Australian Government

Australian Communications and Media Authority

Digital Australians—Expectations about media content in a converging media environment

Qualitative and quantitative research report

OCTOBER 2011

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Summary

The study

Digital Australians examines the impact of the increasing use of digital media on attitudes and expectations about media content and regulation across different media platforms.

The research was conducted for the Australian Communications and Media Authority (the ACMA) by GfK Bluemoon and comprised 13 focus groups held in metropolitan and regional areas across three states between 20 April and 11 May 2011.

The discussion groups were followed by an online survey of 1,250 Australians aged 18 years and over. Fieldwork for the online survey was conducted between 8 and 22 July 2011 and utilised the insights from the qualitative research.

The findings of this community research will contribute to the ACMA's understanding of what convergence of media and communications means for Australians, and the possible implications for regulation and provision of advice to consumers and citizens.

A note on terminology

In this report, those who took part in the discussion groups are generally referred to as 'participants' and those who completed the online survey are referred to as 'respondents'.

'Offline' refers to more traditional media, including broadcast and subscription television, AM and FM radio, and printed newspapers. 'Online' refers to media content available on the internet.

Media in transition

Australians have a high awareness of the extent of ongoing change in media and communications and regard the transition positively. Access to online media brings with it greater choice, personalisation and convenience, but also challenges for some users who do not feel confident about using the technology or feel safe from the risks of being online. However, Australians are generally embracing the changes, even though using traditional media like television and radio remains the most common activity for many.

Offline media the main media activity

Among internet users, broadcast television remains the most important media activity undertaken by 69 per cent in the past month (free-to-air television 65 per cent and subscription television 26 per cent). Listening to radio was also an important activity (54 per cent).

Australians spent less time watching broadcast television and listening to broadcast radio by Australian broadcasters in 2010 than in 1991. Since 1991, average daily time spent on these activities has declined by approximately 20 minutes for radio and 10 minutes for television.

The most common online activities for survey respondents were accessing news online (59 per cent—mostly Australian news sites), general social networking activities (52 per cent), and watching online video content (45 per cent) mainly from YouTube, Facebook and peer-to-peer sites.

Media use diaries provided a picture of the role television, radio and newspapers play in the daily routines of group participants. Online media were more typically accessed ‘on demand’ and as required to meet specific information needs. This activity was regarded as additional to offline media, although accessing social networking services, including news, throughout the day was common for many participants.

The internet has played an expanding role in users’ media experiences. This is illustrated by the use of online news. While the majority of survey respondents accessed multiple news sources, the main sources were television (47 per cent), online news (23 per cent) and newspapers (18 per cent). Preference for traditional news sources was chiefly put down to habit, convenience and ease of use. Online sources were preferred for similar reasons, but the main reason was for quick access to the main stories.

Generational differences

Older Australians (55 years and older) were more likely to be heavier users of broadcast media than online media, and younger people (18–29 years) were generally heavier users of online media than their older counterparts. The difference was stark for social networking activities, and viewing online video content and catch-up television. These activities were primarily undertaken by young adults, unlike watching broadcast television and listening to the radio, where similar viewer and listener participation was evident across all age groups.

However, while young people are just as likely to use broadcast media as other adults, declines are evident among young people in the amount of time spent with these media.

Awareness of regulation and media concerns

Television’s position as the prime media activity was accompanied by high awareness that there are rules and guidelines applying to television content (79 per cent). Survey respondents also perceived television as the most influential media in shaping their views about politics and social issues (44 per cent strongly/somewhat agree). In comparison, there was greater uncertainty as to whether the internet was regulated (only 24 per cent thought it was), and it was considered less influential than television but of similar influence to radio (28 per cent).

Survey respondents were generally less concerned about what was on television than the internet, and about half indicated they had no concerns about the respective platforms. Concerns about what was on television comprised a range of programming and community standards issues; for example, too much advertising, violence, sexual content and nudity. Concerns about the internet reflected lack of confidence in using online content (identity fraud and protecting one’s personal information online, and other online security threats), together with illegal and inappropriate content.

Older respondents (aged 55 and over) were significantly more likely to have a concern about what is shown on television than younger respondents (aged 18–29). However, concerns about the internet were similar across age groups.

Expectations about content

Perceptions of online content

Most participants in the research saw the internet as a huge repository of content—of greatly varying quality and interest. But it was there, searchable and available to meet individual tastes and needs.

Online media created opportunities for new voices and different views, through blogs and posting comments, compared with traditional media, which were seen as offering little opportunity for users to contribute. Social networks, such as Facebook and Twitter, were seen as powerful ways for individuals to speak and be heard.

Content not platform

The research revealed a nuanced view of regulation of content in the new media environment.

With the exception of illegal content, regulating much of the content available online—to meet expectations of taste and decency, for example—was seen as not only extremely difficult to achieve (because so much of it is hosted offshore) but as contrary to how the internet was seen—an incredibly large and varied source of content that was unconstrained and allowed users to communicate freely.

Most research participants distinguished offline or traditional media, such as newspapers, television and radio, from the internet or online content, but delivery platform was not the most important distinction that they made. The more important distinction was between *types* of content.

Content produced by traditional media organisations—whether for print or broadcast, and whether offline or online—was seen as professional content, produced for broad audiences.

Consumers appeared to bring their expectations of regulation from traditional, familiar media to similar content accessed online. Recognition of traditional media organisations by consumers was high. Similarly, branded content online was usually expected to meet the same or comparable standards as offline content. Whether professional content was broadcast or online, most consumers expected it to meet general community standards for taste and decency. For example, print, broadcast and online stories from traditional, reputable news organisations were expected to meet the same journalistic standards for accuracy and fairness.

Content produced by individuals and posted on the internet was seen as user-generated and there was very little expectation that it would adhere to any standards, apart from the need for it to be legal, and meet the terms and conditions of use of the site it was posted to.

In spite of this, it is likely the more original content that is generated for the internet—if it is of professional quality—the greater the public expectation that it will meet the same standards as offline content that is broadcast or shown in cinemas.

Usefulness of consumer information across media

Respondents indicated that it was generally important to have consumer advice such as classifications and ratings information for broadcast television programs and content on the internet. Few said that they thought these were not at all important.

Consumer information was seen as being slightly more important for traditional television content (whether on free-to-air or subscription television) than for user-generated content on the internet, watching television/movies on the internet or online games.

Respondents with children under 18 placed greater importance on classification and rating information than did other respondents. Most parents saw this information as important when deciding what content their children should view across different media.

Protection of children

Participants acknowledged the importance of protecting children from accessing inappropriate or unsuitable content online. While many saw this as the primary responsibility of parents, it was an area where participants thought there was also a role for both content service providers and government.

Most participants saw an ongoing role for current policy mechanisms (time zoning, ratings, classifications, and consumer advice and content warnings) for protecting children from unsuitable content broadcast on free-to-air television. But they recognised that some of these, such as time zoning, would be difficult or impossible to apply in an online setting. Nevertheless, with classification and other information about the suitability of content for children, many saw a natural flow from broadcast content to content hosted on broadcasters' websites.

Parents of children under 18 demonstrated a greater interest in protecting children from inappropriate media content. Parents were more concerned about the internet than were other adults. They had more concerns about sexual content and nudity (on both television and the internet). They also placed greater value on having consumer information to help people decide whether content was suitable for them and their families. Parents considered there was a greater role for government in protecting children online.

Specific types of content

News

As news services have a longer history of being available online than movies and other media content, there has been more time to see the impact of change on users' expectations.

Research participants welcomed the extraordinary flexibility the internet has brought to keeping up-to-date with news and current affairs from their local community as well as from around the world.

The downside of this was the perception that accuracy could suffer due to the need for immediacy and exposure, and user-generated news and blogs were seen as commentary rather than fact. While offline sources—television, print and radio—were still the main news sources, for many the internet provided a better and more immediate vehicle for local, national and international news than did television or radio.

With many consumers starting to access local news and information online, according to their interests and on demand, the community may become less reliant on local broadcast news (although the online survey did not ask about this specifically). Additionally, those who are not online may be more dependent for their local news on traditional sources, including the local news on television.

Older Australians (aged 55 and over) were more likely than younger respondents to expect online news from Australian television broadcasters and news organisations to have the same standards for accuracy, fairness and transparency as news organisations offline.

Australian content

Focus group participants recognised the importance of Australian content on broadcast television, for continuity of the local production industry as well as to foster a sense of Australian cultural identity. Having a production industry was a desirable stepping stone for Australian actors and other talent, and important for Australia's place in a global market.

Participants' personal preference for Australian content was clear when there was direct relevance or local need or interest; for example, news and information and Australian versions of reality television shows. However, they were aware of the threat to the industry of increasing access to professionally produced online content from overseas sources, such as movies and drama series, providing increased competition for similar Australian material.

Support for a viable Australian production industry was matched with strong agreement in the online survey that the government should put in place rules to ensure that high-quality Australian content is available on television (92 per cent important) and online (84 per cent).

Privacy and consumer protection

Findings from both the qualitative and quantitative research indicated that privacy risks in particular loom larger for participants as top of mind concerns when using digital media than do issues around content. Preventing others getting access to one's personal details, together with minimising risks from malware and other security threats, were key concerns identified by participants.

Those who participated in the focus groups generally accepted that they had little control over what subsequently happened to content that they posted online—on social networking sites, for example—but were generally aware that they needed to manage their privacy settings as well as the content they posted.

Participants identified scope for further education and guidance about protecting personal information online as well as ways to improve individual confidence in using technology.

Roles of individuals, industry and government

No single regulatory approach was thought to be most suitable for the current media environment; rather, a mixture of approaches was needed to address community expectations.

The study participants saw regulation as providing important protections, particularly for professionally produced content intended for broad audiences. Of specific importance was:

> ensuring the accuracy, fairness and transparency of mainstream news and current affairs
> ensuring the continued production and availability of Australian content
> protecting children, with value placed on consumer advice about content.

Participants in the research saw responsibility for making media content 'safe' as shared between individuals (for themselves and for children they cared for), industry and government. The extent to which any party had responsibility depended in part on whether the content was offline or online, and was professionally or user-generated.

This was particularly the case for protecting children, but also applied more generally to community standards.

There was a wide recognition of the difficulty in applying current protections online, particularly when content was hosted offshore, and because of the sheer volume of user-generated content being uploaded and made available online. For these and other reasons, most participants saw access to user-generated content as primarily an individual responsibility or the responsibility of parents.

For professional content produced for broad audiences, whether offline or online, content standards and rules were felt to be appropriate. There was little desire to see the current protections reduced for this content.

Information and skills needs

Accessing online content and using PCs and other digital devices clearly posed challenges for some research participants who did not feel confident about using the technology or feel safe from the risks of being online.

The survey specifically identified gaps in people's confidence to manage the security of personal information online and to protect their computer from malware. Only 54 per cent of survey respondents were confident they had these abilities.

While there was little difference in reported confidence to manage security risks online, younger people were generally less interested in learning digital skills than were older age groups in the survey.

The exception was in the area of privacy, where all age groups were equally interested in learning more about asking a website to remove content that breached their privacy (32 per cent). Learning more about managing personal information online (38 per cent) and learning to use the internet safely (36 per cent) were identified as priorities generally.

Most Australians are already online, but many are not using the full range of digital media available or are not using it extensively. There are a numbers of reasons for this, including habit, convenience and ease of use of more familiar media. In some areas, the media transition is more evident, as seen in high levels of online news use by all age groups, and younger adults leading the take-up of online video.

In the research, positive perceptions about the benefits of online media outweighed concerns and people appreciated the advantages *for* younger generations. However, the growing importance of online media for Australians may well highlight the privacy and security risks of being online, as well as concerns about content.

Overall, the study indicates that there is scope for measures such as information and education to assist online consumers generally, to build confidence in using online media. Being able to better manage security and privacy risks is particularly important. Additional considerations for children using digital media were reflected in parents' greater concern about internet content and the priority for protecting children evident in the study. There is a continuing role for government and industry to support parents in managing children's online experience, with education and other initiatives.

1. Introduction

What is meant by 'convergence'?

Within the ACMA, convergence is primarily framed to refer to the merging of the previously distinct platforms by which information is communicated. The historical distinctions between radiocommunications, telecommunications, broadcasting and the internet are breaking down.

Media convergence can be seen as the phenomenon where digitalisation of content, as well as standards and technologies for the carriage and display of digital content, are blurring the traditional distinctions between broadcasting and other media across all elements of the supply chain, for content generation, aggregation, distribution and audiences.

For the consumer, these trends are greatly increasing the availability of media content online—from broadcasters, news organisations, social media sites, iTunes and YouTube, to name a few of the main media sources—on an increasing array of connected devices and screens. The choice of devices for accessing the internet and 3G and wireless broadband networks is also giving users flexibility in how and where they consume media.

While technology is the general enabler that allows for the increasing diversity of media content and sources, this research focused primarily on the impact of convergence on the citizen and consumer's use of and attitudes to media content—and not on the impact of convergence on the supply of media content or other market developments.

Research objectives and methodology

The ACMA undertook the *Digital Australians* study in line with its responsibilities for the regulation of broadcasting, internet content, radiocommunications and telecommunications. The ACMA's functions include conducting attitudinal research on issues relating to broadcasting and internet content as part of a broader role to inform itself and advise on trends impacting the industries it regulates.

The findings of this community research contribute to the ACMA's understanding of the effect of media and communications convergence for Australians, and possible implications for regulation and provision of advice to consumers and citizens.

Objectives

The research was designed to examine attitudes and expectations relevant to various social and cultural policy objectives that Australians may value in a converging media environment, and how these attitudes and expectations vary for different media content or platforms. The three broad areas of inquiry were:

1. How media are being used in an environment where technology is changing the use and consumption of media content.
2. The potential impact of a converging media environment on adult Australians' attitudes, concerns and expectations about media content issues (and their regulation) across different media platforms.
3. The skills and confidence needed to access media content, and to deal with any perceived risks for themselves and their families.

Detailed research objectives are provided in Appendix A.

Methodology

The research was conducted for the ACMA by GfK Bluemoon and comprised 13 focus groups held in metropolitan and regional areas across three states between 20 April and 11 May 2011.

The focus groups discussions lasted 1.75 hours. Participants were asked to keep a diary of media usage across at least four days prior to attending the group discussions, including a weekday and a weekend.

The discussion groups were followed by an online survey of 1,250 Australians aged 18 years and over. Fieldwork for the online survey was conducted between 8 and 22 July 2011 and utilised the insights from the qualitative research.

An online survey approach was used to ensure that issues that concerned online media were more adequately explored with potential users of those media. The approach means that, while the online sample is generally representative of online Australians, it is not representative of the views of all Australians.

Where relevant, data from secondary sources is presented in the report to supplement and frame relevant online survey findings from the current study.

Details of the methodology and sample are provided in Appendix B.

2. Media use

Community attitudes to media policy issues are informed by the community's current media use behaviours and practices. This chapter provides an overview of media use activities by Australians in the converging media environment. It covers broadcast television and radio services, newspapers, catch-up television, online radio, video content and news services that are accessed from the internet. The devices used to access online media content are also examined.

This chapter draws from the ACMA's *Digital Australians* online survey findings of media use by adults aged 18 years and over. Additional research sources are used to provide a more complete picture of media use by Australians, including those who are not internet users. Additional online survey findings about the use of internet-capable mobile devices are also included to complement the ACMA study.

Media activities

Table 1 shows the media activities undertaken by online survey respondents. Viewing broadcast free-to-air television was the top media activity (reported by 65 per cent of respondents in the past month). Including subscription television, 69 per cent had watched broadcast television services.

The second most common media activity was accessing news online (reported by 59 per cent of respondents). This includes visiting news websites (52 per cent) and/or accessing news through social networking sites (22 per cent).

After broadcast television and online news, listening to broadcast radio (54 per cent of online respondents) and using social networking sites (49 per cent) were the next most commonly reported media activities.

Table 1 Media activities undertaken in the past month and past week, 2011

Media activity	Past month	Past week
	%	%
Watched free-to-air television (not online)	65	64
Listened to the radio (not online)	54	52
Visited a website of a news organisation	52	49
Undertook other social networking activities (e.g. browsing others' profiles, staying in touch with friends)	49	48
Watched video content that you downloaded from the internet from sites like YouTube	33	31
Played games on the internet (online games)	30	28
Watched pay TV (e.g. Foxtel, Austar) (not online)	26	25
Watched video content (video clips etc.) through a social media website such as Facebook	25	22
Accessed the news though a social media website (e.g. Facebook, Twitter, MySpace, Bebo – not YouTube)	22	20
Visited a TV broadcaster's or radio station's website (but not to watch catch-up TV over the internet)	20	17
Watched catch-up TV over the internet (e.g. iView, Plus7, FIXPlay, etc.)	17	15
Listened to an internet radio service	14	12
Watched video content that you downloaded from the internet from sites like BitTorrent or Pirate Bay or other peer-to-peer networks	13	11
Created and uploaded video content to the internet (YouTube etc.)	6	5
Watched an IPTV service (e.g. FetchTV, etc.)	2	2
None of these	6	7

Source: ACMA, Digital Australians *online survey, 2011.*
B1 ASK ALL: In the past month, which of the following have you done? M/R RANDOMISE
Base: Media activity for past month, total sample n=1,250; media activity for past week, sample n=1,176.

Background to internet use by Australians

Roy Morgan Research found that most Australians aged 14 years and over had accessed the internet from home (77 per cent) in June 2010. Fewer were connected at work (40 per cent) and other locations (15 per cent). Sixty-six per cent had a home broadband connection, and 13 per cent had used a mobile phone to connect to the internet.[1]

The ABS reports there were 10.9 million internet subscribers (excluding mobile handsets) at the end of June 2011, with households representing 80 per cent of all broadband subscriptions. Ninety-five per cent of subscriptions were broadband services, and in the year to June 2011 the volume of data downloads increased by about 77 per cent to 274,096 TB.[2]

In addition, there were almost 10 million mobile handset subscribers in Australia in June 2011. The volume of data downloaded to mobile handsets was 3,695 TB (during the second quarter of 2011) and complementary in terms of providing Australians with access to the internet.[3]

Young adults are heavier users of the internet than older adults. In 2010, 46 per cent of 18–24s and 40 per cent of 25–34s spent more than 15 hours a week using the internet for personal use (covers all personal internet activities, including

[1] Roy Morgan Single Source, cited in ACMA, Communications report 2009–10 series, *Report 1: Australia in the digital economy: The shift to the online environment*, 2010.
[2] Australian Bureau of Statistics, *8153.0 – Internet Activity, Australia, June 2011*.
[3] ibid.

communications use and accessing media content). This compares with 19 per cent of 55–64s and eight per cent of those aged 65 years and over spending more than 15 hours per week online.[4]

Use of online and offline television and video

Many online respondents viewed video content online as well as catch-up television (online video more so than catch-up television), but substantially more respondents watched broadcast television.

Television and online video activities were grouped together, and Figure 1 summaries the net proportion of respondents who watched television and/or video using online media compared to offline media. It shows that:

> almost four in 10 respondents watched television and/or video content both offline and online (38 per cent)

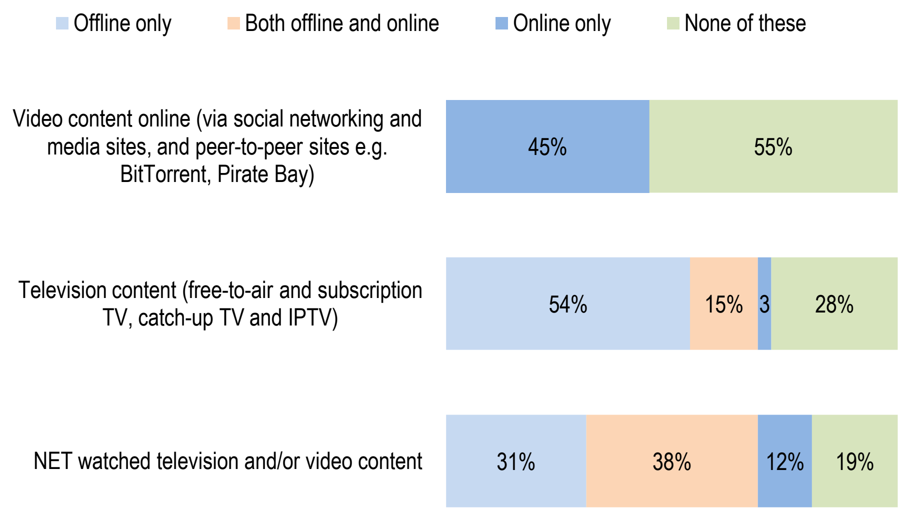
> less than a third watched this material solely offline (31 per cent)

> some were solely online viewers (12 per cent).

A total of 45 per cent of survey respondents had watched online video content from either social networking sites (mainly Facebook), social media sites (mainly YouTube) or peer-to-peer sites such as BitTorrent or Pirate Bay. Fifty-five per cent of the online sample reported not having watched any online video content in the last month.

Just over half (54 per cent) of respondents had only watched broadcast television (free-to-air or subscription). Eighteen per cent watched television from both online (catch-up television or IPTV services) and offline sources, and a low three per cent reported having only watched television content online.

Figure 1 Television and video content viewing offline and/or online, 2011



Source: ACMA, Digital Australians *online survey, 2011.*
B1 ASK ALL: In the past month, which of the following have you done? M/R RANDOMISE
Base: Total sample, n=1,250.

[4] Roy Morgan Single Source, cited in ACMA, Communications report 2009–10 series, *Report 1: Australia in the digital economy: The shift to the online environment*, 2010.

Age differences

The survey findings indicated a generational shift in the way media is used. Younger online survey respondents were generally more involved than other age groups in a range of media activities in the past month. They were more likely to have undertaken online media activities, particularly social networking and watching online video content (Table 2).

Table 2 Online media activities by age, 2011

Media activity	18–29 (n=262)	30–44 (n=353)	45–54 (n=233)	55+ (n=402)
	%	%	%	%
Undertaken other social networking activities, (e.g. browsing others' profiles, staying in touch with friends)	71	49	41	41
NET viewing online video content	68	50	34	32
Watched video content from the internet from sites like YouTube	53	36	23	22
Watched video content through a social media website such as Facebook	45	25	20	14
Watched video content from the internet from sites like BitTorrent or Pirate Bay or other peer-to-peer networks	26	15	7	6
Played games on the internet (online games)	41	31	25	25
Accessed the news through a social media website (e.g. Facebook, Twitter, MySpace, Bebo – not YouTube).	36	25	15	13
Watched catch-up TV over the internet (e.g. iView, Plus7, FIXplay, etc)	31	17	13	11

Source: ACMA, Digital Australians *online survey, 2011.*

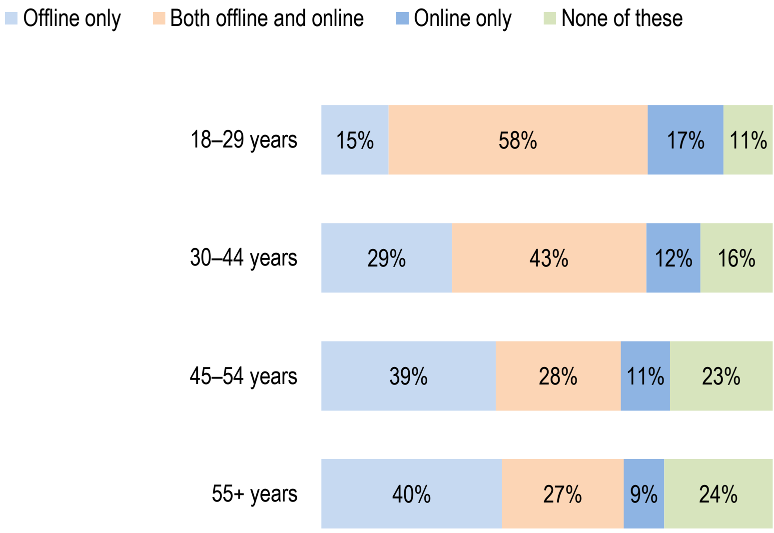
B1 ASK ALL: In the past month, which of the following have you done? M/R RANDOMISE

Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

Younger respondents were just as likely as older respondents to have watched broadcast television services or listened to broadcast radio in the past month. However, evidence from other research sources presented later in this chapter shows a decline in the average time young people spent on these activities over the last two decades.

Figure 2 summarises the proportion of online respondents in each age group who watched television and video content from online and offline sources. Over half (58 per cent) of those aged 18–29 used both offline and online sources for television and video content, decreasing to just over a quarter for those aged 45 years and over. Approximately 40 per cent of these older respondents used only offline sources for television and video compared with 15 per cent for those aged 18–29.

Figure 2 NET television and video content viewed offline and/or online by age group, 2011



Source: ACMA, Digital Australians *online survey, 2011.*
B1 ASK ALL: In the past month, which of the following have you done? M/R RANDOMISE
Base samples by age: 18–29 yrs n=262; 30–44 yrs n=353; 45–54 yrs n=233; 55+ yrs n=402.

Broadcast television

Television industry data collected by OzTAM and RegionalTAM provides audience measures across metropolitan and regional locations in Australia. It is not possible to compare these data to the ACMA's online survey findings because of the different research methods and samples used.

Industry measures indicate the importance of broadcast television viewing, both in terms of audience reach and the amount of time spent watching. Broadcast television is estimated to reach an average 77 per cent of Australians who tune in for at least five minutes per day (Table 3).

Table 3 Daily television reach, 2010

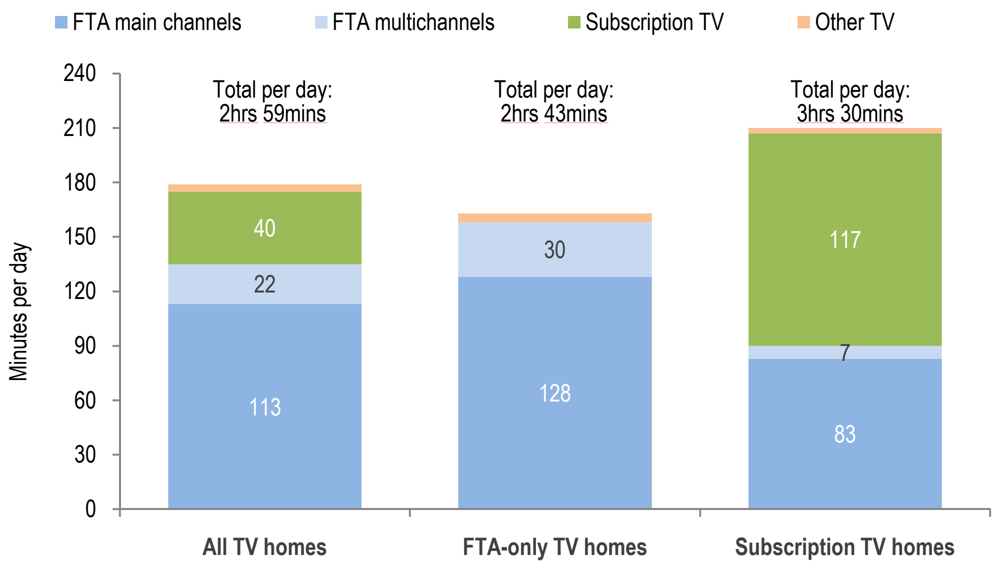
Type of television service	Average daily reach (5-minute threshold)	
	Number of people	%*
Total free-to-air	14,464,100	68.5
Total commercial	12,973,000	61.4
Total public	7,548,500	35.8
Total subscription	4,301,700	20.4
TOTAL TV	16,179,500	76.6

Source: Free-to-air: OzTAM and RegionalTAM, five-city metro, combined aggregate regional markets, 2am–2am, Jan–Dec 2010, consolidated (which includes time-shifted viewing data), ex spill. Metro and regional reach figures have been combined.
Subscription: OzTAM, National STV, 2am–2am, Jan–Dec 2010, consolidated—cited in Screen Australia (2011) Convergence 2011: Australian content state of play—Informing debate, *August 2011.*
**The ACMA calculated reach (%) against OzTAM and RegionalTAM 2010 universe estimates of 14,868,000 for five city metro markets and 6,246,000 for aggregated regional markets (excluding Tasmania).*

In 2010, an average of almost three hours (two hours and 59 minutes) was spent watching television per day (6am to midnight) across all television households in the five Australian mainland capital cities (Figure 3). Compared with the metropolitan average, viewers in aggregated regional markets watched an additional six minutes per day on average.[5]

Australians in the 30 per cent of homes with subscription television viewed more television.[6] Daily viewing averaged a high three hours and 30 minutes, compared with two hours and 43 minutes in metropolitan households with free-to-air television only—a difference of 47 minutes per day.

Figure 3 Average time spent viewing broadcast television by household type, 2010



Source: OzTAM consolidated time spent viewing (ATV) data, 2010, five-city metro, all people 0+ years, 6am–midnight. 'Consolidated' data includes time-shifted viewing. Includes free-to-air multichannels.

Of the average total time spent viewing free-to-air television in all television households, 17 per cent was spent watching free-to-air multichannels. The multichannel television services that were operating throughout 2010 were ABC2, ABC3, 7TWO, GO! and ONE, with the other multichannels—ABC News 24, 7mate and Gem—commencing in the third quarter of 2010.

Age and gender differences were evident. Young adults aged 18–24 years spent less time watching television than audiences aged 25 years and over. However, young adults still watched television for just over one-and-a-half hours (an average 94 minutes for those aged 18–24) per day in 2010 in all television households.

