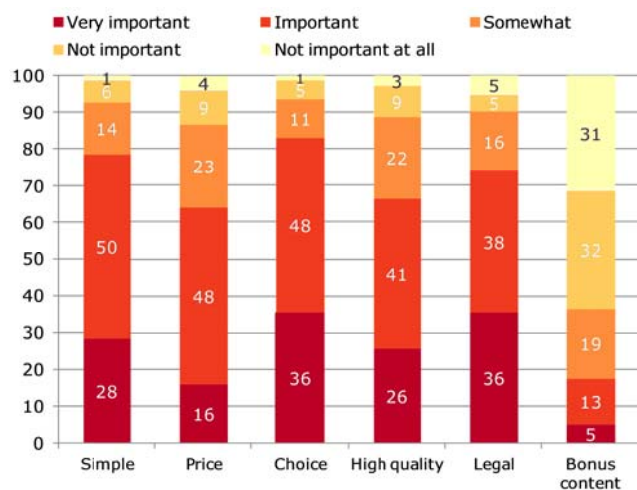
#### 4.20 Where do you get your digital music?

Copying one's own CDs remains the main way that people get their music in digital form, although the use of this method decreased from 60.2% of users in 2009 to 53.6% in 2011. The next most popular source of digital music is copying friend's CDs (8.1% 'often' and 34.4% 'sometimes'). Over a quarter of users report downloading for free (28.6 %) and 22.5% use a file sharing site. Use of online music stores to get digital music grew from 16.8% of users in 2007 to 31.7% in 2009 and 37.1% in 2011. Nearly a third of users in 2011 used video hosting sites to listen to music (30.9%).



#### 4.21 Why do you use pay services to get music from the internet?

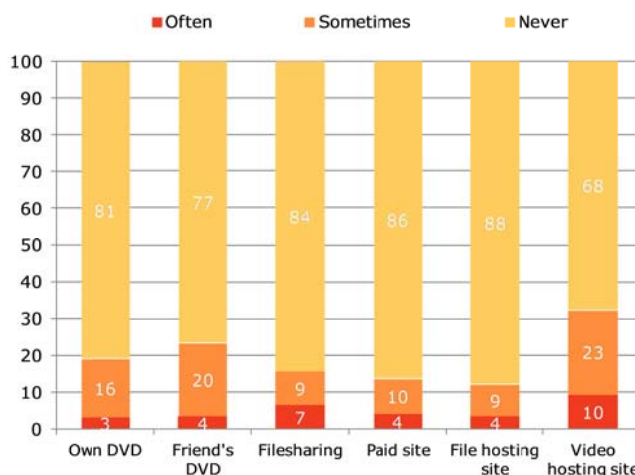
There has not been a great deal of change amongst the importance of the factors that lead users to access music from pay services although respondents in 2011 were more likely to nominate 'important' rather than 'very important' for many of the factors.. More than eight in ten (83.0%) nominated choice of music as important or very important in 2011. The next most popular factors were 'simple and practical' (78.6%), 'legal' (73.9%) high quality sound (66.6%), and price (64.1%).





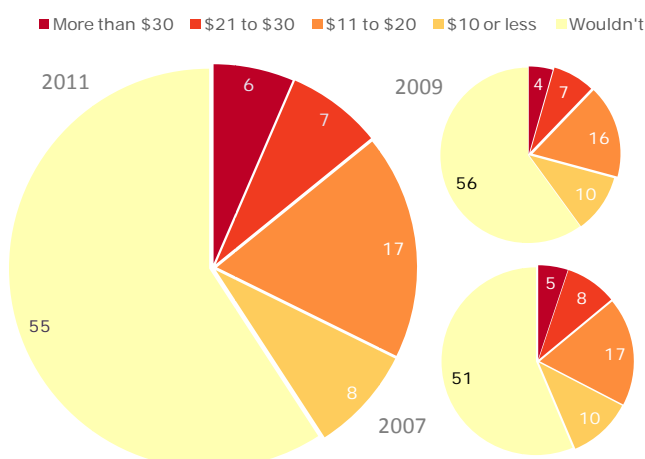
#### 4.22 Where do you get your digital movies?

Copying or downloading movies is still a minority activity and there was only a slight increase in these activities over the period. Around one in five people copy their own DVD with a further quarter copying a friend's DVD. Purchasing digital movies online exhibited the strongest growth, increasing from 3.0% to 9.6% to 13.6% in 2011.



#### 4.23 If a boxed DVD or CD set was on sale for \$40, for what price would you consider downloading a digital copy instead?

There has been little change in people's willingness to substitute 'hard-copy' products for digital between 2007 and 2011. Half of our internet users (49.9% in 2011 compared to 48.3% in 2007) would not consider downloading music or movies instead of buying hard copy at any price. A further 4.9% would only do so if it was free to download. A small proportion (6.0%) would be prepared to pay more than \$30 or around the same as the off-line version.



## Further analysis

### 4.24 Weekly hours of television viewing by how often watch television while online, 2011

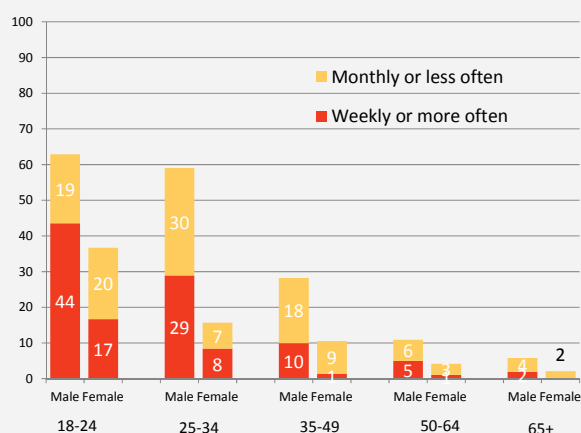
For all age groups those who often watch television while on the internet watch more television overall than those who never do. The difference between these groups is greater for younger age groups. Those aged 18 to 24 who often watch television while on the internet watched 71% more television on average than those who never watched television while online.

Age cohort	Never	Sometimes	Often	Total	% difference
18-24	8.1	7.0	13.9	9.7	71.1
25-34	10.3	10.6	14.3	11.8	39.2
35-49	13.2	12.0	18.5	14.4	40.7
50-64	15.9	15.1	19.0	16.4	19.7
65+	16.8	15.8	18.4	16.9	9.7
<b>Total</b>	<b>13.6</b>	<b>11.5</b>	<b>16.7</b>	<b>14.0</b>	<b>22.8</b>

### 4.25 Filesharing by age and gender, 2011

Younger people, and men in particular, are much more likely to fileshare. More than six in ten males aged 18-24 fileshare, with 43.5% doing so weekly. For women in this age group the figures less than four in ten overall, and 16.7% sharing weekly. Filesharing drops a little for men aged 25-34 but women in this age group engage at less than half the rate of 18-24 year olds.

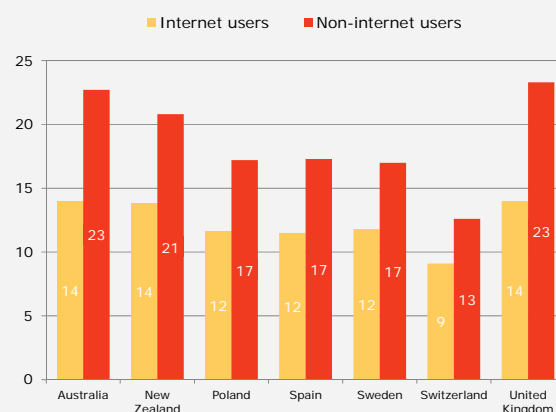
The rate of filesharing halves for men in the 35-49 age group (28.2%). Only one in ten women in this age group fileshare, and only 1.4% do so weekly.



### 4.26 Weekly hours of television viewing by internet status, selected countries, 2011

Though the amount of viewing varies considerably across these countries there are some very clear patterns. Australia records very similar average amounts of television viewing to New Zealand and the United Kingdom, the two countries in this group with whom they have the most in common culturally.

Across all the countries there is a remarkable similarity in the relationship between the television viewing of internet users and non-internet users. The UK had the biggest difference between the two, with internet users watching 60% of the amount of television watched by non-internet users. At the other end of the scale Swiss internet users watched 72% of the television that non-internet users viewed.



## 5 Creative uses of the internet

We are interested in people's creative uses of the Internet, and particularly in the role of Internet users as producers of content. What are the characteristics of those people who are producing online content? How is creative activity related to age, gender, experience and skills or speed of access?

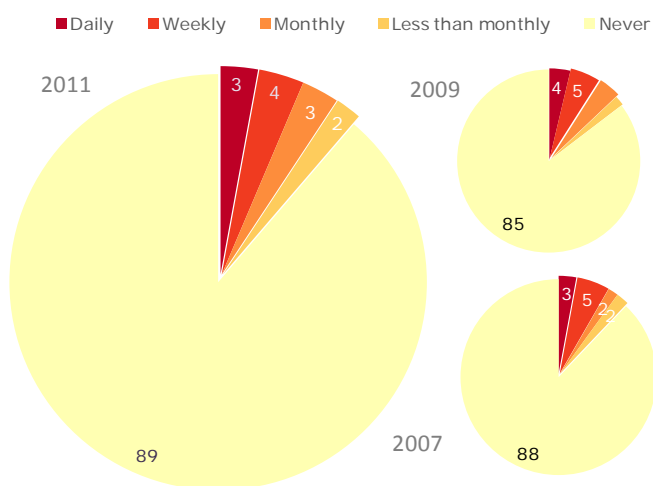
There are also a series of further issues we are keen to pursue: the influence here of the diffusion of broadband, and any factors that may be hindering take-up; the effects of internet usage on the consumption of other media; the uptake of social web technology; video usage; news consumption online and how it is changing; and the impact of the 'always on' element of broadband.

People's creative uses of the net are of interest for two broad and related reasons:

- Creative uses tend to require more skill on the users' part and are an important marker of increasing digital literacy;
- Increasing user-generated content implies that users are gaining more from their online experience and that the resulting increase in online content will also enrich the online experience of others.

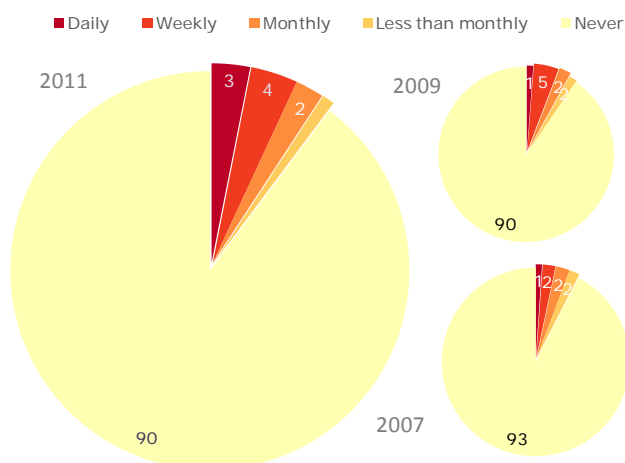
### 5.1 How often do you work on a personal website?

There was little change in the proportions of people who keep a personal website. In 2009 14.8% had a website and two thirds of these people (10.0%) update their site at least once a week. This fell in 2011 with 11.4% of internet users keeping a personal website and 6.4% updating at least weekly.



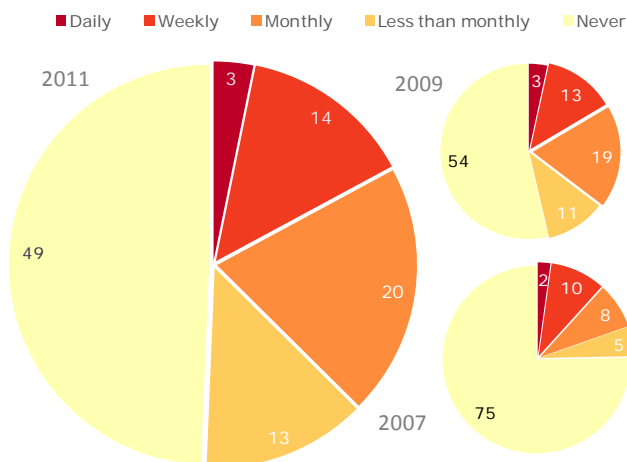
### 5.2 How often do you work on your blog?

A small proportion of our sample kept a blog. In 2011 just more than one in ten did so (10.3%) and more than half of these people (6.9% of all users) updated it more than once a week.



