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.