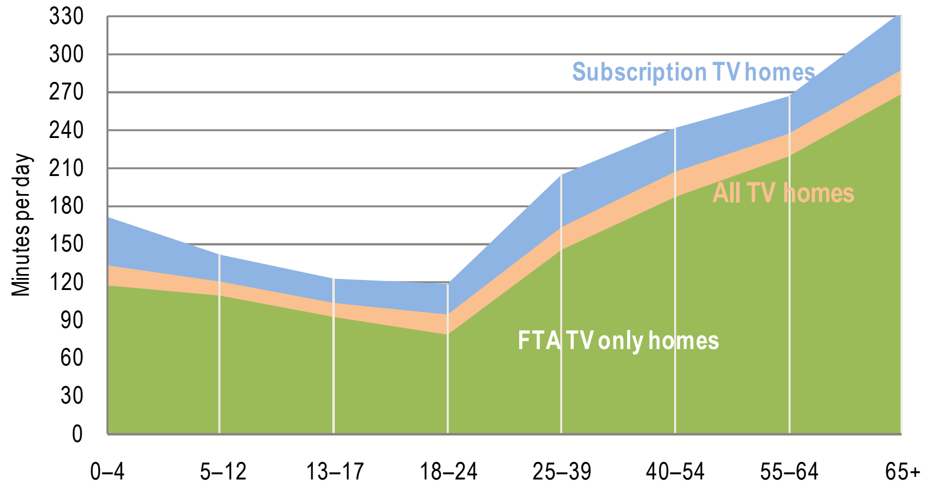
Broadcast television viewing appears to be particularly important for people aged 55–64 years, where average daily viewing ranged from three hours and 39 minutes (219 minutes) in free-to-air-only television households to four hours and 26 minutes (266 minutes) in households with subscription television. Those aged 65 years and over watched even more television (Figure 4).

[5] FreeTV Australia, *Year in review 2010,* 2011, www.thinktv.com.au/content_common/pg-reports.seo.

[6] ibid.

Women spent more time watching television (free-to-air and subscription), averaging three hours and 11 minutes per day. Men watched an average two hours and 47 minutes in all television households.

Figure 4 Average time spent viewing broadcast television by age group and household type, 2010



Source: OzTAM consolidated time spent viewing (ATV) data, 2010, five-city metro, 6am–midnight. 'Consolidated' data includes time-shifted viewing. Includes free-to-air multichannels.

Trends in television viewing

The availability of additional free-to-air multichannels and access to time-shifting technologies appear to have contributed to a small overall increase in time spent viewing television between 2009 and 2010.[7] Increases were higher for people aged 25 years and over, and lower or stable for younger audiences. In 2010, OzTAM introduced time-shifted viewing measures that replaced earlier measures of live-only viewing.

Since the early and mid 1990s, average time spent viewing all television decreased by approximately ten minutes per day. In 1994, prior to the introduction of subscription television in 1995, daily free-to-air television viewing averaged three hours and eight minutes. Sixteen years later in 2010, combined free-to-air and subscription television viewing averaged two hours and 59 minutes per day. Subscription television has taken up much of the decline in free-to-air viewing over that time (Table 4).

It is also notable that there has been a greater decrease in television viewing by children and young people over the past 20 years relative to adults. Viewing decreased by an average 39 minutes per day for children aged 5–12 years and by an average 57 minutes per day for those aged 13–17.

[7] The penetration of Personal Video Recorders (PVRs) that allow time-shifted viewing in Australian households in 2010 was 35 per cent and is predicted to increase. Source: OzTAM Establishment Survey Q4 2010, cited in Free TV Australia, *Year in review 2010*, 2011, www.thinktv.com.au/content_common/pg-reports.seo.

Table 4 Average time spent viewing broadcast television per day, 1991–2010

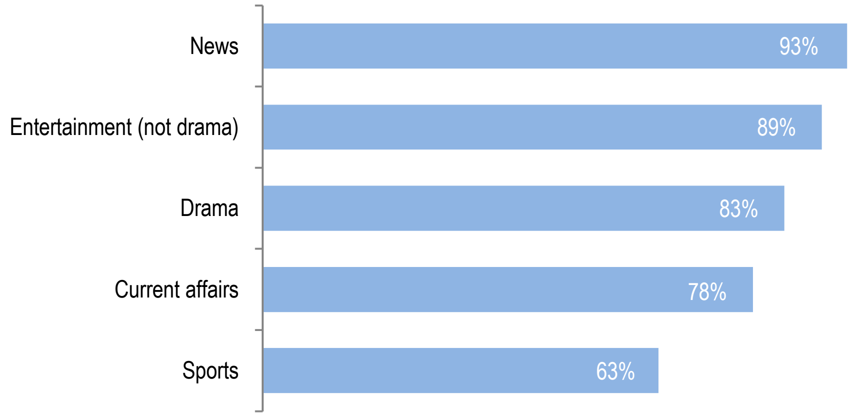
Year	All people 0+ years	Children 5–12 years	Young people 13–17 years
Average minutes (hrs:mins) per day			
All television viewing (FTA and STV) in all television homes			
2010	179 (2:59)	120 (2:00)	103 (1:43)
2009	175 (2:55)	118 (1:58)	104 (1:44)
2007	181 (3:01)	–	–
2006	184 (3:04)	–	–
2005	182 (3:02)	–	–
Free-to-air television viewing in all television homes			
2010	135 (2:15)	84 (1:24)	72 (1:12)
2009	132 (2:12)	83 (1:23)	69 (1:09)
1994	188 (3:08)	159 (2:39)	159 (2:39)
1993	186 (3:06)	153 (2:33)	158 (2:38)
1992	190 (3:10)	152 (2:32)	159 (2:39)
1991	189 (3:09)	159 (2:39)	160 (2:40)

Source: OzTAM 2005–2010; Nielsen Media Research (1991–1994). 2008-2010 data includes free-to-air multichannels.
Annual averages are for five metro cities, 6am–midnight, Sunday–Saturday.
2010 OzTAM data is 'consolidated', which includes time-shifted viewing (live-only viewing was measured prior to 2010).
Note: Dashes indicate that no data was obtained by the ACMA for those aged 5–17 in 2005–07.

Content viewed

In the online survey, most television viewers reported watching news (93 per cent of viewers) and entertainment programs—excluding drama (89 per cent)—in the past week. A smaller majority watched drama (83 per cent), current affairs (78 per cent) and sports (63 per cent) programs (Figure 5).

Figure 5 Programs watched by broadcast television viewers in last week, 2011



Source: ACMA, Digital Australians *online survey, 2011.*
B2 ASK THOSE WATCHED TV (ITEM 1 OR 2 = CODES 02-06 ON B1b): You mentioned earlier that you have watched television in the past week. Approximately how much time have you spent watching the following types of programs on TV over the past week? S/R PER ITEM, RANDOMISE
Base: Free-to-air and subscription television viewers n=859.

Table 5 shows that news and current affairs was the most watched free-to-air program genre in all television (free-to-air and subscription) households, comprising 22 per cent of the total time spent viewing free-to-air television in 2010. Drama (15 per cent of time spent viewing) and light entertainment programs (11 per cent) also attracted considerable viewing.

Table 5 Top 10 free-to-air television program genres by share of viewing, 2010

Ranking	Genre	Share of viewing (%)
1	News and current affairs	22
2	Drama	15
3	Light entertainment	11
4	Sport	9
5	Movies: Feature films	9
6	Comedy	7
7	Children's programs	6
8	Infotainment/lifestyle	6
9	Reality television	6
10	Documentary	4

Source: OzTAM share of viewing data for free-to-air television in all television (free-to-air and subscription) households, 2010, five-city metro, excl. spill, 2am-2am. Consolidated data includes time-shifted viewing.
Note: Each broadcaster defines and supplies the genre description for their programs independently of OzTAM.

Broadcast radio

At 54 per cent, listening to broadcast radio was the third-highest media activity undertaken by online survey respondents in the past month—after broadcast television and online news services. The incidence of radio listening was consistent across age and gender.

Time spent listening to radio by Australians aged 10 years and over was similar to the amount of total television viewing in 2010 in free-to-air and subscription television households. Nielsen Radio Ratings report average daily time spent listening to radio at almost three hours (two hours and 55 minutes) in the five mainland capital cities in 2009.

Older people spent substantially more time listening to radio than younger people. Radio listening ranged from a low average of one hour and 36 minutes for those aged 10–17 to three hours and 54 minutes per day by listeners aged 55 years and over.

Radio listening trends

Over the past 20 years, radio listening has declined by an average of approximately 20 minutes for all people aged 10 years and over. Most of the decline is attributable to younger adults aged 18–39 years (a reduction of 40–50 minutes per day), with smaller reductions for those aged 10–17 and 40–54 years (20–30 minutes per day each) since 1991 (Table 6).

More recently, time spent listening to broadcast radio increased by an average of five minutes per day between 2008 and 2009. This small increase comprises declines for those aged 18–39 and increases by those aged 10–17 years and 40 years and over.

No decline is evident for older people aged 55 years and over, for whom similar listening levels were recorded in 1991 and 2009. There was a dip however in their radio listening in the early 2000s.

Table 6 Average time spent listening to broadcast radio per day by age, 1991–2009

Year	All people 10+ years	10–17	18–24	25–39	40–54	55+
			Average minutes (hrs:mins) per day			
2009	175 (2:55)	96 (1:36)	142 (2:22)	156 (2:36)	187 (3:07)	234 (3:54)
2008	170 (2:50)	87 (1:27)	155 (2:35)	161 (2:41)	177 (2:57)	213 (3:33)
2002	167 (2:47)	106 (1:46)	161 (2:41)	168 (2:48)	171 (2:51)	201 (3:21)
2001	169 (2:49)	106 (1:46)	165 (2:45)	170 (2:50)	174 (2:54)	203 (3:23)
2000	159 (2:39)	92 (1:32)	146 (2:26)	162 (2:42)	166 (2:46)	195 (3:15)
1993	195 (3:15)	118 (1:58)	196 (3:16)	199 (3:19)	205 (3:25)	225 (3:45)
1992	189 (3:09)	119 (1:59)	195 (3:15)	196 (3:16)	201 (3:21)	224 (3:44)
1991	198 (3:18)	125 (2:05)	205 (3:25)	197 (3:17)	201 (3:21)	235 (3:55)

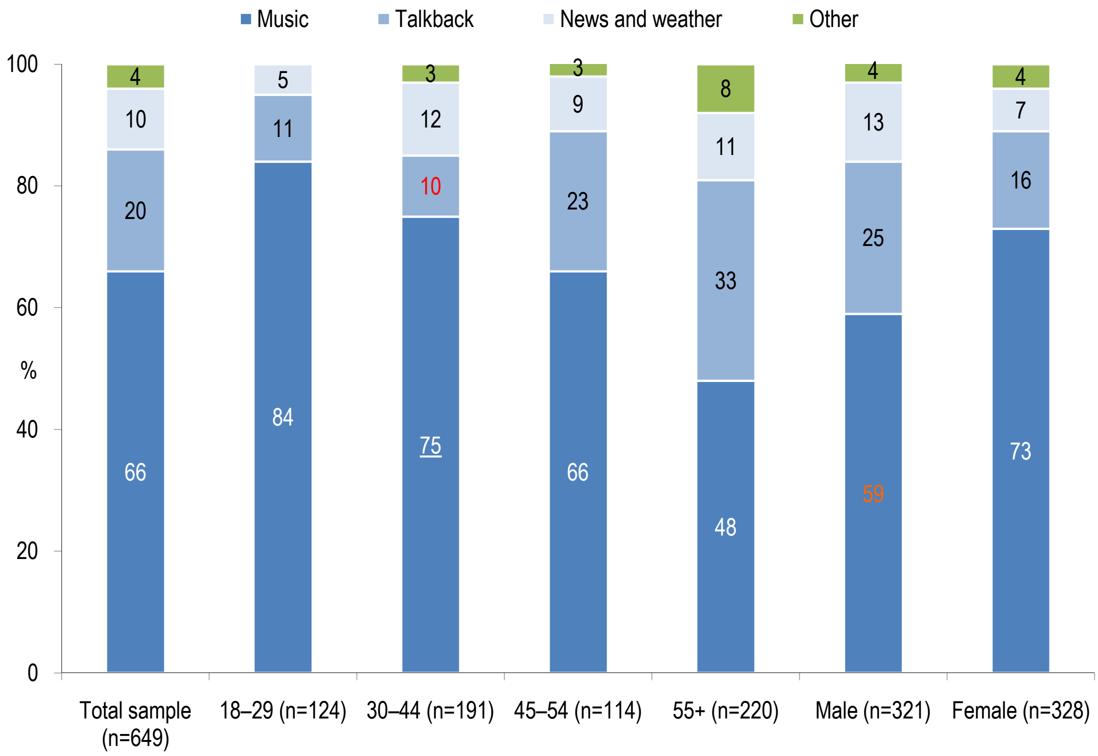
Source: Nielsen Radio Ratings 2008–2009; Nielsen Media Research (2001–2002); AGB McNair (1991–1994). Annual averages are for five metro cities, 5.30am–midnight, Monday–Sunday.

Radio formats

Two-thirds (66 per cent) of online survey respondents who reported listening to radio said that music was the format they listened to most, across age groups. However, with increasing age, music listening declined consistently in favour of other program formats.

Males and older online respondents aged 55 years and over who listened to radio were more likely to be talkback listeners than females and younger adult listeners (Figure 6).

Figure 6 Radio formats listened to the most, 2011



Source: ACMA, Digital Australians *online survey, 2011.*
B39 ASK THOSE LISTENED TO RADIO (ITEM 11 = CODES 02-06 ON B1a): Earlier you indicated that you have listened to the radio. Which of the following have you listened to most in the past week? S/R RANDOMISE
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.
Base: Respondents who had listened to radio (not online) in the past week, n=649.

Newspapers

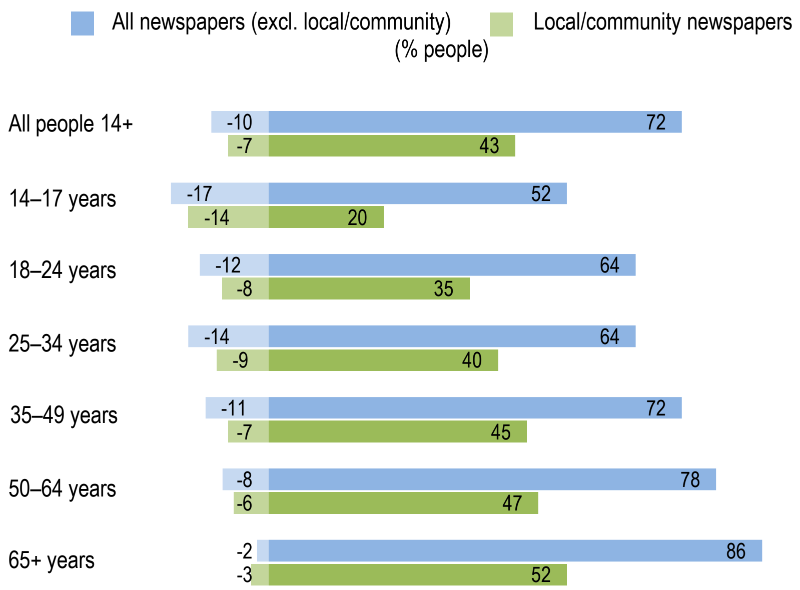
Newspaper readership data for Australians aged 14 years and over have been sourced from Roy Morgan Research and are presented in Figure 7. It shows that in 2010–11, an average 72 per cent of Australians had read a newspaper (excluding local and community newspapers) in the last seven days, and 43 per cent had read a local or community newspaper.

Readership generally increased with age. It was highest among older people aged 65 years and over (86 per cent) and lowest for those aged 14–17 (52 per cent) in 2010–11.

Since 2006–07, newspaper readership has generally declined. Reading newspapers (excluding local and community newspapers) dropped 10 per cent, from 82 per cent in

2006–07. Readership of local and community newspapers dropped seven per cent over the same period. It is also notable that for people aged 65 years and over readership levels have remained much the same since 2006–07.

Figure 7 Newspaper readership in 2010–11 and decline since 2006–07



Source: Roy Morgan Single Source, July 2006 to June 2007, and July 2010 to June 2011. Weighted to the projected population of Australia aged 14+ years.

Online television and radio

This section presents further findings from the ACMA's online survey about the use of online television and radio services, with subsequent sections covering other online media activities.

Catch-up and internet television

Each of the free-to-air television broadcasters in Australia provides catch-up television services. Seventeen per cent of online respondents reported having watched catch-up television in the past month (Table 7). This compares with 69 per cent who watched broadcast television. Younger adults were significantly more likely to have watched catch-up television than older people (31 per cent of those aged 18–29).

The use of Internet Protocol Television (IPTV) was relatively uncommon, with only two per cent of respondents reporting they had watched IPTV in the past month. This small number of respondents does not allow reliable analysis against different demographic characteristics or the devices used to access these services.

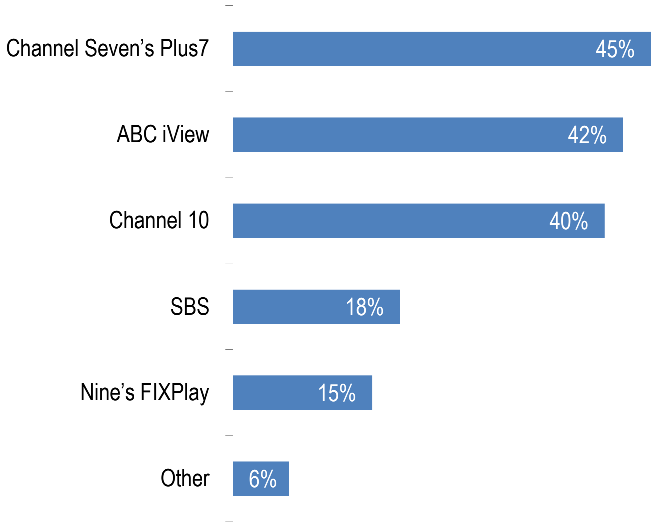
Table 7 Online television viewing and radio listening in past month by age and gender, 2011

	Total sample (n=1,250)	18–29 (n=262)	30–44 (n=353)	45–54 (n=233)	55+ (n=402)	Male (n=613)	Female (n=637)
	%	%	%	%	%	%	%
Visited a TV broadcaster's or radio station's website (but not for catch-up TV)	20	20	22	19	18	22	18
Watched catch-up TV over the internet (e.g. iView, Plus7, FIXPlay etc)	17	31	17	13	11	16	18
Listened to an internet radio service	14	16	17	11	12	18	10
Watched an IPTV service (e.g. FetchTV)	2	3	4	1	0	3	1

Source: ACMA, Digital Australians *online survey, 2011.*
B1 ASK ALL: In the past month which of the following have you done? M/R RANDOMISE
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

Respondents highlighted Channel 7's Plus7, ABC's iView and Channel 10 as the most frequently used catch-up television services (Figure 8).

Figure 8 Catch-up television services used in the past month, 2011



Source: ACMA, Digital Australians *online survey, 2011.*
B26 ASK THOSE WATCHED CATCH UP TV (CODE 7 ON B1): You mentioned earlier that you have watched catch-up TV. Which of the following catch-up TV services have you used in the past month? M/R RANDOMISE
Base: Respondents who have watched catch-up TV in the last month, n=217.

Internet radio services

Fourteen per cent had listened to online radio services in the last month compared to 54 per cent who listened to broadcast radio. Online radio listeners were more likely to be male (18 per cent) than female (10 per cent)—see Table 7.

Survey respondents who listened to online radio reported listening to the radio formats at similar proportions as broadcast radio listeners (see Figure 6 for broadcast radio formats). For online radio listeners:

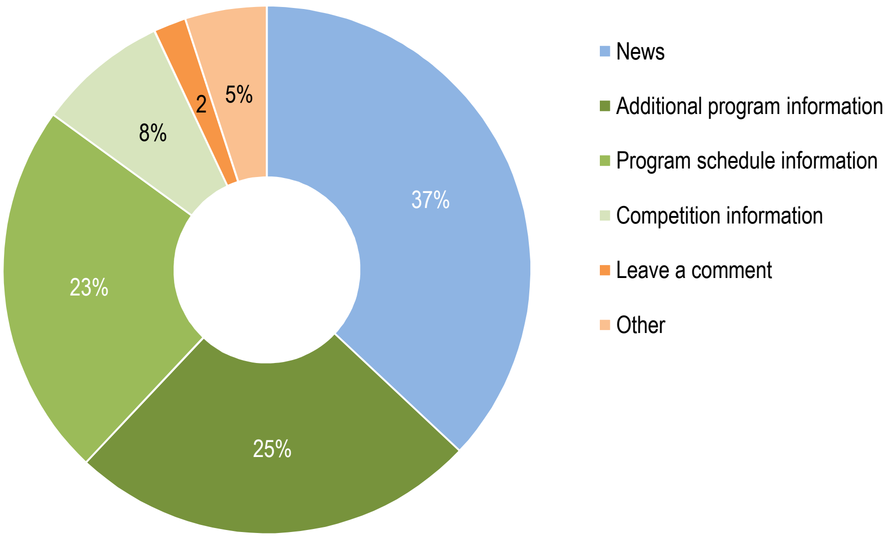
> 66 per cent listened to music in the past week
> 15 per cent listened to talkback programming
> 12 per cent listened to news and weather
> seven per cent gave other responses (mainly sport).

Visits to broadcaster websites

Twenty per cent of respondents reported visiting the website of a television or radio broadcaster in the past month, and no significant differences were found by age or gender for this activity. Almost all of these website visitors (93 per cent) had visited Australian broadcaster websites and seven per cent had visited websites of international broadcasters.

Figure 9 shows that seeking information about programs, schedules and competitions were the main reasons for visiting the websites of Australian broadcasters (a total of 56 per cent), followed by seeking news (37 per cent).

Figure 9 Main reasons for visiting Australian television or radio broadcasters' websites in the past month, 2011



Source: ACMA, Digital Australians *online survey, 2011.*
B13 ASK IF VISITED AUSTRALIAN WEBSITES (CODE 01 ON B11): What was your main reason for visiting these sites in the past month? S/R
Base: Respondents who had visited an Australian television or radio website in the past month, n=232.

Social networking

Social networking is a popular online communication activity that also provides a gateway to video and news content for many internet users.

Almost half (49 per cent) of survey respondents reported visiting social networking sites in the last month to browse personal profiles or stay in touch with friends, 25 per cent watched video content or clips via social networking sites, and 22 per cent accessed news through these sites (Table 8).

Social networking activities were more prevalent among younger age groups than the older groups. More females reported using social networking sites for browsing, connecting with friends and accessing news services than did males.

Table 8 Social networking activities undertaken in past month by age and gender, 2011

	Total sample (n=1,250)	18–29 (n=262)	30–44 (n=353)	45–54 (n=233)	55+ (n=402)	Male (n=613)	Female (n=637)
	%	%	%	%	%	%	%
Undertaken other social networking activities (e.g. browsing others' profiles, staying in touch with friends)	49	71	49	41	41	43	56
Watched video content or clips through a social media site such as Facebook	25	45	25	20	14	26	24
Accessed the news through a social media website (e.g. Facebook, Twitter, MySpace – not YouTube)	22	36	25	15	13	18	25

Source: ACMA, Digital Australians *online survey, 2011.*
B1 ASK ALL: In the past month, which of the following have you done? M/R RANDOMISE
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

Of those who had accessed news stories and video content through social networking websites, Facebook was the most commonly used—more than eight in 10 had used Facebook for these purposes (Table 9). Up to 17 per cent had sourced news stories through Twitter, Windows Live Spaces and Yahoo! 360.

Table 9 Social networking websites used to access video content and news stories, 2011

Social networking websites	Video content (n=313)	News stories (n=252)
	%	%
Facebook	89	83
Twitter	–	17
Windows Live Space (formerly MSN Space)	10	15
Yahoo! 360	7	17
MySpace	4	5
Tumblr	3	2
Bebo	0	1
Flixter	1	0
Other	7	6

Source: ACMA, Digital Australians *online survey, 2011.*
B17 ASK THOSE ACCESSED NEWS THROUGH SOCIAL MEDIA (ITEM 5 = CODES 02-06 ON B1a): Which, if any, of the following social media website(s) have you used to access news stories over the past week? M/R RANDOMISE
B21 ASK THOSE ACCESSED VIDEO CONTENT THROUGH SOCIAL MEDIA (CODE 6 ON B1): Earlier you indicated that you had accessed video content through social media websites in the past month. Which of the following social media website(s) have you used to access video content over the past month? M/R RANDOMISE
Note: Figures do not add to 100 per cent due to multiple responses.
Base: Respondents who accessed video content through social media websites in the past month, n=313; Respondents who accessed news through social media websites in the past month, n=252.

Online video content

Table 10 shows that a third of online respondents watched video content from social media sites such as YouTube in the past month, and 13 per cent watched video from peer-to-peer sites such as BitTorrent and Pirate Bay. As mentioned earlier, a quarter had also watched video content from social networking sites such as Facebook. From these three sources, online video content was viewed by a total of 45 per cent of the surveyed respondents.

It was far less common for respondents to have created and uploaded their own video content to the internet (6 per cent). Viewing of online video content was significantly more prevalent amongst 18-29 year olds than respondents aged 45 years and older.

Table 10 Online video content watched and created in past month by age and gender, 2011

	Total sample (n=1,250)	18–29 (n=262)	30–44 (n=353)	45–54 (n=233)	55+ (n=402)	Male (n=613)	Female (n=637)
	%	%	%	%	%	%	%
Watched video content from the internet from sites like YouTube	33	53	36	23	22	33	32
Watched video content from the internet from sites like BitTorrent, Pirate Bay or other peer-to-peer networks	13	26	15	7	6	15	11
Created and uploaded video content to the internet	6	9	8	7	3	7	5

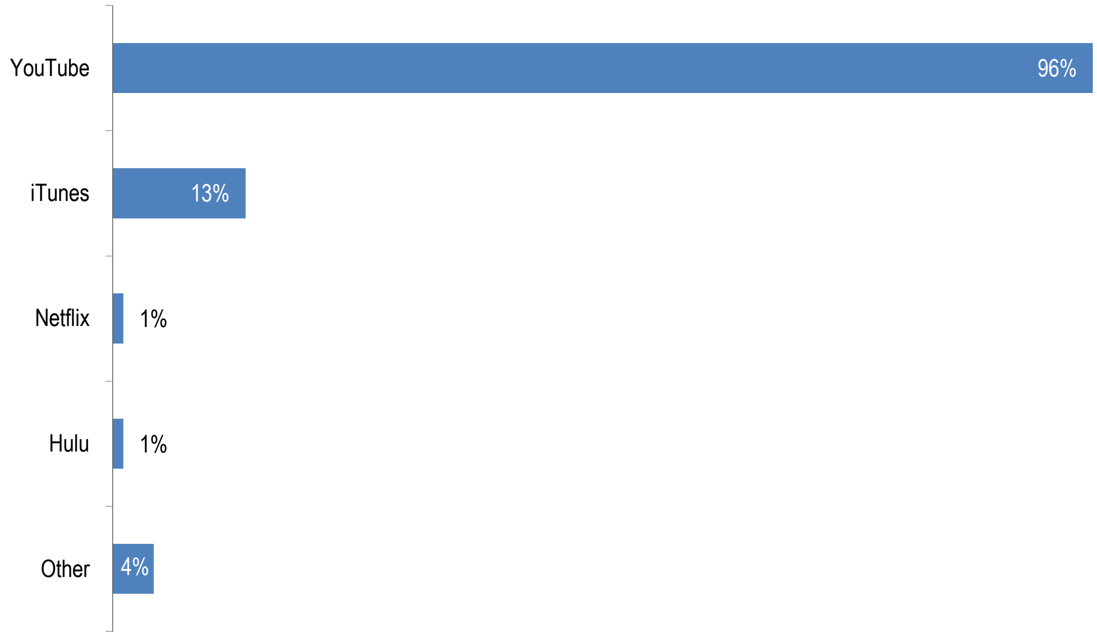
Source: ACMA, Digital Australians online survey, 2011

B1 ASK ALL: In the past month which of the following have you done? M/R RANDOMISE

Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

Figure 10 shows that YouTube was the most commonly used source of video content among respondents who had watched video content from social media sites (96 per cent), followed by iTunes (13 per cent).

Figure 10 Websites used to download video content, 2011



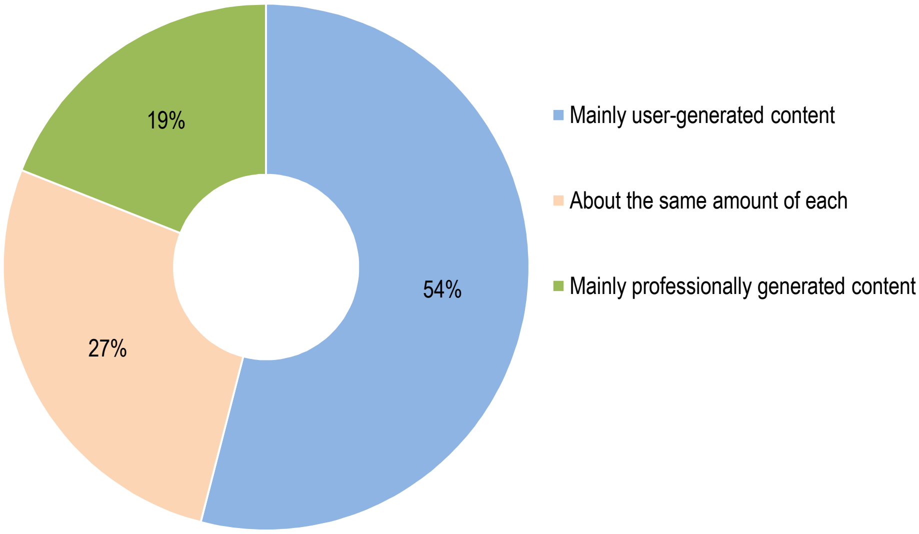
Source: ACMA, Digital Australians *online survey, 2011.*
B33 ASK THOSE DOWNLOADED VIDEO CONTENT (CODE 9 ON B1): Earlier you indicated that you have watched video content that you downloaded from the internet from sites like YouTube. Which of the following website(s) have you used to download video content from the internet over the past month? M/R RANDOMISE
Base: Respondents who had downloaded video content from websites such as YouTube in the past month, n=407.

Types of content watched

Just over half (54 per cent) of the respondents who had watched video content from YouTube watched ‘mainly user-generated content’, while 19 per cent watched ‘mainly professionally generated content’. Over a quarter (27 per cent) reported watching about the same amount of each content type (Figure 11).

Very similar findings also applied to video content that had been downloaded through social networking sites.

Figure 11 Type of video content downloaded from YouTube, 2011



Source: ACMA, Digital Australians *online survey, 2011.*
B34 ASK IF YOUTUBE OR OTHER (CODES 03 OR 90 ON B33): Was the content you downloaded mainly professionally generated or user-generated? S/R PER ITEM ONLY PRESENT THOSE ITEMS SELECTED AT B33
Base: Respondents who had downloaded video content from YouTube in the past month, n=391.

