

researchacma
Evidence
that informs

Methodology

ACMA Consumer Survey 2020: *Snapshot—Trends in online behaviour and technology usage*

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General guidelines for reading the snapshot

- > All percentages are based on weighted survey estimates.
- > Base sizes are shown as the unweighted number of respondents.
- > All percentages have been rounded to the nearest whole number. As a result, there may be discrepancies between sums of the component items in a table or chart and the total.
- > The research often asked about ‘the last six months’—this is the period prior to when data was collected. For the 2020 survey, this was from approximately December 2019 to June 2020.
- > Some questions have been filtered depending on the respondent’s previous responses (for example, a question asked only of those who undertook an internet activity in the past 6 months). This is noted in descriptive language in the report and below as either ‘All respondents’ in the table or ‘Base’ in the table notes. Care needs to be taken when interpreting the results, so that the data is read in the correct context.
- > Some of the questions invited a multiple response, so total responses may sum to more than 100%.
- > In some cases, ‘don’t know’ or other responses with only small levels of response are not shown—these are noted in the tables below.
- > Categories with low sample sizes (less than n=100 interviews) are not shown.
- > All results shown have been tested for statistical significance at the 95% confidence level.
- > Statistically significant changes/differences between groups are identified with red and green arrows as follows:
 - > green arrows (▲): statistically significant increase to the prior year/other sub-groups at the 95% confidence level
 - > red arrows (▼): statistically significant decrease to the prior year/other sub-groups at the 95% confidence level.

About the research

The ACMA annual consumer survey provides an information base on consumer behaviour, adoption of and attitudes towards media and communications services, and the effectiveness of existing regulatory interventions. This research is part of the [ACMA research program](#), which gathers evidence that informs our decisions as a regulator, and ensures we are up-to-date on market developments and consumer trends.

Data contained in the *Trends in online behaviour and technology usage* snapshot is from ACMA annual consumer surveys, collected from 2017 to 2020. This ACMA-commissioned research was undertaken by The Social Research Centre (SRC) using the SRC's probability-based Life in Australia™ (LinA) online panel. LinA includes people with and without internet access—those without internet access or who are not comfortable completing surveys online are able to complete surveys by phone instead.

The methodology adopted for the consumer surveys was a mixed-mode approach, comprising online interviews with Australian adults and computer-aided phone interviews to reach the adult population who are not regularly online. The surveys were representative of the Australian population aged 18 years and over.

Table 1: ACMA consumer survey summary of key statistics, 2017, 2018, 2019 and 2020

	2017	2018	2019	2020
Total sample (n)	2,277	2,107	2,067	2,009
Online interviews (n)	1,965	1,842	1,824	1,913
Telephone interviews (n)	312	265	243	96
Field work date	16 May – 4 June	14–27 May	6–19 May	9–21 June
Average survey length	19.7 minutes	25.1 minutes	20 minutes	25 minutes

The tables below show the annual consumer survey research sample sizes for the charts used in the report.

Devices used to go online

Table 2: Research sample sizes for Australian adults who accessed the internet in the past 6 months, 2019 and 2020

	May 2019	Jun 2020
All respondents	2,067	2,009

QD5. Which of the following devices have you used to access the internet in the past 6 months, for personal use. Desktop computer; Laptop computer; Mobile phone; Tablet like an iPad; e-reader like Amazon (Kindle); Kobo; Portable games console for example a PSP or Nintendo Switch; Other games console for example Xbox, PlayStation or Wii; Television or Smart TV; Personal video recorder (PVR) such as Foxtel IQ, Fetch or similar device; Digital media player such as Chromecast, Apple TV or Fetch; Voice controlled smart speakers such as Google Home, Amazon Echo or Apple HomePod; Something else (Please specify); None/don't use internet (EXCLUSIVE).

Table 3: Research sample sizes for Australian adults who used a device to go online and number of types of devices used, 2019 and 2020

	May 2019	Jun 2020
All respondents	1,992	1,984

'Don't know' and 'Refused' responses are excluded from analysis.

QD5. Which of the following devices have you used to access the internet in the past 6 months, for personal use? See Table 2 notes for response options.

QD8. Below is a range of internet-based activities. Please indicate whether or not you have done any of the following in the past 6 months at home or elsewhere. See Table 6 for response options.

Smart devices connected to the internet

Table 4: Research sample sizes for Australians who had used an internet-connected smart device and number of types of smart devices, 2019 and 2020

	May 2019	Jun 2020
All respondents	2,067	2,009

QD7. Which of the following smart devices do you have connected to the internet? This excludes computers, tablets and mobile phones. Smart TV; Smart fridge; Wearable devices such as smart watches, or a FitBit; Smart lighting; Security cameras; Security system; Smart dishwasher; Heating or cooling system; Voice controlled smart speakers such as Google Home, Amazon Echo or Apple HomePod; GPS tracking tag or device; Something else (Please specify); None/don't use internet (EXCLUSIVE).

QA11. What type of television(s) do you have in your home? Smart TV; Standard TV.

Online activities

Table 5: Research sample sizes for activities performed online in the past 6 months, 2019 and 2020

	May 2019	Jun 2020
All respondents	1,992	1,984

'Don't know' and 'Refused' responses are excluded from analysis.

Chart base: Australian adults who accessed the internet in the past 6 months for personal use.

QD8. Below is a range of internet-based activities. Please indicate whether or not you have done any of the following in the past 6 months at home or elsewhere. See Table 6 for response options.

