

Better connections: How Australians want to hear from government

Results from the April 2014 quarterly survey



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Methodology

How Australians want to hear from government is part of Australia Post's *Better connections* research series.

These reports are developed using data from various sources, including the Australia Post Consumer Survey. This survey, conducted each quarter, measures attitudes and behaviour of Australians towards different communication channels. Australia Post uses Quality Online Research (QOR) to compose a panel of respondents that best represents the Australian population in terms of age, gender and geographic location.

In April 2014, the Australia Post Consumer Survey looked at how Australians prefer to receive government and other official communications, including political messages in the run-up to an election. The survey also asked which channels

people would prefer to use to vote in a referendum or take part in the next census.

Data was also drawn from the August 2013 and November 2013 Australia Post Consumer Surveys. Preferences for receiving rates notifications were taken from the August 2013 survey. In November 2013, readership of mail from federal, state or local government, and preferences for receiving promotional information from these institutions, was analysed.

Audience segments

Apart from analysing results according to gender, age, location and employment status, the following audience segments were identified within the total sample group:

 Youth	Under 25 years old.	Many university students or part-time workers.
 Younger professionals	No children.	Household income: \$50,000–\$150,000.
 Younger families	Dual-income household, with children under 10 years.	Household income: \$50,000– \$150,000.
 Older families	Dual-income household, with children over 10 years.	Household income: \$50,000– \$150,000.
 Home duties	Most likely to have young children.	Household income: under \$50,000.
 Older professionals	Over 40 years old.	Household income: \$150,000+.
 Retirees	Over 65 years old.	Household income: under \$50,000.

In order to identify any age-related or income-related communications channel biases, in this report we have looked at the preferences of three segments – youth, older professionals and retirees – in greater depth.

Executive summary

The findings from the April 2014 Australia Post Consumer Survey confirm that both traditional channels, such as personally addressed mail, and online channels have important roles to play in the communications strategy for federal, state and local government, as well as for political parties.

What becomes clear is that traditional versus digital channel preferences don't correlate simply with age. Older professionals show distinct preferences for email and other online channels, and youth select personally addressed mail and television in selected scenarios.

Here are 10 key findings that support these insights.



1

27% of Australians preferred to find out about important federal, state or local government policy changes via **personally addressed mail**, and **26% preferred email**.

2

More than **one in four Australians preferred personally addressed mail** to find out about **health, social or welfare entitlements** that they or their family may be eligible to receive.

3

40% of Australians preferred **personally addressed mail** to find out about **changes that might affect the health, social or welfare entitlements** that they received.

4

30% of Australians would prefer to find out about upcoming federal, state or local government **referendums** via personally addressed mail. **Online was the preferred channel for voting** (48%), followed by in person at a ballot box (24%).

5

31% of Australians would like to be informed of the next national census by personally addressed mail. **76% of Australians would prefer to complete the national census form online**. 61% would like to receive their online census access code via personally addressed mail.

6



77% of Australians who received personally addressed mail from a federal, state or local government department or authority within the past week **read it**.

7

Older professionals showed a stronger preference than the average population for **email communications** for many government-related communications.



8



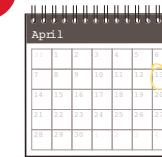
One in five Australians preferred to be informed of **political parties' policies** via television.

9

55% of Australians would like to receive their rates notice **in the mail**. 30% would like to receive it via email.



10



59% of Australians believed that receiving bills in the mail is a **good reminder** to pay.

How Australians want to hear from government

Australians prefer to find out about **changes to policies and entitlements** and **participate in upcoming referendums and census collections** via **personally addressed mail**.

