



Digital participation

A view of Australia's online behaviours

White paper
July 2017



Advancing the United Nations' Sustainable Development Goals

We all have a crucial role to play in building a sustainable future through responsible business practices.

In January 2016 the United Nations' Sustainable Development Goals (SDGs) came into effect, which provide a common set of goals to put the world on a sustainable path to 2030.

The UN Global Compact – the UN's corporate sustainability initiative to which Australia Post is a signatory – encourages businesses to contribute to the SDGs first by doing business responsibly, and then by finding opportunities to solve the challenges represented by the goals through innovation and collaboration.

Australia Post and the SDGs

Australia Post is committed to advancing the SDGs and, in particular, we are focusing our efforts on the goals we can influence the most. We are purposefully advancing our performance against these particular goals through our investments, our business practices and our products, services and solutions.

Digital inclusion and the SDGs

Our commitment to a digitally inclusive society is a fundamental part of achieving a number of these goals, particularly those relating to decent work and economic growth, industry and innovation, reducing inequalities, and sustainable cities and communities.

A digitally inclusive Australia aligns with the UN Sustainable Development Goals as it underpins social connectedness, self-improvement through education and knowledge, better health outcomes, access to cheaper more convenient goods and services, as well as the general economic benefits of productivity, larger markets for small business and more efficient Government services.

More broadly, we have a commitment to improve the lives of all Australians. By addressing these goals we greatly enhance the lives of our customers – individuals, small and large businesses, and communities.

For further information about the SDGs, see <https://sustainabledevelopment.un.org/sdgs>





Contents

1 Foreword	6
2 Executive Summary: Taking a closer look at digital inclusion	7
3 Key Findings	8
4 Behaviour profiles identified	9
5 What Australians are doing online	10
6 Barriers and motivators	11
7 The online journey	12
8 Increasing digital participation in Australia	13
9 Conclusion	15
10 Methodology	15



1 Foreword



Australia Post has always been more than just a business. For over 200 years, we've been part of the very fabric of the nation. Helping to improve the lives of our customers, our workforce, and their families. Bringing communities closer together. And contributing to Australia's economic growth.

As Australia – and the world – faces unprecedented challenges and levels of change, our power to make a positive difference becomes more important than ever.

Our enterprise purpose is to deliver a better future for our people, customer and community. And our approach to Corporate Responsibility forms Australia Post's roadmap to connect Australians physically and digitally, to minimise our environmental impact, and to transform our business to help customers and communities prosper in the digital world.

It's about making sure everyone has the opportunity to take part in Australia's future prosperity, so collectively we can deliver a better future. For Everyone. Everywhere. Everyday.

Leading by example

As a business that's had to go through a digital transformation of our own to remain relevant, we know first-hand the importance of not being left behind.

It's why one of our most important strategic goals is to help all Australians become equipped with the skills and confidence to participate in the digital world.

With more shopfronts of any service provider in the country, we're in a unique position to support Australian communities, and help guide those in a new digital world.

Understanding digital inclusion

In support of the National Year of Digital Inclusion in 2016, we partnered with BehaviourWorks Australia, part of the SDG-focused Monash Sustainable Development Institute to carry out a unique study into the online behaviours of Australians across all walks of life.

While most other studies focus on measuring the extent of digital inclusion and the depth of the nation's digital divide, our research was designed to more directly understand why and how people are using (or not using) the internet and engaging in the digital world.

Our aim is to use and share the findings to help inform the design of interventions by organisations and communities that bridge the gap between the digitally capable, and those who are missing out from not being engaged in the online world.

This isn't just something for organisations to commit to. As individuals, we can all help those less able to get online. After all, everyone prospers when we're better connected.

A handwritten signature in black ink that reads "Christine Corbett". The signature is fluid and cursive, with a large initial 'C'.

Christine Corbett
Chief Customer Officer
Australia Post

2 Executive Summary: Taking a closer look at digital inclusion

For most Australians, using the internet to socialise, shop, work and do everyday tasks is something we now take for granted.

Yet some figures suggest one in seven¹ (around 3 million) Australians are not internet users. In many cases that is by choice. But for some it is due to a lack of access or a lack of skill and knowledge, that is holding them back.