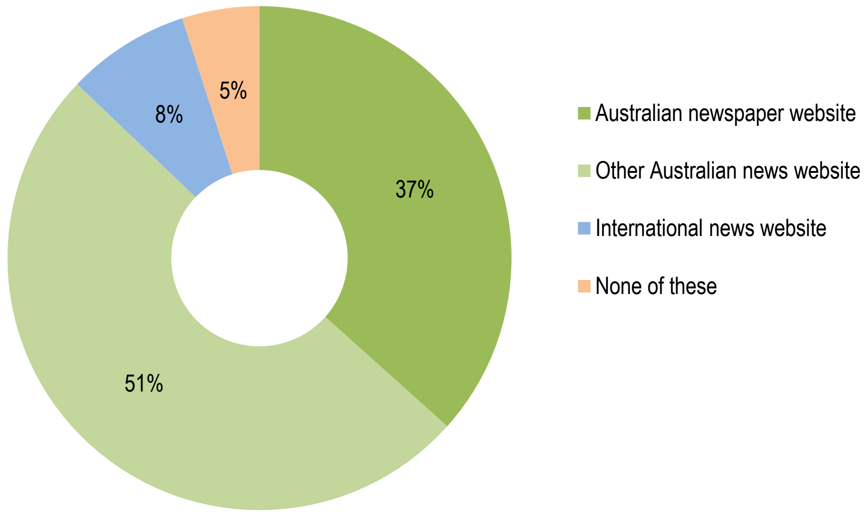
Online news

Just over half (52 per cent) of respondents reported visiting a news website in the past month. More males (57 per cent) than females (47 per cent) did so and there were no significant age differences. As mentioned above, 22 per cent of respondents had also accessed news through social networking sites.

A total of 59 per cent of respondents had accessed news from news websites or social networking sites, making access to online news content the second-highest media activity overall after watching broadcast television.

Australian websites were most preferred by 88 per cent of those who visited news websites. Thirty-seven per cent had mainly visited an Australian newspaper website and 51 per cent identified other Australian news websites (Figure 12).

Figure 12 Type of news website visited most, 2011



Source: ACMA, Digital Australians *online survey, 2011.*
B6 ASK THOSE VISITED NEWS WEBSITE (ITEM 1 = CODES 02-06 ON B1a): You mentioned earlier that you have visited website(s) of a news organisation(s). Which, if any, of the following news websites have you visited most in the past week? S/R RANDOMISE
Base: Respondents who had visited the website of a news organisation in the past week, n=607.

Chapter 4 presents more detailed findings about the use of different offline and online news sources.

Devices used to access online content

Although there are an increasing range of devices for accessing online content, desktop computers and laptops were found to be the primary devices used for all forms of online media activities.

For most activities, the proportion of online respondents who mostly used a desktop computer is similar to the proportion who mostly used a laptop. Exceptions were a higher proportion of respondents who mostly used a laptop to access online news sites. Desktop computers were mainly used to visit broadcaster websites, play online games and listen to online radio. Desktop and laptop computers were used almost equally to watch catch-up television and radio content.

Considerably fewer respondents identified mobile phones, tablet computers, internet-enabled television and game consoles as their main access device. Mobile phones were nominated by less than one in 10 and tablets by one in 20 or less.

Table 11 Devices most used for online media content, 2011

Online media content/activity	Desktop computer	Laptop	Mobile phone	Tablet computer	MP3/4 player	Internet enabled TV	Games console	Other
	%	%	%	%	%	%	%	%
Online news sites (n=607)	37	57	4	2	–	–	–	0
Video content from a social media site e.g. YouTube (n=407)	48	43	5	2	1	0	0	0
Online games on the internet (n=350)	49	40	7	1	1	–	2	0
Video content through a social media site e.g. Facebook (n=313)	47	44	7	1	–	–	–	0
News through a social media website e.g. Facebook (n=252)	38	50	9	3	–	–	–	0
Website(s) of television broadcasters and/or radio stations (n=250)	52	42	3	3	–	–	–	0
Catch-up TV on the internet (n=217)	43	47	3	1	–	4	–	1
Video content from sites like BitTorrent, Pirate Bay, or other peer-to-peer networks (n=162)	38	46	1	3	0	5	2	5
Radio on the internet (n=155)	48	35	6	5	–	–	–	5

Source: ACMA, Digital Australians *online survey, 2011.*

B8, B19, B42, B44, B15, B24, B28, B36, B38: Which of the following devices did you use most to <do media activity> in the past month/week? S/R RANDOMISE

Note: Dashes indicate where data was not collected.

Internet access using mobile phones and tablets/e-readers

Nielsen's online consumer study, conducted in 2010 with respondents aged 14 years and over, examined the use of mobile phones and tablets/e-readers and the impact on the consumption of online content.

Nielsen found that ownership of mobile phones with internet capability had increased from 43 per cent in 2009 to 65 per cent in 2010, including 35 per cent of respondents who owned a smartphone in 2010.[8] Smartphone owners were more likely to be men (43 per cent) than women (32 per cent) and live in a metropolitan area (40 per cent) than a non-metropolitan area (32 per cent), and be aged 25–34 years (55 per cent).

Over half (52 per cent) of online mobile phone users browsed the internet, up from 29 per cent in 2009. The use of email also increased significantly from 20 per cent to 39 per cent between 2009 and 2010. Smartphone users were much more likely to use internet-related functions than other mobile phone owners—87 per cent of smartphone owners browsed the internet and 74 per cent used email.

Ten per cent of online respondents had at some time used a tablet or e-reader to access the internet. Fewer owned a tablet computer (eight per cent), an e-reader or a portable reading device (seven per cent) in 2010. The larger screen size of tablets was more readily used to watch online video content (43 per cent) than were smartphones (33 per cent).

[8] Nielsen defines smartphones as internet-capable mobile handsets with advanced functionality, such as handsets capable of accessing email, browsing the web, opening documents, and downloading and using applications or software, and that have a 'qwerty' keyboard or a touch screen.

Apps

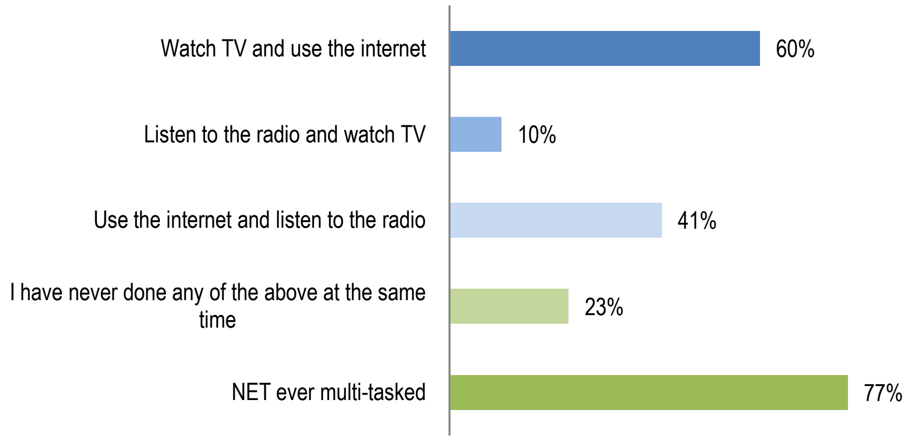
Sixty-nine per cent of Nielsen's online respondents who accessed the internet from a mobile phone had downloaded an app and 54 per cent reported using apps regularly. Of those who accessed the internet via a tablet or e-reader, 59 per cent had downloaded an app and 49 per cent said they used apps regularly. Males (73 per cent) were more likely than females (64 per cent) to download apps.

Games apps were regarded as the most useful app category by 39 per cent of mobile app users. This was followed by social networking apps (23 per cent), and the more functional maps/directions- (18 per cent) and weather-related apps (17 per cent).

Multi-tasking

The Nielsen study also reported on the simultaneous use of different media (or multi-tasking).[9] It found that over three-quarters (77 per cent) of online Australians had used two or more media at one time. Figure 13 shows watching television and using the internet were the two most likely media activities to be undertaken simultaneously in 2010.[10]

Figure 13 Simultaneous media consumption, 2010



Source: Nielsen, The Australian Online Consumer Report, *2011.*
Base: Online Australians 16+ (n=5,886).

Nielsen also found that online media often attracted a user's primary attention when combined with watching television or listening to radio. Sixty-five per cent of online respondents who used traditional media with online activities reported giving their primary focus of attention to the internet.

General patterns of media use

The media use diaries that the focus group participants completed as part of the homework task provide insights into media consumption patterns. Offline media use tended to follow a daily routine with clear use patterns at particular times of the day. For example, radio was often listened to throughout the day (commonly in the background while doing other activities), newspapers were read in the morning, and television was viewed at the start and end of each day.

[9] Multi-tasking explains why looking at individual hours spent per media activity can grossly overestimate the amount of time people are spending on media activities in total, and it also affects the level of attention they are giving to any one media activity.
[10] Nielsen, *The Australian Online Consumer Report*, 2011.

Online media content, on the other hand, was typically accessed throughout the day 'on demand' as and when required. It was usually driven by particular interests and/or specific needs for information. Typical examples include catch-up television, online news and communicating via social networking sites.

Variations in media use patterns

As shown in this chapter, Australians vary in their media preferences, levels of media use and the types of media content accessed. The following three examples from participant diaries illustrate low, equal and high patterns of online media use.[11]

1. **Primary use of traditional media—**this group tended to consume more traditional media content from broadcast television, broadcast radio and newspapers than online content. They were least likely to own a smartphone or to use social networking or social media sites.

Table 12 Typical day for participants who primarily used traditional media, 2011

Time of day	Device	Content	Location	Time spent
7–9 am	AM radio Newspaper	ABC – FM Coffs Harbour Advocate	Home	20 mins
9–11 am				
11 am–1 pm	Computer	Greenslip website Hospital website	Home	25 mins
1–3 pm				
3–5 pm				
5–7 pm	TV	ABC News A Current Affair Escape to the Country Better Homes and Gardens	Home	2 hours 15 mins

Source: ACMA, Digital Australians *qualitative research, 2011.*

2. **Equally use offline and online media**—this group used online and traditional media at roughly equal levels. If they owned a smartphone, they tended to use it for accessing online sites and apps that assisted them to organise their daily lives. They occasionally used social media and/or social networking sites.

[11] These three examples of media use have been described rather than quantified because the information was gathered from qualitative research.

Table 13 Typical day for participants who equally used offline and online media, 2011

Time of day	Device	Content	Location	Time spent
7–9 am	TV	Channel 9 – Today Program	At home	15 minutes
9–11 am	iPhone	Weather watch	At home	5 minutes
11 am–1 pm				
1–3 pm				
3–5 pm	Computer	Real estate.com.au	At work (break)	1 hour
5–7 pm				
7–9 pm	Computer	Facebook – emails	At home	15 minutes
9–11 pm	TV – T-box	Recorded TV programs	At home	2 hours

Source: ACMA, Digital Australians *qualitative research, 2011.*

3. **Primary use of online media**—while this group rarely accessed content through traditional media, they compensated with their heavier use of online content. They owned and relied on smartphones, accessed social networking and media sites on a daily basis, and used online content on demand throughout the day.

Table 14 Typical day for participants who primarily used online media, 2011

Time of day	Device	Content	Location	Time spent
7–9 am	Smartphone	Football scores – BBC	Home –in bed	10 mins
9–11 am	Computer	Facebook / emails	At home	30 mins
11 am–1 pm	Smartphone	iTunes store – downloading movie to rent	In town	5 mins
1–3 pm	Computer	Twitter	At home	5 mins
3–5 pm	Computer	Facebook, specific websites	At home	5 mins
5–7 pm				
7–9 pm	Apple TV	Movie	At home	2 hours
9–11 pm	Smartphone	Facebook emails YouTube	At home	10 mins
7–9 am	Smartphone	Football scores – BBC	Home –in bed	10 mins

Source: ACMA, Digital Australians *qualitative research, 2011.*

The impact of age on media use reported earlier in this chapter was also apparent in the focus groups. Younger adults were more likely to be medium- and high-level users of converging media, and low-level users were mostly older.

Types of content consumed also differed by age. Participants aged under 35 years had a substantial 'entertainment' focus that was indicated by their interest in video content from YouTube. They made time and space available to view this type of content, and were more likely to access media content online and engage with friends through social networking sites.

Participants aged 35 years and over were more pragmatic in their use of content. Their behaviour was influenced by the demands of their jobs and the presence of children in their lives, and they claimed to have less free time to follow their own interests. They appreciated easy access to media that helped them to successfully negotiate their lives. They tended to seek online information such as weather and traffic reports to plan their day.

3. Attitudes towards the changing media environment

Overall positive view of change

Irrespective of their personal engagement with converging media, focus group participants had a similar level of awareness that the media environment continues to change. They were aware of a number of developments including:

> content being available across a range of different platforms including traditional media sources, the internet and mobile phones

> mobile phones and laptops with internet capability allowing media to be consumed beyond traditional settings and locations

> content being more widely available than before, with far fewer barriers to worldwide distribution, such as geography, time or costs

> a greater variety of content being available to suit a range of different information needs and tastes

> more content being created by other users that is able to be distributed to a wide audience via sharing sites such as YouTube

> social networking becoming increasingly more prevalent, with people being more prepared to share personal information and stories on the internet.

This group of Australians had a positive attitude toward the changing media landscape. Noting that the qualitative sample largely included those who were in some way engaged with the internet, everyone could see at least some benefit to the changes. Even those for whom the developments have not had a personal impact acknowledged positive changes:

I don't use the internet much myself, but when my grandkids come round they show me all the things they can do on their mobile phones and for them I think it's great, it's just that I'm not terribly interested for myself.

Three key factors appeared to drive the overall positive response:

> choice and personalisation of content

> convenience of consumption

> a sense of wonder about new technologies.

Perceived benefits of converging media environment—choice, convenience and new technologies

Most people in the focus groups appreciated the ability to freely access a wide array of content and thereby felt more in control of their media consumption. Many also felt more informed and able to make their own judgements about what happens in the world due to the choice of media sources available to them:

I feel like I'm in the driver's seat now.

People appreciated the 'on-demand' nature of media, which is regarded as a key benefit. The fact that media consumption can fit into their busy lives where they need it to is a real advantage. As a result, many people feel more connected with their world because they can access media when they want to:

People aren't bound by schedules any more ... we can watch the news whenever!

Alongside the benefits of choice and convenience, there was a real sense of amazement about technology, particularly among older people:

> Sometimes I feel like we're living in *Back to the Future*, with all these devices, Skype and things like that.

Concerns about social consequences—reliance on technology and individual versus shared media consumption

Despite these positive attitudes towards the changing media environment, some respondents had a clear sense of unease. This centred on aspects of the online experience or implications of 'being online' rather than on concerns about the content or services accessed on the internet. Some participants admitted that they found the rapid changes in technology especially daunting, and conceded it was hard to keep up. Others did not understand what was available.

This attitude of unease was characterised by an acceptance of the changed media landscape. These participants tended to believe that 'it is what it is'; there was not a great deal they could do about it and they needed to adapt to the changes in order to keep up in life. However, this belief was not necessarily accompanied by enormous interest or excitement.

Focus group discussions touched on the social impacts that the internet generally, and social networking in particular, have had on society. For many participants, particularly those in older age groups, aspects of internet use were felt to be problematic:

- technology controlling people's lives
- less face-to-face social contact, including less frequent family contact
- a 'lazier' population developing.

These concerns were underpinned by two elements. First, the consumption of media is becoming an individual activity rather than a shared experience. Second, technology now enables social interaction with others and a shared experience during content consumption without a physical presence being required.

With content able to be delivered 24 hours a day, seven days a week, some individuals perceived a need to be connected at all times, with no down time. This has resulted in a sense of people being out of control in their use of technology and engagement with content.

For some participants, this concern was often a manifestation of fear of change. Some parents and older adults felt that it was all happening so quickly that they were struggling to keep abreast of the changes.

Many participants perceived that people were 'wasting' more time engaging with content than they did previously and are doing fewer physical activities as a result. The concern was that a 'lazier' population is emerging:

> Instead of being outside they are sitting in front of a computer.

However, it was unclear whether this perception reflects real changes in physical activity or was recognition that people are spending more time on their computers and mobile phones consuming media rather than watching television.

The increased use of personal media devices has reduced the need to engage with others to determine what content to consume. For example, recording devices and on-demand TV mean there is often little negotiating over what show to watch in households. There is usually less down time to interact with others or go about other activities as there are no ad breaks to fill or programs they do not wish to watch.

On the other hand, participants recognised that the technology enables a different kind of social interaction; for some, social needs are being met while they engage with content. Social networking sites containing user-generated content allow social interaction as does online interaction while watching television. Having multiple devices encouraged these interactions. For some, the opportunity to engage more actively with others around content was seen as positive.

Not surprisingly, these issues were perceived to lead to a greater separation of the 'family' unit. Participants noted that each individual has their own device, such as a mobile phone, laptop and, in some cases, a tablet, to individually consume content. This has led to a reduction in shared family experiences, the most common of which was watching television together.

Respondents perceived the main cause of the lack of tangible interaction among family members to be individuals' involvement with social networking sites, which has been exacerbated by changes in technology.

The development of applications on smartphones and tablets has meant that individuals are able to engage with friends and family while on the move, and no longer even have to be close to a computer to use these sites. Parents gave examples of their children not needing to wait to enter the 'school gates' to find out about what their friends have been doing at the weekend. Similarly, adults commented they often knew what activities their work colleagues had engaged in before seeing them on Monday morning:

> People just don't talk to each other [face to face] these days.

> They don't know how to communicate face to face.

While views about these wider social impacts of the internet were not specifically sought out in the research, they were raised in the focus group discussions and provide a context for concerns about online media generally. The overall perception was that little can be done to 'stop' the changes and that individuals would find a way to manage the social implications. In a sense, the social rules to manage the behaviour are likely to evolve as people become aware of the consequences and implications of converging media.

Attitudes of online survey respondents

In order to understand the likely range of attitudes among the online sample, survey respondents were asked to indicate which of a series of statements best described them. The statements were developed following the qualitative phase of the study and sought to capture converged media use and attitudes—whether respondents were enthusiastic or accepting of changes in the media environment.

Table 15 Statements used to classify respondents into segments

Statement	% of total sample	18–29 (n=262)	30–44 (n=353)	45–54 (n=233)	55+ (n=402)
I access most information online including a lot of user-generated and on-demand content. My experiences with online media have been very positive.	10	16	13	7	6
I am generally very positive about the way digital media is evolving and I use a range of traditional media and online sources for information. But I am quite cautious about the information I share about myself online.	27	35	32	25	19
I use a lot of online media and some social networking. I think about the advantages and disadvantages, and despite the negatives it is important for me to be involved.	9	19	8	6	4
While I feel slightly overwhelmed for choice, I go online for some things, but I still get most of my information from traditional media (TV, newspapers, radio) and don't get too involved in the social networking side of things.	16	11	12	15	22
I get most of my information from traditional media (TV, newspapers, radio) and while I only use the internet in a limited way I think it is an important part of the future for my kids and to keep up.	24	11	22	29	32
I rarely access online media, and I'm not interested in being more involved myself.	14	7	12	18	17

Source: ACMA, Digital Australians *online survey, 2011.*
B45 ASK ALL: Thinking generally about your usage of different devices to access media; which one of the following statements best describes your usage of and attitude towards different media?
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.
Base: Total sample, n=1,250.

Based on the statements presented to respondents, two groups accounted for over half of the total sample. They were:

> Those who were positive about the way digital media was evolving and engaged with both traditional and online media, but were cautious about sharing personal information online (27 per cent). Younger respondents were more likely to identify with this group.

> Those whose personal use of online media was limited but who thought it important to keep up with developments in recognition of the possibilities online media offered their children (24 per cent).

4. Expectations of news and current affairs

The impact of technological and media market developments is especially evident in the ways that Australians now consume news and information, both local and overseas. Given the primacy of the media in informing citizens about matters of public interest and the long-standing regulation of news and current affairs in broadcasting, an objective of the study was to explore changing patterns of news consumption and attitudes to help understand:

> To what extent does increased use of online news sources signal a shift in how important digital Australians view traditional sources of news such as newspapers and broadcast networks?

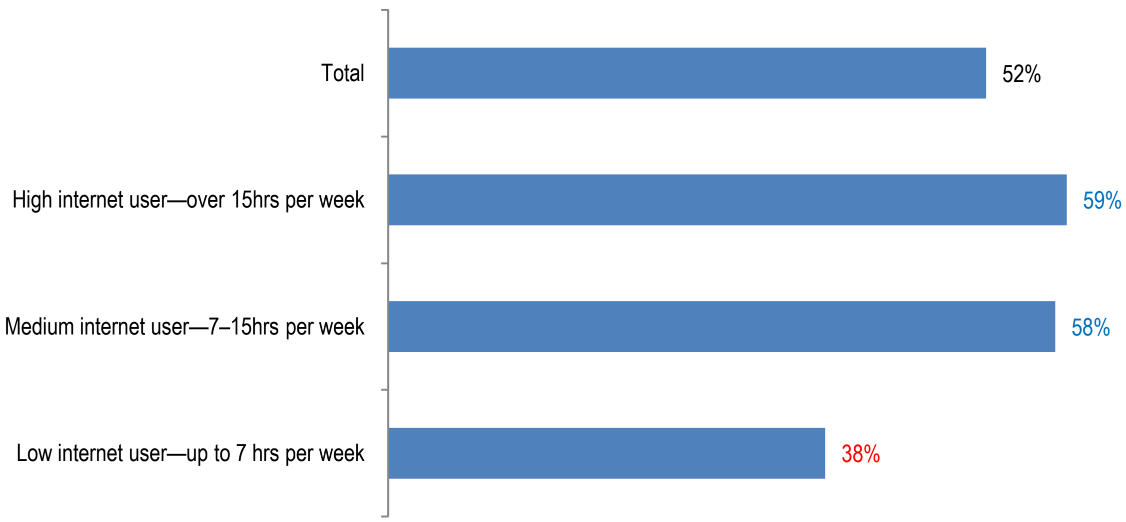
> What are expectations for the presentation of news and current affairs across different platforms?

Sources of news

Overall, 68 per cent of online survey respondents indicated that traditional media (television, radio and print) was their main source of news, while 23 per cent cited online news sources (Table 16 below). Older respondents were more likely to report traditional media as the main source of news, and younger respondents to report online sources.

Those who used the internet for more than seven hours a week were more likely to have visited the website of a news organisation, television broadcaster or radio station in the last month than those who use the internet up to seven hours a week.

Figure 14 Visited a website of a news organisation in the last month, by level of internet use



Source: ACMA, Digital Australians *online survey, 2011.*

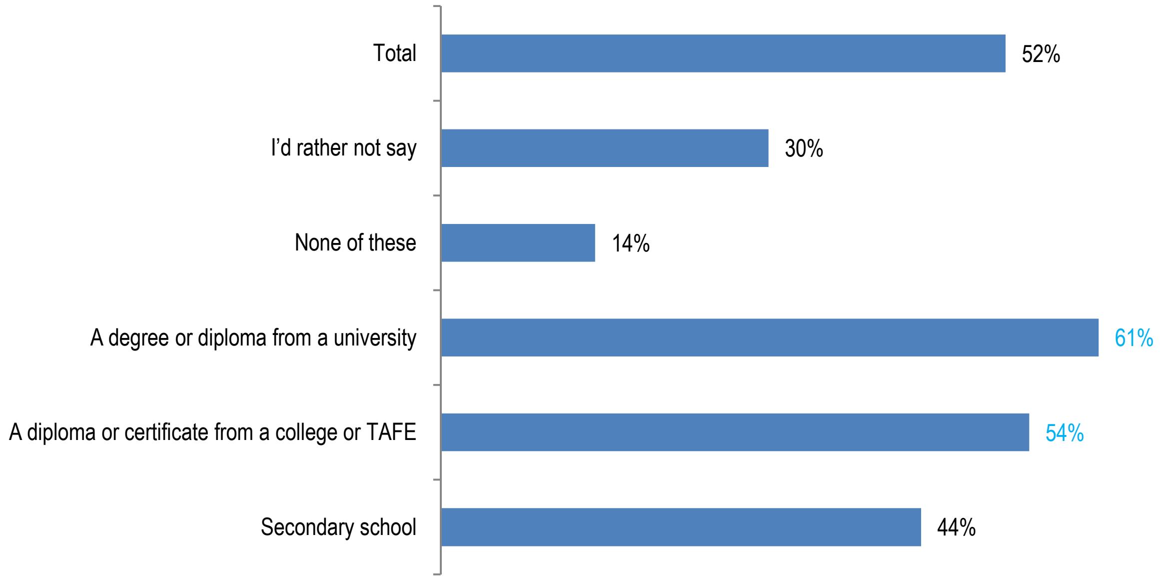
B1 ASK ALL: In the past month, which of the following have you done? M/R RANDOMISE

Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

Base samples by level of internet usage: Up to 7 hrs/wk n=368; Between 7 and 15 hrs/wk n=433; Over 15 hrs/wk n=449.

Those with further education (TAFE or university) were more likely than those for whom secondary school was the highest level of education to have visited a website of a news organisation in the last month.

Figure 15 Visited a website of a news organisation in the last month, by level of education



Source: ACMA, Digital Australians *online survey, 2011.*
B1 ASK ALL: In the past month, which of the following have you done? M/R RANDOMISE
Base samples by level of education: I'd rather not say n=33; None of these n=7; A degree or diploma from a university n=388; A diploma or certificate from a college or TAFE n=408; Secondary school n=414.

Commercial television was the main source of news identified by 36 per cent of respondents, followed by Australian news websites (excluding newspaper websites) (10 per cent), local newspaper (not online) (nine per cent), Australian newspaper websites (eight per cent), Australian metro/national newspaper (eight per cent) and ABC or SBS television (eight per cent).

Table 16 Main source of news

Main source of news	Total sample (n=1,250)	Male (n=613)	Female (n=637)	18–29 (n=262)	30–44 (n=353)	45–54 (n=233)	55+ (n=402)
	%	%	%	%	%	%	%
Commercial TV (7, Nine, Ten)	36	33	38	30	36	41	36
Australian news websites (not newspaper websites)	10	8	11	17	9	7	7
Local newspaper (not online)	9	8	9	6	8	9	10
Australian newspaper websites	8	9	8	11	10	9	4
Australian Metro/national newspaper (not online)	8	10	6	5	7	6	13
ABC or SBS television	8	9	7	5	6	9	12
Social media websites	4	3	4	5	5	3	2
Radio	4	4	3	2	4	3	4
Sky News Australia	2	2	1	0	2	2	2
International news websites	2	2	1	3	2	1	0
Fox News, BBC World News, CNBC or CNN	1	2	1	2	2	0	1
International newspaper (not online)	1	1	1	2	1	1	0
None of these	9	9	9	12	8	7	8
NET TV, radio, print	68	69	67	51	66	72	79
NET Online	23	22	24	37	26	21	13

Source: ACMA, Digital Australians *online survey, 2011.*
C1 ASK ALL: Which of the following would you say is your main source of news? That is to say, which of these do you use the most? S/R RANDOMISE
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

The main reason given by 37 per cent of respondents for visiting the website of an Australian television or radio broadcaster in the past month was to get the news (see Figure 9 above). Ten per cent also indicated that they mostly listened to the news and weather on the radio in the past week.

Reasons given for preferring a news source

Online respondents were asked the main reasons they mostly got the news from the source they had nominated (Table 17):

> ‘I can quickly get the main stories of the day’—48 per cent

> Habit: ‘This is where I have always got my news from’—44 per cent

> Convenience: ‘I can look at it wherever I am’—30 per cent

> The news source represented a variety of views—25 per cent

> ‘It is reliable (I trust it is accurate)’—24 per cent.

Those respondents who mainly got their news from traditional (offline) sources were more likely to say that the main reason was habit (50 per cent compared with 28 per cent online). Those who got their news from online sources were more likely to give reasons of speed of access (59 per cent compared with 44 per cent), convenience (49 per cent compared with 23 per cent), being more up-to-date (32 per cent compared with 15 per cent), and being able to find news that interested them specifically (37 per cent compared with 19 per cent).

Those who used the internet more than seven hours a week were more likely to prefer a particular source of news because it was more up to date (22 per cent compared with 11 per cent), or more detailed (23 per cent compared with 16 per cent).

Table 17 Reason for preferred source of news

	Total sample (n=1,140)	TV, Radio, Print (n=850)	Online (n=290)
	%	%	%
I can quickly get the main news stories of the day	48	44	59
Habit – this is where I have always got my news from	44	50	28
I can look at it wherever I am (it is convenient)	30	23	49
I am familiar with the 'brand' and am most comfortable with this source	28	29	27
It represents a variety of views	25	24	28
It is reliable (I trust it is accurate)	24	24	22
I can find particular news stories that interest me	24	19	37
It is more relevant to me and my interests	21	21	22
It is more detailed	21	23	14
It is more up-to-date than other sources	19	15	32
It is independent (it doesn't have an agenda)	11	12	9
Other	5	6	2

Source: ACMA, Digital Australians *online survey, 2011.*
C2 ASK THOSE WHO GET NEWS FROM ANYWHERE (I.E. NOT CODE 90 ON C1)
What are the main reasons you mostly get your news from [RESPONSE TO C1] rather than anywhere else? M/R RANDOMISE
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.
Base: Respondents who get news from anywhere, n=1,140.

Accuracy and fairness of news sources

Participants in the group discussions were generally positive about the greater diversity of news sources online, but also acknowledged a number of negatives; for example, the 24 hours a day, seven days a week news cycle eroding accuracy, and online news not always being fair or credible. Some also mentioned the ease of access by children to online news stories that may be disturbing to them.

Despite the issues with online news mentioned by participants, most indicated that being aware of the potential pitfalls meant that they found ways to overcome them.

The accuracy of all news was seen to have suffered because of the need to report stories, especially breaking news, before all the facts had been established. Speed to break a story was now seen as essential, given the constant news cycle that has developed.

Participants felt that accuracy of news online can also suffer because of the ease with which the public can now contribute to news stories or share breaking news.

The majority of participants were aware of the issues with accuracy and reported that they often looked at multiple online sources to check the veracity of a news story and see what was corroborated by others:

> If I see something new that I think is important, I'll make a point of watching for it on the commercial news on TV, and the ABC news.