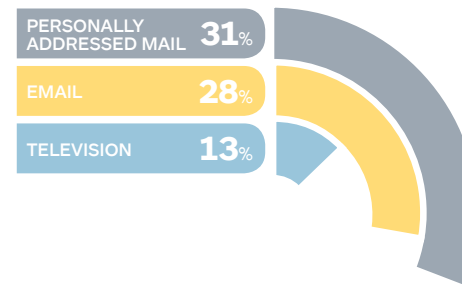
Base: All Australians (n=2,308)

		Policy changes	Entitlements might be able to receive	Changes to entitlements	Upcoming referendums	Upcoming census collections
1	PERSONALLY ADDRESSED MAIL	27%	41%	40%	30%	31%
2	EMAIL	26%	31%	32%	22%	30%
3	TELEVISION	16%	8%	4%	22%	18%
4	CATALOGUES & FLYERS	6%	4%	2%	5%	4%
5	NEWSPAPERS & MAGAZINES	7%	4%	1%	7%	5%
6	WEBSITE	5%	6%	3%	3%	3%
7	RADIO	2%	1%	1%	2%	2%
8	SOCIAL MEDIA ADVERTISING	1%	1%	0%	1%	1%
9	OUTDOOR ADVERTISING	1%	1%	0%	1%	0%
10	TELEMARKETING	0%	0%	0%	0%	0%
11	PREFER NOT TO KNOW	1%	1%	0%	2%	1%
12	UNSURE / DON'T KNOW	7%	4%	4%	5%	4%
13	N/A	-	-	13%	-	-

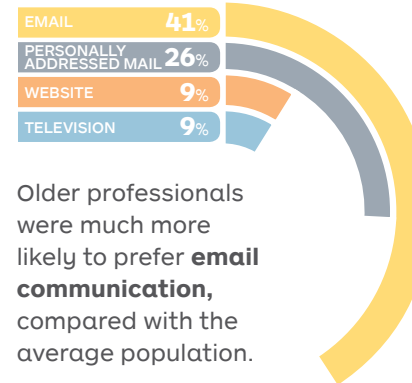
Note: Top five channels in each category marked in red.

Finding out about health, social or welfare entitlements that may be received

For **youth**, the top three channels were:

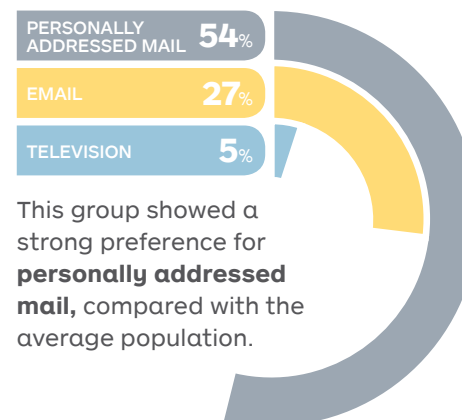


For **older professionals**, the top four channels were:



Older professionals were much more likely to prefer **email communication**, compared with the average population.

For **retirees**, the top three channels were:



This group showed a strong preference for **personally addressed mail**, compared with the average population.

Personally addressed mail was the preferred channel for receiving government communications.

Personally addressed mail connects with the segments who need help most.

Some audience segments were more likely to prefer **personally addressed mail** for finding out about health, social or welfare entitlements when compared with all Australians.

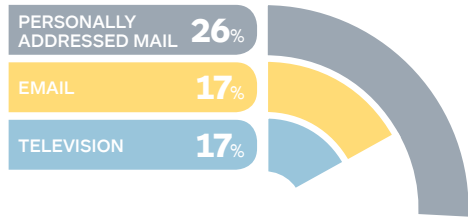
These groups include:

- **Retirees**
- People with a household income of **\$20,000 to \$39,999**
- People who are **not employed**
- People living in **regional areas**
- People who visit an Australia Post outlet **monthly**.

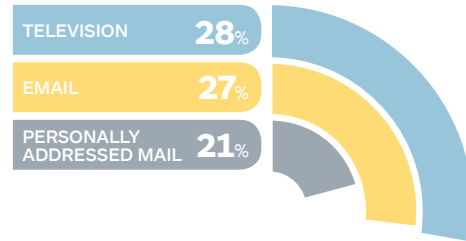
Finding out about upcoming federal, state or local government referendums

When it comes to receiving communication regarding **upcoming referendums**, the preferred channel was **personally addressed mail** (30%), followed by **email** and **television** (both 22%) and **newspapers and magazines** (7%).