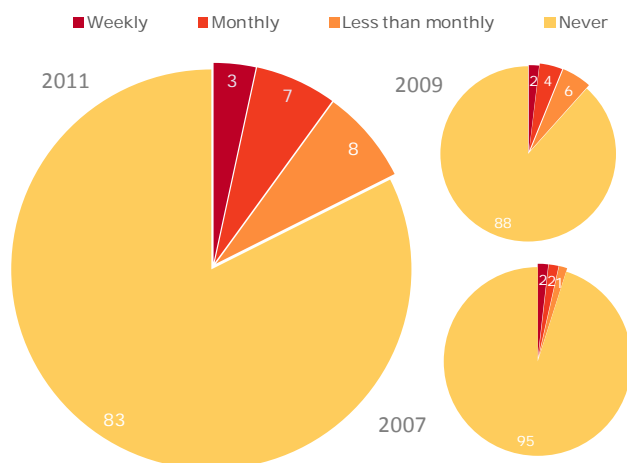
### 5.3 How often do you post pictures or photos?

Reflecting the growth of social media, there was an increase in people posting pictures and photographs from just under a quarter of users in 2007 (24.8%) to nearly a half (46.5%) in 2009. This growth flattened in 2011 by which time a half of users were posting photos and pictures (50.7%).



### 5.4 How often do you post videos?

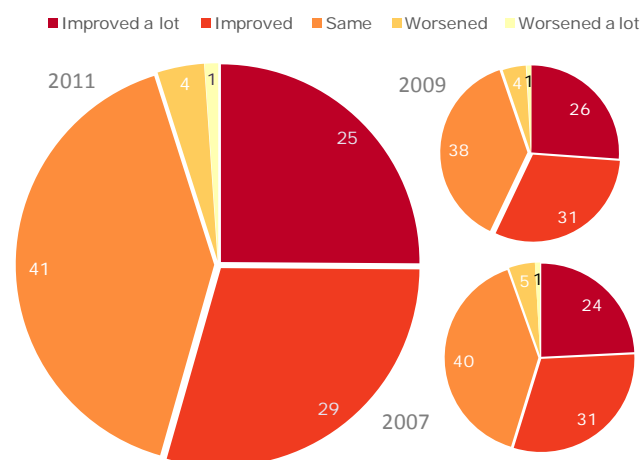
The proportion of users posting videos online increased from 4.8% to 11.7% between 2007 and 2009 and increased again to 17.5% in 2011. In 2011 3.4% post videos at least weekly, while a further 6.6% of users do so monthly.



## Attitudes to the impact of the internet on respondents' creativity and productivity

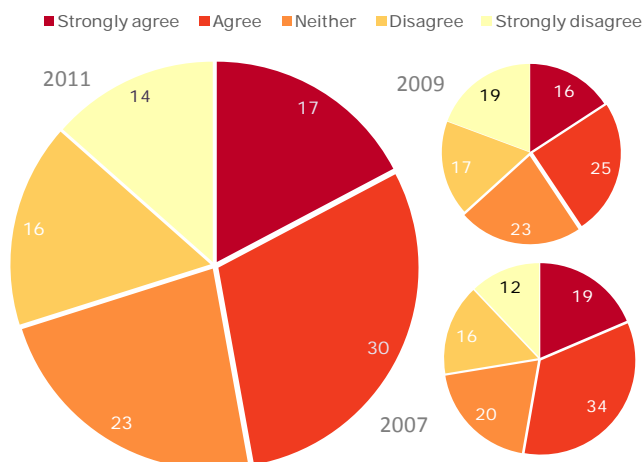
### 5.5 How do you feel your Internet access has affected your work performance/productivity?

There has been very little change over the period of analysis – respondents on the whole are positive about the effect of internet use on their productivity. In all years more than half of users felt that internet access had either improved their productivity a lot (25.1% in 2011) or somewhat (29.3% in 2009). 4.9% felt the internet had negatively influenced their productivity.



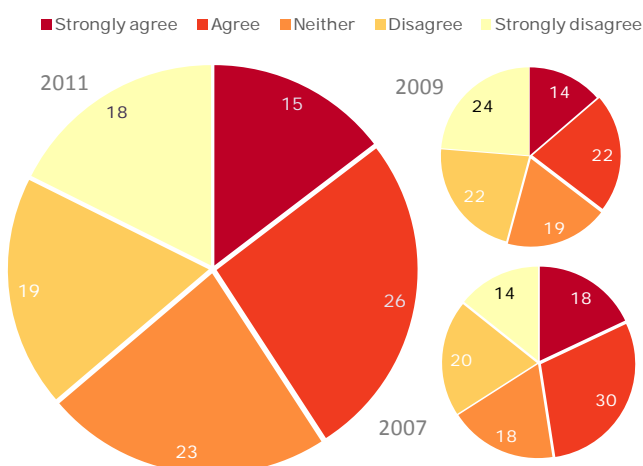
## 5.6 The internet enables me to share creative work I like with others

While respondents were less positive about the use of the internet for creative purposes in 2009 than in 2007, in 2011 views swung back to the positive, somewhere between the results for the previous two years. In 2007 a majority of internet users agreed that the internet enabled them to share creative work they liked with others (52.7%) but this fell to 40.7% in 2009, before rising to 47.2% in 2011. Conversely in 2007 just over a quarter of users disagreed with this contention (27.4%) while in 2009 this figure was 40.7%. In 2011 it fell back to 29.9%.



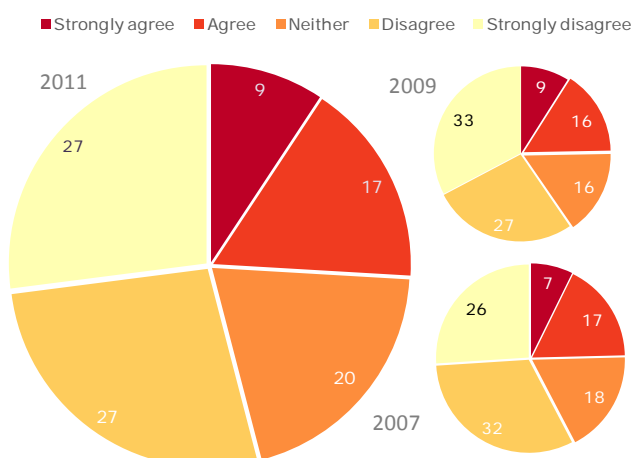
## 5.7 The internet enables me to share my own creative work with others

The same pattern was evident for this question. In 2011 40.8% of users agreed that access had enabled them to share their own creative work up from 35.4% recorded in 2009 but down from 47.5% in 2007.



## 5.8 The internet has encouraged me to produce my own creative work and share it with others

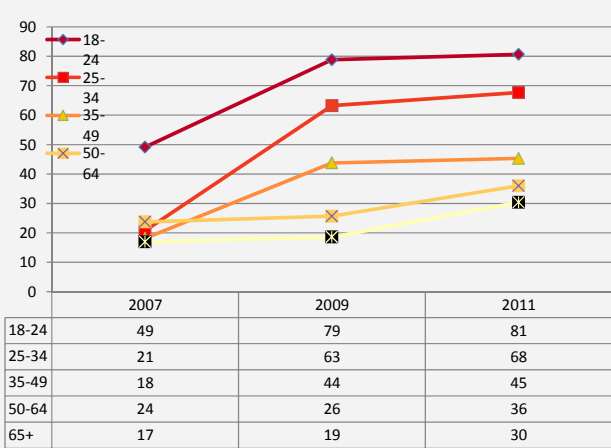
In the final question of this series we asked whether internet access had actually encouraged respondents to create their own work and share it. A majority of respondents disagreed with the proposition in all three years (54.0% in 2011, 59.6% in 2009 and 57.7% in 2007). In all three years nearly a quarter of respondents agreed (25.9% in 2011). Given the strength of the proposition this indicates that the internet has played a positive role in encouraging creative pursuits.



Further analysis

5.9 Posting photographs by age, 2007-2011

The pattern of adoption for posting photographs differs across the age groups. In 2007, almost half of those aged 18-24 were posting photos with the other age groups varying from 17% to 24%. The three youngest age groups then had considerable growth to 2009 while the proportion of those aged 50-64 and 65 and over barely changed. In the period 2009 to 2011 these older two groups experienced growth in participation while the younger three groups saw little change.

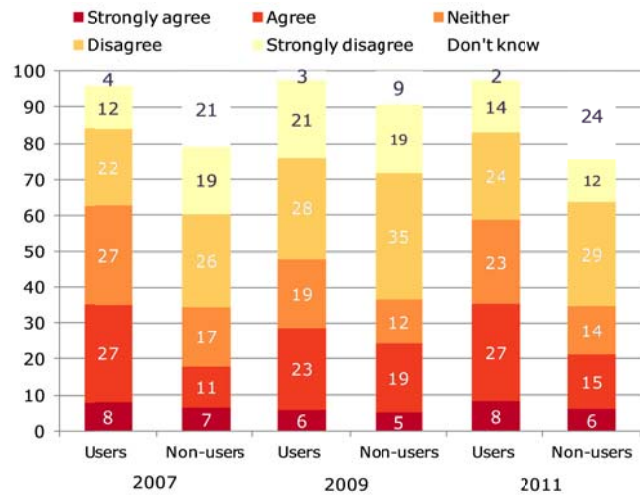


## 6 Internet politics and policy

We asked a series of questions about peoples' attitudes to the internet and politics, and the broad issues of contemporary internet policy and regulation. In general, non-users were more sceptical than users about the internet's capacity to empower citizens. Perhaps more importantly, a sizeable proportion of non-users said they didn't know what impact the internet was having on politics and the role of citizens. Respondents generally supported the National Broadband Network and the regulation of the Net.

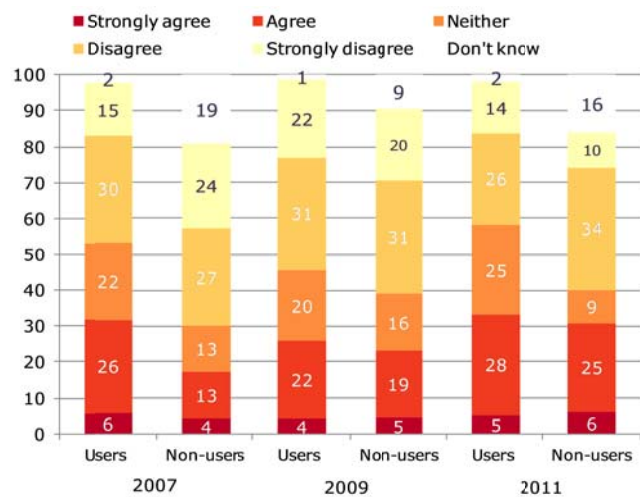
### 6.1 By using the Internet people like you can have more political power

Both users and non-users were generally sceptical about the idea that the internet could give people more political power. Between 2007 and 2009, users in particular became more sceptical but this turned around again in 2011. While in 2007 a third of users (33.2%) disagreed that the internet could give you more political power, in 2009 just under a half of users disagreed (49.3%) and then 38.8% in 2011.



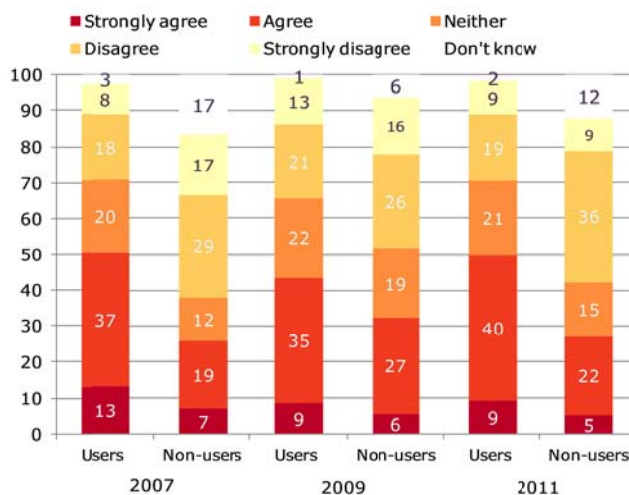
### 6.2 By using the Internet people like you will have more say about what the government does

In 2007 just under a third of users agreed that the internet can give users more say about what government does (31.9%) with 17.2% of non-users agreeing with this proposition. In 2009 fewer users agreed (25.9%) while more non-users agreed (23.2%). In 2011 33.4% of users and 31.1% of non-users agreed.