Often the essence of the story was more important than every detail being correct:

> The important thing is that there was a tsunami that caused a lot of damage and death. It doesn't matter exactly how big the earthquake was.

Most focus group participants understood that news organisations—both traditional and online news sources—often had an agenda. This resulted in consumers sometimes being aware of conflicting opinions and views, with some indicating that they take some news stories 'with a grain of salt'. The increasing diversity of news sources also meant that there was often more opinion to 'wade' through.

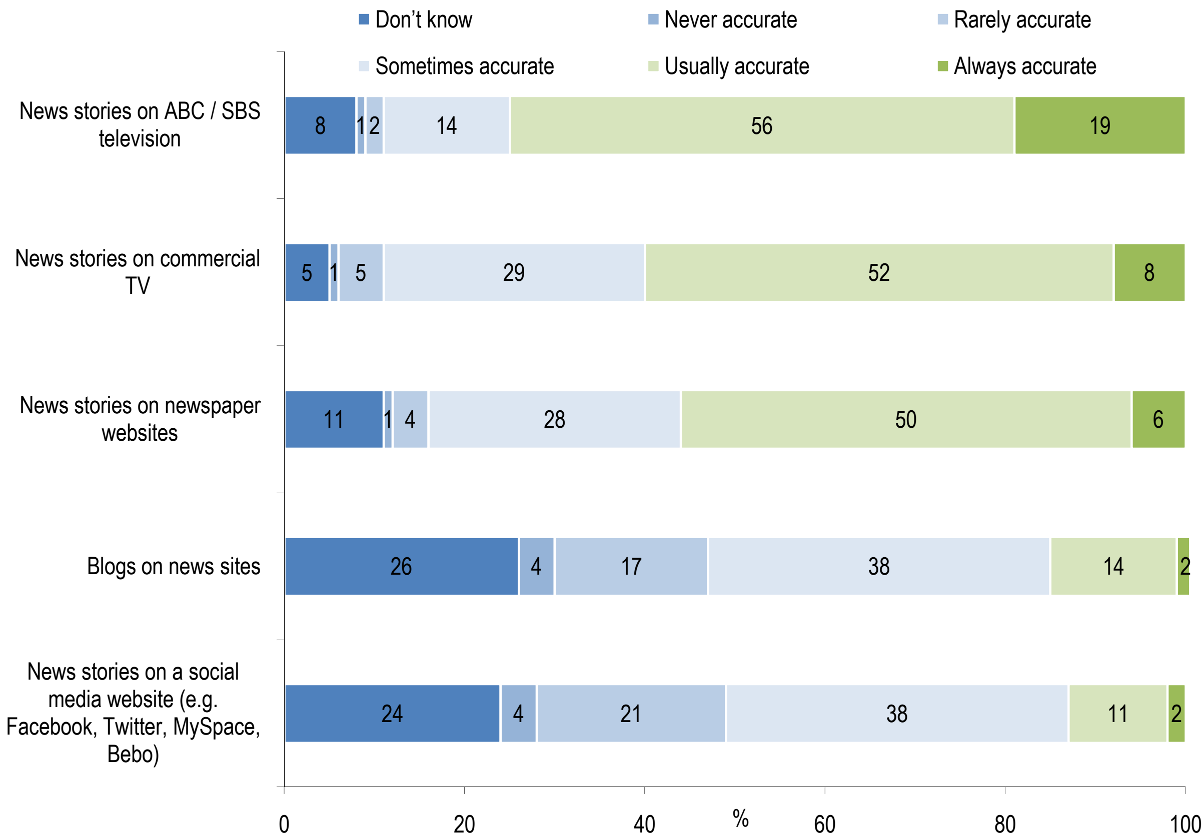
The diversity of news sources was generally seen as a positive, however, with many participants indicating that it was now easier to obtain the full story, and they were no longer limited to a few main media providers.

The focus group findings were supported by the online survey. When asked about their perceptions of the accuracy of news from various sources, 75 per cent of respondents saw the ABC and SBS as usually or always accurate (Figure 16).

The majority of respondents also perceived commercial television news (60 per cent) and newspaper websites (56 per cent) as being usually or always accurate.

Nearly 40 per cent of respondents saw blogs on news sites and news stories on social media as being only sometimes accurate, and a further 21–25 per cent thought these sources were never or rarely accurate.

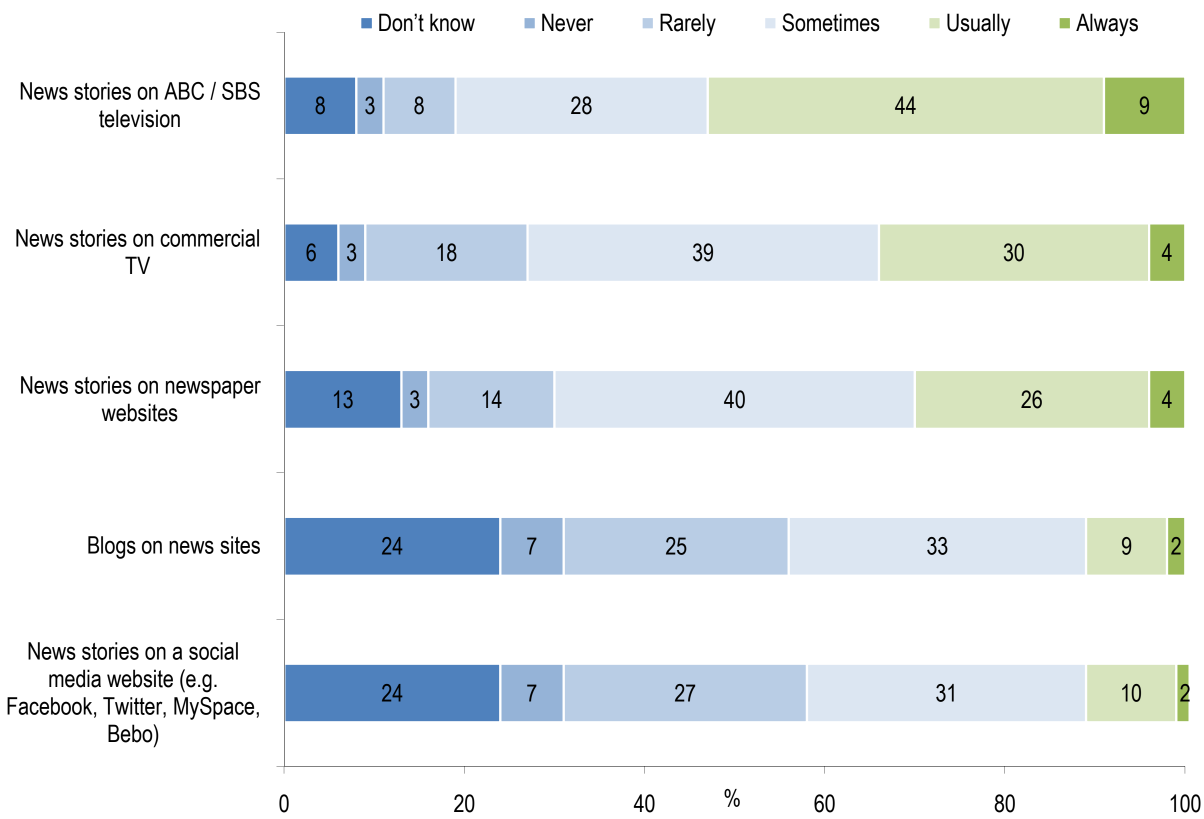
Figure 16 Perceptions of accuracy of various news sources



Source: ACMA, Digital Australians *online survey, 2011.*
D1 ASK ALL: News can be obtained from a number of different sources including TV, internet and newspapers. Please indicate how accurate you think news stories from each of the following sources are in general, S/R PER ITEM, RANDOMISE ITEMS
Base: Total sample, n=1,250.

When respondents were asked about how they perceived the fairness of various news sources, the findings were similar to those for accuracy. For news stories on ABC and SBS television, 53 per cent of respondents believed they usually or always gave both sides of the story. For commercial television news, this figure was 34 per cent (Figure 17).

Figure 17 Perceptions of fairness of various news sources



Source: ACMA, Digital Australians *online survey, 2011.*

D2 ASK ALL: Please indicate to what extent you believe each of the following sources of news give both sides of a story: S/R PER ITEM, RANDOMISE ITEMS

Base: Total sample, n=1,250.

Online news standards

Generally, respondents agreed that the same standards that apply to accuracy and fairness of news stories offline should apply to online news on the websites of Australian broadcasters and news organisations. It was also just as important for nearly three-quarters (74 per cent) of respondents to be able to make a clear distinction between advertising and other content on these websites as on radio and television. Older respondents (aged 55 years and over) were significantly more likely to hold these views (Table 18).

Table 18 Attitudes towards accuracy and fairness of various news sources

	Total sample (n=1,250)	18–29 (n=262)	30–44 (n=353)	45–54 (n=233)	55+ (n=402)	Male (n=613)	Female (n=637)
	%	%	%	%	%	%	%
On the internet, Australian news organisations should take the time to check the facts before publishing a news story	79	74	76	81	84	78	80
Websites of Australian television broadcasters should have the same rules about accuracy and fairness as their news items shown on television	77	70	75	79	83	76	79
It is just as important to be able to make a clear distinction between advertising and other content on the websites of Australian broadcasters as on radio and TV	74	69	69	77	80	73	75
There should be some way for me to make a formal complaint about the accuracy of online news content	65	63	64	69	66	66	65
On the news on television, there should be warnings that prepare me for graphic photos or video material	64	64	63	67	63	57	70
On news organisations' websites on the internet there should be warnings that prepare me for graphic photos or video material	61	60	64	63	58	55	67

Source: ACMA, Digital Australians *online survey, 2011.*
D4 ASK ALL Below are some statements that other people have made about news programs on TV and the internet. Please indicate to what extent you agree or disagree with each statement: S/R PER ITEM, RANDOMISE ITEMS
Base: Total sample, n=1,250.

Graphic material

Generally, a similar proportion of respondents agreed that there should be warnings about graphic photos or video material on the news on television (64 per cent) as on news organisations' websites (61 per cent). Women were significantly more likely to have this view (70 and 67 per cent respectively) than men (57 and 55 per cent respectively) (Table 18).

Special case—the protection of children

Focus group participants indicated that warnings about graphic images and video on the news were important to parents. They were also concerned about other news content that may be upsetting for children. However, there was an acknowledgement that parents were simply not always there to explain or talk about upsetting or inappropriate content children may find online—be it news stories or video content. They recognised that it is ultimately the parents' responsibility to monitor children's online access, but acknowledged the practical difficulty of doing this (see also the discussion on community standards in Chapter 5):

> I limit my children's exposure to watching the news due to the horrific images they show … but you can't do that online … they come across all sorts of things.

Trust and brand

For many, the perceived trustworthiness or credibility, and fairness, of online news sites appeared to depend on whether or not the source was an established brand. Where traditional brands also had an online presence, the same credibility was also attached to online content.

Focus group participants frequently explained that they chose online news sources due to their affiliation with an existing and trusted offline or traditional brand. Many said they believed that ABC News online, for example, was as credible as ABC News on television.

Complaints mechanisms

Many focus group participants were aware of mechanisms to complain about online content that may breach personal privacy or be inappropriate, but most were generally sceptical about online content providers acting on such complaints.

When prompted, some expected online news sources, including broadcasters' websites, to have the same standards about accuracy and fairness as their offline counterparts. They expected to be able to complain to the media organisation concerned if there was an issue with online content, but were generally unsure about who to complain to if the site did not resolve the issue.

The online survey found that 65 per cent agreed that there should be some way for them to make a formal complaint about the accuracy of online news content.

Participants generally believed that any complaints about user-generated content would need to be made directly to the site hosting the content, but they felt that the site operators were unlikely to do anything about it, unless the content was seen to be illegal in some regard.

Local news

Research participants welcomed the extraordinary flexibility the internet has brought to keeping up to date with news and current affairs from their community as well as from around the world.

The downside of this was the perception that accuracy could suffer due to the need for exposure, with user-generated news and blogs seen as commentary rather than fact. However, for many, the internet provided a better and more immediate vehicle for local, national and international news than did television or radio.

With many consumers starting to access local news and information online, according to their interests and on demand, the community may no longer need current local news content quotas to the same extent. However, views about this were not sought as part of the online survey. Additionally, those who are not online may depend more on traditional sources, including television news, for their local news.

5. Attitudes to, and expectations of, media regulation

A main objective of the study was to understand community attitudes, concerns and expectations about media content issues, including:

> the degree to which content types are perceived as similar across different media platforms
> expectations of social and cultural policy objectives across different content and platforms
> how consumers might address any content risks they are exposed to in the new media environment.

The focus groups allowed attitudes about these issues to be explored in depth—with some specific issues being addressed in the online survey. These included awareness of content rules applying to different media, the level and nature of community concerns about television and the internet, and expectations for content regulation that reflects community standards.

Regulation for community standards

Television and radio broadcasters have the primary responsibility for ensuring that the material they broadcast reflects community standards. Most program requirements are governed by codes of practice, determined through industry and community consultation.

Some aspects of programming on free-to-air and subscription television are regulated by the ACMA. The areas covered by the ACMA's commercial free-to-air television regulation include setting minimum levels of Australian content, children's programming, local content, Australian content in advertising and the anti-siphoning of sport. There are different requirements for subscription television (for example, minimum expenditure on Australian drama and anti-terrorism standards) and community broadcasters (for example, sponsorship limits).

Areas of programming on commercial radio regulated by the ACMA cover the disclosure of sponsorship arrangements, ensuring that advertising is clearly distinguishable from all other programs and local content on regional commercial radio stations.

Illegal and offensive online content is regulated via a complaints-based mechanism administered by the ACMA. The scheme is designed to protect consumers, particularly children, from exposure to inappropriate or harmful material.

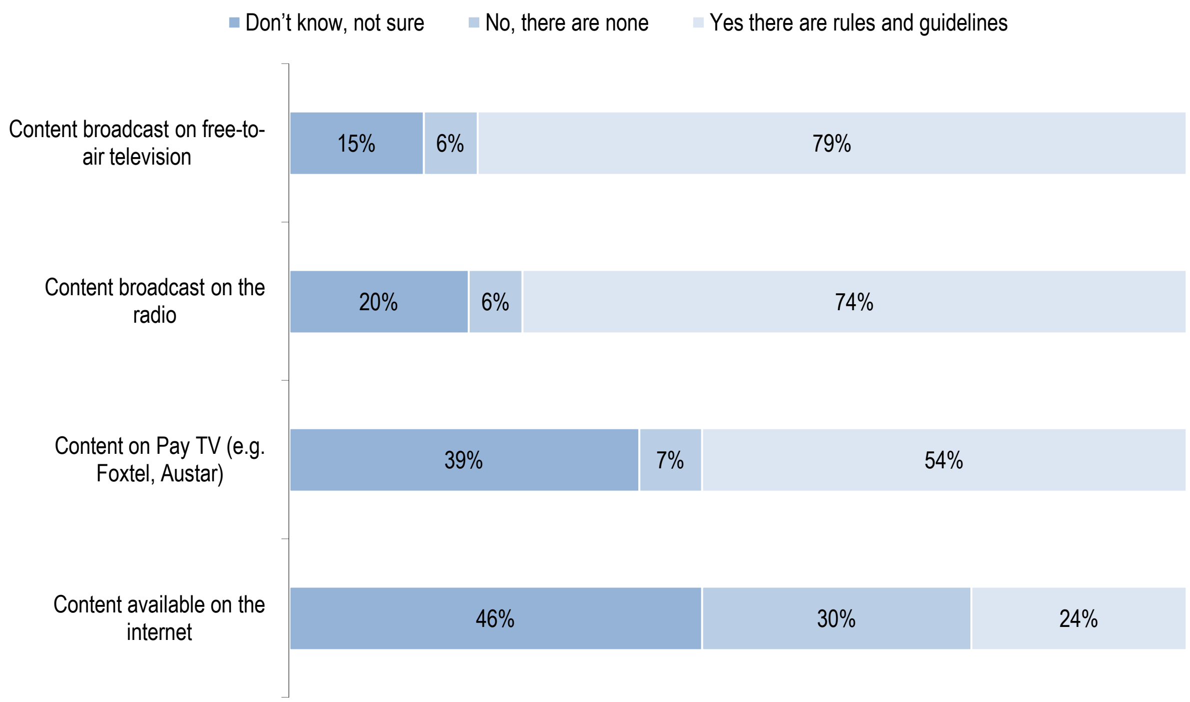
The scheme applies to content accessed through the internet, mobile phones and convergent devices, and applies to content delivered through emerging content services such as live audiovisual streaming services. The ACMA has the authority to direct relevant content service providers to remove prohibited content from their service. Where content is not hosted in Australia and is prohibited, the ACMA will notify the content to the suppliers of approved filters, so that access to the content using such filters is blocked. In addition, regardless of where the content is hosted, if the ACMA considers the content to be of a sufficiently serious nature, it must notify an Australian police force of the content.

The internet industry has also developed codes of practice that support measures to help people manage their use of the internet and the delivery of digital communications and media services, including young people's use of the internet.

Awareness of current regulation of media content

Respondents were more aware that traditional media such as free-to-air television and radio were regulated, with about three-quarters or more believing there were guidelines in place. There was a greater level of uncertainty about subscription television (possibly due to lower levels of familiarity), although over half (54 per cent) of all respondents still indicated that they thought there were guidelines for this medium.

Figure 18 Perceptions of content rules by medium

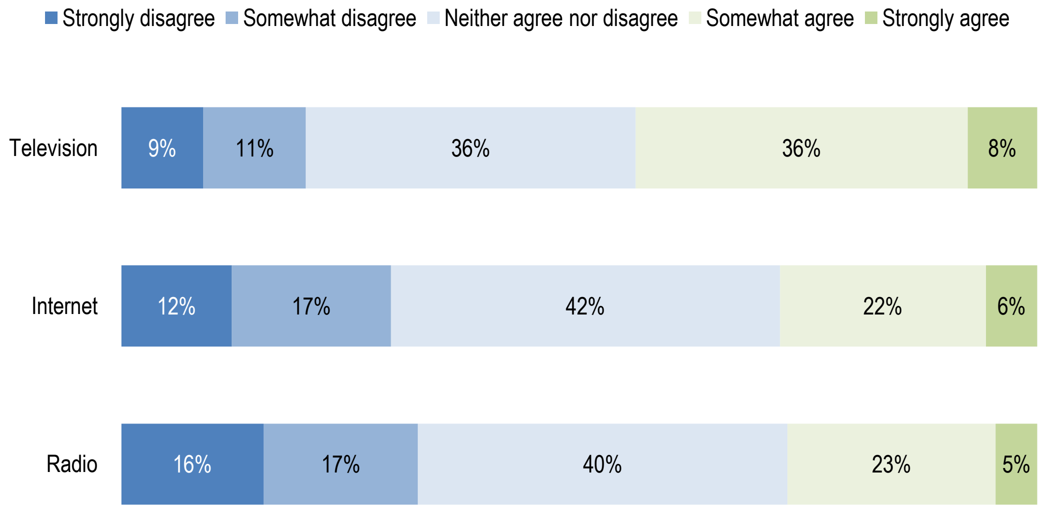


Source: ACMA, Digital Australians *online survey, 2011.*
E5 ASK ALL: Are there any rules or guidelines that currently apply to content broadcast on television, on the radio or available on the internet? S/R PER ITEM RANDOMISE
Base: Total sample, n=1,250.

In contrast, less than a quarter (24 per cent) of respondents thought there were guidelines in place governing content on the internet. Almost half (46 per cent) were unsure, while 30 per cent thought there were no such guidelines.

Influence of various media sources

Figure 19 Influence of television, internet and radio on views about political and other issues



Source: ACMA, Digital Australians *online survey, 2011.*

D5 ASK ALL: Please indicate to what extent you agree or disagree with each of the following statements: SR PER ITEM, RANDOMISE

1. The internet is very influential in shaping my view about political and other important issues

2. Television is very influential in shaping my view about political and other important issues

3. Radio is very influential in shaping my view about political and other important issues

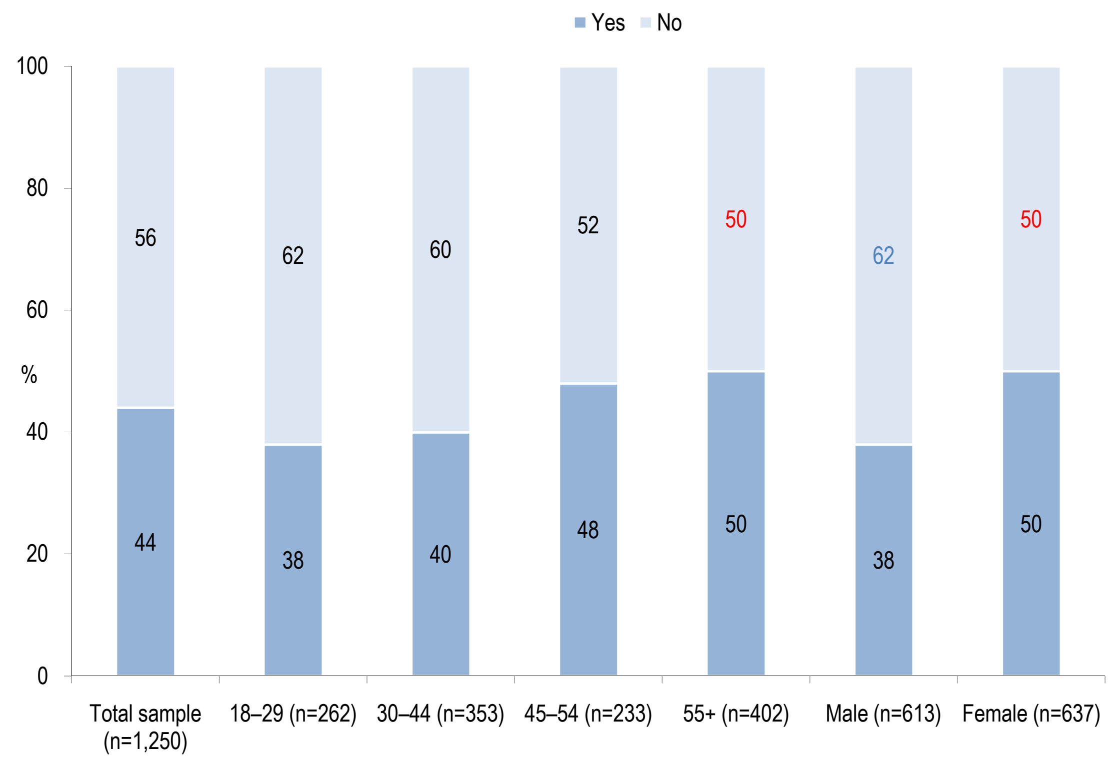
Base: Total sample, n=1,250.

Survey respondents perceived television as being more influential than either the internet or radio in shaping their views about political and other important issues. Forty-four per cent agreed strongly or somewhat agreed with the statement that television 'is very influential in shaping my views about political and other important issues' compared with 28 per cent for both the internet and radio.

Concerns about television content

Respondents were asked whether they had any concerns about what is shown on television. Just under half (44 per cent) of all respondents indicated that they did have concerns, while 56 per cent had no concerns. Younger respondents (those aged 18–29 years) were less likely to have concerns while those aged 55 and over, and female respondents, were more likely to cite concerns about what is shown on television.

Figure 20 Have concerns about what is shown on television



Source: ACMA, Digital Australians *online survey, 2011.*
E1 ASK ALL: Do you have any concerns about what is shown on TV? S/R
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

Respondents who indicated that they did have concerns about television content were asked to select up to three issues that they had concerns about. They were most likely to select excessive advertising, violence, too many reality programs and sexual content as their biggest concerns.

When UK adults with television in the household were asked a similar question in a 2010 survey by Ofcom, 40 per cent said they had any concerns. These (unprompted) concerns related mainly to offensive content (such as bad language/swearing and violence) and poor quality content or too many repeats.[12]

[12] Ofcom, *UK adults' media literacy,* April 2011, http://stakeholders.ofcom.org.uk/market-data-research/media-literacy/medlitpub/medlitpubrss/adultmedialitreport11/.

Table 19 Concerns about what is shown on television

	Total sample (n=554)	Male (n=233)	Female (n=321)
	%	%	%
Too many advertising breaks	45	47	45
Violence	43	35	49
Too many reality programs	36	46	29
Sexual content	32	24	38
Coarse language	23	22	24
Programs where people are made fun of or tricked	17	15	19
Themes like racism, suicide and euthanasia	17	17	16
Drug use/drug references	15	17	13
Too much sport	15	12	17
Not enough program choice	14	17	12
Nudity	13	13	13
Too many American/British programs	7	12	3
Other	7	9	6

Source: ACMA, Digital Australians *online survey, 2011.*
E2 ASK IF HAVE CONCERNS (CODE 01 ON E1): Which of the following are you concerned about on TV? Please select the three issues that you are most concerned about (you may pick less than three if appropriate) M/R RANDOMISE—RESPONDENT TO SELECT 0-3 RESPONSES
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.
Base: Respondents who had concerns about what is shown on TV, n= 554.

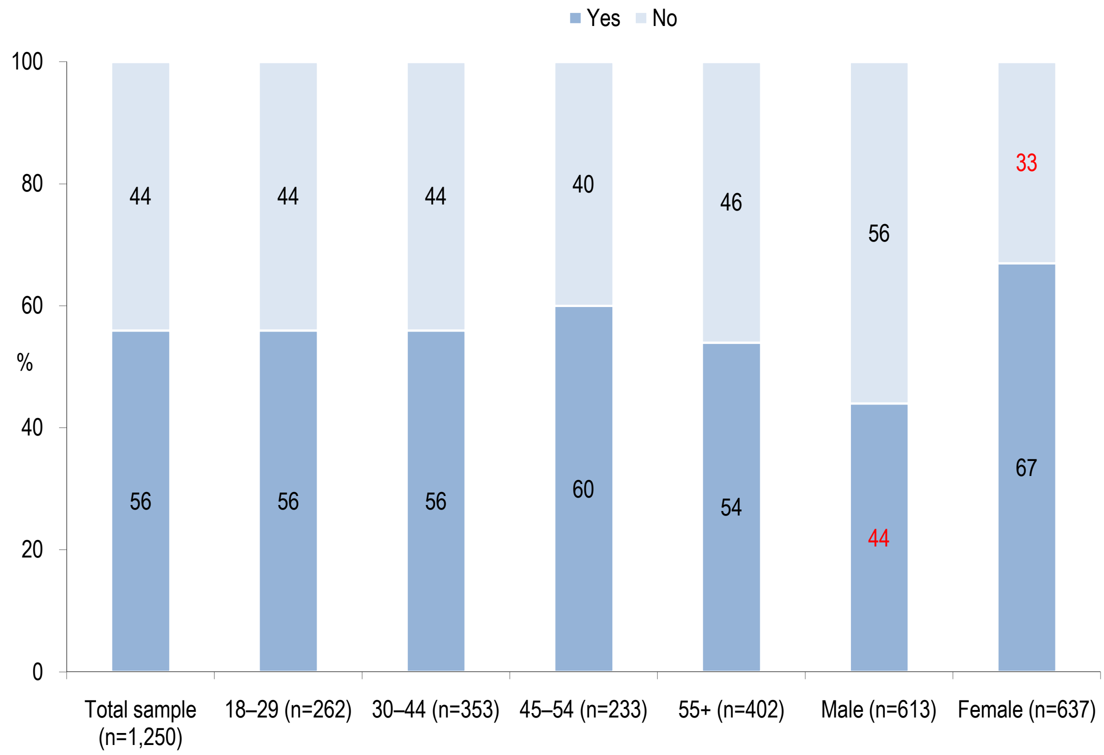
As shown in Table 19, female respondents were more likely to be concerned about violence and sexual content, while males were more likely to be concerned about too many reality programs and too many British/American programs on television.

Parents with children under 18 were no more likely to have concerns about television than other respondents but those who did have concerns were more likely to select sexual content and nudity than were other adults.

Concerns about the internet

Respondents were also asked whether they had any concerns about content on the internet. Respondents generally reported a greater level of concern about this medium than television (56 per cent compared with 44 per cent). As shown in Figure 21, there were no significant differences by age, although women were more likely to report having concerns about what is on the internet than men. Parents of children under 18 were also more likely to be concerned than were other adults (63 per cent compared with 53 per cent).

Figure 21 Have concerns about what is on the internet



Source: ACMA, Digital Australians *online survey, 2011.*
E3 ASK ALL: Do you have any concerns about what is on the internet? [Note that access can be on any device connected to the internet: a desktop computer, a laptop computer or netbook, a mobile phone (e.g. iPhone or other 'smart phone'), an iPod or similar device, a tablet computer (e.g. an iPad), or an internet-enabled television] S/R
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

When asked to select up to three issues that they were concerned about, respondents who earlier indicated that they did have concerns about online content selected a different suite of concerns to those reported about television.

These concerns reflected consumers' focus on the technology, and caution about aspects of the online environment, privacy and inappropriate content.

In contrast to the concerns cited about television, there were no significant differences between male and female respondents in the responses to this question. However, similar to the concerns identified about television, parents of children under 18 were more likely to report concerns about sexual content and nudity than were other adults. But like adults generally, the top concerns for parents about the internet were identity fraud, websites showing abuse of children and computer security.

A similar proportion of UK adult internet users (56 per cent) said they had concerns about what is on the internet when asked in the 2010 survey by Ofcom. The top (unprompted) concerns related to offensive/illegal content (such as content unsuitable for children and sexual content/pornography) and identity fraud.[13]

[13] ibid.

Table 20 Concerns about what is on the internet

	Total sample (n=701)	Male (n=272)	Female (n=429)
	%	%	%
Identity fraud/others getting access to my personal details	54	50	57
Websites showing abuse of children	48	48	47
Computer viruses/security	37	37	38
Personal information that companies/governments may hold about me	20	19	21
Sexual content	20	16	22
Websites instructing on committing crimes	19	21	17
Websites instructing how to commit suicide/self-harm	19	16	20
Gambling on the internet	13	16	12
Violence	12	13	10
Themes like racism, suicide and euthanasia	9	10	9
Nudity	9	10	8
Too much advertising	8	9	8
Content where people are made fun of or tricked	6	6	7
Poor quality content	6	6	6
Drug use/drug references	6	8	4
Coarse language	3	3	2
Other	2	2	2

Source: ACMA, Digital Australians *online survey, 2011.*
E4 IF AT ALL CONCERNED (CODES 02-05 ON E3): Which of the following are you concerned about on the internet? Please select the three issues that you are most concerned about (you may pick less than three if appropriate) M/R RANDOMISE—RESPONDENT TO SELECT 0-3 RESPONSES
Base: Respondents who were at all concerned about content on the internet, n=701.