As digitisation continues to reshape our country and our economy, people who never or rarely use the internet are at risk of being left behind. This 'digital exclusion', and the characteristics, causes and possible solutions are the subject of this white paper.

We partnered with Monash University's BehaviourWorks Australia to conduct a nation-wide survey of 1,611 Australians (including minority groups like the homeless) to understand how people use – or do not use – the internet.

The study plays an important role in improving digital inclusion in Australia. Acknowledging the results of the study, we aim to collaborate with like-minded organisations and individuals, and implement interventions that provide everyone the opportunity to participate and benefit from the digital world.



¹ Source: Australian Bureau of Statistics <http://www.abs.gov.au/ausstats/abs@.nsf/mf/8146.0>

3 Key Findings

1. Around one in ten respondents never use the internet.

Of those surveyed, 9% reported 'never' using the internet. In contrast, 60% use the internet 'several times a day' and 24% at least daily.

2. Access, skill and attitude are the main barriers to getting online.

Those who had negative attitudes towards the internet, who lacked home or mobile internet access, or who had poorer self-rated abilities were less likely to be frequent internet users.

3. Five behaviour-based profiles of internet users were identified

- 1) 'Non-users'
- 2) 'Samplers'
- 3) 'Socialisers'
- 4) 'Pragmatics'
- 5) 'Enthusiasts'

4. Age is the strongest demographic determinant of internet use.

People over 65 are more likely to lack access to the internet, rate their abilities as 'poor' or 'fair' and have more negative attitudes towards the internet.

5. Homelessness does not guarantee 'digital exclusion'.

78% of the homeless people in the study had a mobile device with internet access. Only one homeless person reported 'never' using the internet.

6. A lack of interest is the main reason people do not use the internet or rarely engage with it.

For the majority of 'Non-users' (who never learned how to use the internet), this lack of interest may be related to a lack of understanding of how the internet could be beneficial, as well as privacy concerns.

7. People follow a common 'internet journey'.

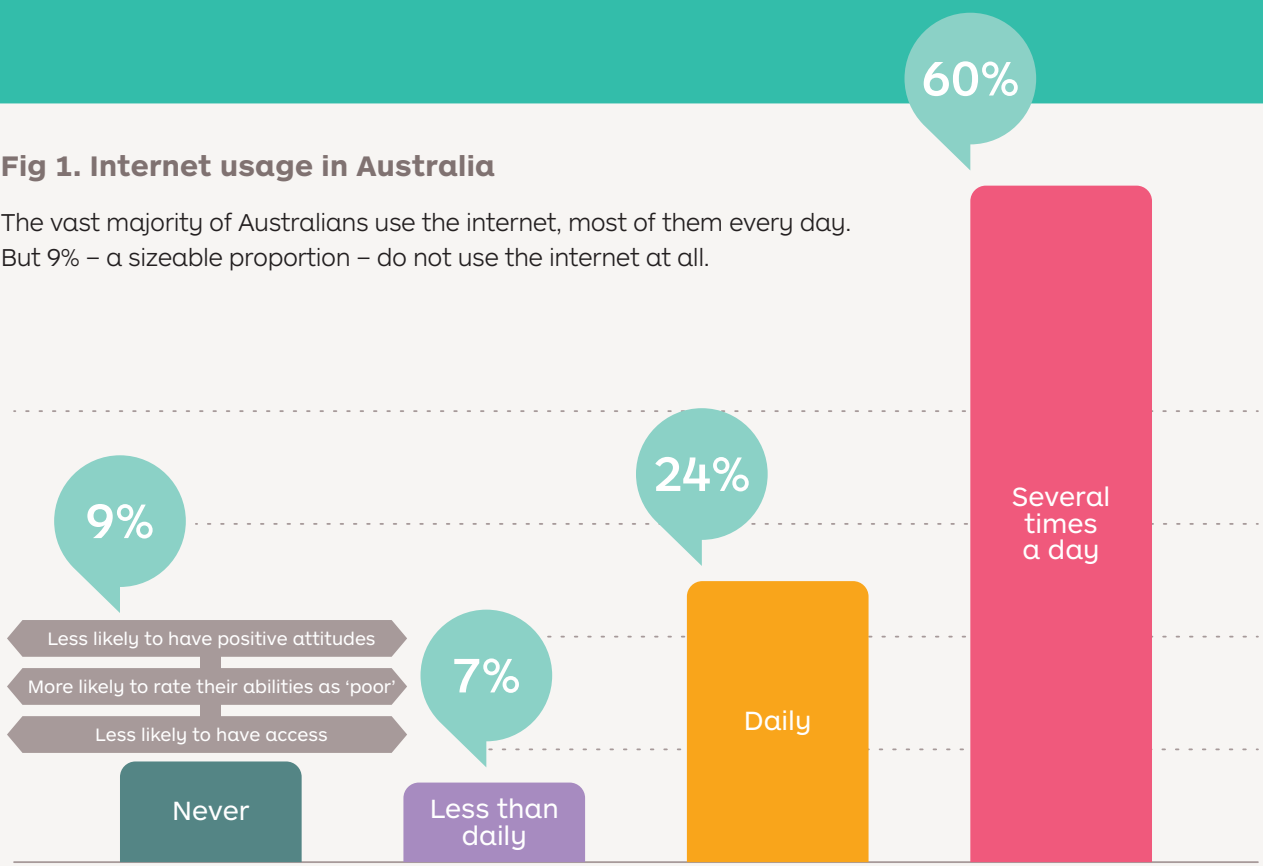
Users typically start with easy activities like email and web searches, proceed to social media and entertainment, and then advance to more involved tasks like internet banking and online shopping.