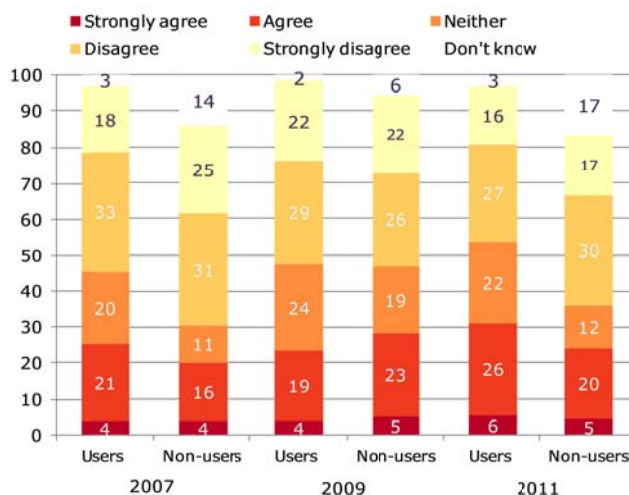
### 6.3 By using the Internet people like you can better understand politics

The pattern over time was similar to the previous statement. In 2011 around a half of users agreed (49.8%) which was more than 2009 (43.7%) and around the same as 2007 (50.5%). For non-users, more agreed in 2009 (32.5%) compared to 26.0% in 2007 and 27.3% in 2009.



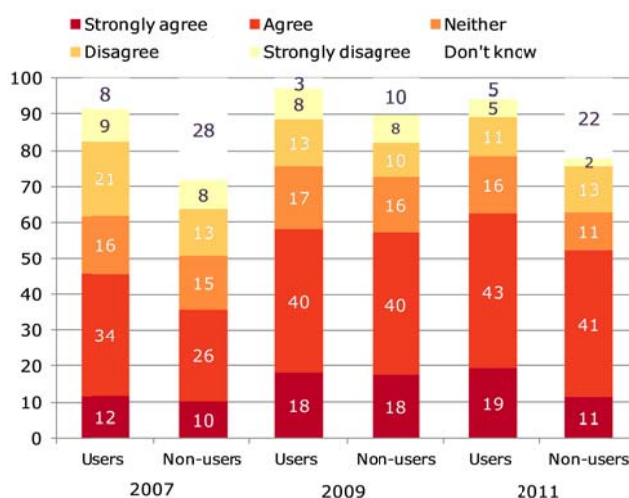
### 6.4 By using the Internet public officials will care more what people like you think

Around a quarter of users agreed with this statement in 2007 (25.3%) and 2009 (23.5%) while three in ten did in 2011 (31.3%). Again agreement amongst non-users was greatest in 2009 (28.4%) compared to 20.1% in 2007 and 21.2% in 2011.



### 6.5 The Internet has become important for the political campaign process

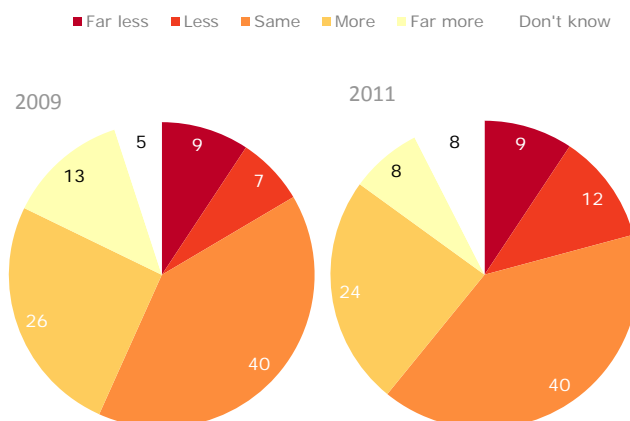
A majority of both internet users and non-users agreed that the internet has become important for the political campaign process in 2011 (62.4% and 52.3% respectively). Support for this statement has grown each year amongst users and while for non-users of the internet agreement decreased slightly in 2011.





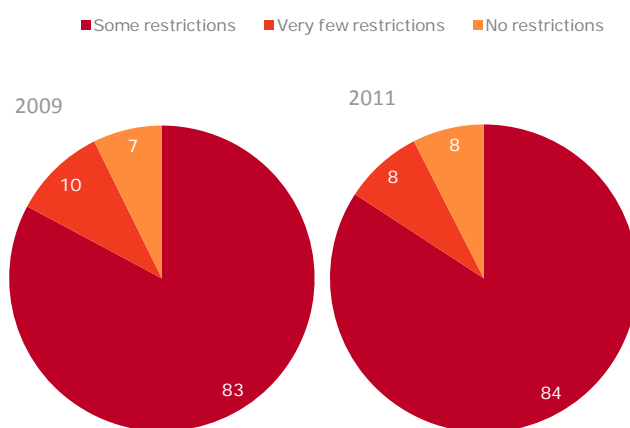
## 6.6 How much should the government regulate the internet?

The majority of Australians do not think that the internet is over-regulated. In both 2009 and 2011 four in ten thought that the current amount of regulation was about right. A further quarter would like more regulation. There was little change between 2009 and 2011.



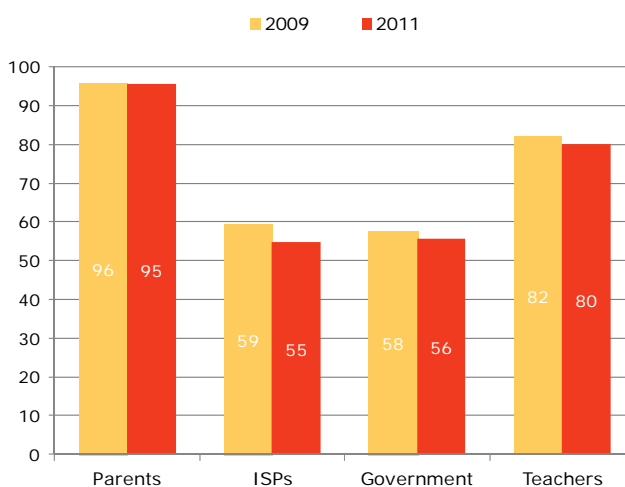
## 6.7 Should children's content on the internet be restricted?

There is very strong support for restricting children's content on the internet. An overwhelming 84.2% felt there should be some restrictions, with 8.3% calling for 'very few restrictions' and 7.5% saying there should be no restrictions. There was little change between 2009 and 2011.



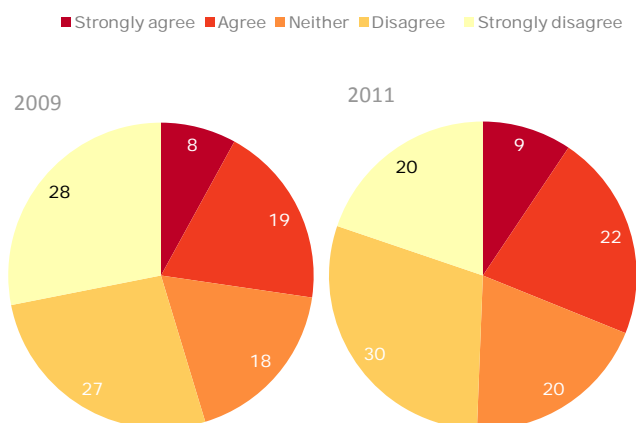
## 6.8 Who should be responsible for restricting children's content

Almost all those who believe that children's access to online content should be restricted think that parents should be responsible, and this barely changed between 2009 and 2011. Eight in ten believe that schools have a role while less than six in ten believe that internet service providers (54.7% in 2011, down from 59.3% in 2009) and government should take responsibility (55.5%).



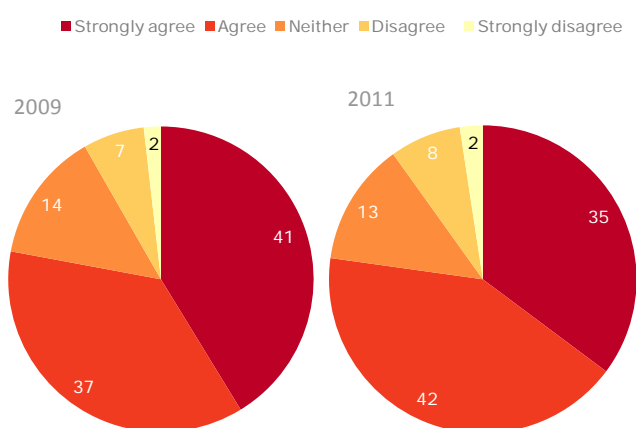
## 6.9 People should be careful what they say about politics on the internet

Australians were more inclined to believe that people need to be careful what they say about politics on the internet in 2011. While nearly three in ten 'strongly disagreed' with this statement in 2009 (28.1%), in 2011 just under one in five did (19.8%). In 2011 31.1% agreed with this statement compared to 27.3% in 2009.



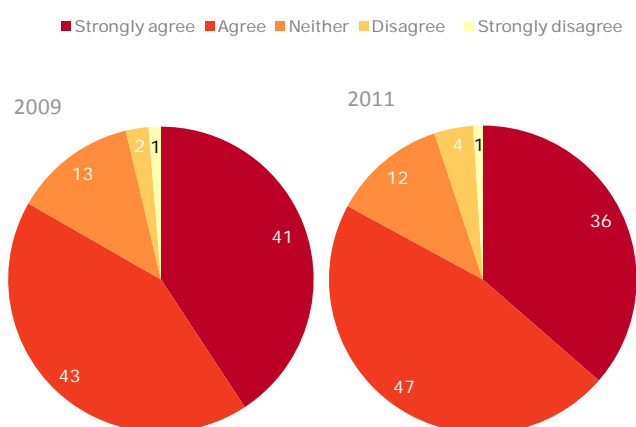
## 6.10 People should be free to criticize their government on the internet

Australians overwhelmingly agree people should be free to criticize government online. More than a third strongly agree while a further 42.0% agree. One in ten (9.9%) disagree. There was little change from 2009.



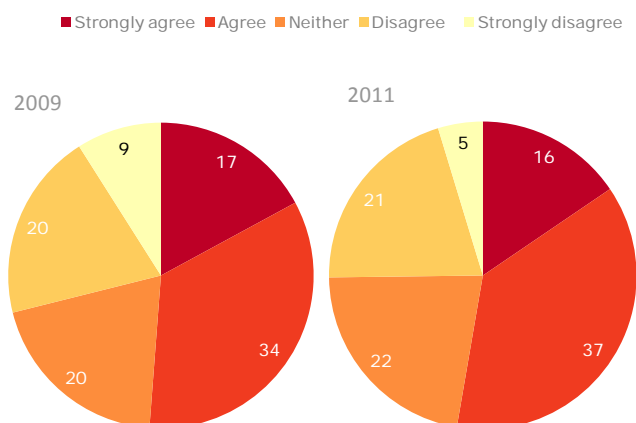
## 6.11 People should have the right to express their opinion on the internet

There was almost no disagreement with this contention. More than four in five Australians agreed (82.9%) with 5.1% disagreeing. Again there was very little change from 2009.



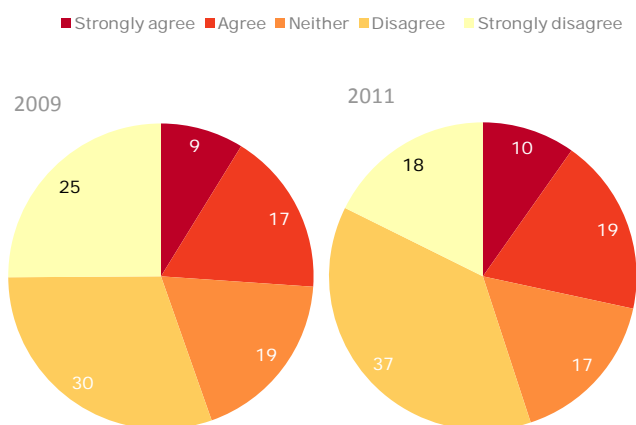
### 6.12 It is okay for people to express their ideas on the internet even if they are extreme

This statement attracted a greater level of disagreement than the previous but still over half of our sample agreed (52.7%). Only 4.7% disagreed strongly down from 9.0% in 2009 with a further one in five (20.5%) disagreeing.