Expectations for regulation across different content and platforms

One of the key findings from the focus group discussions was the expectation that community standards should apply differently to content type rather than the delivery channel.

Participants consistently distinguished between user-generated and professionally produced content. This distinction was driven by the perception of each content type having a different 'community'. Content that was professionally produced (such as films, television programs or series) was expected to be consumed on a mass scale by the broader community and, as such, it was expected to reflect broad community standards. Its producers usually needed to attract an audience that involved the mainstream population in order to have a profitable, worthwhile enterprise.

Accordingly, participants believed professionally produced content should reflect collective views about desirable content and shared cultural and social values. It was felt that professional content that did not reflect the collective views would ultimately not be profitable and, therefore, not sustainable.

On the other hand, user-generated content was expected to be consumed by a more limited number of individuals who choose to do so. As such, participants generally considered that user-generated content should reflect the principle of individual expression and consumption, meaning it did not necessarily have to conform to community standards. Illegal content was the exception here.

Content that originates online is much less likely to be used by broadcasters or others offline. However, content that is professionally produced for linear viewing is much more likely to be found online as well as offline, meaning that the flow of professionally produced content is almost exclusively *from* broadcast and other traditional media *to* the internet. Accordingly, expectations about this content tended to follow that flow—for example, if something had been broadcast and then was made available on a catch-up service, then the same consumer expectations were likely to apply to both.

This general finding was reflected in attitudes to media brands—if the brand was well established, then the expectation was that the same standards would apply whether content was offline or online. Making a distinction between offline and online content was not as important to discussion group participants, but trust and confidence in the brand was.

Conversely, if the content service had been founded on the internet; for example, YouTube, then the expectations generally aligned with other expectations about online content—essentially, that few, if any, content-related standards were enforced, apart from those to do with illegal content.

When using YouTube and similar sites, which allow the sharing of video clips online, it was evident that many respondents accessed both user-generated content and professional content uploaded by media outlets and others. However, it was clear that views and expectations about video available on these sites depended to a large extent on whether it had been professionally produced or user-generated.

When user-generated content was picked up by broadcasters, there were a range of expectations about how it should be used, including the need to obtain consent from those depicted.

Community standards and classification for professionally produced content

Overall, the classification system for television programs was seen to reflect broad community standards. Participants agreed it was sensible to implement a system that classified programs according to their suitability for different age groups. They regarded this as a courtesy service for viewers, allowing them to make appropriate decisions about what they, and their children, choose to consume, and there was an expectation that subscription television services and 'new' free-to-air channels also follow the same classification system.

The classification system was mainly being used by parents in the groups as a guide for monitoring the content children may consume. It provided an indication as to whether parents should watch the programs with children or not allow them to watch them at all, as it gave some indication as to whether the program included violence, sex scenes, nudity or adult content:

> It's especially useful with other people's kids. You can just say no to them watching it because you don't know what their parents would do.
>
> It's an alert to me that I need to watch the show with them to see what is happening.

The classification system was less likely to be used as a guide for adult consumption, with participants explaining that they were able to determine the suitability of what they wanted to watch.

Parents regarded classification ratings and consumer advice to be one useful tool among others that can be used in the offline environment. Other physical interventions and tools that are available to parents to help them monitor what content their children view include:

> timeslot restrictions
> physically monitoring the content by watching the program with their child
> locks on digital television and Freeview channels
> parental lock for subscription television.

The expectation among participants was that those providing content would be responsible for providing advice on standards and ratings. Currently, providers of professional content made for broadcasting are largely responsive to the needs and wants of their customers.

That said, there was also an underlying expectation by participants that behind the scenes there was a government regulatory body for broadcast television to whom community members could complain should they be unable to resolve an issue with a provider. Many participants were not exactly sure *who* they would turn to; however, a minority were aware of the ACMA and the role it has to play.

Community standards for content online

From the qualitative research, parents in particular recognised the challenge the online environment posed in meeting community standards and the potential risks to their children. Physical interventions and tools, such as timeslots for particular programs and locking channels to restrict access, were seen as not effective for online content, given that most content is able to be downloaded or streamed on demand.

In these circumstances, participants expected online content to meet the standards of the website's end users. Three different types of content were identified, with each expected to reflect different standards:

> Smaller sites, predominantly made up of user-generated content—for example, many blog sites—that have niche consumption, were expected to meet the standards of the small group of end users. Given this, participants did not believe standards needed to be so encompassing. Instead, they believed it should be up to individuals to self-regulate and decide for themselves whether to use those sites.
> Larger sites hosting user-generated content and that are bordering on mass consumption—for example, YouTube, Facebook—were expected to reflect relatively broad community standards. Participants expected these sites to demonstrate a sense of corporate social responsibility by monitoring content and, at a minimum, responding to users' complaints. At the same time, they believed users should still take responsibility for self-regulating their use of these sites.
> Those sites with professionally produced content aimed at mass consumption were expected to uphold broader community standards. Participants believed these sites should be subject to some regulation and be responsible for providing information and advice according to established community standards.

Ideally, participants considered that professionally produced content available online should provide guidance about what that content contains. Participants believed the classification and ratings information that applied to broadcast television should also apply to on-demand television. They also considered that classification and ratings should apply to movies and games available online, given that all professionally produced mass-consumed content should be subject to community standards. Furthermore, as parents were less likely to have a comparative reference for movies and games than for television shows, it was felt to be almost more important that classification and ratings apply to these products.

Participants accepted that children would be likely to ignore classifications and rating advice provided for ‘online’ content and most were unlikely to alert their parent of the classification given. Indeed, this system could potentially backfire if some children actually sought out content they were otherwise not allowed to consume. To date, some parents reported finding their children watching television shows on their tablets and computers that they had not been allowed to watch on television.

> That’s what happened. We didn’t let him watch *Family Guy* and the next thing you know he has it on his computer thingy [iPad].

> Kids won’t pay any attention to it.

Despite these limitations, a classification and ratings system for online content was still considered useful for parents; in particular, to provide a framework for them to understand and manage their child’s online consumption of professionally produced content. Parents tended to manage children’s access by physically watching or monitoring what content they downloaded.

Given that most participants recognised a regulatory body exists to monitor and regulate professional content on broadcast television, some assumed that this may also be the case with online content provided by those with an offline presence.

Expectations of community standards for user-generated content online

In contrast to expectations about professional content, participants did not see user-generated content as something that should, or could, be regulated. Participants recognised that the internet is a tool for individuals to express themselves and their view. It also provides people with a vast array of choices about where to source information and is a means by which to educate people. Respondents felt very strongly about this. They considered that placing limitations on what can be accessed on the internet would be suppressive and did not accord with Australian culture:

> You’d end up being like China.

That said, it was recognised that children may need to be protected from some online user-generated content where there is little reference or guidance provided as to the type of material. The greatest concern among parents in the groups was content containing violence and extreme behaviour:

> You don’t know what that video is going to really show when you click on the link.

> They think it’s going to be funny, but really they end up seeing things they are just not ready for.

> I limit my children’s exposure to watching the news due to the horrific image they show … but you can’t do that online … they come across all sorts of things.

Although the capacity and resilience to deal with inappropriate content online is learnt over time by parents and their children, some parents expressed concerns about the speed in which developments have taken place on the internet and the sheer volume of content that is available to children.

Participants could see, for example, that parents could value having some guidance as to what user-generated content contains. However, in practice, all participants recognised that a classification and ratings system for user-generated content would logistically not be possible, given the sheer amount of this type of content that is available online:

> Who would want to be the person who sits there and classifies all the YouTube videos?

Participants also recognised that it would be impossible to police or enforce classification or ratings systems among site providers.

> That's ridiculous, totally impossible. Only in *1984*.

Ultimately, any sense of community standards applying to user-generated content was driven by those who consumed that content. People considered it was up to them to censor or regulate any content they were not happy with, either by not visiting the site or by complaining about it to the site owner or administrator.

Parents in the focus groups accepted that they should take responsibility and act as the regulator of their children's internet use. Many said they were able to achieve this by using a number of tools or mechanisms.

First, they felt that educating themselves and ensuring their children were educated about the possible dangers of online content helped them to manage usage. Parents talked about trying to keep up to date with developments. However, it was evident that not all parents were finding it easy to keep up with the rapid changes or knew what to look out for.

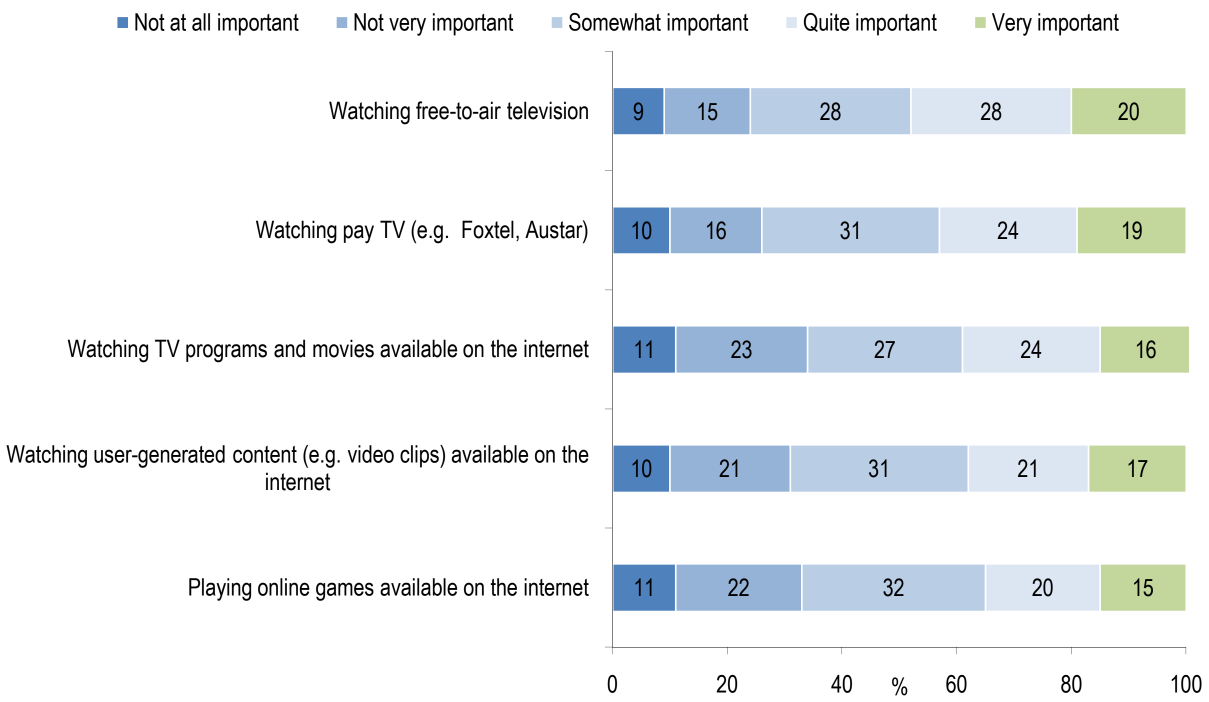
Second, parents recognised that actually monitoring their children's use, while not always possible, was still one of the most effective means of regulating usage. Third, they accepted that there is hard and soft infrastructure that helps them to regulate access. For example, only allowing their children to have a standard mobile phone, instead of a smartphone, is one way to limit access to content. They also talked about having a limited download amount and content filters to their internet at home. Some also used the parental lock function that is available on some digital televisions.

Usefulness of consumer information across media

The results of the quantitative survey supported the qualitative findings. As shown in Figure 22, when participants were asked to indicate how important they thought consumer information such as classifications and ratings were for broadcast television programs and content on the internet, between 35 and 48 per cent of those who had undertaken each activity in the past month saw this consumer information as at least 'quite important'. Few said that they thought these were 'not at all important'.

While there were few differences in the perceived importance of this consumer information across media, it was seen as being slightly more important for traditional television content (whether on free-to-air or subscription television) than for user-generated content on the internet, watching television/movies on the internet or online games.

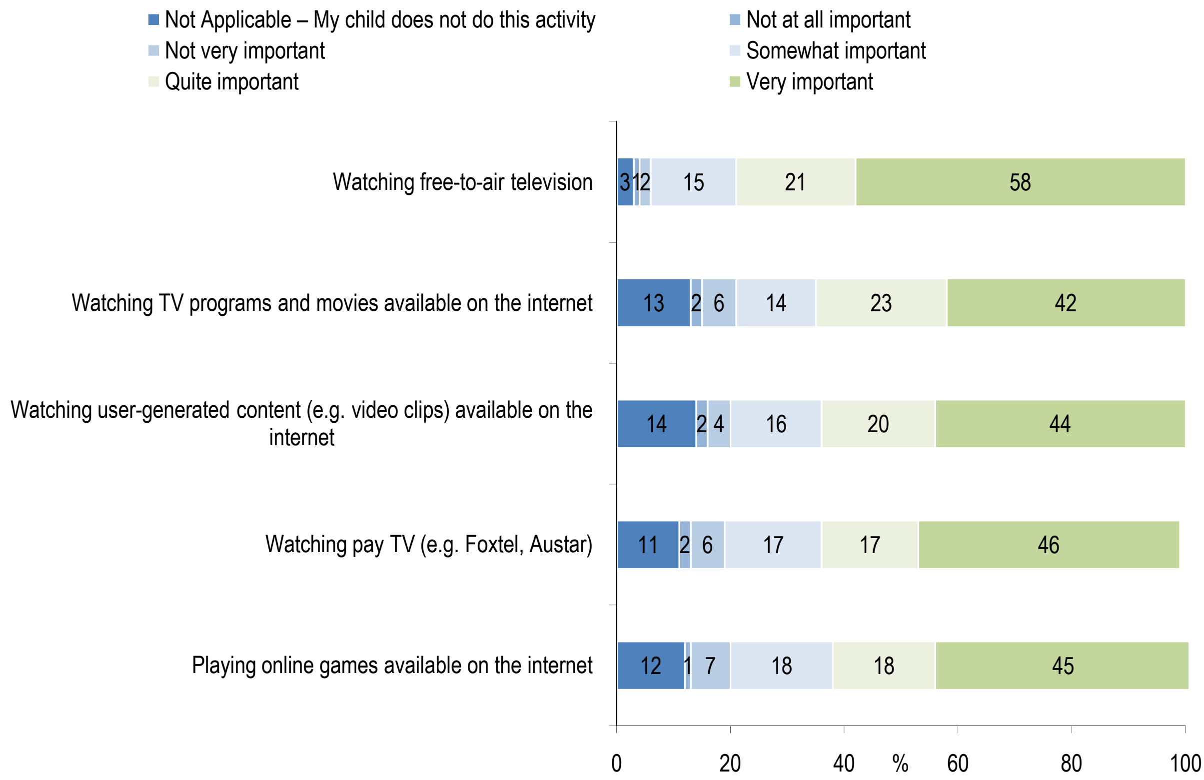
Figure 22 Perceived importance of consumer information across media



Source: ACMA, Digital Australians *online survey, 2011.*
F1 ASK ALL: Broadcast television programs, and some content on the internet includes information such as classification, ratings or other information to help people decide whether content is suitable for them and their families. How important is it to you to have this type of information available for you personally to decide whether content is suitable for you. When you are…? S/R PER ITEM, SHOW ONLY THOSE ACTIVITIES THAT RESPONDENTS REPORT DOING, RANDOMISE
Base: Respondents who have undertaken each activity in the past month, n=323–816.

Across all media, participants with children under 18 placed greater importance on classification and rating information than did other online adult Australians. The same question was asked of these participants with children under 18—but this time specifically in relation to content for their children. As shown in Figure 23, information about content was generally seen as being more important for children. Between 63 and 79 per cent of parents who themselves had used each medium in the past month indicated that they saw this information as very or quite important when deciding which content their children should view across different media.

Figure 23 Perceived importance of consumer information for children's viewing across media



Source: ACMA, Digital Australians *online survey, 2011.*
F1 ASK ALL: Broadcast television programs, and some content on the internet includes information such as classification, ratings or other information to help people decide whether content is suitable for them and their families. How important is it to you to have this type of information available for you personally to decide whether content is suitable for you. When you are…? S/R PER ITEM, SHOW ONLY THOSE ACTIVITIES THAT RESPONDENTS REPORT DOING, RANDOMISE
Base: Respondents who have undertaken each activity in the past month, n=323—816.

Responsibility for restricting children's access to inappropriate online content

When all participants were asked which groups they thought were responsible for preventing children from seeing content with too much sex and violence on the internet, they clearly indicated that most responsibility for this lies with a parent (this was in line with the qualitative findings).

Half (50 per cent) of all participants also felt that industry had some responsibility, while almost four in 10 (39 per cent) also nominated the government. While these views were broadly held across the sample, about half (48 per cent) of participants with children under 18 felt government had a role, and women were more likely to report that they felt parents and industry had a role to play.

Table 21 Responsibility for preventing children from seeing too much sex or violence on the internet

	Total sample (n=1,250)	18 –29 (n=262)	30–44 (n=353)	45–54 (n=233)	55+ (n=402)	Male (n=613)	Female (n=637)
	%	%	%	%	%	%	%
Parents	89	85	89	87	94	87	92
The industry/ content providers/ broadcasters	50	49	49	56	47	43	56
The government	39	41	42	42	33	36	41
Someone else	2	1	2	2	2	2	2
No one has responsibility	2	5	1	0	2	3	1

Source: ACMA, Digital Australians *online survey, 2011.*
G1 ASK ALL: In your opinion, which of the following groups are responsible for preventing children (under the age of 18) from seeing content with too much sex or violence on the internet? M/R RANDOMISE
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

Furthermore, when asked who they felt had *most* responsibility for this, 80 per cent of respondents indicated that they felt parents did. Twelve percent said industry and eight per cent said the government. While there were some significant differences by age and gender, the overall pattern of the results (that is, the order) was consistent.

Table 22 Who is *most* responsible for preventing children from seeing too much sex or violence on the internet?

	Total sample (n=1,223)	18–29 (n=250)	30–44 (n=348)	45–54 (n=232)	55+ (n=393)	Male (n=596)	Female (n=627)
	%	%	%	%	%	%	%
Parents	80	73	81	77	85	79	81
The industry/ content providers/ broadcasters	12	15	11	17	9	12	13
The government	8	12	8	6	5	8	7
Someone else	0	0	0	0	0	1	0

Source: ACMA, Digital Australians *online survey, 2011.*
G2 ASK THOSE SELECTING CODES 01-04 AT G1: Who do you consider to be most responsible for preventing children from seeing content with too much sex or violent on the internet? S/R RETAIN ORDER FROM G1
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.
Base: Respondents who thought that anyone was responsible for preventing children from seeing certain content on the internet, n=1,223.

From the qualitative and quantitative findings, there appeared to be a need for ongoing education to assist parents 'keep their heads above water' as they try and keep up with the changes in media availability and access.

However, the key challenge in this is that parents often struggle to be proactive in keeping abreast of the changes. They are often looking to be educated after an incident in which their child accesses inappropriate content. This is when the provision of resources for parents would be extremely useful.

In line with attitudes to community standards, group participants found the idea of applying some content regulations to professionally generated Australian online media content to be entirely reasonable. Such regulation was not seen as limiting individual expression, learning and choice, as users would still be able to access the material from overseas. Instead, it was perceived as reflecting broader community standards in a manner that would apply to similar professionally produced content offline.

6. Australian content

Australian content requirements date back to 1961. They aim to promote the role of commercial television services in developing and reflecting a sense of Australian identity, character and cultural diversity by supporting the community's continued access to television programs produced under Australian creative control.

The current standard—Broadcasting Services (Australian Content) Standard 2005—commenced on 30 December 2005 and was made under the *Broadcasting Services Act 1992*. The standard requires all commercial free-to-air television licensees to broadcast an annual minimum transmission quota of 55 per cent Australian programming between 6 am and midnight. In addition, there are specific minimum annual sub-quotas for first-run Australian adult drama, documentary and children's programs.

The Broadcasting Services Act also requires subscription television broadcasting licensees that broadcast drama channels to maintain a minimum level of expenditure each year on new Australian drama. At least 10 per cent of the total program expenditure on a subscription television drama service must be on new eligible drama programs. The expenditure requirement can be met by channel providers based in Australia or overseas. There is no requirement for the drama program to be broadcast.

Australian content on broadcast television

An important objective of the qualitative component of the research was to understand how participants viewed Australian content and how a converged media environment may affect consumption.

Focus group participants recognised the importance of Australian content on broadcast television, for continuity of the local production industry as well as to foster a sense of Australian cultural identity. Many focus group participants were aware of rules about the amount of Australian content on television, and this fact was not surprising to other participants who did not know.

Having a strong production industry was seen as a desirable stepping stone for Australian actors and other talent, and important for Australia's place in a global market.

Participants' personal preference for Australian content was clear when there was direct relevance or a local need or interest; for example, news and information and Australian versions of reality television shows. However, they were aware of the threat to the industry of increasing access to professionally produced content online, such as movies and drama series from overseas sources, providing increased competition for similar Australian material.

Current affairs, soaps and reality television were the first Australian programs to come to mind in focus groups. Participants frequently identified *MasterChef, Today Tonight, A Current Affair, Home and Away, Neighbours* and *Australia's Got Talent* as Australian content they enjoyed watching. There was little spontaneous mention of Australian drama series such as *Packed to the Rafters, Underbelly* or *Sea Patrol*.

Participants believed that Australian shows may struggle if online channels increased access to overseas professional content. Despite endorsing the idea of Australian content, most participants claimed to prefer overseas series due to their perceived higher production values. They felt that Australian television, as a whole, struggled to compete with high-quality production dramas and soaps from overseas.

Reality television was regarded differently to drama. Given that this genre is about everyday people pursuing a dream or being part of a competition, participants explained they needed to imagine it could be them, or their neighbour or friend. An Australian version of this type of program, while not necessary, could significantly enhance the viewing experience as participants were more likely to connect to the Australian 'reality stars'.

Australian content online

Participants said they would often look at Australian sites first as local online content was generally seen to be more relevant. Participants indicated local information and news, recipes containing local produce, prices in Australian dollars and material set in the Australian context as examples of the content they like to see online.

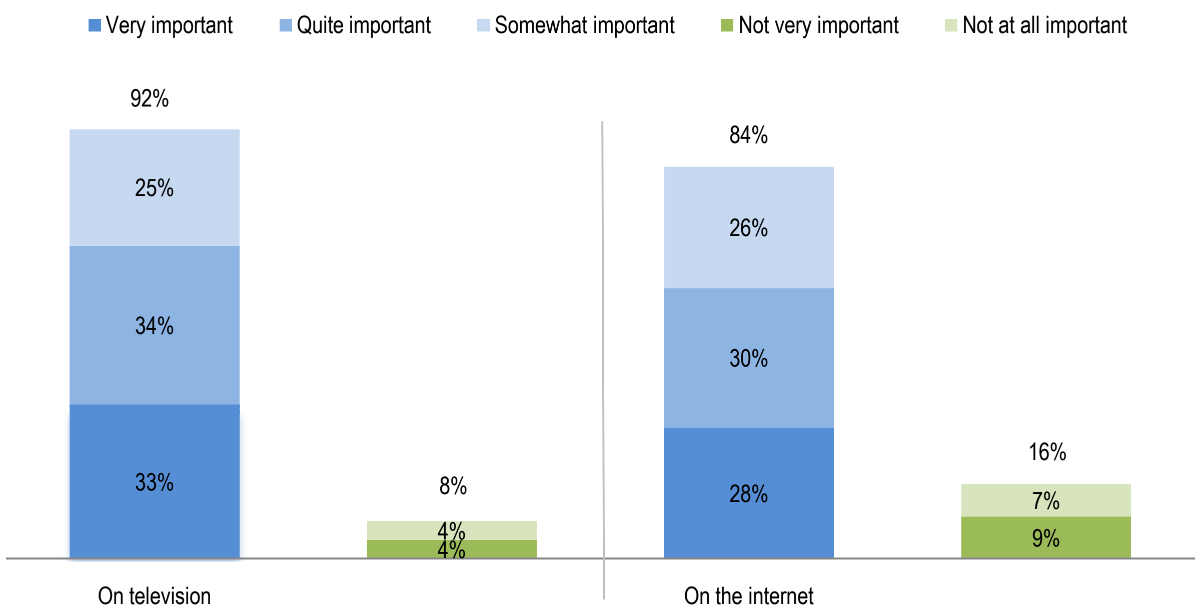
Despite this interest in Australian content online, participants were taking advantage of numerous 'overseas' sites that are now easily accessible online.

Ensuring availability of Australian content on television and online

In line with the importance placed on Australian content that was identified in the focus groups, online survey respondents also saw this as important.

Nine out of 10 online survey respondents (92 per cent) agreed that it was somewhat/quite/very important for the Australian Government to put in place rules to ensure that high-quality Australian content is available on television.

Figure 24 Importance for government to ensure high-quality Australian content, for television and internet

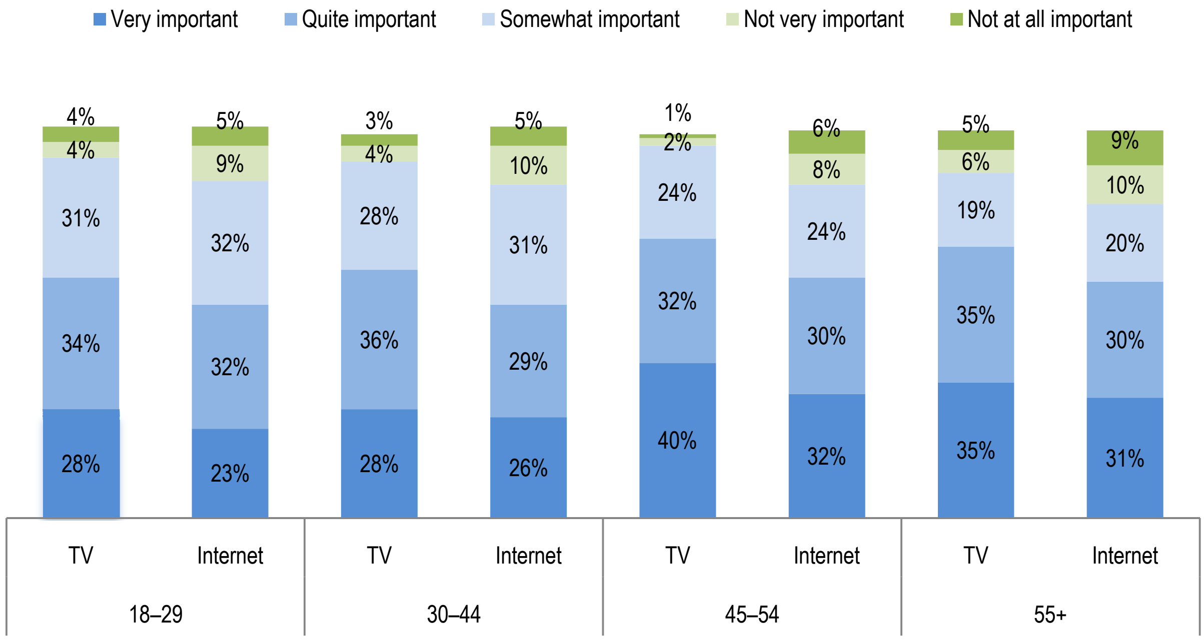


Source: ACMA, Digital Australians *online survey, 2011.*
H1 ASK ALL Please indicate to what extent you think it is important for the Australian Government to put in place rules to ensure that high-quality Australian content is available on television and the internet
Base: Total sample, n=1,250.

There was agreement across all age groups that it was important for the government to ensure high-quality Australian content on television—but less so on the internet. Eighty four per cent agreed that it was somewhat/quite/very important for the

Australian Government to put in place rules to ensure that high-quality Australian content is available on television.

Figure 25 Importance for government to ensure high-quality Australian content, for television and internet, by age group



Source: ACMA, Digital Australians *online survey, 2011.*
H1 ASK ALL Please indicate to what extent you think it is important for the Australian Government to put in place rules to ensure that high-quality Australian content is available on television and the internet
Base samples by age: 18–29 yrs n=262; 30–44 yrs n=353; 45–54 yrs n=233; 55+ yrs n=402.

7. Privacy and consumer protection

The study explored issues that may arise in relation to privacy. This included participants' views about user privacy being compromised when using digital media such as social networking services and mobile apps that collect personal information or user location details for businesses. Attitudes towards protecting individual privacy online in these situations were also examined.

Privacy and security concerns

Focus group participants raised privacy and security issues in the online media environment that were related to the misuse of content that individuals create about themselves, personal content that others post about them, and the collection and use of personal information by businesses.

Content people create about themselves

Content that people create about themselves was seen to include content posted to online profiles such as status updates, photos, video and commentary. This material was mostly associated with social networking sites and blogs. Participants acknowledged that such self-generated material can compromise privacy.

Content that others create

Participants were also concerned about content that others create that features people who may not be aware that information about them has been uploaded. Content posted to other people's online profiles may include 'tagged' photos, videos and commentary. There was awareness that such material could compromise privacy, when consent for the personal information to be used had not been sought or given.

Information collected by businesses and others

When prompted, focus group participants also mentioned identifying information that businesses and others collect about online users, including purchasing habits, preferences, location-based information and social habits. It was felt that such information could also compromise privacy.

Social media

Online social networks and social media are a relatively recent phenomenon, gaining popularity in the last five years. Social media has given individuals an online voice and opportunities for self-expression, but it also comes with some risks that the research sought to examine.

The focus groups provided a sense that almost everyone has a social networking profile. Even those who were not using social networking themselves could identify people their own age who were engaged with it. For many, there was a sense that people needed to be online to ensure that they did not miss out on anything, as so much of their social lives took place online. Not everyone in the groups was comfortable with that expectation.

Participants were aware of some of the negative consequences associated with the rise of social media and the type of content that is accessible online. Indeed, many of the participants related first- and second-hand accounts of these consequences occurring, as well as being able to recall specific examples in media reports.