8. Barriers differ by behaviour and user group

While access, skill and attitude are key barriers to general use, each online behaviour is associated with specific barriers (for example security concerns and privacy concerns are commonly related to online banking). Barriers often differ between user groups too. So there is an opportunity to target specific barriers of particular groups with individual needs.

Fig 1. Internet usage in Australia

The vast majority of Australians use the internet, most of them every day. But 9% – a sizeable proportion – do not use the internet at all.

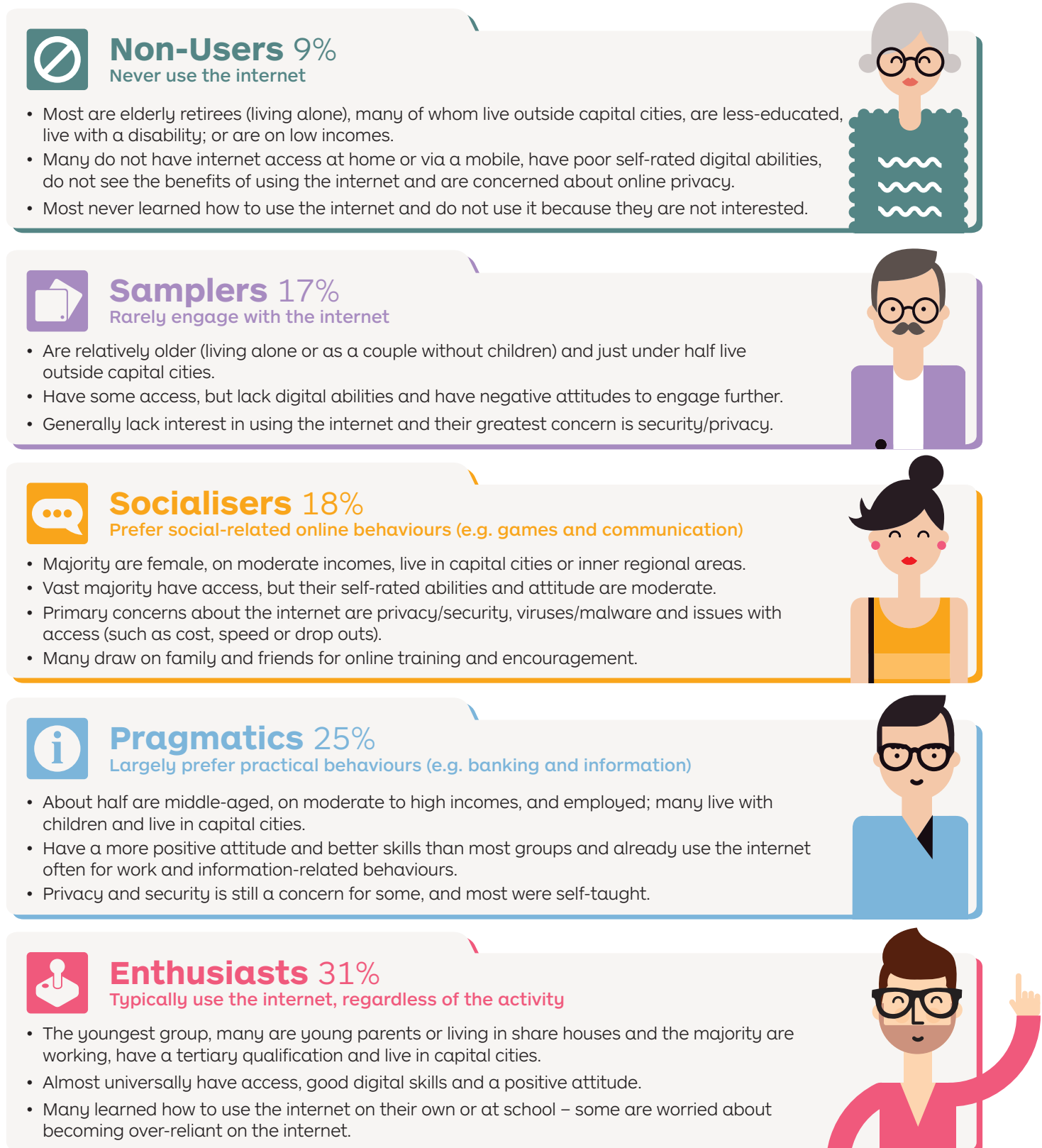


4 We identified five behaviour profiles