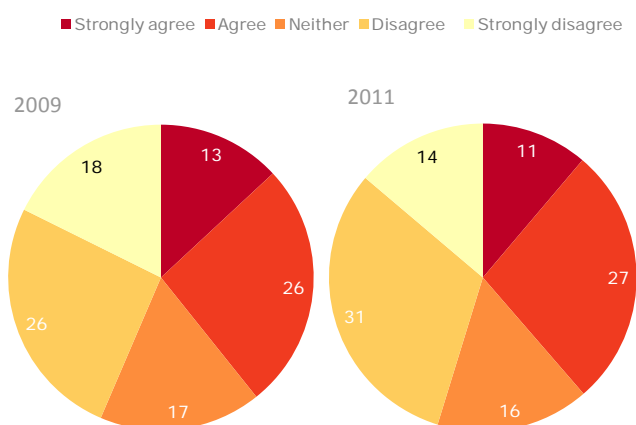
### 6.13 I am worried about the government checking what I do online.

Over a quarter of people were concerned in 2011 (28.4%), up slightly from 2009 (26.1%). In 2011 nearly one in ten respondents agreed strongly (9.8%). A majority of people however were not concerned (55.1%).



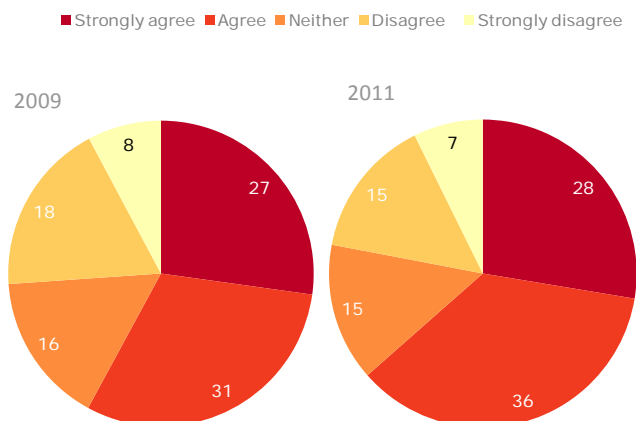
### 6.14 I am worried that people who are not supposed to see them might read my email messages.

Nearly two in five Australians are concerned about the security of their email messages (38.6%). A slightly higher proportion were not concerned (45.2%). There was little change from 2009.



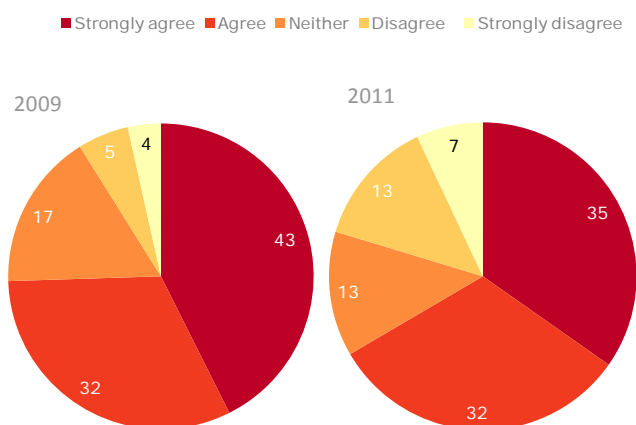
### 6.15 The Australian government should allocate funds to enable all Australians to have access to internet services

Agreement with this statement has slightly strengthened between 2009 and 2011. Just over a quarter of Australians strongly agree with this contention (27.6%) while a further third agree (35.9%). Slightly more than one in five do not think that government should play this role (22.0%).



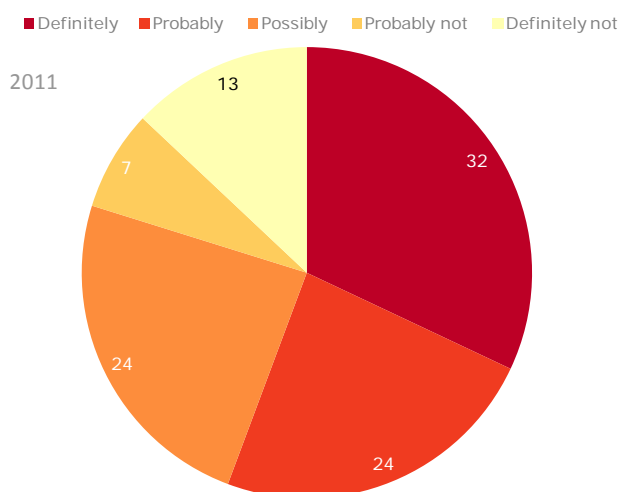
### 6.16 Do you think that the development of a National Broadband Network is a good idea?

There is wide agreement that the development of the NBN is a good idea. The proportion of Australians that strongly supported the NBN fell from four in ten (41.5%) in 2009 to a third in 2011 (33.6%) in 2011. The proportion 'agreeing' that they supported it stayed at around three in ten (31.1% to 30.8%). Overall in 2011 just under two thirds of Australians were in favour of the NBN (64.4%). Just over one in five disagreed (12.9%) or strongly disagreed (6.8%).



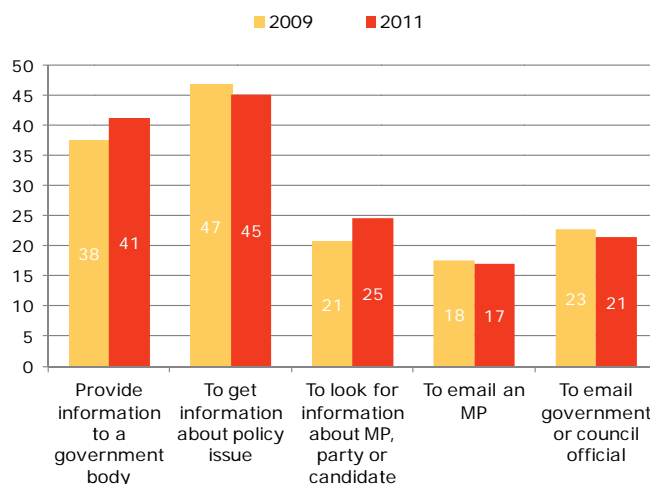
### 6.17 Do you intend to connect to the NBN when it is available in your area?

A third of our respondents said that they would definitely connect to the NBN while a further quarter said they 'probably will' (23.7%). Around one in five will 'probably' or 'definitely' not do so.



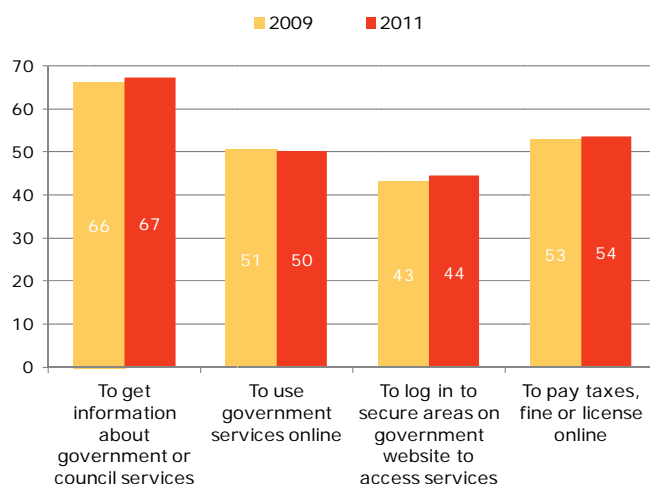
## 6.18 Political uses of the internet

There was no major change for any of the activities in this section. Nearly half of our sample of internet users had used the internet to find information about government policy issues (45.2%), while four in ten had provided information to a government body via the net (41.3%, up from 37.6% in 2009). Around one in five had used email to contact a government official (21.5%), to contact an MP (17.0%) and to look for information about an MP, party or candidate (24.5% up from 20.8% in 2009).



## 6.19 Accessing government services

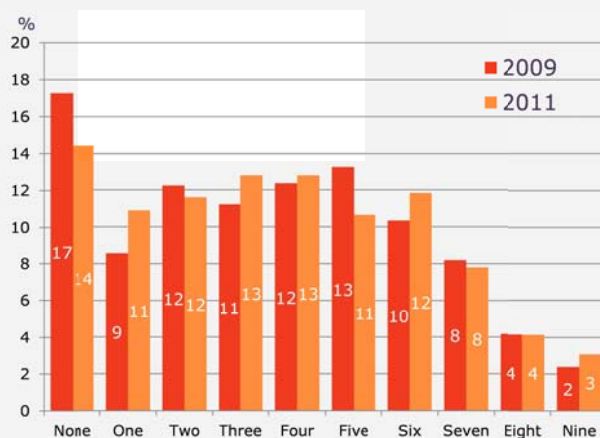
Two thirds had used the internet to access information about government while over half had actually used government services online (50.3%) and to pay taxes, fines or a licence (53.7%). A further 44.4% had logged into to a secure area to access government services. There was almost no difference between results for 2009.



## Further analysis

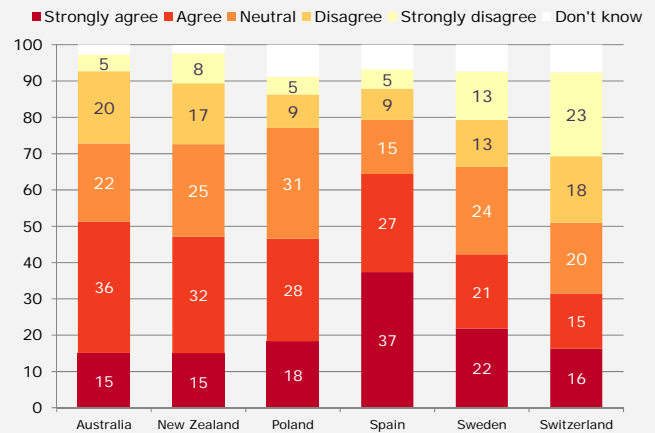
### 6.20 Number of political uses of the internet, 2011

Only a small proportion of Australian internet users do not use the internet for one of the nine political uses we asked about (14.4% in 2011). Use of the internet for these purposes increased slightly between 2009 and 2011.



### 6.21 It is okay for people to express their ideas on the internet, even if extreme, selected countries, 2011

There was a lot of variation between countries for this question. Over a third of Spanish respondents 'agreed strongly' with the contention compared to less than one in five Australian, New Zealand, Polish and Swiss respondents. Australia was at the more liberal end of the spectrum, with over a half agreeing that it was okay and a quarter feeling that it wasn't.

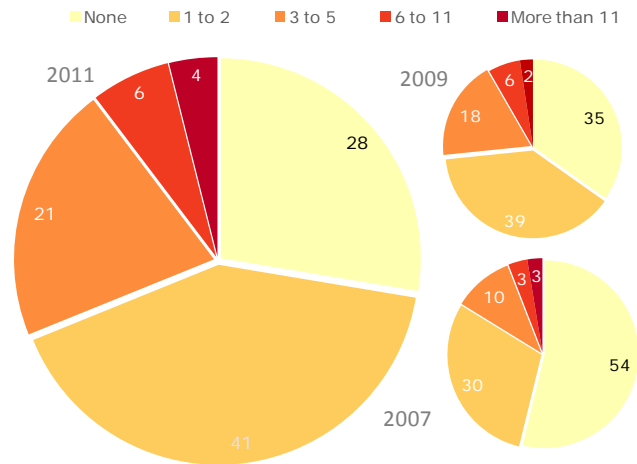


## 7 The internet and commerce

From the web's early days, there has been much speculation and interest in commercial and retail applications. Many books have been written on strategies to maximise online sales; Amazon and eBay are spectacular success stories. This section presents our findings on consumer activity online and peoples' perceptions of online transactions.

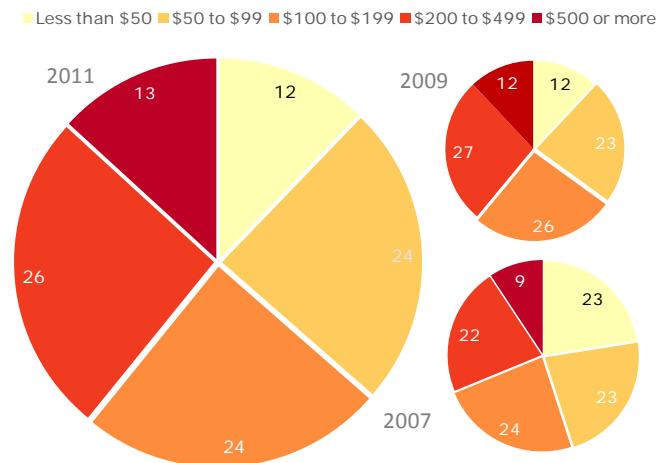
### 7.1 In an average month, how many times do you purchase products or services over the Internet?