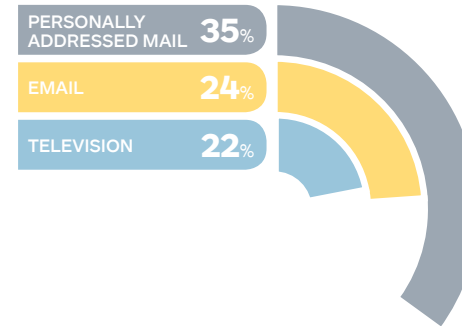
For **youth**, the top three channels were:



For **older professionals**, the top three channels were:



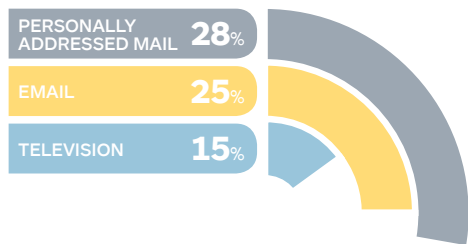
For **retirees**, the top three channels were:



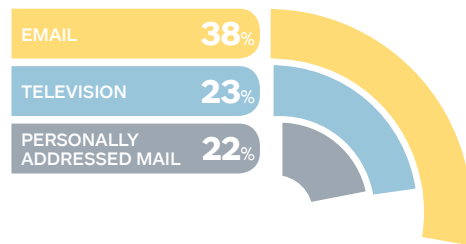
Finding out about an upcoming national census

The preferred channel for finding out about the **national census** was **personally addressed mail** (31%), followed by **email** (30%) and **television** (18%).

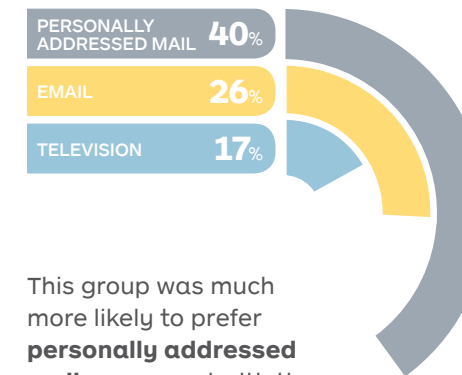
For **youth**, the top three channels were:



For **older professionals**, the top three channels were:



For **retirees**, the top three channels were:



This group was more likely to be **unsure** (11%, compared with 4% of the total population).

Again, older professionals showed a stronger preference for **email communication**, compared with the average population.

This group was much more likely to prefer **personally addressed mail**, compared with the average population.



Are younger Australians more apathetic about their responsibilities and rights? While **younger Australians'** census preferences were in line with the overall population, this group was more likely to be **unsure** as to how they would prefer to complete the national census form (11%, compared with 4% of the total population). This could suggest that this segment is **less clear on the value of census data** and how they can contribute towards it.

Completing the national census form

76% of Australians would prefer to **complete the national census form online**.

This compares with:

- 88% of **older professionals**
- 73% of **youth**
- 66% of **retirees**.

However, **61%** of Australians would prefer to **receive an access code** for the online census via **personally addressed mail**.

- 34% would prefer to get the code as a **text message**
- 1% who would prefer to get the code from someone over the **phone**
- 4% didn't know / were unsure.