The internet has become an integral part of modern life for most Australians, but people use it in different ways. To better understand and explain how Australians participate in the digital world, we identified five behaviour-based profiles.

These profiles group people by how they use the internet and frequency of doing so. As anticipated, the profile groups differed on what motivates them to use and not use the internet, and on certain demographic characteristics.

Fig 2. Behaviour profiles of internet use



5 What Australians are doing online

Of the groups that do use the internet, there were distinct differences with regards to how and why.

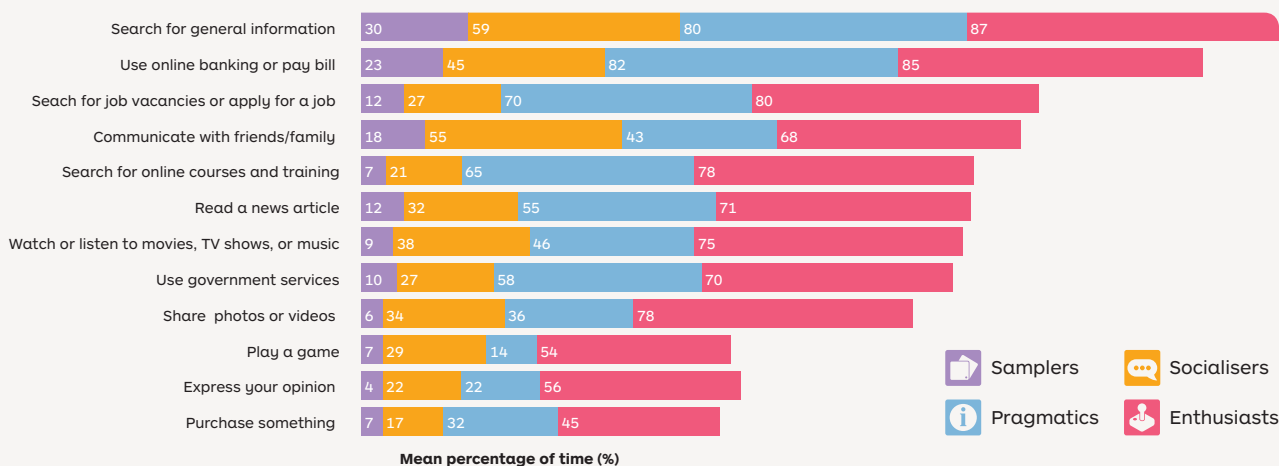
We asked respondents to indicate what percentage of time they would use the internet to perform certain tasks, compared to using offline alternatives (e.g. telephone, in person).