Change in internet activities since COVID-19

Table 6: Research sample sizes for change in participation in online activities undertaken since COVID-19 restrictions were introduced in March 2020

	Jun 2020
Telehealth consultation with a doctor, physio or other medical professional, via video conferencing, phone or emails. Excludes veterinarians	771
Video conferencing or video calling via an app or web-based service such as Zoom	1,281
Working online from home	896
Studying online from home	556
Accessing news and current affairs online	1,691
Watching video content online such as subscription services, catch up TV, live streaming, or YouTube	1,728
Legal, financial or other professional consultation online (excluding medical)	253
Buying goods or services online	1,649
General web browsing or researching online*	1,908
Accessing audio content online such as internet radio, podcasts, Apple Music or Spotify	1,306
Sending or receiving email	1,947
Online gambling	138
Posting or engaging with content online such as clicking on 'like', posting comments, contributing to blogs or reviews or uploading photos or videos	1,384
Selling goods or services online	573
Purchasing lottery tickets online	358
Banking or paying bills online	1,786

*2019 wording was 'General web browsing or gathering information'.

Statements (for internet-based activity categories) reflect wording from the 2020 survey.

'Don't know' and 'Refused' responses are excluded from analysis.

Chart note: Labels for data less than 3% are not displayed in chart.

Chart base: Australian adults who participated in at least one internet activity in past 6 months and accessed the internet in the past 6 months for personal use.

QD8. Below is a range of internet-based activities. Please indicate whether or not you have done any of the following in the past 6 months at home or elsewhere. See Table 6 for response options.

QD17. Since the COVID-19 social and physical distancing restrictions were introduced in March 2020, how has your participation in the following activities changed or has it stayed about the same? It has decreased; It has stayed about the same; It has increased; First started this activity since March 2020; Don't know; Refused.

Table 7: Research sample sizes for change in participation in online activities since COVID-19 restrictions were introduced in March 2020, by age group, 2020

	18–54 years	55+ years
Working online from home	592	295
Accessing news and current affairs online	890	784
Watching video content online such as subscription services, catch up TV, live streaming or YouTube	929	782

Statements (for internet-based activity categories) reflect wording from the 2020 survey.

'Don't know' and 'Refused' responses are excluded from analysis.

Chart base: Australian adults who participated in at least one internet activity in past 6 months and accessed the internet in the past 6 months for personal use.

QD8. Below is a range of internet-based activities. Please indicate whether or not you have done any of the following in the past 6 months at home or elsewhere. See Table 6 for response options.

QD17. Since the COVID-19 social and physical distancing restrictions were introduced in March 2020, how has your participation in the following activities changed or has it stayed about the same? See Table 6 notes for response options.

Services used to communicate

Table 8: Research sample sizes for Australian adults who used communication services for personal purposes, 2017, 2018, 2019 and 2020

	Jun 2017	May 2018	May 2019	Jun 2020
All respondents	2,277	2,106	2,067	2,009

2017 wording was 'Messaging/calling app (i.e. Messenger, WhatsApp, Viber, Skype)', 2018–2020 wording was 'Used an app for messages, for example Messenger, WhatsApp, Skype'; 'Used an app for voice calls, for example Messenger, WhatsApp, Skype'.

QA1. In the past 6 months, which of the following communication services have you used for personal purposes? Landline telephone call at home; Mobile phone call; Texting (SMS) from a mobile phone; Public payphone; Used an app for social networking, for example Facebook, Twitter, Instagram and Snapchat; Email; Video calling from a mobile phone not including video calls made using an app; Fax; Used an app for messages, for example Messenger, WhatsApp, Skype; Used an app for video calls, for example Messenger, WhatsApp, Skype; Used an app for

voice calls, for example Messenger, WhatsApp, Skype; Don't know (EXCLUSIVE); Refused (EXCLUSIVE).

Table 9: Research sample sizes for Australian adults who used communication services for personal purposes by age group, 2019 and 2020

	May 2019	Jun 2020
18–44 years	644	654
45+ years	1,418	1,334

QA1. In the past 6 months, which of the following communication services have you used for personal purposes? See Table 8 notes for response options.

Use of communications apps and social networking

Table 10: Research sample sizes for Australian adults used a communication app, 2019 and 2020

	May 2019	Jun 2020
All respondents	1,992	1,984

Base: Australian adults who used a device to access the internet in the past 6 months for personal use.

QA1. In the past 6 months, which of the following communication services have you used for personal purposes? See Table 8 notes for response options.

Table 11: Research sample sizes for top communication apps used, 2019 and 2020

	May 2019	Jun 2020
All respondents	1,992	1,984

Base: Australian adults who used a device to access the internet in the past 6 months for personal use.

QE1. Which of the following apps, if any, have you used in the past 6 months to make voice calls, video calls or send messages? Apple iMessage; Facebook Messenger; FaceTime; Google Hangouts; Skype; SnapChat; Viber; WeChat; WhatsApp; Instagram; Zoom; HouseParty; Microsoft Teams; Webex; Slack; Some other app (Please specify), None/don't use apps to make voice calls, video calls or send messages (EXCLUSIVE); Don't know (EXCLUSIVE); Refused (EXCLUSIVE).

Table 12: Research sample sizes for those who used an app for social networking and changes in social networking sites used since COVID-19 restrictions were introduced in March 2020

	Jun 2020
Total—used app for social networking	1,394

'Don't know' and 'Refused' responses are excluded from analysis.

Base: Australian adults who used an app for social networking in the past 6 months.

QE2. What sites or apps have you used for social networking in the past 6 months? See Table 11 notes for response options (as selected from QE1).

QE3. Which social networking site or app do you use most often? See Table 11 notes for response options (as selected from QE1).

QE4. Since the COVID-19 social and physical distancing restrictions were introduced in March 2020, how has your participation in social networking changed or has it stayed about the same? It has decreased; It has stayed about the same; It has increased; First started this activity since March 2020; Don't know; Refused.