There has been an increase in online purchasing over the last two years. Whereas in 2007 just under half of our sample (46.2%) used the internet to make purchases, by 2009 it was around two thirds (65.8%) and by 2011 it was close to three-quarters (72.4%). The increase in those purchasing was spread across all the frequency categories.



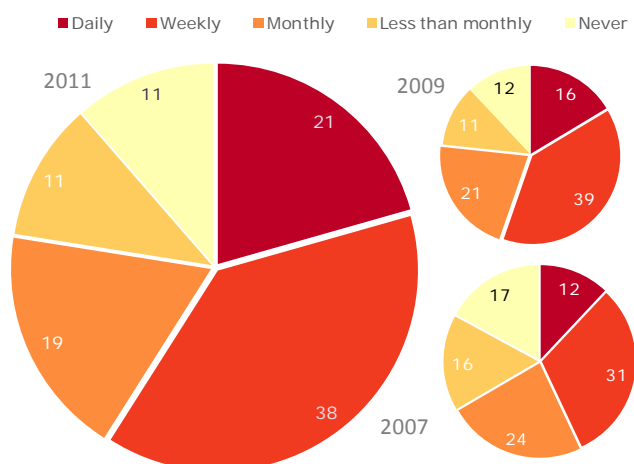
### 7.2 In an average month, how much do you spend on products or services purchased over the Internet?

Expenditure on products bought online showed growth between 2007 and 2009 but remained steady between 2009 and 2011. The proportion of online shoppers spending \$200 or more a month increased from 31.2% in 2007 to 39.0% in 2009, where it remained in 2011. At the other end of the spectrum those spending less than \$50 a month almost halved (22.5% down to 12.0%).



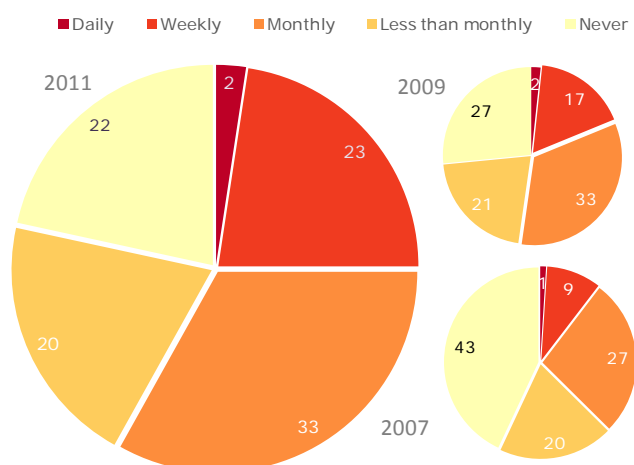
### 7.3 How often do you use the internet to get information about products?

The vast majority of users use the internet to research products. This proportion increased slightly from 82.9% in 2007 to 88.0% in 2009 and 88.6% in 2011. Those researching product information on a daily basis increased from 12.0% to 16.4% to 20.6% while the proportion researching weekly increased from 31% to 38.9% between 2007 and 2009 and stayed at 38.4% in 2011.



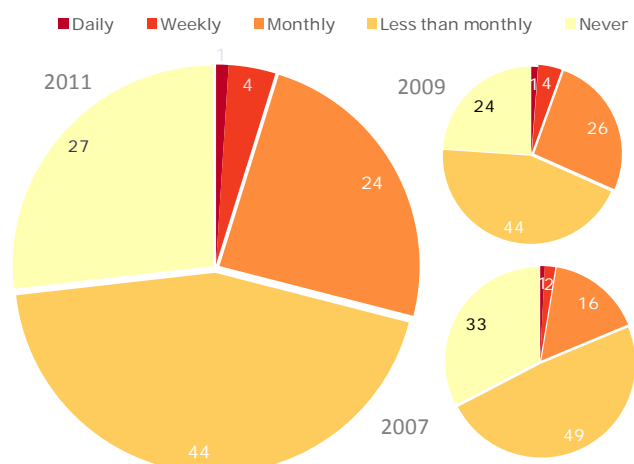
### 7.4 How often do you buy products online?

The proportion of users who never buy products online dropped from more than four in ten users in 2007 (43%) to a little over a quarter in 2009 (26.5%) and then a little of a fifth in 2011 (21.6%). The proportion shopping online at least weekly has increased from one in ten in 2007 to over a quarter in 2011.



### 7.5 How often do you make travel reservations/bookings online?

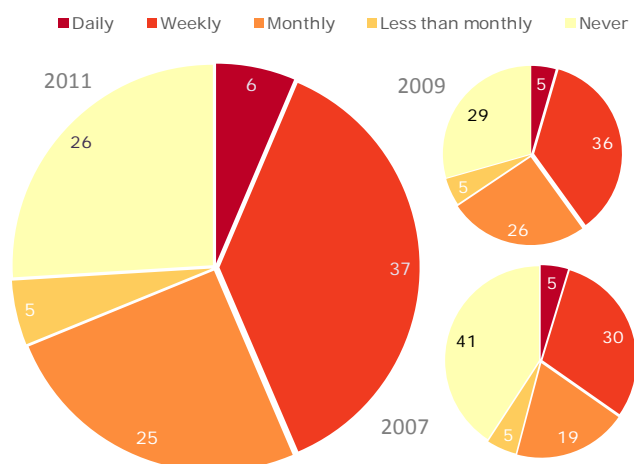
While in 2007 two-thirds of users made travel bookings online, in 2009 just over three quarters did (76.1%). This proportion fell slightly in 2011 to 73.2%. The proportion making bookings regularly followed the same pattern. Those booking monthly or more often increased from 18.7% in 2007 to almost a third in 2009(31.3%). This proportion fell slightly in 2011 to 29.0%





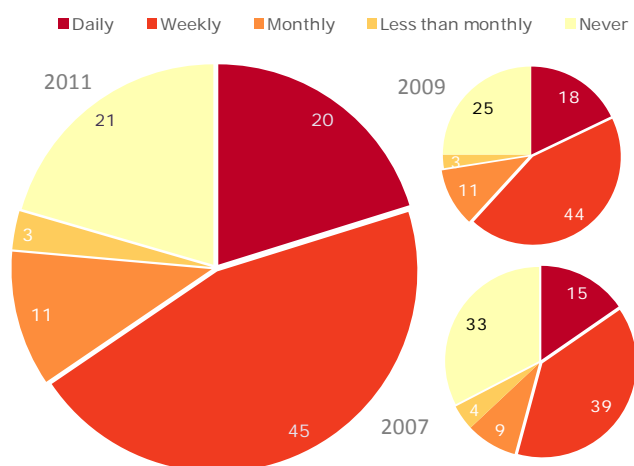
## 7.6 How often do you pay bills online?

The proportion of users paying bills online increased from 59.2% in 2007 to 71.6% in 2009 and then to 74.0% in 2011. This increase was mostly for those doing so monthly (19.4% to 25.6% to 25.3%) with a smaller increase in the proportion paying weekly (30.0% to 35.5% to 37.2%).



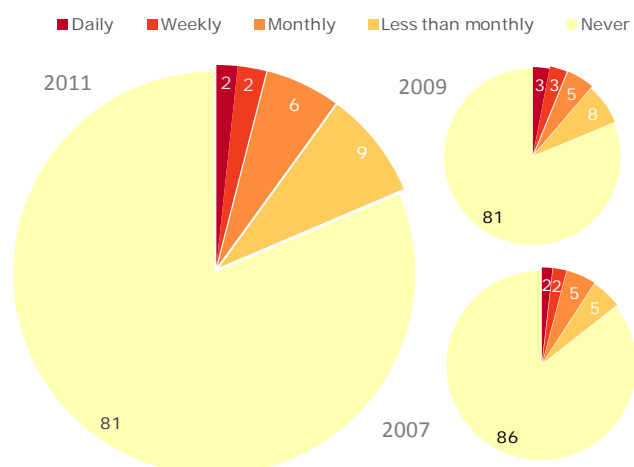
## 7.7 How often do you use your bank's online services?

In 2007 two thirds of users banked online. By 2009 this had increased to three-quarters and by 2011 four in five. The proportion of internet users banking online at least weekly increased from 54.2% in 2007 to 61.8% in 2009 to 65.5% in 2011.



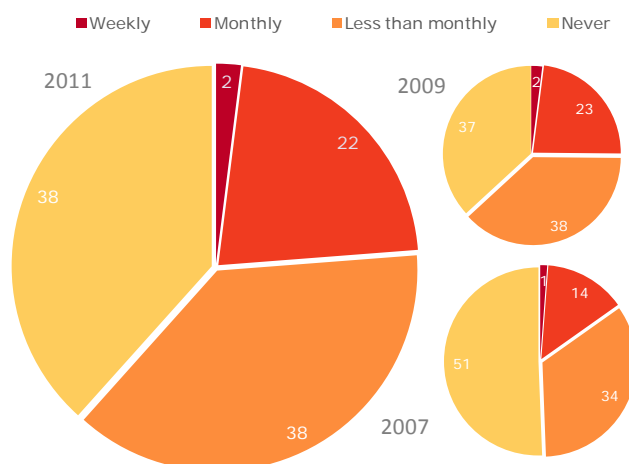
## 7.8 How often do you invest in stocks/funds/bonds online?

The majority of users do not invest online and this did not change much over the period. In 2007, 85.5% did not invest compared to 81.2% in 2009 and 81.4% in 2011.



## 7.9 How often do you purchase event tickets online?

A greater proportion of internet users were purchasing event tickets online in 2009 than 2007. In 2007 just under half of internet users did so (49.4%) while in 2009 this figure was almost two thirds (63.4%). As with travel bookings there was a small decrease in usage in 2011 (61.6%). Those purchasing at least monthly increased from 15.3% to 25.6% and then dipped to 23.8%.

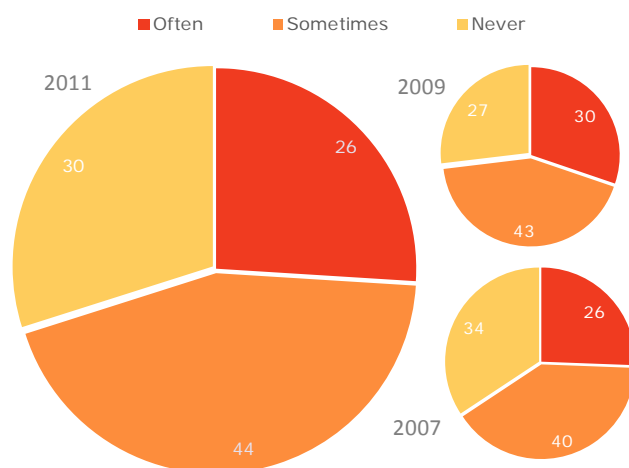


## Tactics

This section examines the interaction between online and off-line purchasing.

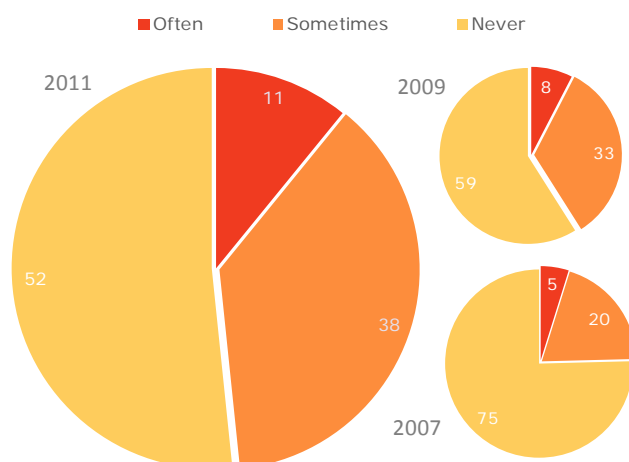
### 7.10 How often do you look at goods on the Internet but when it comes time to buy, you purchase from local stores?

Researching online but buying offline is an activity that has been popular from our first survey. In 2007 almost two thirds of our sample had done this (65.1%) while in 2009 it was close to three quarters (73.1%). There was a small drop-off in activity in 2011 (70.1%).