'Samplers' preferred to use the internet much less often for all activities compared to other groups.

'Socialisers' used the internet more than 'Pragmatics'

for communicating with friends and family and playing games; while 'Pragmatics' used the internet more than 'Socialisers' for work and information-related activities like seeking news, using government services, and job seeking. 'Enthusiasts' preferred to use the internet most of the time for almost all activities.

Fig 3. Percentage of time online by behaviour profile



A demographic profile

There are digitally excluded people across most demographics. But those more likely to lack access, have poor skills and/or have negative internet attitudes are:

- People over 65 (this was the most influential demographic factor)
- Living away from capital cities
- Less educated (no tertiary education)
- Unemployed or not in the labour force
- Living with a disability



People experiencing homelessness and the internet

Australia's homeless are bigger internet users than some may think. Of the homeless people who participated in the research, 78% had mobile devices with internet access and only one reported never using the internet.

Nevertheless, this group still relies largely on offline resources when compared with the general community. This may be related to the high number of homeless people in the study who did not have a tertiary education and who identified as disabled, both of which influenced internet use in the general community.

6 Barriers and motivators

Not having internet access or internet skills were obvious barriers to internet use. But negative attitudes towards the internet – a perceived lack of benefits, or privacy concerns, for example – were also a significant factor.

Improving these attitudes could therefore be an effective way to encourage digitally excluded people to get online, or improve their digital skills.

A lack of interest

Some 'Non-users' and 'Samplers' cited access and ability as barriers to more frequent internet use. But the most common reason given by both groups was simply a lack of interest.

Many 'Non-users' also indicated they were unaware of the benefits of using the internet, or that they had heightened concerns about privacy. These may actually be the driving factors behind a stated lack of interest.

Getting the most from the internet

'Samplers' and 'Socialisers' are internet users, but they are not necessarily getting the most out of being online. For example, they may not have access to a variety of professional development services, online government services, or other features of the digital environment.

These groups would benefit from opportunities to improve their skills and awareness of online tools and services. They are not entirely dismissive of the internet; they may just lack the motivation or ability to engage further.



7 The online journey

We also wanted to understand the journey internet users take over time.