Participants frequently mentioned risks associated with children being online, such as exposure to inappropriate content, cyberbullying and unwelcome contact from others.

Participants were also aware of reputations being compromised by private indiscretions captured online. Associated with this were reports that employment prospects had been damaged, as many employers seek out people's Facebook profiles before offering them a position. In addition, there were some reports of homes being broken into when people use the 'check-in' function on Facebook.

Concerns about privacy online were underpinned by a sense that participants felt they were no longer in control of their image or personal information once it is online. Even with privacy controls in place, it was felt that many people were still able to see content and they could potentially comment on it. People were able to share the content with others, with the potential for it to 'go viral'.

Many considered that online content being used and published by mainstream broadcasters was the ultimate loss of control. Many focus group participants were able to cite examples where user-generated content had been used by mainstream media, such as:

> using Twitter commentary as evidence to support a news story
> showing elements of Facebook profiles of people involved in a news story
> using YouTube footage to illustrate a story for a current affairs show, such as the bullying-related story in NSW (March 2011)
> YouTube footage 'going viral' and forming the basis for a story, such as that involving the teenager singer Rebecca Black.

Discussion groups believed that individuals have control over what they do or do not post about themselves and can use their own judgement to make decisions. In the case of children, it was felt that parents are ultimately responsible for helping them make sound judgements. When individuals choose to post content, responsibility for their actions is seen to lie with the individual.

Most participants indicated an awareness that once content was posted online, very little control existed over what happened to it. The majority believed that people post content online fully aware of the potential to lose control. Indeed, when prompted, few participants had any sympathy for those who posted material and experienced negative consequences. For example, few participants had sympathy for Rebecca Black, the American teenager who posted a video on YouTube that received many abusive comments and was picked up by mainstream broadcasters:

> Rebecca Black posted that video herself, and she, and her parents, should have known what could happen.

In a separate study, the ACMA found that privacy intrusions by broadcasters are evaluated against the unique circumstances of each case. Most Australians are sensitive to broadcasters using personal content from online social networking sites if access had been restricted to online 'friends'.[14]

Most participants did not believe that they could control content featuring themselves that others post online. This was particularly seen as an issue for those with young children, who said they preferred that photos of their children were not posted online.

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[14] ACMA, *Community research into broadcasting and media privacy* (discussion group findings) and *Australians' views on privacy in broadcast news and current affairs* (national survey), 2011. The national survey found that just over three-quarters (76 per cent) of media users believe it is 'very intrusive' to broadcast personal material from online social networking sites where access has been restricted to online friends, compared with less than a third (31 per cent) who felt the same if there were no access restrictions.

The only control participants felt they did have was their influence over people they knew; however, often this was seen to be relatively tenuous.

Because service providers were perceived as only intervening if content was illegal or violated terms and conditions, most believed that individuals needed to manage the privacy and security risks posed by social media. The provision of information and education was seen as a useful approach to promote an understanding of potential consequences, privacy settings, careful judgements and strategies that set social boundaries.

About a third (32 per cent) of respondents in the online survey indicated that they would be interested in learning more about asking a website to remove content that breached their privacy. There was no significant difference by gender or age (Table 23).

Table 23 Interested in learning more about …

Interested in learning more about...	Total sample (n=1,250)	Male (n=613)	Female (n=637)	18–29 (n=262)	30–44 (n=353)	45–54 (n=233)	55+ (n=402)
	%	%	%	%	%	%	%
Asking a website to remove content that breaches your privacy	32	30	33	31	30	35	32

Source: ACMA, Digital Australians *online survey, 2011.*
I3 ASK ALL: Which, if any, of the following would you be interested in learning more about? M/R RANDOMISE
Base: Total sample, n=1,250.

Collection of information by businesses

Many participants knew their information was being collected by businesses and that they had probably given permission for its use whenever they agreed to terms and conditions to use online services, purchase merchandise online or register software applications. However, most also said they had accepted terms and conditions without reading them. While many regarded the collection of personal information as legitimate for marketing purposes, others felt a sense of unease and saw this as an intrusion of privacy. Given the growth of online services, the collection of personal information by businesses was generally regarded by participants as a necessary exchange.

8. Confidence in online abilities and interest in learning more

In the focus groups, a wide range of familiarity and comfort with technology was expressed. Generally, participants viewed television and radio as straightforward and easy to use, and the internet and devices used to access online content as significantly more challenging.

Frequently 'digital natives'—those who have grown up with the internet—were seen as being more comfortable in that domain. In one case, a parent had asked their 13-year-old:

> Can you show me how to block you from doing that?

The research sought to examine a number of issues related to confidence—seen as one aspect that may affect Australians' use of online media—as well as their preferences and attitudes.

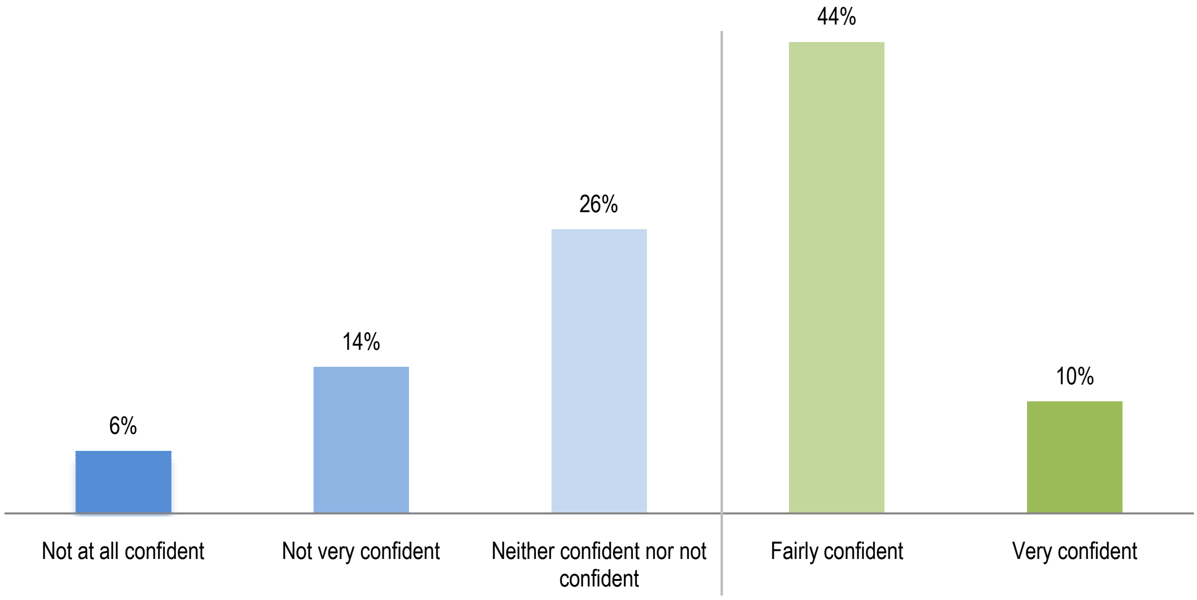
To help understand the concerns with technology use and the difficulty in keeping up with changes, the quantitative component of the research asked respondents to indicate their level of confidence in two areas—their ability to manage security of personal information online, and their confidence in their level of protection from computer viruses and other security threats.[15] In addition, respondents were also asked to indicate their interest in learning new skills and competencies.

Confidence in ability to manage security of personal information online

Over half (54 per cent) of online Australians 18 and over indicated that they were confident in their ability to manage security of personal information online—this comprises 10 per cent who were very confident and 44 per cent who were fairly confident.

[15] A Roy Morgan survey (from July 2009 to June 2010 for Australians 14+) indicates that 67 per cent agreed that technology changing so fast makes is difficult to keep up with the changes.

Figure 26 Confidence in ability to manage security of personal information



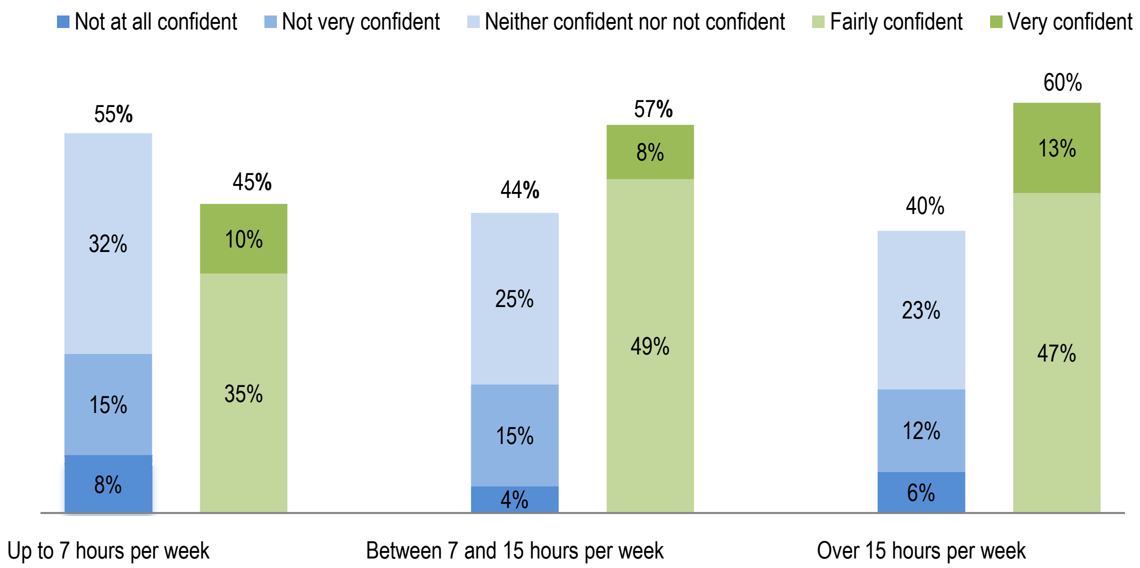
Source: ACMA, Digital Australians *online survey, 2011.*
I1 ASK ALL How confident would you say you are currently in your ability to manage the security of your personal information online
Base: total sample, n=1,250.

Of those respondents not feeling confident, 26 per cent were neither confident nor not confident, 14 per cent were not very confident and six per cent were not confident at all.

Respondents' level of use of the internet affected their confidence in managing security of personal information. The level of confidence was lower (45 per cent feeling confident) for those using the internet fewer than seven hours per week, compared to 60 per cent feeling confident for those using the internet more frequently (over 15 hours per week).

There were no major differences by age.

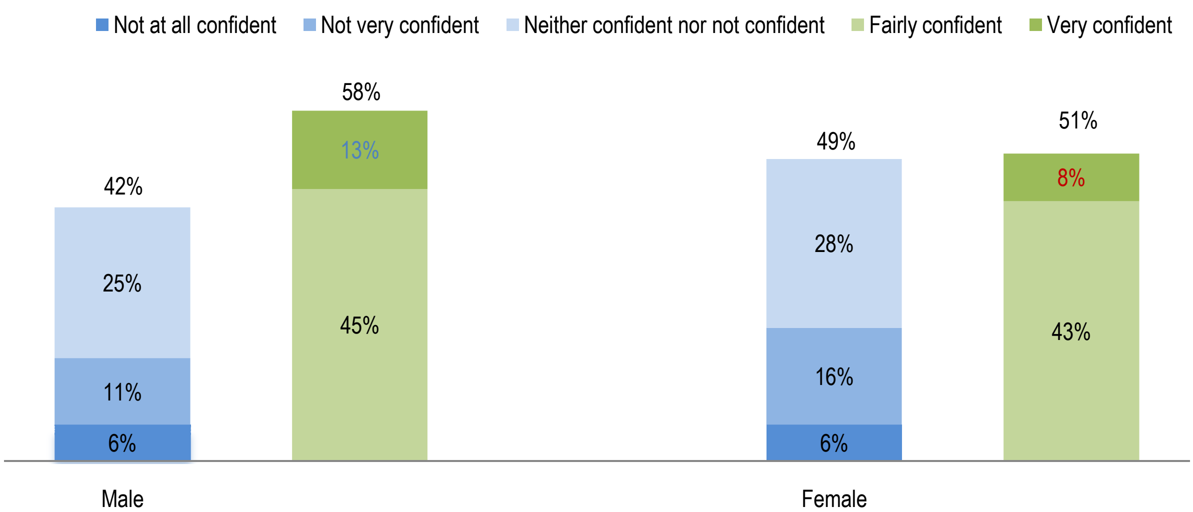
Figure 27 Confidence in ability to manage security of personal information online, by level of internet use



Source: ACMA, Digital Australians *online survey, 2011.*
I1 ASK ALL How confident would you say you are currently in your ability to manage the security of your personal information online
Base samples by level of internet usage: Up to 7 hrs/wk n=368; Between 7 and 15 hrs/wk n=433; Over 15 hrs/wk n=449.

There were no significant differences in how confident respondents were in their ability to manage security of personal information online. Male respondents indicated a slightly higher level of confidence (58 per cent were fairly or very confident) than female respondents, who tended to perceive themselves as less confident (51 per cent of females answered fairly or very confident).

Figure 28 Confidence in ability to manage security of personal information online, by gender



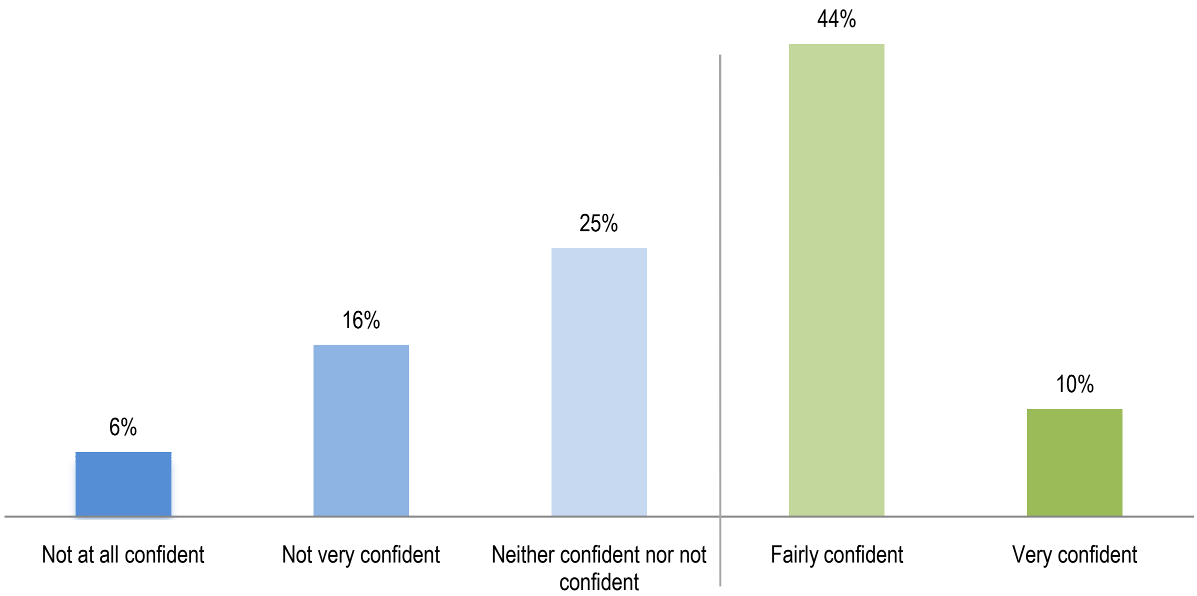
Source: ACMA, Digital Australians *online survey, 2011.*
I1 ASK ALL How confident would you say you are currently in your ability to manage the security of your personal information online
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.
Base samples by gender: Male n=613; Female n=637.

Confidence in protection from malware when accessing media content on the internet

Respondents' level of confidence in their protection from malware was very similar to that for managing security of their personal information online. Over half (54 per cent) of respondents were fairly or very confident in their own protection from computer viruses and other threats when accessing media content online—this comprised 10 per cent who were very confident and 44 per cent who were fairly confident.

A quarter of respondents were neither confident nor not confident. A further 22 per cent were not confident—16 per cent not very confident and six per cent not confident at all.

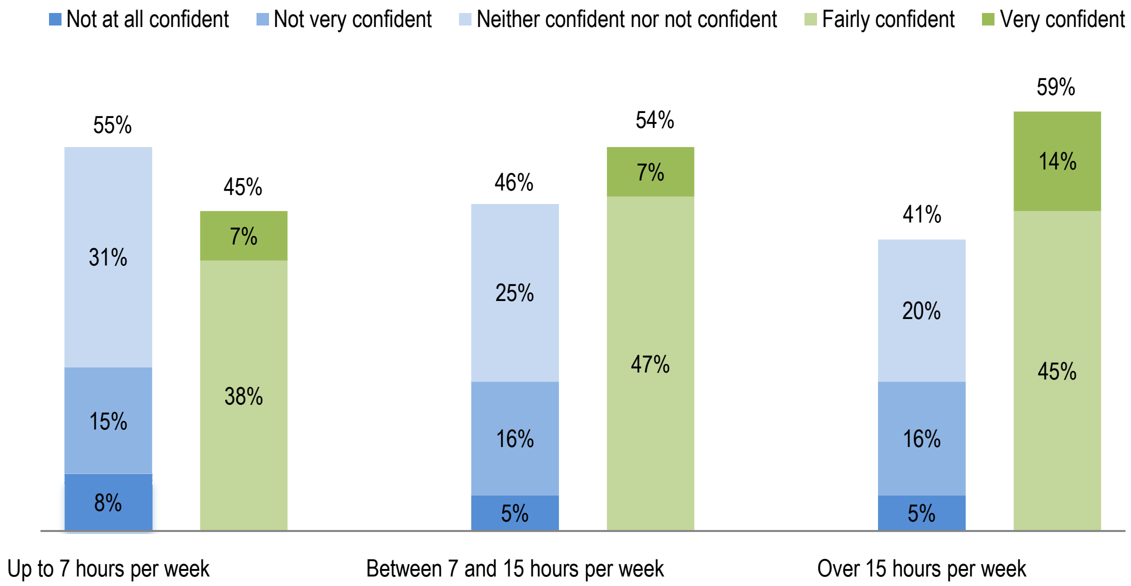
Figure 29 Confidence in protection from computer viruses and other security threats when accessing media content on the internet



Source: ACMA, Digital Australians *online survey, 2011.*
I2 ASK ALL When accessing media content on the internet how confident are you that you are protected from computer viruses and other security threats
Base: Total sample, n=1,250.

As for confidence in their ability to manage security of personal information online, respondents' level of confidence in their own protection from computer viruses and other security threats increased the more they used the internet. Those who used the internet the most (over 15 hours per week) were the most confident, with 59 per cent of this group either fairly confident (45 per cent) or very confident (14 per cent).

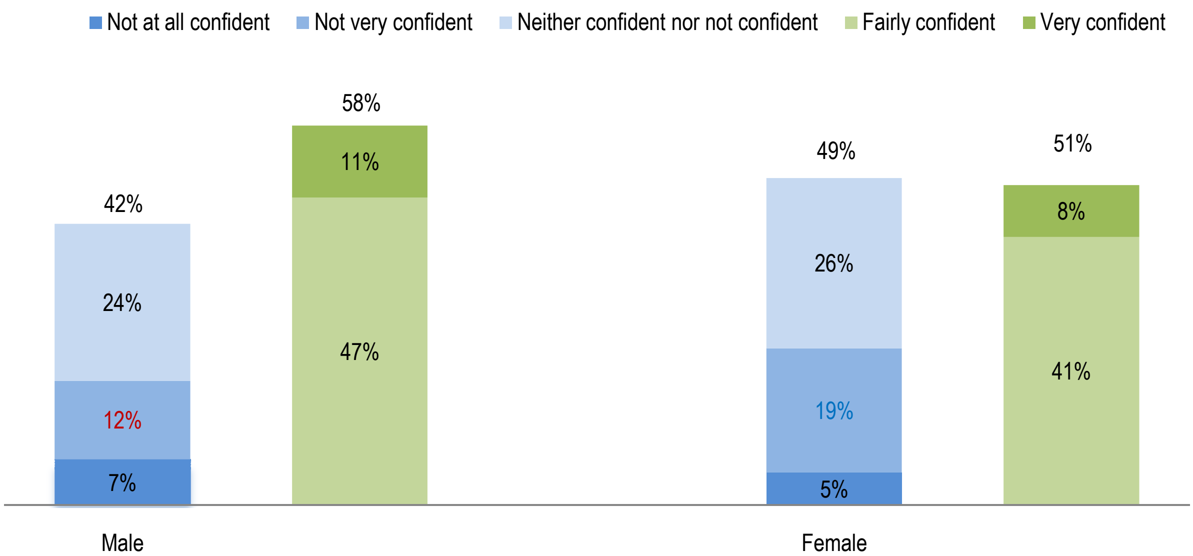
Figure 30 Confidence in protection from computer viruses and other security threats when accessing media content on the internet, by level of internet use



Source: ACMA, Digital Australians *online survey, 2011.*
I2 ASK ALL When accessing media content on the internet how confident are you that you are protected from computer viruses and other security threats
Base samples by level of internet usage: Up to 7 hrs/wk n=368; Between 7 and 15 hrs/wk n=433; Over 15 hrs/wk n=449.

No significant differences were found in the overall level of confidence in protection from computer viruses and other security threats by gender (Figure 31).

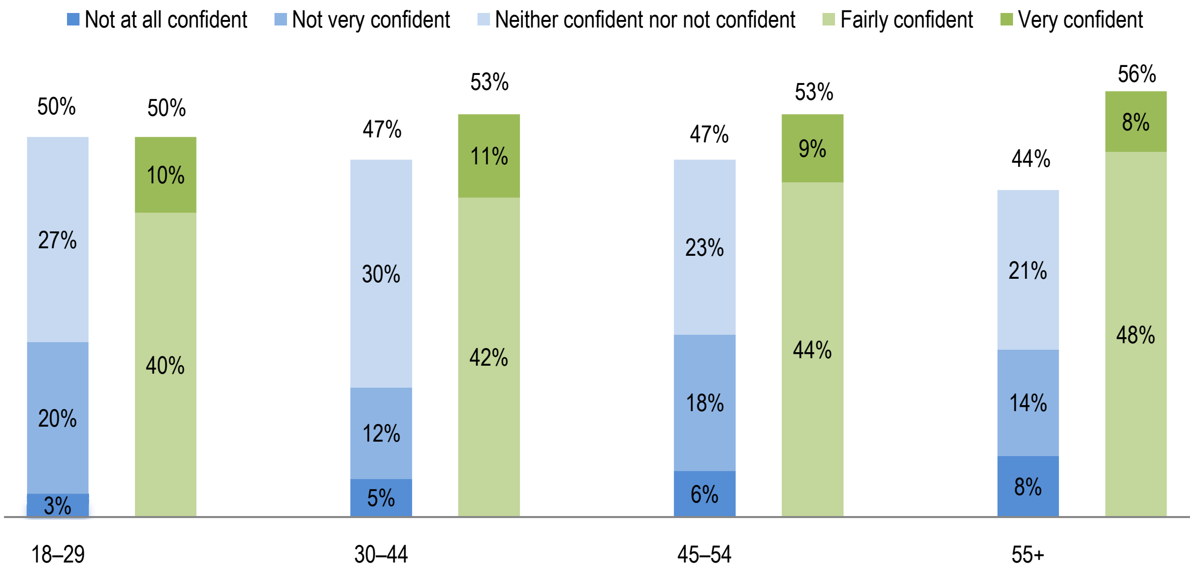
Figure 31 Confidence in protection from computer viruses and other security threats when accessing media content on the internet, by gender



Source: ACMA, Digital Australians *online survey, 2011.*
I2 ASK ALL When accessing media content on the internet how confident are you that you are protected from computer viruses and other security threats
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.
Base samples by gender: Male n=613; Female n=637.

There were also no significant differences in the level of confidence by age group (Figure 32).

Figure 32 Confidence in protection from computer viruses and other security threats when accessing media content on the internet, by age group



Source: ACMA, Digital Australians *online survey, 2011.*
I2 ASK ALL When accessing media content on the internet how confident are you that you are protected from computer viruses and other security threats
Base samples by age: 18–29 yrs n=262; 30–44 yrs n=353; 45–54 yrs n=233; 55+ yrs n=402.

Interest in learning more

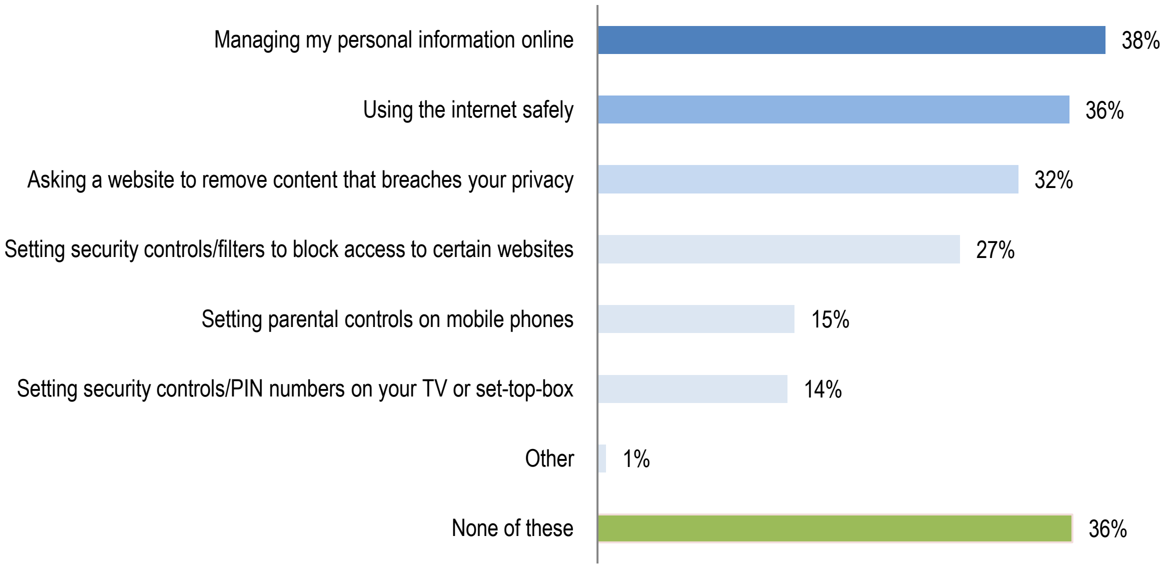
Online survey respondents were also asked about their interest in learning more about a number of security issues that may arise from use of digital media (Figure 33).

The skills that attracted the greatest interest were managing personal information online (38 per cent of respondents would be interested learning about this), using the internet safely (36 per cent) and asking a website to remove content that breaches their privacy (32 per cent).

Respondents showed comparatively little interest in learning about parental controls (15 per cent interested) or setting security controls on televisions or set-top boxes (14 per cent).

Over a third (36 per cent) of respondents indicated they were not interested in learning any of the digital literacy skills or competencies presented to them.

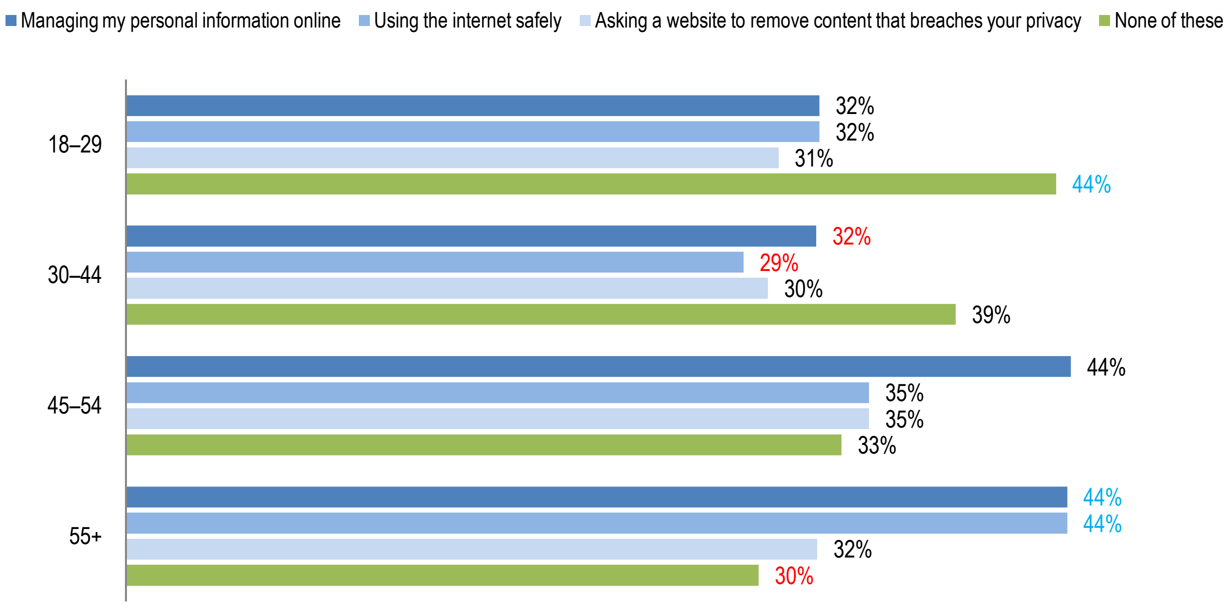
Figure 33 Skills or abilities online Australians would be interested learning more about



Source: ACMA, Digital Australians *online survey, 2011.*
I3 ASK ALL Which, if any, of the following, would you be interested in learning more about?
Base: Total sample, n=1,250.

There were some differences by age. Younger age groups (18–29 and 30–44) tended to be less interested in learning digital skills—44 per cent of those aged 18–29 were not interested in learning any of the six skills listed. Those most interested in learning new skills were aged 55 and over.