### 7.11 How often do you look at goods in local stores but when it comes time to buy, you purchase online?

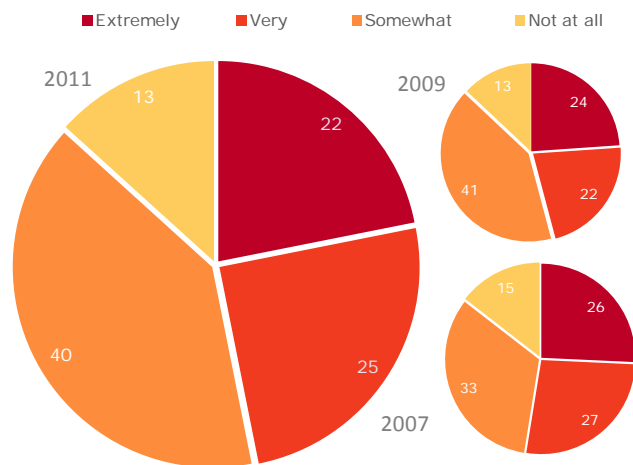
In 2007 only a quarter of our users reported doing this, but by 2009 this figure had grown to 41.0% and to almost half of users in 2011 (48.3%). Just over one in ten internet users report doing this 'often'.



## Concerns about internet security

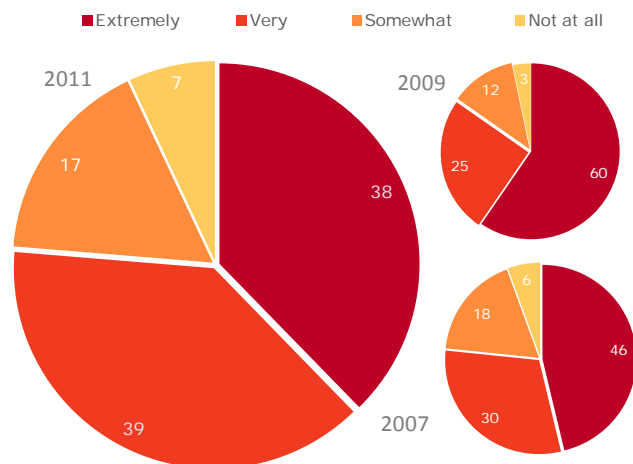
### 7.12 Internet Users: How concerned would you be about the security of your credit or bank card information if you bought something online?

There has been little change in concerns about credit card security when shopping online. Four in ten users said that they were 'somewhat concerned' in 2011, while a quarter were 'very concerned' and a further one in five 'extremely concerned'.



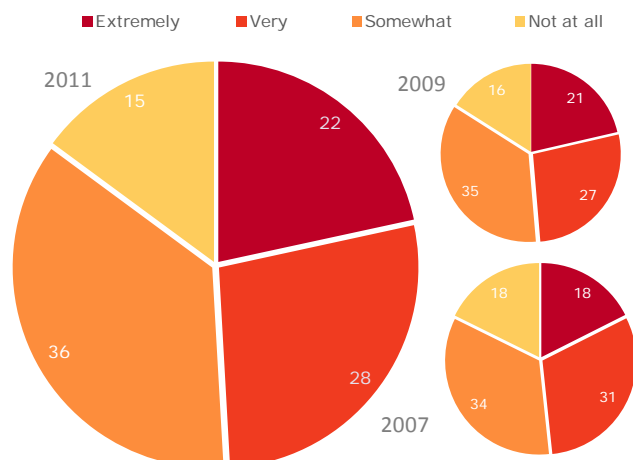
### 7.13 Internet Non-Users: How concerned would you be about the security of your credit or bank card information if you bought something online?

Non-users report being much more concerned about credit card security if they were to purchase online than users. Almost four in ten say they would be 'extremely concerned' (37.7%) while a further four in ten say they would be 'very concerned' (38.6%). The figures for internet users is 21.9% and 25.0% respectively.



### 7.14 If you bought something online, how concerned would you be about the privacy of your personal information such as name and address, phone number, purchasing habits?

There was very little change in users' concerns about online privacy. Most people were either 'somewhat' or 'very' concerned.

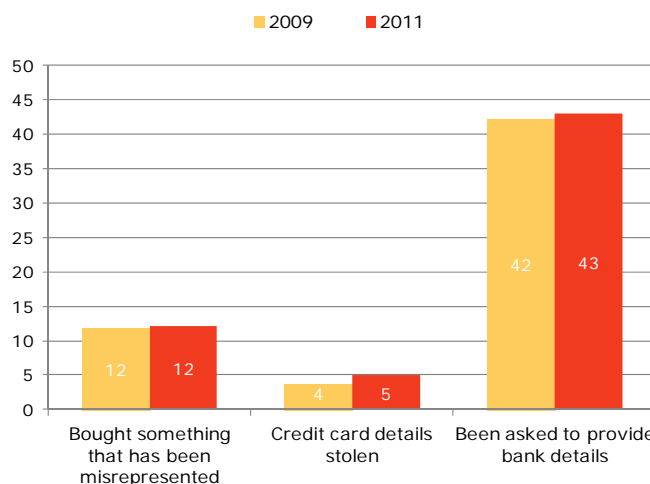


### 7.15 Have you ever bought something that has been misrepresented on a website, had your credit card details stolen in an internet transaction or been contacted by someone asking you to provide bank details?

A relatively small proportion of Australians have bought something online that had been misrepresented and there was little change between 2009 and 2011. Just over one in ten internet users have had this problem (11.8% in 2009 and 12.1% in 2011).

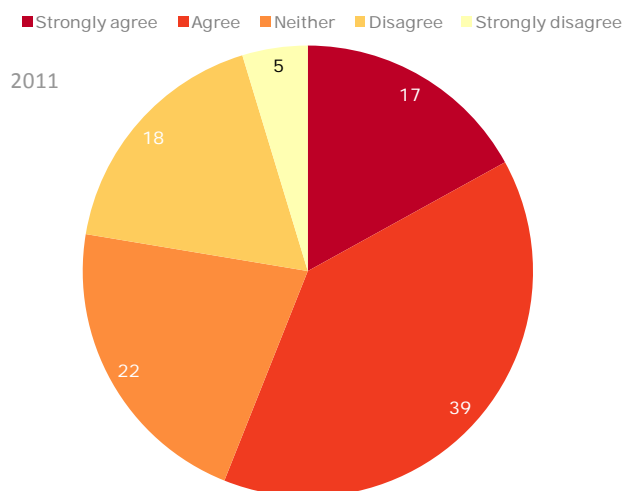
In 2009 3.7% of internet users said they had had their card details stolen in an online transaction while in 2011 the proportion was 5.0%.

More than four in ten Australians have been contacted to provide bank details. This problem does not appear to be growing as the results for the two years are almost identical (42.2% in 2009 and 42.9% in 2011).



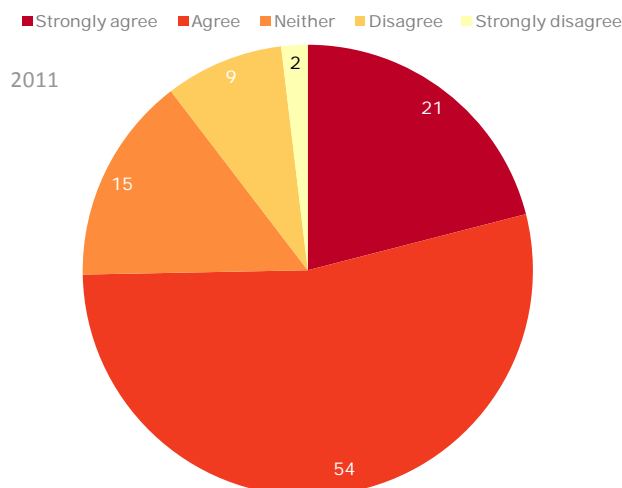
### 7.16 Its difficult to return or exchange goods ordered on the internet?

Most of our respondents agreed that it was difficult to return or exchange goods ordered online. Almost one in five agreed strongly (17%) while a further two in five agreed (39.1%). Around one in five disagreed that this was the case (22.4%).



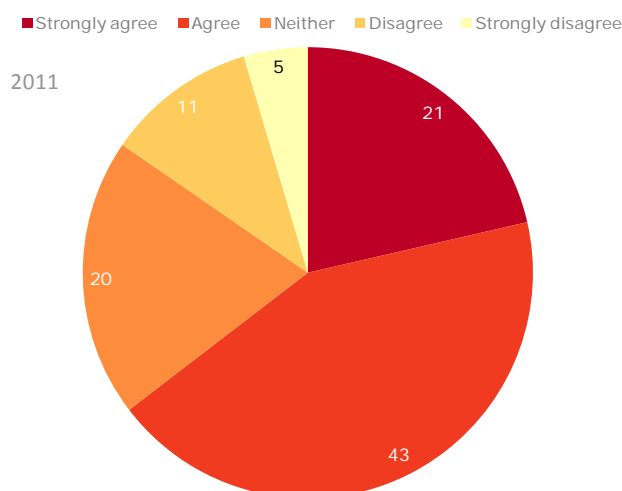
### 7.17 It's difficult to assess product quality when shopping on the internet.

Three quarters of our respondents agreed that it was difficult to assess product quality online (74.7%) with one in five agreeing 'strongly' (21.0%). One in ten disagreed (10.4%).



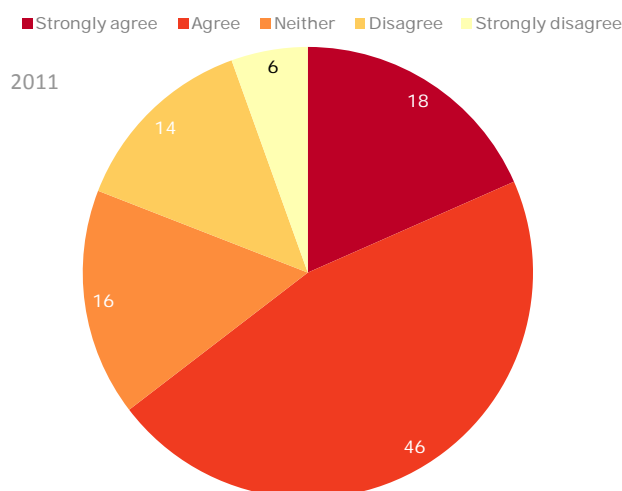
### 7.18 I buy things online because they are cheaper.

Almost two thirds of our internet users said that shopped online because it is cheaper (64.6%). More than one in five strongly agreed that this was the case (21.4%).



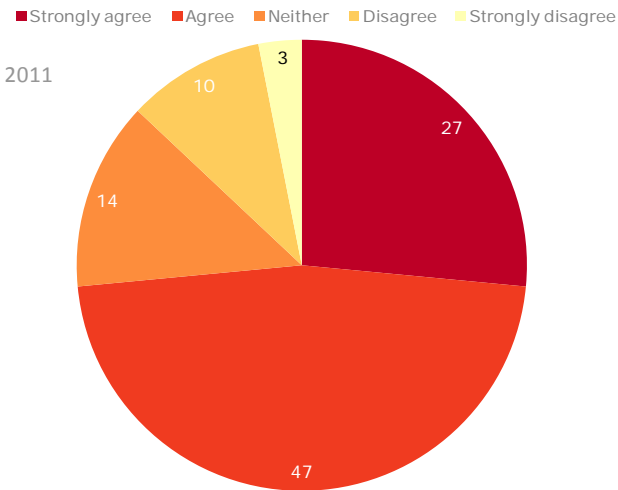
### 7.19 I buy things online because I can't find them in stores.

The proportion of our sample who agreed with this statement was exactly the same as for the previous statement (64.6%). It would seem that lower prices and greater choice are equal drivers of Australians' online shopping.



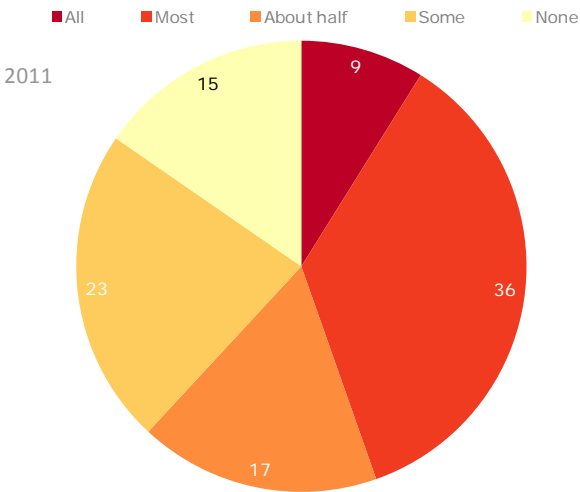
**7.20 I would prefer to shop with Australian-based websites**

Most Australians have a preference for shopping with Australian-based websites (63.5%). A quarter of Australians feel this way (26.5%).