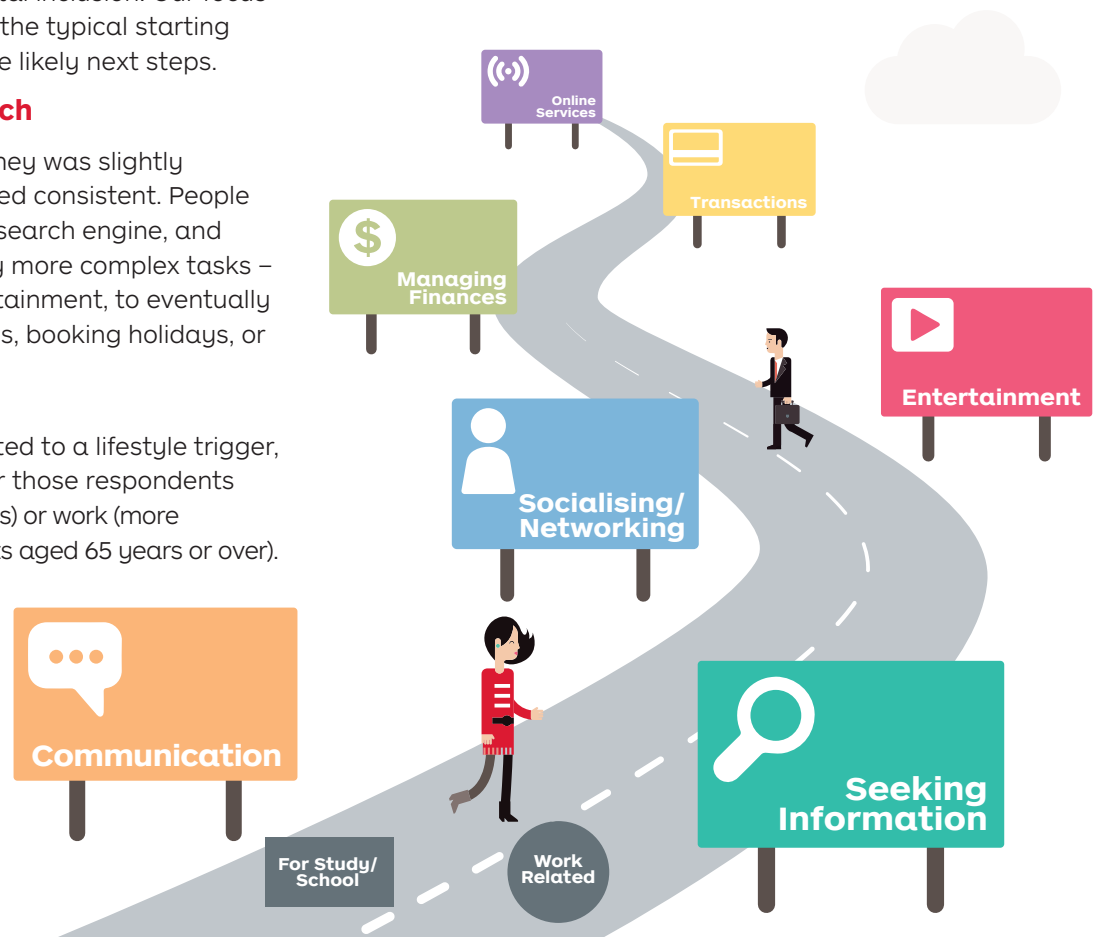
Research in the past has tended to focus on measuring the extent of digital inclusion. Our focus takes this further to identify the typical starting point for going online and the likely next steps.

A step-by-step approach

While each user groups' journey was slightly different, the pattern remained consistent. People start simple, with email or a search engine, and then progress to increasingly more complex tasks – from social media and entertainment, to eventually things like managing finances, booking holidays, or buying and selling on eBay.

Often, the first step was related to a lifestyle trigger, like school (more common for those respondents aged between 18 and 44 years) or work (more common for those respondents aged 65 years or over).

Fig 4. Online activity pathway

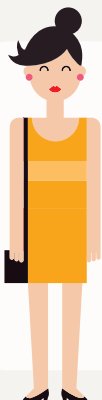


What we can learn



Non-Users

'Non-users' who are looking to take their first step could start by setting up an email account or using a search engine.



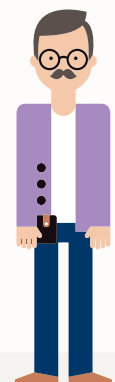
Socialisers

'Socialisers' could be encouraged to move further along the path towards practical tasks like managing finances or using government services online.



Samplers

'Samplers' may benefit from being exposed to more advanced activities like using social networking sites with friends and family.'