Figure 34 Skills or abilities online Australians would be most interested learning more about, by age group



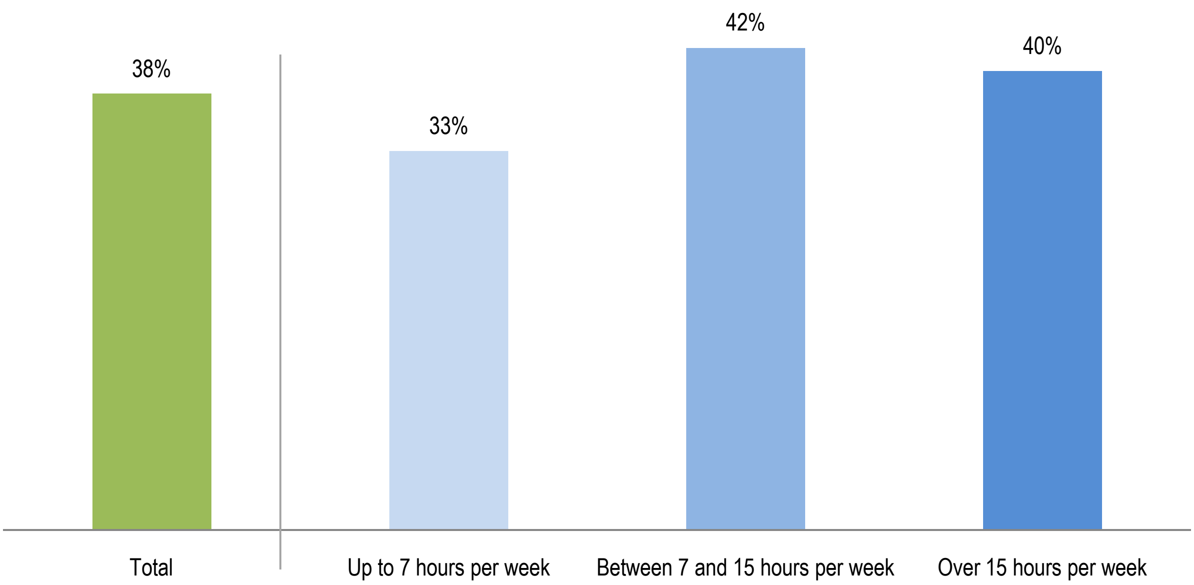
Source: ACMA, Digital Australians *online survey, 2011.*
I3 ASK ALL Which, if any, of the following would you be interested in learning more about?
Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.
Base samples by age: 18–29 yrs n=262; 30–44 yrs n=353; 45–54 yrs n=233; 55+ yrs n=402.

The top two skills of interest for those aged 55 and over were how to manage personal information online and how to use the internet safely (44 per cent of respondents in this age group expressed an interest in these skills). Those aged 45–54 expressed a similar level of interest in how to manage personal information online. Interest in learning how to ask a website to remove content that breaches your privacy was of similar interest to younger and older respondents (between 30 and 35 per cent).

Interest in learning and the hierarchy of skills of interest was similar for both males and females, with managing personal information online most commonly chosen, followed by using the internet safely and how to ask a website to remove content that breaches your privacy.

No significant differences were identified in respondents' interest in managing personal information online and using the internet safely.

Figure 35 Interest in learning more about managing personal information online, by level of internet use



Source: ACMA, Digital Australians *online survey, 2011.*
I3 ASK ALL Which, if any, of the following, would you be interested in learning more about?
Base samples by level of internet usage: Up to 7 hrs/wk n=368; Between 7 and 15 hrs/wk n=433; Over 15 hrs/wk n=449.

Overall, 36 per cent of respondents indicated they would be interested in learning more about how to use the internet safely.

Conclusion

Digital Australians provides a snapshot of Australians' changing use of digital media and the growing role of online content. The findings are based on recent qualitative and quantitative research among Australians who are online themselves or are familiar with online media. In some areas, the media transition was more evident, as seen in high levels of online news use by all age groups and younger adults leading the take-up of online video. However, broadcast television was the most common media activity reported in the online survey and many internet users were not using the full range of digital media available.

The research provides insights into online Australians' attitudes to traditional media and their expectations for media content accessed online. It also identifies concerns about the changing media environment and accessing media content on the internet.

Expectations about media content and its regulation appeared to be shaped by long experience with broadcast television, radio and newspapers. The research confirmed that Australians have an ongoing expectation that similar standards should apply to content produced by traditional media organisations, whether the content is distributed online or offline. The research also indicated that online Australians are pragmatic about the limited capacity to regulate content distributed over the internet and, with the exception of illegal content, they expected that much of the content available online would not be regulated.

In the research, positive perceptions about the benefits of online media outweighed concerns, and the advantages for younger generations of ongoing developments in media and communications were clearly appreciated. Keeping up with technology emerged as a main concern for research participants, and many preferred traditional media for reasons of habit, convenience and ease of use. There was also unease about privacy and security risks of being online, as well as some concerns about content. The growing importance of online media for Australians may well highlight these issues.

Overall, the study indicates that there is scope for measures such as information and education to assist online consumers generally, to build confidence in using online media. Being able to better manage risks around security and privacy is particularly important.

Additional considerations for children using digital media were evident in the study—these were reflected in parents' greater concern about the internet and the view that protecting children is a priority. The findings of *Digital Australians* point to a continuing role for government and industry to help parents manage children's online experience through education and other initiatives.

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Appendix A—Research objectives

Objectives

The overall aim of the research was to help the ACMA understand community behaviour, attitudes, concerns and expectations about media content issues in a converging media environment.

Three core objectives were identified, together with more specific objectives:

1. Understand converged media usage:
    > Identify usage behaviours of Australian adults in terms of converged media sources.
    > Identify distinct media user segments to contextualise views about media content issues.
    > Identify relevant demographic information to help identify different media user segments.

2. Explore perceptions of converged media content issues:
    > Understand the degree to which content types are perceived as similar across different media platforms and devices.
    > Explore specific media content issues and concerns as perceived by adults.
    > Explore how consumers might address risks they are exposed to in a converging media environment.
3. Investigate policy and regulatory expectations:
    > Examine knowledge and attitudes toward current content regulation.
    > Examine attitudes and expectations around social and cultural policy objectives and how these differ across different content, platforms and devices.
    > Explore community interest in regulatory, educational or other approaches that might empower citizens and consumers to confidently access, navigate and evaluate media content.

Appendix B—Methodology

Overview and rationale for the methodology

GfK Bluemoon undertook a phased approach when conducting the research, which enabled the researchers to build and learn from the findings as the research progressed.

Qualitative research

GfK Bluemoon conducted a program of qualitative research that consisted of nine group discussions in round one of the research. These were conducted with adults in metro and regional areas across three states. In round two, four group discussions were held in metropolitan and regional areas in one state. Each group was approximately one hour and 45 minutes in duration and comprised six to eight participants. All participants completed a homework task prior to attending group discussions. The fieldwork was conducted between 20 April and 11 May 2011.

Quantitative research

The quantitative phase of this study was conducted on the competition of the qualitative phase. A large sample of n=1,250 online interviews was conducted with respondents recruited from an online research-only panel. The questionnaire was developed in conjunction with the ACMA to answer the objectives outlined in the brief. The survey took approximately 15 minutes on average to complete and fieldwork was conducted between 8 and 22 July 2011.

Qualitative sample

Figure 36 Methodology overview

A program of 13 x 1.75 hour group discussions (consisting of 6–8 participants per group) was conducted						
Group	**Lifestage**	**Age**	**Convergent media exposure**	**SEG**	**Location**	**State**
1	Youth	18–24	Regular user	White	Parramatta	NSW
2	Youth	18–24	Exposed but irregular	Mix	Murray Bridge	SA
3	Young family	25–40	Regular user	White	Adelaide	SA
4	Older family	34–55	Exposed but irregular	Mix	Coffs Harbour	NSW
5	Young adults, no kids	25–34	Regular user	Blue	Parramatta	NSW
6	Older Family	34–55	Very irregular/ non users	White	Melbourne	VIC
7	Never had kids	35–50	Regular user	Blue	Melbourne	VIC
8	Empty nesters	50–65	Exposed but irregular	White	Adelaide	SA
9	Empty nesters	50–65	Very irregular/ non users	Blue	Murray Bridge	SA
10	Young adults, no kids	25–34	Exposed but irregular	Blue	Wagga Wagga	NSW
11	Older family	34–55	Regular user	Mix	Wagga Wagga	NSW
12	Young Family	25–40	Exposed but irregular	Blue	Parramatta	NSW
13	Never had kids	35–50	Very irregular/ non-users	White	Parramatta	NSW

Rationale for qualitative sample

The sample was segmented according to age, life stage, socioeconomic background and convergent media exposure and usage.

Converging media usage

The sample was segmented according to the participants' behaviour and level of engagement and exposure with converging media.

Those participants in the 'regular user' groups were defined as those who:

> use traditional media at least three times per week
> use at least two internet devices
> spend more than 15 hours online per week.

At least three respondents per group had to be using social networking and at least two in each group had to be 'content creators' online.

Those participants in the 'exposed but infrequent user' groups were defined as those who:

> use traditional media at least three times per week
> use at least one internet device
> spend between seven and 15 hours online per week.

At least three participants in each group had to be using social networking sites.

Those participants in the 'very irregular or non-user' groups were defined as those who:

> use traditional media at least three times per week
> use no more than one internet device (or none)
> spend between zero and seven hours online per week.

Gender

Selection quotas were set to ensure that each of the groups comprised an approximately equal mix of men and women.

Age and life stage

The sample was segmented according to six different life stages and ages, and included participants aged 18–65 years.

Socioeconomic background

The sample included a mix of people classified as blue collar and white collar. 'White collar' refers to people in professional occupations and 'blue collar' to those with occupations that do not require specific tertiary qualifications, such as a trade.

Location

Groups were conducted in three states in Australia—New South Wales, Victoria and South Australia. The metropolitan groups were held in Sydney, Adelaide and Melbourne, and the regional groups were held in Wagga Wagga, Coffs Harbour and Murray Bridge.

Recruitment of participants

Participants were recruited by specialist recruitment companies that regularly partner with GfK Bluemoon. A recruitment screening questionnaire structured around the attitudinal and demographic variables outlined in the sample was used for recruitment (Appendix A).

Pre-group homework task

Respondents completed a pre-task prior to attending the group, in which they were asked to keep a diary of media usage across at least four days, including a weekday and a weekend. They were also asked a series of written questions about changes in media consumption, the benefits and drawbacks of this, and any strategies used to manage the drawbacks and risks in a changed media environment.

Discussion guide and use of scenarios

A semi-structured discussion guide was developed and was approved by the ACMA prior to use.

The discussion guide covered the following broad areas:

> exploration of current media usage including content and platforms

> perceptions of changes in media usage over time and attitudes towards these changes including attitudes towards the convergence of media platforms

> concerns and potential issues around media content in a converged environment, including user-generated content

> detailed exploration of specific issues, including community standards, privacy and consumer protection/empowerment, news and current affairs and Australian content

> understanding and expectations of media regulation and complaints processes.

Quantitative sample

Figure 37 Quantitative sample

Age	Percentage of total sample	Gender	Percentage of total sample
18 –29	21	Male	49
30 –44	28	Female	51
45 –54	19		
55+	32		
Personal internet usage	**Percentage of total sample**	**State**	**Percentage of total sample**
Up to 7 hrs/wk	29	NSW/ACT	35
Between 7 and 15 hrs/wk	35	VIC/TAS	27
Over 15 hrs/wk	36	QLD	20
		WA	10
		SA/NT	8

Rationale for quantitative sample

The quantitative sample was structured to provide a broad and national overview of adults aged 18+ and their views on convergence. All survey methods have some degree of coverage limitations, and an online survey was recommended as being an appropriate method of exploring respondents who would be likely to consume some degree of converged media.

Survey administration

The quantitative survey was conducted by means of an online survey that took respondents an average of around 15 minutes to complete.

Sample stratification

In order to control for sampling variance and ensure that the final sample had the correct proportions of respondents by key variables, quotas were set in relation to:

> age
> gender
> state
> personal internet usage.

It is acknowledged that an online survey does systematically exclude potential respondents who never use the internet, and this was deemed acceptable given the objectives of the survey.

However, as noted above, in order to ensure that the survey sample was not over-represented by 'heavy' internet users, quotas were set and the sample was stratified by personal internet usage. Quotas were aligned with population estimates derived from the Roy Morgan single source data cited in a recent ACMA report.[16]

Profiling

The data obtained from the quantitative study has been analysed in the context of the project objectives and the preceding findings from the qualitative phase. Where appropriate, and given sufficient sample sizes, the responses to questions have been compared with key demographics and the segments originally identified in the qualitative phase and replicated in this phase of the study.

Recruitment of respondents

Respondents to the quantitative survey were recruited from an online research-only panel.

Timing

The quantitative survey was conducted between 8 and 22 July 2011 inclusive.

Weighting

The data for this report was not weighted.

Significance testing

Unless otherwise stated, the significance testing referred to in this report was carried out at the 95 per cent confidence level, and assumed an un-weighted, un-clustered, simple random sample.

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[16] ACMA, *Report 1—Australia in the digital economy: The shift to the online environment*, 2010, www.acma.gov.au/webwr/_assets/main/lib310665/report_1-aust_in_the_digital_economy.doc.

An ‘FDR’ (False Discovery Rate) correction has been applied to all significance tests to reduce the possibility of detecting a false positive (that is, a difference that does not exist) as a result of the large number of comparisons and cross-tabs being made across the sample.

Statistically significant results are noted by a circle/line and/or blue/red font on charts and tables, as well as being included (where considered appropriate) in the text of the report.

Appendix C—Focus group recruitment screener

Hello. My name is _________. I work for_____________ , a research company. I am looking for people to take part in a social research study for the Australian Government which looks at people's attitudes towards the media. There are no right or wrong answers, and all points of view are welcome.

We will be talking to people within three states in Australia and will focus on individuals with particular characteristics in each area. We therefore need to ask some questions to find out whether you are eligible to take part in a discussion.

1. Do you or any of your close relations, work in any of the following industries?

<table>
<tr><td>Market research</td><td>1</td><td rowspan="3">TERMINATE</td></tr>
<tr><td>Advertising, marketing, public relations</td><td>2</td></tr>
<tr><td>Media, communications, journalism</td><td>3</td></tr>
<tr><td>Government</td><td>4</td><td>CHECK WHICH GOV'T AGENCY WORK FOR—EXCLUDE IF FOR PRIVACY COMMISSION, LAW REFORM COMMISSION, DPT OF BROADBAND OR ACMA</td></tr>
</table>

2. When was the last time you took part in a group discussion or depth interview? (Record)

TERMINATE IF LESS THAN 6 MONTHS AGO

3. How old are you? (Record)

CHECK QUOTAS

4. If you have any children, which category / categories do they fall into?

No children	1	SEE QUOTAS
0–4 years	2	
5–12 years	3	
13–17 years	4	
18+ years	5	

5. How many of your children live at home?

Some / All	1	SEE QUOTAS
None	2	SEE QUOTAS for EMPTY NESTERS

6. How often do you...? (please ensure these are all done 'off-line', i.e. they watch TV on an actual television, or read a hardcopy newspaper etc)

Watch television?	More than 3 times per week	1	Respondents MUST use at least one of these more than 3 times a week. Otherwise CLOSE
	Less than 3 times per week	2	
Listen to radio?	More than 3 times per week	3	
	Less than 3 times per week	4	
Read newspapers or magazines?	More than 3 times per week	5	
	Less than 3 times per week	6	
Play video games?	More than 3 times per week	7	
	Less than 3 times per week	8	

7. Which of the following do you use regularly? (for personal use)

PC / Laptop through which you access the internet	1	See Quotas
Mobile phone through which you access the internet	2	See Quotas
Gaming Console (e.g. X-Box or Playstation) through which you access the internet / play online	5	See Quotas
Tablet (e.g. iPad or other mobile tablet device, through which you access the internet)	6	See Quotas
None of the above	7	See Quotas

8. How much time do you spend on the internet each week, including home and personal use (i.e. not for work), regardless of whether you are on using a PC, laptop, mobile tablet device, mobile phone, gaming device or otherwise?

0–7 hours per week	1	See Quotas for 'Very irregular/Non users'
8–15 hours per week	2	See Quotas for 'Exposed but Infrequent user'
More than 15 hours per week	3	See Quotas for 'Regular Users'

9. ONLY ASK 'REGULAR' AND 'EXPOSED BUT INFREQUENT' USERS:
Which of the following do you access regularly (at least 3 times per week)?

Facebook or other social networking site	1	SEE QUOTAS
YouTube or other video hosting website	2	
Twitter	3	
Blogs or forums	4	
Online Games	5	
Photo sites (e.g. Flickr or Photobucket)	6	
None of the above	7	

10. ONLY ASK 'REGULAR' AND 'EXPOSED BUT INFREQUENT' USERS:
Which of the following do you use/access regularly? (across all options, must be at least twice a week)

Catch-up TV	1	SEE QUOTAS
IPTV (or other online sources TV programs)	2	
Movies	3	
Online news services	4	
Music or music videos	5	
Podcasts	6	
None of the above	7	

11. ONLY ASK REGULAR USERS:

Which of the following statements apply to you?

I have and use a Twitter account	1	SEE QUOTAS
I have an active blog(i.e. one you've posted on in the last month)	2	
I have and use a Facebook / other social networking site account	3	
I have created and uploaded videos &/or music to the internet (e.g. to YouTube, or Facebook)	4	
I have uploaded or posted photos online	5	
None of the above	6	

12. Record Gender:

Male	1	AIM FOR APPROXIMATELY 50:50 IN EACH GROUP
Female	2	

13.

PLEASE COMBINE ANSWERS TO Q13 AND Q14 TO DETERMINE SES:

What is (or was) your occupation? (Record job and SES)

White collar	1	Higher SES
Upper white collar	2	
Blue collar	3	Lower SES
Unemployed	4	

CHECK QUOTAS

14. What was your highest level of education you attained?

Primary school	1	Lower SES
Secondary school	2	
Tertiary education (i.e. university degree)	3	Higher SES
Post graduate qualification	4	

CHECK QUOTAS

QUOTAS

Each group should include 7-8 respondents and will last for 1 ¾ hours.

Exclude:

> Those who work in the usual industries and specific government departments
> Anyone who has taken part in a group discussion in the last 6 months
> Exclude those 17 yrs and under; and 65 years and over

Within each group:

> Ensure approximately 50:50 men and women in each group.
> With regard to lifestages:
  - 'Youth'—18-24 with no children
  - Young adults, no kids—25-34 with no children
  - 'Younger family'—aged 25-40 with all children aged under 12 years old, with at least one child over 2 years old. Aim for a mix of ages of children in each group.
  - 'Older family'—parents aged 34-55 with at least one child aged 12-18 years (can also have children under 12). Aim for a mix of ages of children in each group.
  - 'Never had kids'—aged 35-50 with no children.
  - 'Empty nesters'—aged 50-65, have children but none live at home.

QUOTAS FOR Q.6 'How often do you use any of the following?'

> All users must use at least one of the traditional media channels more than 3 times a week. If not please CLOSE.

QUOTAS FOR Q. 7 'Which of the following do you use? (for personal use)?'

> 'Regular users' must use at least two internet enabled devices (however, if it is the case that there are few 'heavy' users in terms of hours spent online who are using multiple internet enabled devices please contact us)
> 'Exposed but infrequent users' must use at least one internet enabled device.
> 'Very irregular/Non users' can be using none or a minimum of one internet enabled device.

QUOTAS FOR Q. 8, with regards to ‘usage’ levels:

> ‘Regular Users’ are those that are online for 15+ hours per week.
> ‘Exposed but infrequent users’ are those that are online for 7-15 hours per week.
> ‘Very irregular/Non users’ are those that are online for 0-7 hours per week.

QUOTAS FOR Q. 9 ‘Which of the following do you access regularly (at least 3 times per week)?’
Please include at least 3 respondents per group in the ‘Regular’ and ‘Exposed but infrequent’ groups who access at least one of these sites 3 or more times a week.

QUOTAS FOR Q.10—Please include at least 3 respondents per group in the ‘Regular’ and ‘Exposed but infrequent’ groups who access these types of content at least twice per week (across all listed)

QUOTAS FOR Q. 11 ‘Which of the following statements apply to you?’
Please include at least 2 respondents per group in the ‘Regular user’ groups who do one of these activities (i.e. they are content creators).

Definitions:

Group	Traditional media	No. of hours online per week	Use of internet enabled devices
‘Regular users’	At least 3 times a week	15+	At least 2
‘Exposed but infrequent users’	At least 3 times a week	7–15	At least 1
‘Very irregular/Non users’	At least 3 times a week	0–7	None or 1

Appendix D—Scenarios used in group discussions

Scenario A

Maria has two children aged under 12. She makes an effort to ensure that they only watch programs on television that she considers suitable—these are usually the ones on before 8.30 pm and rated G and PG. Maria's children regularly use the internet and have started to watch online episodes of their favourite programs that they have missed. Maria is concerned that they may also be downloading the programs that she otherwise doesn't allow them to watch (that is, the ones that screen after 8.30 pm).

Scenario B

Pete has been spending more and more time online watching content on video sharing websites like YouTube. Occasionally he finds things that he doesn't enjoy watching and lately he has been thinking about the fact that when he watches TV, there are classifications and advice that tell him when programs contain violence, sexual material or make reference to drugs—and he uses this to decide what to watch. But on the internet, nothing like that really exists at the moment.

Scenario C

Jane likes to know what is happening in the world around her, and she has always taken an interest in the news on TV and in local papers. These days she uses her laptop and iPhone to access the news, and she has found that she uses many different sites including news sites that have a range of video and audio clips to help deliver the news. Jane also looks at some blog sites and uses these as a source of news and information. Recently she has begun to question whether or not these sites are in fact always accurate

Scenario D

Rebecca Black is a 13-year-old who uploads a video of herself singing a song on YouTube. In response to this, numerous comments are posted on YouTube that are rude and abusive. She becomes an overnight YouTube sensation, with her video going viral and the negative commentary becoming more and more nasty. The video and the commentary is picked up and widely distributed by mainstream broadcasters and publisher media around the world.

Scenario E

Jess has a smartphone and likes to use lots of different apps. Many of these apps record her personal information and transmit it back to the companies that developed the app. Sometimes, the apps collect the unique ID of her phone, as well as her physical location and sometimes her age and gender. Jess isn't really sure how these things work, and isn't really aware that her information is being collected and potentially sold to advertisers.

Appendix E—Discussion guide

3069—DISCUSSION GUIDE

1	**Introduction**	**10 minutes**

- Introduce research topic:
    - Here to talk about media—the things they watch, read, listen to, play (not just the news, also Facebook, YouTube, games, music etc)
    - As well as the way they access it—including TV, radio, the internet, smartphones and tablets.
- Interested in their opinions, no right/wrong. Explain viewing/recording etc.
- Respondent intros: name, work / study, household arrangements, age, favourite media source
- Check completion of homework task

2	**Media usage**	**10 minutes**

Explain that we would like to begin by talking to them about their homework tasks.

- How did they find doing the homework? Easy? Hard? Why?
- Did doing the homework make them realise anything about their media use?
- How often did they access/use/consume media over the days they were filling in the diary?
- How long did they typically consume media for during each session?
- What times of the day did they use media?
- What types of content did they consume? (Probe fully including platforms used for each type)
- Did they use different media devices/channels to consume different content?
- How much professional vs. user generated content did they consume?
- What else were they doing while they were consuming media? (Probe multitasking)
- Where were they when they were consuming media?
- Did they consume media alone or with others?
- Did they consume differently on different days?

Ask respondents to imagine they are someone who uses a whole range of different media from all traditional channels, the internet and a smartphone/tablet. What would they do when they:

- Wake up
- Are having breakfast
- Are travelling to work
- Throughout the day at work
- On their way home from work
- In the evenings
- Just before bed
- On a weekend

3	**Perceptions and attitudes toward changes in media**	**15 minutes**

- How has their media use changed over the last five years? (Probe types, sources)
- What about the last 2 years?
- What has been the impact of this change on their lives?
- How have the changes impacted them personally?
- How do they imagine things will look in another 5 years time?

[ONLY FOR THOSE GROUPS WHO ARE LESS TECH-SAVVY] Put up boards of TV, radio, laptop computer, tablet and smartphone and explain that we would like them to think about how they consume media on these devices. (If they do not have personal experiences, let them talk about 'other people' but try to get their experiences out first).

- What types of media do they consume on each?
- What similarities/differences exist in the **type** of media consumed on each of these? (Probe content, e.g. news, entertainment etc, sources e.g. Channel 9, YouTube)
- What similarities/differences exist in the **way** they use each of these devices to consume media? (Probe times, locations)

Explain that we are interested in talking to them today about how things that once had separate functions, like TVs, radios, computers and mobile phones no longer just have one role, and that different media can now be consumed across a number of these devices/platforms. ENSURE THEY DO NOT JUST FOCUS ON SMARTPHONES.

- How would they describe these changes? What words would they use?
- How relevant are these changes for them?
- How do they feel about being able to access media in a range of different ways like this?
- What do they like about being able to access different media across a range of platforms/devices?
- What advantages do these changes have for people's lives?
- How might these changes impact negatively on people's lives?

4	Brainstorm—concerns and expectations about converged media 10 minutes

Explain that we would now like them to think about some of the things that might worry or concern people about the changes in the way we consume media. Explain we are interested in identifying issues even if there is a simple solution to manage them. Fully brainstorm concerns and flipchart responses.

Moderator to use the following prompts to help brainstorming:

- What concerns did they identify in their homework?
- What downsides/risks are there to using media like this?
- What issues might exist for someone using social networking like Facebook?
- What issues might exist for someone watching user-generated video content?
- What concerns might people have about where they get their news?
- What about issues for people who upload content?
- What about when they use smartphone apps?
- What concerns might people who are different to them have (e.g. older, younger, parents, more/less tech savvy)

Once issues have been brainstormed, broadly discuss the following:

- How important do they think it is for people to manage these issues?
- How much personal responsibility do they think people have for managing these issues?
- How easy/difficult would they say it is to manage these issues overall?

5	Detailed exploration of concerns	50 minutes

From brainstorm, identify key issues/concerns for further exploration. Where relevant, tie these in to the specific issues below in bold. Where specific issues are not raised spontaneously, explore these last by using scenarios and the questions below, as well as the specific prompts listed for each under the bold headings.

- For each identified, explore:
  - What is the issue?
  - Why might people be worried about this?
  - Who might this issue affect?
  - When do they think this issue might be relevant?
  - How serious do they think this issue is?
  - How can they see the issue playing out in an everyday scenario?
  - What could individuals do to manage this concern?
    - How would this work?
    - What impact would individual action have?
    - How effective would this action be?
    - How likely is it that people would do this?
  - What might industry be able to do to help manage this concern?
    - How would this work?
    - What impact would it have?
    - How effective would industry action be?
  - What could the government do?
    - How would this work?
    - What impact would it have?
    - How effective would government action be?
  - Who do they think is ultimately responsible for this? (Individual vs. industry vs. govt)

Specific issue: community standards

Scenarios A and B

- Do people use classifications and ratings in the manner described?
- How do people determine the nature of content online?
- How important is it for people to be able to determine the nature of content online?
- How important is it for children and young people to be protected when online?
- How important is it for material online to reflect community standards?
- Do they think about user-generated content in the same way as professional content?
- Should user-generated content be treated in the same way as professional content?
- Do they feel that people know enough about this to make informed choices online?
- How important is consumer information and advice in these situations?

Specific issue: news and current affairs

Scenario C

- How do people find sources of news and current affairs?
- Why do people use the sources they do?
- How important do they think it is for the community to have access to diverse views and choices?
- How important are accuracy and transparency in news?
- How important is the availability of local news?
- How worried are they about the info they receive from media being influenced by advertising?
- How confident do people feel in selecting news and information services that they trust and regard as credible?

Specific issue: Australian content

No scenario. The issue is simply Australian content being available on a range of platforms.

- How important is it to them that high quality Australian content be available? Why?
- What role can they see the online environment playing in making Australian content more accessible?

Specific issue: Privacy and consumer protection/empowerment

Scenarios D and E

- What issues like this have they experienced online themselves?
- What sorts of things do they think compromise a user's privacy? (Ensure focus is on media and not e-commerce)
- What are they confident managing online as far as their privacy goes?
- What are they less confident about?
- Do they feel like they know enough about this area?
- Do they think that materials or information might be helpful for people? What information?

6	Government regulation and complaints	10 minutes

Explain that we would like to finish by briefly talking about government regulation and complaints processes.

- What do they know about government or industry rules around media that exist today?
- Are they aware of any specific rules?
- How important do they think government and industry rules are?
- What would they like to see happen in the future as far as government/industry rules for information online and on smartphones etc?
- What role do they think the government/industry has to play around user-generated content?
- Are they aware of any existing complaints mechanisms?
- How important do they think that a complaints mechanism is?
- For what types of content do they think a complaints process might be needed?
- What are their expectations around being able to complain in an online environment?
- How do they think complaints handling might differ in the following situations:
    - When downloading video from Channel 9 online
    - When downloading content from overseas
    - When viewing video footage from Google/YouTube
- How might an online complaints mechanism work?

Appendix F—Quantitative questionnaire

Digital Australians Project for the ACMA
GfK Blue Moon Project 6865
FINAL Questionnaire (v12 5/07/11) ONLINE SURVEY

n=1,250 completes
Target: General population aged 18+
Quotas on age, gender, state and internet usage as below
Quotas are not interlocking

Quota	Segment	Sample proportion	Sample size
Age	18–29	21%	n = 261
	30–44	29%	n = 359
	45–54	18%	n = 229
	55+	32%	n = 401
Gender	Male	49%	n = 613
	Female	51%	n = 637
State	NSW/ACT	35%	n = 438
	VIC/TAS	27%	n = 337
	QLD	20%	n = 250
	WA	10%	n = 125
	SA/NT	8%	n = 100
Frequency of internet* use	Light (up to 7hrs/ wk)	29%	368
	Medium (7–15hrs/ wk)	35%	433
	Heavy (over 15hrs/ wk)	36%	449
TOTAL		**100%**	**n = 1,250**

*Internet use includes accessing the internet on any device (e.g. TV screen, computer, laptop or notebook, tablet, smart phone or other mobile device)

The sample is to be drawn from Metro / non-Metro across all States and territories in line with ABS population estimates from 2006 census.