**7.21 Proportion of online expenditure with Australian-based websites.**

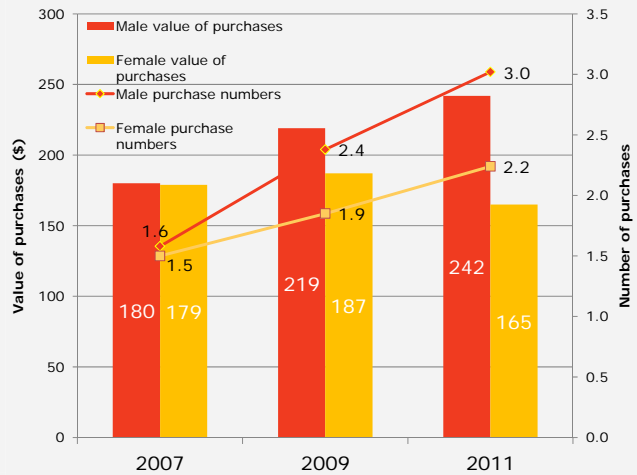
Despite their preference for shopping with Australian-based websites, fewer than one in ten online Australians make *all* their online purchases with Australian-based sites (8.9%), while a further third (35.7%) make most of their purchases locally.



## Further analysis

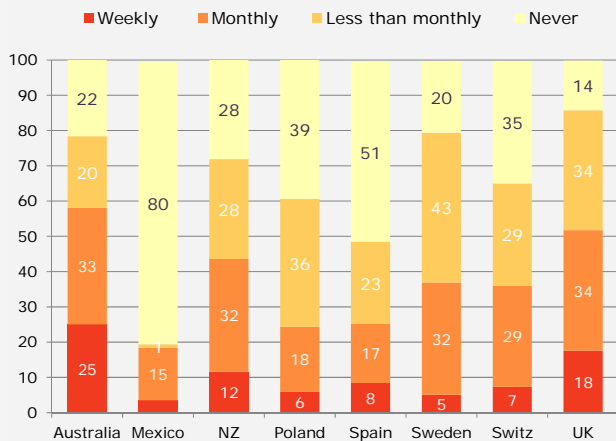
### 7.22 Value and number of monthly online purchases by gender, 2007-2011

Male online shopping has increased at a greater rate than that for women since 2007. In 2007 men and women bought as often and as much as each other. Since then the number of purchases made monthly by men has doubled to 3 while women's has increased to 2.2. The value of men's purchases increased to \$242 per month while women's decreased slightly to \$165.



### 7.23 How often do you purchase online, selected countries, 2011

Australians were the most regular online shoppers amongst the comparison countries. A quarter of Australians shopped at least weekly, the highest proportion and more than twice the level of New Zealand. The UK was the second most regular. Almost six in ten Australians shop online at least monthly, while just over a half of the British do so. Online shopping was least popular in Mexico with only one in five Mexicans ever buying online.



## Appendix I

### Background to the World Internet Project

The first report produced by what has become the World Internet Project was the work of a group of researchers based at the University of California at Los Angeles. The UCLA study team set out their guiding objective as follows:

Our goal is to explore how the Internet influences social, political, cultural, and economic behaviour and ideas, as measured by the attitudes, values, and perceptions of both Internet users and non-users.

They went on to outline how they thought their work could contribute:

We hope our findings about the Internet will have broad implications for government policymaking, corporate planning, and social and cultural study. To begin this project now is critical if we hope to fully understand the Internet as it evolves. Had this type of research been conducted on the evolution of television as it emerged in the late 1940s, the information would have provided policy makers, the media, and ultimately historians with invaluable insights about how broadcasting has changed the world.

The first report produced by the US partners was concerned with a number of emerging questions around the social, economic, political and cultural dynamics of the Internet. Who was online, who was not, what were users doing online? How was the Net changing patterns of media consumption, consumer behaviour, and communication patterns? What social and psychological effects were apparent?

From its beginnings, the main research activity of the project has been a sample survey of internet users and non-users. The survey is administered in different ways by the different partners. Most partners undertake the survey by telephone with a significant minority opting for face to face interviews. Samples are collected on various bases, with some partners choosing cluster samples and some engaging in stratification to make sure that their sample reflects the population on key variables. Sample sizes range from 900 respondents to 4,000. In addition the minimum age of respondents varies from 12 up to 18 years.

Given the range of countries involved in the collaboration there are significant differences in the stage of internet development. There are large differences in internet penetration and the prevailing forms of access. For example in many countries public access points are becoming increasingly less important while in developing countries public access points are still the main means for people to access the internet.

A related issue is that of broadband take-up. This is becoming the key issue in many countries in which the internet is a 'mature' technology, but there is no consensus regarding what constitutes broadband and this definitional problem is exacerbated when looking across countries. Similarly the evolution of the internet has varied between countries in terms of technologies adopted.

Public policy framing of internet development also varies between the partner countries. Regulating the perceived negative effects of the internet is given more emphasis in some jurisdictions while others are more interested in the economic benefits of the net.

Just as importantly for a project such as this, there is great variation in the amount and type of research conducted on internet use and its impact in the various partner countries. In the US for example, the *Pew Internet and American Life* project, commenced in 1999, is a major ongoing survey-based project examining the internet and its impact on households and communities. In Australia, however, research on the social impact of the internet has been piecemeal at best. While there are many surveys that have been conducted on internet use and non-use in various countries, the World Internet Project is the only attempt to undertake coordinated survey work across countries. The combination of longitudinal data and international comparison makes this project extremely useful for identifying and tracking trends.



In the United States there has been a lot of survey research concentrating on the diffusion of new technologies. The Department of Commerce's *Falling Through the Net* project, begun in 1995 and then rebadged as *A Nation Online*, is the best example of this type of research. It began in response to concerns about the digital divide more generally and is now focused on the issue of broadband diffusion. The research includes some limited consideration of uses of the internet by individuals and households but does not investigate 'social impact' in any detailed way. In this research the positive effect of the internet is assumed.

The Pew Internet and American Life Project is a more ambitious and larger project that aims to 'explore the impact of the Internet on families, communities, work and home, daily life, education, health care, and civic and political life.' This project is a series of thematically linked investigations of the impact of the internet. Recent reports have included a study of bloggers and online banking. In contrast to the US World Internet Project this approach enables more detailed investigation of particular issues and uses but doesn't provide as clear an overview. The focused nature of these surveys doesn't facilitate the investigation of the relationship between various online (and off-line) activities and uses.

All partners in the WIP have their own funding source although the US partner in particular has played a key role in advising new partners and meeting with prospective funders. Another challenge to the development of the project has been in developing a consistent approach for partners with greatly varying funding arrangements both in terms of quantum and funding mix. This year will see the first international report published out of the project that will include data on a dozen countries.

## ***Appendix II***

### **About CCI**

The ARC Centre of Excellence for Creative Industries and Innovation (CCI) was established in 2005 to focus research and development on the contribution that the creative industries and their contributing disciplines can make to a more dynamic and inclusive innovation system.

Funded by the Australian Research Council from 2005-13, CCI is acknowledged as a global leader in this emerging field. It is a broadly-based, cross-disciplinary, internationally focused Centre embracing both fundamental theoretical and highly applied research in media, cultural and communication studies, law, education, economics and business and information technology, addressing key problems and opportunities arising for Australia, the Asian region, and for the wider world, from innovation in both the creative economy and the broader service economy. It addresses the nature of the field as rapidly-moving and internationally-focused, with extensive research links and international nodes established or planned in Britain, Singapore and China.

The Centre plays a significant role in theoretical and strategic debates with academic, policy, and industry interlocutors, as well as working extensively on new empirical and technical methodologies, including, for example, the creation of new statistical approaches to measuring the creative economy, new software solutions for creative enterprise, and ethnographic action research.

The Centre gratefully acknowledges the support of the Australian Research Council in providing core funding to establish the Centre, 2005-13.

## ***Appendix III***

### **Research Methods**

#### ***Sampling Design and Procedures***

A random sample of 1,001 Australians was interviewed.

Household telephone numbers were sourced through Sampleworx ([http://www.sampleworx.com.au/household\\_rdd.html](http://www.sampleworx.com.au/household_rdd.html)). This is a Sydney-based company which randomly computer generates phone numbers and validates each one before adding it to their data base.

Information provided on the Sampleworx website indicates that numbers are re-validated every 6 months to refresh the available sample pool. In addition, Sampleworx states that because numbers are randomly computer generated, the sample pool includes not only published phone numbers, but also numbers in new exchange areas and VOIP numbers, thus providing a greater coverage of numbers. Sampleworx phone numbers are profiled to Australian Communications and Media Authority (ACMA) Districts and Zones including a "best guess" postcode. The Sampleworx household sample selection is weighted approximately to ABS population statistics based on post code.

The numbers randomly drawn from the Sampleworx number pool were classified into urban (capital city) and rural (balance of state/territory) based on ACMA Districts and Zones.

There were three quota requirements – age (5 groups) x gender x location (capital city / balance), resulting in 20 quota groups. The number of respondents requested in each quota group, and the actual number of respondents is presented in Table 1.

In a number of categories the actual number of interviews does not match the required number of interviews. There were two main reasons for this occurring.

1. The age of the respondent was not asked until the end of the interview. Although we kept a close watch on the quotas as they were filling up, and took measures to avoid over-sampling within categories, in some instances more than one interviewer was speaking to a respondent in the same quota category and this was not discovered until the interview was completed and the CATI software updated the quota numbers.
2. Since the survey was quite long, we had many instances where respondents stopped the interview part way through due to time constraints. In these cases we made appointments to complete the interviews – in some cases making multiple call backs before completing the interview. In a few cases this meant that the completion of the survey took us over for a quota number for that category. Given the difficulty in obtaining participants, it was deemed more appropriate to complete interviews that were partly done than to abandon those surveys in favour of trying to get another participant.

Table 1  
Quota Categories for WIP Sample

	18-24		25-34		35-49		50-64		65+		Total		Grand Total
	M	F	M	F	M	F	M	F	M	F	M	F	
Urban	43 (43)	44 (41)	59 (62)	60 (61)	89 (93)	97 (94)	72 (71)	75 (73)	47 (47)	58 (58)	310 (316)	334 (327)	644 (643)
Rural	20 (21)	18 (19)	26 (29)	26 (28)	49 (50)	53 (50)	45 (45)	45 (44)	35 (33)	40 (38)	175 (178)	182 (179)	357 (357)
Total	63 (64)	62 (60)	85 (91)	86 (89)	138 (143)	150 (144)	117 (116)	120 (117)	82 (80)	98 (96)	485 (494)	516. (506)	1001 (1000)

*Note: M = Male; F = Female*

*Note: Numbers in brackets are the quotas originally suggested by the client. Numbers outside brackets represent the actual number of respondents*

Although not specifically requested by the client, sample numbers were further grouped by state and territory urban (capital city) and rural (balance) regions, with proportionately greater numbers in NSW, VIC and QLD. This was done in order to provide data that was more representative of the Australian population. The number of surveys completed in each state/territory location is presented in Table 2.

Table 2  
*Number of Respondents in State and Territory Urban and Rural Locations*

	ACT	NSW	NT	QLD	SA	TAS	VIC	WA	Total
Urban	29	143	11	114	73	19	188	67	644
Rural	–	88	1	49	42	13	141	23	357
Total	29	231	12	163	115	32	329	90	1001

*Note: Urban (capital city); Rural (balance)*

## **Recruiting Younger Respondents**

After completion of approximately 800 surveys, the recruitment strategy was changed slightly to maximise the potential to reach younger respondents. .

Up to that point we had been asking if the person who answered the phone was willing to participate in the survey. If not, we asked whether anyone else in the household would be willing to participate.

As the older age quotas filled up, we were referred to younger people in the same household – children or grandchildren of the people who answered the phone, and who were living in the same household.

At that stage we were still only using landline telephone numbers.

At approximately 800 completed surveys, we were only seeking males aged 18-49 years and females aged 18-34 years, in both urban and rural areas.

After discussion with the chief researcher (Scott Ewing), we decided to ask for recommendations of people to call who might be outside the household we had contacted.

We accepted mobile phone numbers to call as well as landlines. We also accepted referrals of people who were in different states from the state we had called – provided they were in the same region – i.e. urban to urban; rural to rural.

## **Record Keeping for Referrals**

Once we started accepting referrals outside the household we had contacted, we manually kept records of completed surveys that resulted from these referrals. We recorded whether surveys were completed on a mobile or landline phone; gender and age of respondents; state and region (urban/rural).

We completed a total of 17 surveys which were referrals outside the household we had originally contacted. Of these 16 respondents were male and one was female, with eight surveys completed on land lines and nine surveys completed on mobile phones. The majority of these respondents were urban males aged 25-34 years. The number of respondents contacted via mobile and land line is presented in Table 3.