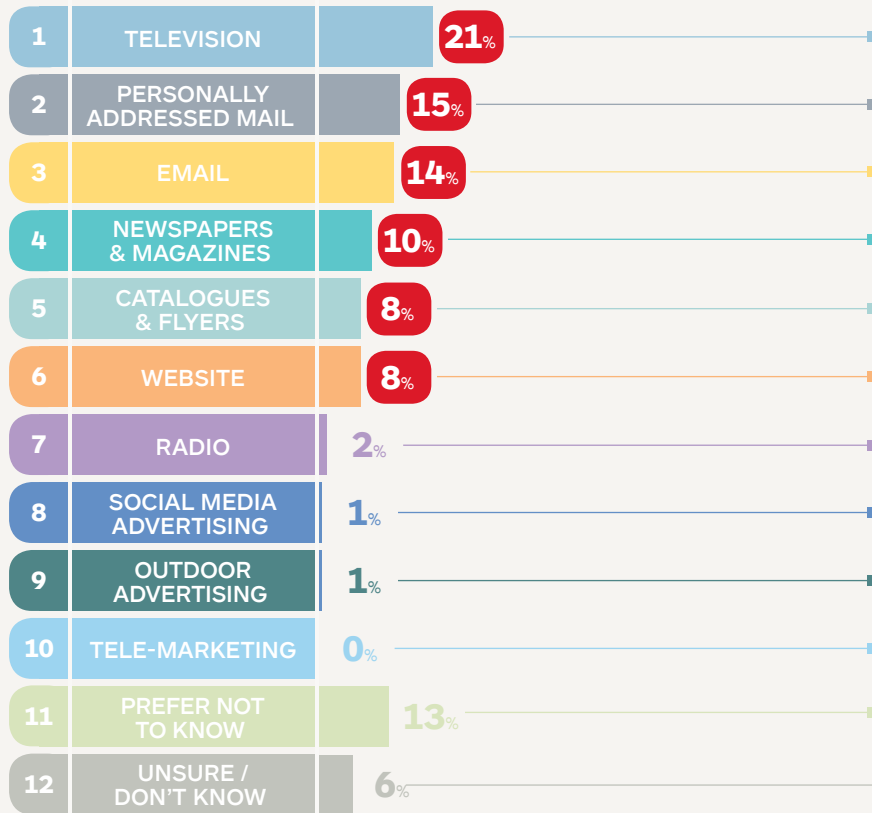


Three quarters of Australians would prefer to complete the census online and half would prefer to vote in a referendum online.

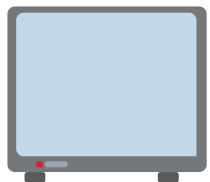
Keeping up to date with political parties' policies in the lead-up to an election

Base: All Australians (n=2,308)

Being informed in lead-up to election



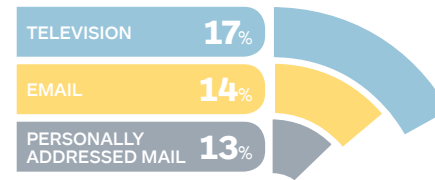
Note: Top five channels marked in red.



One in five Australians preferred to be informed of political parties' policies via television.

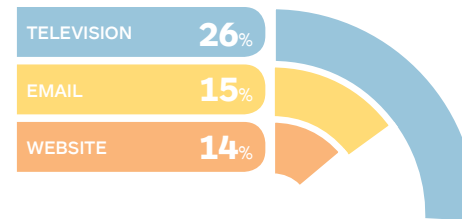
Political party communications

For **youth**, the top three channels were:



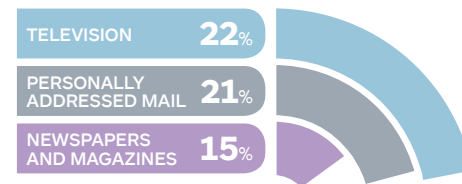
A higher proportion of young people were **not sure** how they would like to be informed of political party policies (13%, compared with 6% of the total population). Again, this could suggest that youth are **less interested in party policies**.

For **older professionals**, the top three channels were:

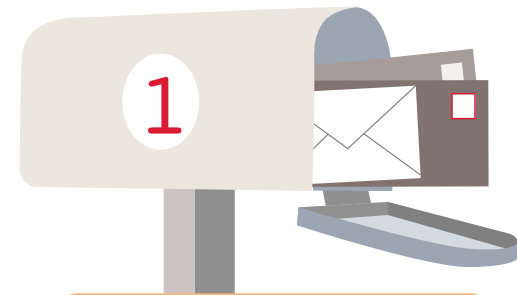


More older professionals preferred to be informed via a **website** (ranked third at 14%, compared with 8% and a ranking of sixth for the total population). This is in line with the group's preference for email communications and for voting or completing the national census form online.