PROGRAMMING NOTES

- Text in normal script is to appear on screen.
- Where emphasis is required for respondents, this is shown with underlines.
- Text in BOLD CAPITALS is a programming instruction and is not to appear on screen.
- Code numbers are used on this q'aire, however they are not to appear on the respondent screen – they are there for database set up only. Respondents will use check boxes, radio buttons, etc.
- Question numbers are used on this q'aire, however they are not to appear on the respondent screen – they are for database set up only.
- Respondents not to be able to go back – they can only go forward in the survey.
- Respondents should complete the survey in one go (not be able to suspend and go back to it at a later time)
- Screen to have 'completion meter' to show progress
- All questions must be answered. If respondent tries to advance to the next page, a reminder message to come up to prompt missing response data
- Each question on a new screen unless indicated. Indicated here with rules between each screen.
- Respondent 'right mouse click' to be disabled – respondents not to have the ability to copy product shots, ad pictures or MPEGs used in the research.

+++===+++

OPENING SCREEN AT LOG IN

Thank you for agreeing to take part in this survey.

This research is being conducted for the Australian Communications and Media Authority to understand people's usage of and opinions about different kinds of media. This is a very important survey and your opinions really will count.

The information and opinions you provide will be used only for research purposes, and your responses will be anonymous.

Depending on your answers, the survey should take around 15 minutes to complete. A progress indicator will appear on the screen to show your progress through the survey.

+++===+++

INSTRUCTIONS SCREEN

Before we start just a few simple instructions on completing this survey.

Instructions for each question will appear on each screen. Most questions simply ask you to click in the appropriate box, or boxes, corresponding to your answer.

After answering each question, a button at the bottom of the screen will take you to the next question.

Please consider your answers carefully; you cannot go back during the survey. Please DO NOT use the 'back' button on your internet browser.

Please stay in the survey until you are finished, do not switch out to other windows. Should you have any technical difficulties through the survey, you can contact our helpdesk on XXXXXXX.

+++===+++

SECTION A: SCREENER QUESTIONS

A1 **ASK ALL**
Are you... **S/R**

Male	01	CONTINUE: CHECK QUOTAS
Female	02	CONTINUE: CHECK QUOTAS

A2 **ASK ALL**
How old are you? **S/R**

PROG NOTE: RECORD AGE IN YEARS AND AUTO CODE TO:

18–29	01	CONTINUE: CHECK QUOTAS
30–44	02	CONTINUE: CHECK QUOTAS
45–54	03	CONTINUE: CHECK QUOTAS
55+	04	CONTINUE: CHECK QUOTAS

A3 **ASK ALL**
In which state or territory do you currently live? **S/R**

Sydney	01	CONTINUE: CHECK QUOTAS
Rest of New South Wales	02	
Melbourne	03	CONTINUE: CHECK QUOTAS
Rest of Victoria	04	
Brisbane	05	CONTINUE: CHECK QUOTAS
Rest of Queensland	06	
Perth	07	CONTINUE: CHECK QUOTAS
Rest of Western Australia	08	
Adelaide	09	CONTINUE: CHECK QUOTAS
Rest of South Australia	10	
Hobart	11	CONTINUE: CHECK QUOTAS
Rest of Tasmania	12	
Australian Capital Territory	13	CONTINUE: CHECK QUOTAS
Northern Territory	14	CONTINUE: CHECK QUOTAS

A4 **ASK ALL**
Do you have any dependent children (under the age of 18) currently living with you at your house? **S/R**

Yes	01
No	02

A5 **ASK THOSE WITH CHILDREN AT HOME (CODE 01 ON A4)**
Roughly how old are those children? **M/R**

Under 2 years	01
2–less than 5 years old	02
5–less than 8 years old	03
8–less than 13 years old	04
13–less than 15 years old	05
15–less than 18 years old	06
I'd rather not say	99

A6 **ASK ALL**
In total in an average week, how many hours would you say you spend on the internet for personal use (i.e. not including work-related use)? Please enter nearest whole number of hours: **S/R**

Note: this includes accessing the internet on any device (e.g. internet-enabled TV screen, computer, laptop or notebook, tablet computer, smart phone or other mobile device etc)

PROG NOTE: RECORD ACTUAL HOURS AND AUTO CODE TO:

Up to 7 hours per week	01	CONTINUE: CHECK QUOTAS
Between 7 and 15 hours per week	02	CONTINUE: CHECK QUOTAS
Over 15 hours per week	03	CONTINUE: CHECK QUOTAS

+++===+++

TERMINATION / QUOTA FULL SCREEN:

Thank you for agreeing to participate in this survey. Unfortunately, we already have enough respondents from this category.

+++===+++

SECTION B: USAGE AND BEHAVIOUR

B1 **ASK ALL**

In the past month, which of the following have you done? **M/R RANDOMISE**

Watched free to air television (not online)	01
Watched pay TV (e.g. Foxtel, Austar) (not online)	02
Visited a website of a news organisation	03
Visited a TV broadcaster's or radio station's website (but not to watch catch-up TV over the internet)	04
Accessed the news though a social media website (e.g. Facebook, Twitter, MySpace, Bebo – not YouTube)	05
Watched video content (video clips etc.) through a social media website such as Facebook	06
Undertaken other social networking activities, (e.g. browsing others' profiles, staying in touch with friends)	14
Watched catch-up TV over the internet (e.g. iView, Plus7, FIXPlay, etc)	07
Watched an IPTV service (e.g. FetchTV, etc)	08
Watched video content that you downloaded from the internet from sites like YouTube?	09
Watched video content that you downloaded from the internet from sites like BitTorrent or Pirate Bay or other peer-to-peer networks?	10
Listened to the radio (not online)	11
Listened to an internet radio service	12
Played games on the internet (online games)	13
Created and uploaded video content to the internet (YouTube etc.)	15
None of these	90

B1b **ASK THOSE DONE ANYTHING IN PAST MONTH (NOT CODE 90 ON B1)**

Approximately how much time have you spent doing each of the following in the past week? **S/R PER ITEM, PRESENT ONLY THOSE SELECTED AT B1**

	Haven't done this in the past week	Less than an hour	1–9 hours	10–19 hours	20–29 hours	30 hours or more
1. Watched free to air television (not online)	01	02	03	04	05	06
2. Watched pay TV (e.g. Foxtel, Austar) (not online)	01	02	03	04	05	06

B1a **ASK THOSE DONE ANYTHING IN PAST MONTH (NOT CODE 90 ON B1)**
Approximately how much time have you spent doing each of the following in the past week? **S/R PER ITEM, PRESENT ONLY THOSE SELECTED AT B1**

	Haven't done this in the past week	Less than an hour	1–4 hours	5–9 hours	10–14 hours	15 hours or more
3. Visited a website of a news organisation	01	02	03	04	05	06
4. Visited a TV broadcaster's or radio station's website (but not to watch catch-up TV over the internet)	01	02	03	04	05	06
5. Accessed the news though a social media website (e.g. Facebook, Twitter, MySpace, Bebo – not YouTube)	01	02	03	04	05	06
6. Watched video content (video clips etc.) through a social media website such as Facebook	01	02	03	04	05	06
14. Undertaken other social networking activities, (e.g. browsing others' profiles, staying in touch with friends)	01	02	03	04	05	06
7. Watched catch-up TV over the internet (e.g. iView, Plus7, FIXPlay, etc)	01	02	03	04	05	06
8. Watched an IPTV service (e.g. FetchTV, etc)	01	02	03	04	05	06
9. Watched video content that you downloaded from sites like YouTube?	01	02	03	04	05	06
10. Watched video content from the internet that you downloaded from sites like BitTorrent or Pirate Bay or other peer-to-peer networks	01	02	03	04	05	06
11. Listened to the radio (not online)	01	02	03	04	05	06
12. Listened to an internet radio service	01	02	03	04	05	06
13. Played games on the internet (online games)	01	02	03	04	05	06
15. Created and uploaded video content to the internet (YouTube etc.)	01	02	03	04	05	06

B2 **ASK THOSE WATCHED TV (ITEM 1 OR 2 = CODES 02-06 ON B1b)**
You mentioned earlier that you have watched television in the past week. Approximately how much time have you spent watching the following types of programs on TV over the past week? **S/R PER ITEM, RANDOMISE**

	Haven't watched	Less than an hour	1–4 hours	5–9 hours	10–14 hours	15 hours or more
1. News	01	02	03	04	05	06
2. Current affairs (e.g. Today Tonight, 7:30 Report, 60 Minutes etc.)	01	02	03	04	05	06
3. Drama	01	02	03	04	05	06
4. Sport	01	02	03	04	05	06
5. Other entertainment (e.g. lifestyle, comedy, reality TV infotainment etc.)	01	02	03	04	05	06

B3 **ASK THOSE WATCHED NEWS (CODES 02-06 ON ITEM 1 B2)**
On which of the following channels have you watched most of your news programs in the past week? **S/R RANDOMISE**

Commercial TV (7, Nine, Ten)	01
ABC or SBS television	02
Sky News Australia*	03
Fox News, BBC World News, CNBC or CNN*	04
None of these	90

*** PROG. NOTE: ONLY PRESENT CODES 03 AND 04 IF WATCHED PTV (CODE 02 ON B1)**

B6 **ASK THOSE VISITED NEWS WEBSITE (ITEM 1 = CODES 02-06 ON B1a)**
You mentioned earlier that you have visited website(s) of a news organisation(s). Which, if any, of the following news websites have you visited most in the past week? **S/R**

Australian newspaper websites (SMH, Age, Australian, Telegraph etc.)	01
Other Australian news websites (AAP, NineMSN, Yahoo7, News.com.au, ABC News etc.)	02
International news websites (Reuters, Associated Press, BBC, New York Times, Guardian, etc.)	03
None of these	90

B8 **ASK THOSE VISITED NEWS WEBSITE (ITEM 1 CODES 02-06 ON B1a)**
Which of the following devices did you use most to access online news sites in the past week? **S/R RANDOMISE**

Desktop computer	01
Laptop	02
Mobile phone	03
Tablet computer (e.g. iPad)	04
Other **(SPECIFY)**	05

B11 **ASK THOSE VISITED BROADCASTER WEBSITE (CODE 4 ON B1)**
You mentioned earlier that you have visited website(s) of TV broadcasters and / or radio stations (but not to watch catch-up TV over the internet) in the past month. Did you visit the website(s) of any Australian TV broadcasters and / or radio stations in the past month? **S/R**

Yes, I did	01
No, I only visited the websites of international broadcasters / radio stations	02

B13 **ASK IF VISITED AUSTRALIAN WEBSITES (CODE 01 ON B11)**
What was your main reason for visiting these sites in the past month? **S/R**

To get news	01
To get program schedule information	02
To get additional information about a program or feature	03
To get information about competitions	04
To leave a comment	05
Other **(SPECIFY)**	06

B15 **ASK IF VISITED BROADCASTER WEBSITES (CODE 04 ON B1)**
Which of these devices did you use the most to access website(s) of TV broadcasters and/or radio stations in the past month? **S/R RANDOMISE**

Desktop computer	01
Laptop	02
Mobile phone	03
Tablet computer (e.g. iPad)	04
Other **(SPECIFY)**	05

B17 **ASK THOSE ACCESSED NEWS THROUGH SOCIAL MEDIA (ITEM 5 = CODES 02-06 ON B1a)**
Which, if any, of the following social media website(s) have you used to access news stories over the past week? **M/R RANDOMISE**

Bebo	01
Facebook	02
Flixter	03
MySpace	04
Tumblr	05
Twitter	06
Windows Live Spaces (Formerly MSN space)	07
Yahoo! 360	08
Other websites that involve chat, profiles, social activities **(SPECIFY)**	90

B19 **ASK THOSE ACCESSED NEWS THROUGH SOCIAL MEDIA (ITEM 5 = CODES 02-06 ON B1a)**
Earlier you indicated that you had accessed the news through a social media website (e.g. Facebook, Twitter, MySpace, Bebo – not YouTube). Which of these devices did you use the most to access news stories on or through social media website(s) in the past week? **S/R RANDOMISE**

Desktop computer	01
Laptop	02
Mobile phone	03
Tablet computer (e.g. iPad)	04
Other **(SPECIFY)**	05

B21 **ASK THOSE ACCESSED VIDEO CONTENT THROUGH SOCIAL MEDIA (CODE 6 ON B1)**
You mentioned earlier that you have accessed video content through social media websites in the past month. Which of the following social media website(s) have you used to access video content over the past month? **M/R RANDOMISE**

Bebo	01
Facebook	02
Flixter	03
MySpace	04
Tumblr	05
Windows Live Spaces (Formerly MSN space)	07
Yahoo! 360	08
Other websites that involve chat, profiles, social activities **(SPECIFY)**	90

B22 **ASK THOSE ACCESSED VIDEO CONTENT THROUGH SOCIAL MEDIA (CODE 6 ON B1)**
Was the video content that you accessed through social media in the past month mainly professionally-generated OR user-generated?

Mainly professionally-generated	01
Mainly user-generated	02
About the same amount of each	03

B24 **ASK THOSE ACCESSED VIDEO CONTENT THROUGH SOCIAL MEDIA (CODE 6 ON B1)**
Which of these devices did you use the most to access video content on or through social media website(s) in the past month? **S/R RANDOMISE**

Desktop computer	01
Laptop	02
Mobile phone	03
Tablet computer (e.g. iPad)	04
Other **(SPECIFY)**	05

B26 **ASK THOSE WATCHED CATCH UP TV (CODE 7 ON B1)**
You mentioned earlier that you have watched catch-up TV. Which of the following catch-up TV services have you used in the past month? **M/R RANDOMISE**

ABC iView	01
SBS	02
Channel Seven's Plus7	03
Nine's FIXPlay	04
Channel 10	05
Other **(SPECIFY)**	06

B28 **ASK THOSE WATCHING CATCH-UP TV (CODE 7 ON B1)**
Which of these devices did you use the most to watch catch-up TV on the internet over the past month? **S/R RANDOMISE**

Desktop computer	01
Laptop	02
Mobile phone	03
Tablet computer (e.g. iPad)	04
Internet-connected TV or set top box	06
Other **(SPECIFY)**	05

B29 **ASK THOSE WATCHED IPTV (CODE 8 ON B1)**
You mentioned earlier that you have watched IPTV. Which of the following IPTV services have you used in the past month? **M/R RANDOMISE**

FetchTV	01
TPG	02
MyiTV	03
Other **(SPECIFY)**	06

B32 **ASK THOSE WATCHING IPTV (CODE 8 ON B1)**
Which of these devices did you use the most to watch IPTV over the past month? **S/R RANDOMISE**

Desktop computer	01
Laptop	02
Mobile phone	03
Tablet computer (e.g. iPad)	04
Games Console (e.g. PS3, Xbox etc)	05
Internet-connected TV or set top box	06
Other **(SPECIFY)**	07

B33 **ASK THOSE DOWNLOADED VIDEO CONTENT (CODE 9 ON B1)**
Earlier you indicated that you have watched video content that you downloaded from the internet from sites like YouTube.
Which of the following website(s) have you used to download video content from the internet over the past month? **M/R RANDOMISE**

Hulu	01
Netflix	02
YouTube	03
iTunes	04
Other **(SPECIFY)**	90

B34 **ASK IF YOUTUBE OR OTHER (CODES 03 OR 90 ON B33)**
Was the content you downloaded mainly professionally generated or user-generated?
S/R PER ITEM ONLY PRESENT THOSE ITEMS SELECTED AT B33

	Mainly professionally generated content	Mainly user-generated content	About the same amount of each
YouTube	01	02	03
Other **(SPECIFY)**	01	02	03

B36 **ASK THOSE DOWNLOADED VIDEO CONTENT (CODE 9 ON B1)**
Which of these devices did you use the <u>most</u> to watch video content that you downloaded from the internet from sites like YouTube in the past month? **S/R RANDOMISE**

Desktop computer	01
Laptop	02
Mobile phone	03
Tablet computer (e.g. iPad)	04
iPod or similar device	05
Games Console (e.g. PS3, Xbox etc)	06
Internet-connected TV or set top box	07
Other **(SPECIFY)**	08

B38 **ASK THOSE USED P2P (CODE 10 ON B1)**
Earlier you indicated that you have watched video content from the internet that you downloaded from sites like BitTorrent or Pirate Bay or other peer-to-peer networks. Which of these devices did you use the <u>most</u> to watch video content that you have downloaded using a peer-to-peer network in the past month? **S/R RANDOMISE**

Desktop computer	01
Laptop	02
Mobile phone	03
Tablet computer (e.g. iPad)	04
iPod or similar device	05
Games Console (e.g. PS3, Xbox etc)	06
Internet-connected TV or set top box	07
Other **(SPECIFY)**	08

B39 **ASK THOSE LISTENED TO RADIO (ITEM 11 = CODES 02-06 ON B1a)**
Earlier you indicated that you have listened to the radio. Which of the following have you listened to most in the past week? **S/R RANDOMISE**

News and weather	01
Talkback	02
Music	03
Other **(SPECIFY)**	05

B40 **ASK THOSE LISTENED TO INTERNET RADIO (ITEM 12 = CODES 02-06 ON B1a)**
Earlier you indicated that you have listened to the radio on the internet. Which of the following have you listened to most in the past week? **S/R RANDOMISE**

News and weather	01
Talkback	02
Music	03
Other **(SPECIFY)**	05

B42 **ASK THOSE LISTENED TO INTERNET RADIO (ITEM 12 = CODES 02-06 ON B1a)**
Which of these devices did you use the most to listen to the radio on the internet in the past week? **S/R RANDOMISE**

Desktop computer	01
Laptop	02
Mobile phone	03
Tablet computer (e.g. iPad)	04
Other **(SPECIFY)**	05

B44 **ASK THOSE PLAYING ONLINE GAMES (ITEM 13 = CODES 02-06 ON B1a)**
Earlier you indicated that you have played online games. Which of these devices did you use the most to play online games on the internet in the past week? **S/R PRESENT THOSE SELECTED AT B44**

Desktop computer	01
Laptop	02
Mobile phone	03
Tablet computer (e.g. iPad)	04
iPod or similar device	05
Games Console (e.g. PS3, Xbox etc)	06
Other **(SPECIFY)**	07

B45 **ASK ALL**
Thinking generally about your usage of different devices to access media; which one of the following statements best describes your usage of and attitudes towards different media? **S/R RANDOMISE**

I access most information online including a lot of user-generated and on-demand content. My experiences with online media have been very positive.	01	CODE AS "EXTREME ADVOCATE"
I'm generally positive about the way digital media is evolving and I use a range of traditional media and online sources for information. But I am quite cautious about the information I share about myself online.	02	CODE AS "CAUTIOUS ADVOCATE"
I use a lot of online media and some social networking. I think about the advantages and disadvantages, and despite the negatives it is important for me to be involved.	03	CODE AS "INFORMED REALIST"
While I feel slightly overwhelmed for choice, I go online for some things but I still get most of my information from traditional media (TV, newspapers, radio) and don't get too involved in the social networking side of things.	04	CODE AS "RELUCTANT PARTICIPANT"
I get most of my information from traditional media (TV, newspapers, radio) and while I only use online media in a limited way I think it is an important part of the future for my kids and to keep up.	05	CODE AS "POSITIVE PARENT"
I rarely access online media, and I'm not interested in being more involved myself.	06	CODE AS "DISENGAGED BYSTANDER"

SECTION C: NEWS AND CURRENT AFFAIRS

C1 **ASK ALL**
Which of the following would you say is your main source of news? That is to say, which of these do you use the most? **S/R RANDOMISE**

Commercial TV (7, Nine, Ten) **[B3]**	01
ABC or SBS television **[B3]**	02
Sky News Australia **[B3]**	03
Fox News, BBC World News, CNBC or CNN **[B3]**	04
Australian newspaper websites (SMH, Age, Australian, Telegraph etc.) **[B6]**	05
Other Australian news websites (AAP, NineMSN, Yahoo7, News.com.au, ABC News etc.) **[B6]**	06
International news websites (Reuters, Associated Press, BBC, New York Times, Guardian, etc.) **[B6]**	07
Local newspaper (not online) **[ALL]**	08
Australian metro/national newspaper (not online) **[ALL]**	09
International newspaper (not online) **[ALL]**	10
Social media websites (e.g. Facebook, Tumblr, Twitter, Yahoo!, etc) **[ANY CODE 01-08 SELECTED AT B17]**	11
Radio **[CODE 01 ON B39]**	12
None of these	90

*** PROG. NOTE: ONLY PRESENT CODES IF SELECTED AT EARLIER QUESTIONS NOTED IN BRACKETS.**

C2 **ASK THOSE WHO GET NEWS FROM ANYWHERE (I.E. NOT CODE 90 ON C1)**
What are the main reasons you mostly get your news from **[RESPONSE TO C1]** rather than anywhere else? **M/R RANDOMISE**

It is more up-to-date than other sources	01
It is more relevant to me and my interests	02
It is reliable (I trust it is accurate)	03
It is more detailed	04
It represents a variety of views	05
I can look at it wherever I am (it is convenient)	06
It is independent (it doesn't have an agenda)	07
Habit – this is where I have always got my news from	08
I can find particular news stories that interest me	09
I can quickly get the main news stories of the day	10
I am familiar with the 'brand' and am most comfortable with this source	11
Other **(SPECIFY)**	90

SECTION D ATTITUDINAL QUESTIONS BY CATEGORY

D1 **ASK ALL**
News can be obtained from a number of different sources including TV, internet and newspapers.

Please indicate how accurate you think news stories from each of the following sources are in general, **S/R PER ITEM, RANDOMISE ITEMS**

	Never accurate	Rarely accurate	Sometimes accurate	Usually accurate	Always accurate	Don't know
News stories on Commercial TV	01	02	03	04	05	06
News stories on ABC / SBS television	01	02	03	04	05	06
News stories on newspaper websites	01	02	03	04	05	06
Blogs on news sites	01	02	03	04	05	06
News stories on a social media website (e.g. Facebook, Twitter, MySpace, Bebo)	01	02	03	04	05	06

D2 **ASK ALL**
Please indicate to what extent you believe each of the following sources of news give both sides of a story: **S/R PER ITEM, RANDOMISE ITEMS**

	Never	Rarely	Sometimes	Usually	Always	Don't know
News stories on Commercial TV	01	02	03	04	05	06
News stories on ABC / SBS television	01	02	03	04	05	06
News stories on newspaper websites	01	02	03	04	05	06
Blogs on news sites	01	02	03	04	05	06
News stories on a social media website (e.g. Facebook, Twitter, MySpace, Bebo)	01	02	03	04	05	06

D4 **ASK ALL**
Below are some statements that other people have made about news programs on TV and the internet. Please indicate to what extent you agree or disagree with each statement: **S/R PER ITEM, RANDOMISE ITEMS**

ACCURACY OF NEWS	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
Websites of Australian television broadcasters should have the same rules about accuracy and fairness as their news items shown on television	01	02	03	04	05
On the internet, Australian news organisations should take the time to check the facts before publishing a news story	01	02	03	04	05
There should be some way for me to make a formal complaint about the accuracy of online news content	01	02	03	04	05
It is just as important to be able to make a clear distinction between advertising and other content on the websites of Australian broadcasters as on radio and TV	01	02	03	04	05
On the news on television, there should be warnings that prepare me for graphic photos or video material	01	02	03	04	05
On news organisations' websites on the internet there should be warnings that prepare me for graphic photos or video material	01	02	03	04	05

D5 **ASK ALL**
Please indicate to what extent you agree or disagree with each of the following statements: **SR PER ITEM, RANDOMISE**

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
The internet is very influential in shaping my view about political and other important issues	01	02	03	04	05
Television is very influential in shaping my view about political and other important issues	01	02	03	04	05
Radio is very influential in shaping my view about political and other important issues	01	02	03	04	05

SECTION E: COMMUNITY STANDARDS / CONTENT INFORMATION/PROTECTION OF CHILDREN

PROG. NOTE: RANDOMISE QUESTIONS E1 AND E3

E1 **ASK ALL**
Do you have any concerns about what is shown on TV? **S/R**

Yes	01
No	02

E2 **ASK IF HAVE CONCERNS (CODE 01 ON E1)**
Which of the following are you concerned about on TV? Please select the three issues that you are most concerned about (you may pick less than three if appropriate) **M/R RANDOMISE – RESPONDENT TO SELECT 0-3 RESPONSES**

Violence	01
Sexual content	02
Nudity	03
Coarse language	04
Drug use/drug references	05
Themes like racism, suicide and euthanasia	06
Not enough program choice	07
Too many reality programs	08
Too many American/British programs	09
Programs where people are made fun of or tricked	10
Too much sport	11
Too many advertising breaks	12
Other (specify)	91

E3 **ASK ALL**
Do you have any concerns about what is on the internet?

[Note that access can be on any device connected to the internet: a desktop computer, a laptop computer or netbook, a mobile phone (e.g. iPhone or other 'smart phone'), an iPod or similar device, a tablet computer (e.g. an iPad), or an internet-enabled television] **S/R**

Yes	01
No	02

E4 **IF AT ALL CONCERNED (CODES 02-05 ON E3)**
Which of the following are you concerned about on the internet? Please select the three issues that you are most concerned about (you may pick less than three if appropriate) **M/R RANDOMISE – RESPONDENT TO SELECT 0-3 RESPONSES**

Violence	01
Sexual content	02
Nudity	03
Coarse language	04
Drug use/drug references	05
Themes like racism, suicide and euthanasia	06
Websites showing abuse of children	07
Websites instructing on committing crimes	08
Poor quality content	09
Content where people are made fun of or tricked	10
Too much advertising	11
Gambling on the internet	12
Websites instructing how to commit suicide/ self-harm	13
Personal information that companies/governments may hold about me	14
Identity fraud/others getting access to my personal details	15
Computer viruses/security	16
Other (specify)	

E5 **ASK ALL**
Are there any rules or guidelines that currently apply to content broadcast on television, on the radio or available on the internet? **S/R PER ITEM RANDOMISE**

	Yes there are rules and guidelines	No, there are none	Don't know, not sure
Content broadcast on free-to-air television	01	02	03
Content on Pay TV (e.g. Foxtel. Austar)	01	02	03
Content available on the internet	01	02	03
Content broadcast on the radio	01	02	03

SECTION F: CONSUMER INFORMATION

F1 **ASK ALL**
Broadcast television programs, and some content on the internet includes information such as classification, ratings or other information to help people decide whether content is suitable for them and their families.

How important is it to you to have this type of information available for you personally to decide whether content is suitable for you. When you are…? **S/R PER ITEM, SHOW ONLY THOSE ACTIVITIES THAT RESPONDENTS REPORT DOING, RANDOMISE**

	Not at all important	Not very important	Somewhat important	Quite important	Very important
Watching free-to-air television **[CODE 01 ON B1]**	01	02	03	04	05
Watching pay TV (e.g. Foxtel, Austar) **[CODE 02 ON B1]**	01	02	03	04	05
Watching TV programs and movies available on the internet **[CODE 07 OR 08 OR 10 ON B1]**	01	02	03	04	05
Watching user-generated content (e.g. video clips) available on the internet **[CODE 06 OR 09 ON B1]**	01	02	03	04	05
Playing online games available on the internet **[CODE 13 ON B1]**	01	02	03	04	05

F2 **ASK THOSE WITH KIDS (CODE 01 ON A4)**
How important is it to you to have this type of information available for you to decide whether content is suitable for your child/children. When they are…? **S/R PER ITEM, SHOW ONLY THOSE ACTIVITIES THAT RESPONDENTS REPORT DOING, RANDOMISE**

	Not at all important	Not very important	Somewhat important	Quite important	Very important	Not applicable – My child does not do this activity
Watching free-to-air television	01	02	03	04	05	06
Watching pay TV (e.g. Foxtel, Austar)	01	02	03	04	05	06
Watching TV programs and movies available on the internet	01	02	03	04	05	06
Watching user-generated content (e.g. video clips) available on the internet	01	02	03	04	05	06
Playing online games available on the internet	01	02	03	04	05	06

G1 **ASK ALL**
In your opinion, which of the following groups are responsible for preventing children (under the age of 18) from seeing content with too much sex or violence <u>on the internet</u>? **M/R RANDOMISE**

Parents	01
The industry / content providers / broadcasters	02
The government	03
Someone else **SPECIFY**	04
No-one has responsibility	05

G2 **ASK THOSE SELECTING CODES 01-04 AT G1**
Who do you consider to be <u>most responsible</u> for preventing children from seeing content with too much sex or violence <u>on the internet</u>? **S/R RETAIN ORDER FROM G1**

Parents	01
The industry / content providers / broadcasters	02
The government	03
Someone else **SPECIFY**	04

SECTION H: AUSTRALIAN CONTENT

H1 **ASK ALL**

Please indicate to what extent you think it is important for the Australian Government to put in place rules to ensure that high-quality Australian content is available on television and the internet: **S/R PER ITEM, RANDOMISE**

	Not at all important	Not very important	Somewhat important	Quite important	Very important
On TV	01	02	03	04	05
On the internet	01	02	03	04	05

SECTION I: DIGITAL MEDIA LITERACY

I1 **ASK ALL**
How confident would you say you are currently in your ability to manage the security of your personal information online? **S/R**

Not at all confident	01
Not very confident	02
Neither confident nor not confident	03
Fairly confident	04
Very confident	05

I2 **ASK ALL**
When accessing media content on the internet how confident are you that you are protected from computer viruses and other security threats? **S/R**

Not at all confident	01
Not very confident	02
Neither confident nor not confident	03
Fairly confident	04
Very confident	05

I3 **ASK ALL**
Which, if any, of the following would you be interested in learning more about? **M/R**
RANDOMISE

Using the internet safely	01
Managing my personal information online	02
Asking a website to remove content that breaches your privacy	03
Setting security controls/PIN numbers on your TV or set-top-box	04
Setting security controls/filters to block access to certain websites	05
Setting parental controls on mobile phones	06
Other **(SPECIFY)**	90

SECTION X: DEMOGRAPHICS

X1 **ASK ALL**
Finally some questions to check that we have surveyed a proper cross-section of the population.

Is a language other than English regularly spoken in your household? **S/R**

Yes	01
No	02

X3 **ASK ALL**
Which of the following best describes your total household income before tax? **S/R**

$ 0–$25,000	01
$25,001–$50,000	02
$50,001–$75,000	03
$75,001–$100,000	04
$100,001–$150,000	05
$150,001–$200,000	06
$200,001+	07
I'd rather not say	98

X4 **ASK ALL**
To help ensure we have a representative sample, please indicate the highest level of education you personally have completed? **S/R**

Secondary school	01
A diploma or certificate from a college or TAFE	02
A degree or diploma from a university	03
Or, none of these	04
I'd rather not say	98

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That is the end of the survey, thank you for your time.

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