Table 3  
*Number of Urban and Rural Respondents contacted Via Mobile or Land Line*

	Age Group						Total
	18 - 24		25 - 34		35 – 49		
	Mob	L/L	Mob	L/L	Mob	L/L	
Urban Male			8	4		1	13
Urban Female		1					1
Rural Male		1	1			1	3
Rural Female							0
Total		2	9	4		2	17

*Note: Mob = Mobile Phone; L/L = Land Line*

## ***Survey Dates and Call Times***

- A pilot shift was conducted by the CATI manager, with phone calls being made by 5 supervisors and 6 interviewers on 7<sup>th</sup> June 2011
- Interviews were conducted between 8<sup>th</sup> June and 6<sup>th</sup> July 2011.
- The CATI facility runs 11 shifts per week
  - Monday – Thursday: 2 shifts per day (10am – 3pm; 3pm – 8pm)
  - Friday: 1 shift (10am – 5pm)
  - Saturday: 1 shift (10am – 6pm)
  - Sunday: 1 shift (11am – 6pm)
- The CATI facility has 10 interviewer workstations, a supervisor workstation and the manager's workstation. The maximum number of simultaneous interviews is either 10 or 11, depending upon whether the manager's workstation is available for interviewer use.
- The shift times and the number of interviewers working during a shift were varied over the course of data collection, based on the particular respondents we were trying to reach. In particular, as younger respondents were sought, shifts were focussed in weekends and the latter part of each weekday.
  - For the first three weeks, full shifts were run with 10 interviewers working in every shift.
  - In the fourth week, weekday morning shifts were run with just 2-3 interviewers, and evening shifts were run with 10 or 11 interviewers.
  - In the fifth week no weekday morning shifts were run, and evening shifts were run with 10 or 11 interviewers.
  - All weekend shifts were run with 10 or 11 interviewers.
- No calls were made on Monday 13<sup>th</sup> June due to the Queen's Birthday national public holiday. Survey calls are prohibited by law on national public holidays.

## ***Interviewers***

- Calls were made by 38 different people.
- The CATI manager made a number of calls and conducted a few interviews.
- There were 5 supervisors (one or two supervisors on duty each shift) who made some calls during their shift. All supervisors are current Swinburne students employed as research assistants. They have long-standing dedicated expertise in supervision and interview technique.
- The majority of calls were made by 32 interviewers. Most interviewers are current undergraduate and postgraduate Swinburne Social Science students.
- All interviewers were trained and monitored by the CATI manager and the supervisors.

## ***Survey Length***

- Across all 1001 interviews, survey time ranged from 5 minutes 24 seconds to 1 hour 11 minutes ( $M = 35$  minutes 8 seconds,  $SD = 9$  minutes 47 seconds).
- Interviews for internet users ranged from 5 minutes 24 seconds to 1 hour 11 minutes ( $M = 36$  minutes 52 seconds,  $SD = 8$  minutes 55 seconds)
- Interviews for non-internet users ranged from 9 minutes 40 seconds to 42 minutes 38 seconds ( $M = 22$  minutes 3 seconds,  $SD = 6$  minutes 45 seconds)

- Interviews for ex-internet users ranged from 17 minutes 35 seconds to 41 minutes 46 seconds ( $M = 28$  minutes 20 seconds,  $SD = 7$  minutes 20 seconds)

*Please Note: Very short survey time occurs because the software calculates the length of the final call to complete survey. In cases of incomplete surveys, the final call to survey completion was often quite short.*

## **Interviewing Operational Criteria**

### **Callbacks**

The number of callbacks for each telephone number was set to a maximum of 10 in the CATI software. Therefore, each number could be called a maximum of 10 times in repeated attempts to reach a potential respondent before being automatically removed from the active phone numbers in the sample. The timing of each callback attempt was programmed into the CATI software to allow for maximum contact potential.

In the cases where a survey was partially completed, the automatic removal of the telephone number was manually overridden. In these cases respondents were called as many times as was necessary to complete the interview. The highest number of call backs recorded for this survey in this category of call was 16 call backs to complete the interview.

### **Response Rates**

The Swinburne CATI Facility developed the following approach to the calculation of response rates. We believe this method gives a detailed account of all call categories.

#### **“Telephone Listing Report” Definitions**

- Active – These numbers are still available in the system. For example, there are 1930 answering machine numbers that the system is holding in memory that would be brought up again if the survey were continuing.
- Dead – These numbers are finished with and would not be used again. This file includes the completed surveys and any numbers that have been sent to the ‘kill’ file because they are unusable for the purposes of the survey (eg fax numbers; business numbers; invalid numbers).
  - Invalid numbers are numbers that are not connected

### **Calculation of Response Rates**

Total Tries = 69,447. This is the total number of calls made by the interviewers, including all categories of calls

Total phone numbers used = 31,910 (dead 27,604 + active 4,306).

Of these, 14,212 were ineligible; 6,517 were non-responses; and 11,181 were eligible (see Tables 4 to 6 for full details).

Of the ineligible calls, some phone numbers were ineligible and some participants became ineligible once age and sex quotas had been filled (see Table 4).

Table 4  
*Number of Ineligible Calls in Various Categories*

<b>Ineligible</b>	
Invalid number	3418
Business Number	2724
Fax machine	2469
Age quota full	4855
Sex quota full	746
<b>Total</b>	<b>14,212</b>

Table 5  
*Number of Non-Response Calls in Various Categories*

<b>Non Responses</b>	
No answer	2710
Answering machine	2711
Engaged	897
Make appointment	58
Number called too many times	141
<b>Total</b>	<b>6,517</b>

Table 6  
*Number of Eligible Calls in Various Categories*

<b>Eligible</b>	
Completed	1001
Refused	9517
Language barrier	578
Out of survey time	55
Respondent stopped interview	19
Interviewer stopped interview	11
<b>Total</b>	<b>11,181</b>

Language Barrier: These were calls where the respondent was unable to complete the survey because they could not understand English, or because they were so hard of hearing that it was impractical to attempt a telephone interview.

Out of Survey Time: These were calls made in the last few days of the survey where the respondent would have been willing to participate had the survey continued for a few more days.

Respondent Stopped Interview: These were calls where the respondent stopped the interview part way through and they were unwilling to complete the interview at a later time.

Interviewer Stopped Interview: In a small number of cases the interviewers (in consultation with the supervisor on duty) deemed it appropriate to terminate the interview. This was done in cases where the respondent clearly did not understand the questions or was behaving in an inappropriate way towards the interviewer. In such cases, interviewers are trained to tell the respondent "That was the last question. Thank you very much for your time."

If the language barrier and 'out of survey time' responses are deemed ineligible, this leaves 10,548 eligible responses.

The response rate is then the proportion of completed calls from the total valid eligible responses (1001 / 10548) = 9.49%



## **Appendix IV**

### **The World Internet Project – International Contacts**

#### **Argentina**

Institute of Applied Economics & Fundación de Investigaciones  
Económicas Latinoamericanas  
[www.fiel.org.ar](http://www.fiel.org.ar)

#### **Australia**

ARC Centre of Excellence for Creative Industries and Innovation (CCi)  
Institute for Social Research, Swinburne University of Technology  
[www.cci.edu.au/projects/digital-futures](http://www.cci.edu.au/projects/digital-futures)

#### **Austria**

Commission for Comparative Media and Communication Studies (CMC)  
[www.oeaw.ac.at/cmc](http://www.oeaw.ac.at/cmc)

#### **Brazil**

Brazilian Economics and Technology Institute  
[www.braeti.net](http://www.braeti.net)

#### **Canada**

Canada Internet Project (CIP)/Recherche Internet Canada (RIC)  
[www.cipiconline.ca](http://www.cipiconline.ca)

#### **Cape Verde**

Innove Research  
[www.research.innove.cv/](http://www.research.innove.cv/)

#### **Chile**

School of Communications, Pontificia Universidad Catolica de Chile (UC)  
[www.wipchile.cl](http://www.wipchile.cl)

#### **China**

Chinese Academy of Social Sciences  
[www.wipchina.org/en](http://www.wipchina.org/en)

#### **Croatia**

Innovation Institute  
[mfuduric@innovation-institute.eu](mailto:mfuduric@innovation-institute.eu)

#### **Colombia**

Centro de Investigación de las Telecomunicaciones (CINTEL)  
[www.cintel.org.co](http://www.cintel.org.co)

#### **Cyprus**

Cyprus University of Technology  
Department of Communication and Internet Studies  
[www.cut.ac.cy](http://www.cut.ac.cy)

#### **Czech Republic**

Faculty of Social Studies, Masaryk University Brno  
[www.fss.muni.cz/ivdmr](http://www.fss.muni.cz/ivdmr)

#### **Ecuador**

Universidad de los Hemisferios (University of the Hemispheres)  
[www.uhemisferios.edu.ec](http://www.uhemisferios.edu.ec)

#### **France**

Center for Political Research at Sciences-Po  
[www.cevipof.com](http://www.cevipof.com)

**Germany**

Deutsches Digital Institut  
[www.deutsches-digital-institut.de](http://www.deutsches-digital-institut.de)

**Hungary**

ITHAKA -- Information Society and Network Research Center  
[www.ithaka.hu](http://www.ithaka.hu)

**India**

School of Journalism and New Media Studies, IGNOU  
[www.ignou.ac.in](http://www.ignou.ac.in)

**Iran**

Faculty of Social Sciences and Economics, University of Alzahra  
[www.alzahra.ac.ir](http://www.alzahra.ac.ir)

**Israel**

The Research Center for Internet Psychology (CIP)  
Sammy Ofer School of Communications, The Interdisciplinary Center (IDC)  
[www.idc.ac.il/communications/cip/en](http://www.idc.ac.il/communications/cip/en)

**Italy**

SDA Bocconi, Bocconi University  
[www.sdabocconi.it/home/it/](http://www.sdabocconi.it/home/it/)

**Japan**

Department of Media and Communications, Toyo University  
[www.soc.toyo.ac.jp/~mikami/wip/en/index.html](http://www.soc.toyo.ac.jp/~mikami/wip/en/index.html)

**Macao**

University of Macau, ERS E-Research (Lab)  
Macao Internet Project (MIP)  
[www.macaointernetproject.net](http://www.macaointernetproject.net)

**Mexico**

Tecnológico de Monterrey, Proyecto Internet  
[www.wip.mx](http://www.wip.mx)

**New Zealand**

Institute of Culture, Discourse and Communication, AUT University of Technology  
[www.wipnz.aut.ac.nz](http://www.wipnz.aut.ac.nz)

**Poland**

Gazeta.pl Research and Analyses Unit  
<http://badania.gazeta.pl>

**Portugal**

Lisbon Internet and Networks International Research Programme (LINI)  
[www.lini-research.org](http://www.lini-research.org)

**Singapore**

Singapore Internet Research Centre (SiRC)  
Nanyang Technological University  
[www.ntu.edu.sg/sci/sirc](http://www.ntu.edu.sg/sci/sirc)

**South Africa**

South Africa Network Society Survey  
[www.journalism.co.za](http://www.journalism.co.za)

**South Korea**

Yonsei University  
[www.yonsei.ac.kr](http://www.yonsei.ac.kr)

**Spain**

Internet Interdisciplinary Institute (IN3)  
Open University of Catalonia (UOC)  
[www.uoc.edu/in3/pic/eng/communication.html](http://www.uoc.edu/in3/pic/eng/communication.html)

**Sweden**

World Internet Institute (WII)  
[www.wii.se](http://www.wii.se)

**Switzerland**

Division on Media Change & Innovation  
IPMZ – Institute of Mass Communication and Media Research  
University of Zurich, Switzerland  
[www.mediachange.ch](http://www.mediachange.ch)

**Taiwan**

Taiwan e-Governance Research Center  
Department of Public Administration, National Chengchi University  
[www.teg.org.tw](http://www.teg.org.tw)

**United Arab Emirates**

Mass Communication Department, American University of Sharjah,  
[www.aus.edu](http://www.aus.edu)

**United Kingdom**

Oxford Internet Institute  
[www.oii.ox.ac.uk/microsites/oxis](http://www.oii.ox.ac.uk/microsites/oxis)

**Uruguay**

The Universidad Catolica del Uruguay  
[www.ucu.edu.uy](http://www.ucu.edu.uy)

**United States**

Center for the Digital Future  
USC Annenberg School for Communication & Journalism  
[www.digitalcenter.org](http://www.digitalcenter.org)