For **retirees**, the top three channels were:



While retirees also ranked **television** number one, this group was more likely to prefer **personally addressed mail** and **newspapers and magazines**, compared with the average population.



How Australians interact with mail from government

In the November 2013 consumer survey, **one in five Australians** (21%) had received personally addressed mail from a federal, state or local government department or authority within the past week.



- **43%** of Australians prefer to receive advertising and promotional material from federal, state and local governments **via mail**.
- **22%** of Australians preferred to receive federal, state and local government communications **via email**.
- **16%** would like **both** mail and email communications.

How Australians receive rates notices

Two thirds of Australians currently receive their rates notice in the mail; just 4% receive their rates notice via email. 27% don't receive a rates notice.



Base: All Australians (n=2,068)

	Total Population	Youth (under 25)	Older professionals	Retirees
MAIL	63%	36%	69%	71%
EMAIL	4%	4%	9%	3%
BOTH	5%	7%	6%	2%
NEITHER	2%	2%	5%	1%
DON'T RECEIVE THIS	27%	50%	11%	24%

Note: Top channel for each segment marked in red.

While mail was the top channel for rates notices for **youth**, 50% of this segment did not receive a rates notice (compared with 27% of the total population).

Youth preferences for receiving rates notices were:

MAIL	55%
EMAIL	28%
BOTH	14%
NEITHER	3%

The preferences for this segment were in line with the general population.

Older professionals' preferences for receiving rates notices were:

EMAIL	42%
MAIL	39%
BOTH	16%
NEITHER	3%

Older professionals showed a stronger preference for receiving their rates notice via **email**, compared with the average population.

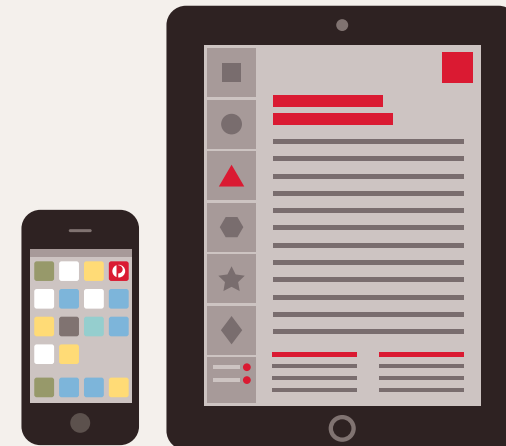
Rates notice channel preferences

Base: Currently receive rates notice (n=1,509)

	Currently receive rates notice via...	Would like to receive rates notice via...	Difference	
1	MAIL	86%	55%	-31%
2	EMAIL	4%	30%	26%
3	BOTH	7%	14%	7%
4	NEITHER	3%	1%	-2%

Note: Figures highlighted in red indicate a significant increase.

Of **Australians who receive a rates notice**, more than half (55%) would prefer to receive it via mail. 30% would prefer their rates notice to be emailed.



Most Australians prefer to receive their rates notices via mail.

Retiree preferences for receiving rates notices were:

MAIL	64%
EMAIL	26%
BOTH	9%
NEITHER	1%

This group was more likely to prefer to receive their rates notice **via mail**, compared with the average population.

59% of Australians believed that receiving bills in the mail is a good reminder to pay.

Youth:

59% strongly agreed / agreed
14% strongly disagreed / disagreed

Older professionals:

54% strongly agreed / agreed
28% strongly disagreed / disagreed

Retirees:

56% strongly agreed / agreed
20% strongly disagreed / disagreed

How Australians want to hear from government is part of Australia Post's *Better connections* series. These reports are released on a quarterly basis and are available to download at auspost.com.au/betterconnections.

The Association for Data-driven Marketing (ADMA) and Australia Post have also conducted additional research on advertising channel preferences in different industries. To find out more about the advertising channels Australians consider most useful, download your free copies of these industry-specific reports at: auspost.com.au/creatingconnections.