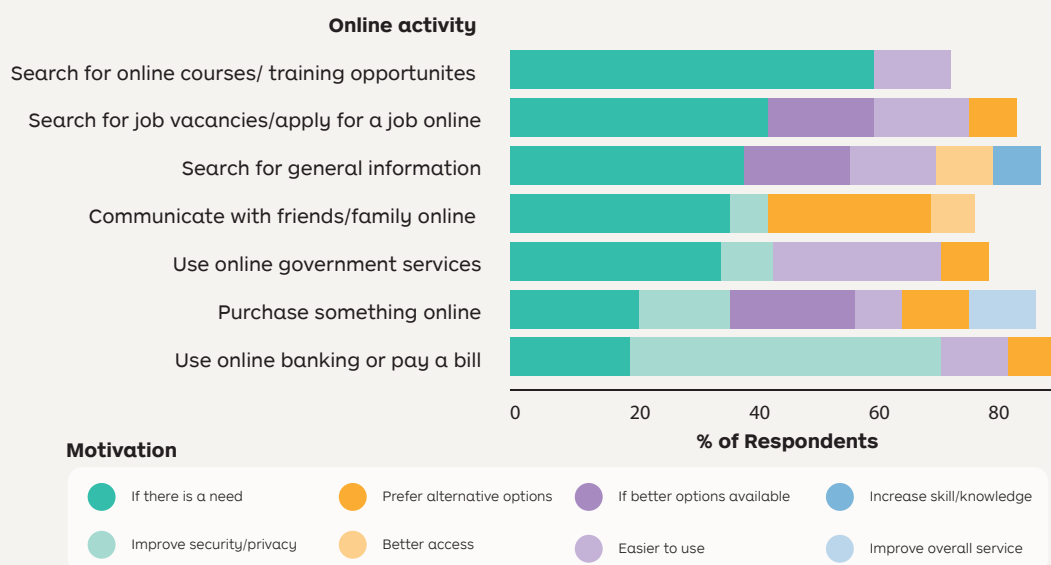


8 Increasing digital participation in Australia

By understanding Australia's Internet usage we can uncover practical ways to increase digital inclusion.

To better understand how usage could be increased, we asked respondents - those that use the internet 30% of the time or less for a particular activity - how they could be encouraged to do so more often. These findings provide a unique insight into the perceived barriers associated with each specific online activity.

Fig 5. Most common responses to encourage internet use (for selected behaviours)



We organised responses into a number of different thematic categories.

1. Improve privacy and security

This was particularly relevant for services which require the sharing of personal information, like online banking or sharing photos and videos.

2. Provide better access and increase skills/knowledge

This was mentioned in relation to entertainment – things like watching movies or TV, listening to music, sharing photos or searching for information.

3. Educate on the importance of accessing relevant services

In relation to behaviours that are dependent on a lifestyle necessity (like searching for education or employment opportunities), the most common response was 'if there is a need/no other option'.

4. Provide better options

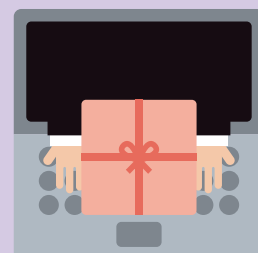
Faster or cheaper online options could increase internet usage, especially for things like reading news articles.

5. Make services more convenient and easier to use

This was particularly relevant to online government services.

Interestingly, we also found that the different user groups had different suggestions for most online behaviours.

This presents an opportunity to target behaviours for specific user groups, based on their suggestions. For example, when looking at the top three most common suggestions to encourage online shopping, most user groups mentioned 'improve privacy and security'. However around one in four 'Enthusiasts' also mentioned 'improve overall service/experience'. Because we know that 'Enthusiasts' shop online some of the time already, this presents an opportunity for increasing their online shopping by improving aspects of the overall service (e.g. faster/more convenient delivery).





9 Conclusion

While the internet is very much a part of daily life for most Australians, there are a significant proportion who are not using the internet much, if at all. These people are at risk of being left behind as society and the economy continues to change.

The next step is to determine which online behaviours should be targeted among vulnerable groups. In general, any activities or programs designed to address digital inclusion should take into account:

1. The different types of internet users,
2. Common behavioural pathways of internet users, and
3. Behaviour-specific barriers of targeted groups.



Our research has given us a much deeper insight into the reasons people remain digitally excluded, as well as how we can design activities or programs to bring them online or to help them on their online journey.

Given a person's attitude is also a strong determinate of internet use, it is important to work with existing attitudes in any activity or program messaging.

For example, there are generally positive attitudes towards using the internet to look up information about business, services or products, or to keep in touch with people. So this could be a good place to start.

Equally, a person's priorities vary depending on where they sit on the internet journey (and the barriers to usage also vary) so getting targeted users involved in the design and testing of specific programs is critical.

Australia Post will continue to build on it's commitment to address the digital literacy needs of the Australian community. We believe reducing Australia's digital divide relies upon like-minded organisations from all sectors working together – to design appropriate interventions that bring digital capability and access, and ensure no Australian is left behind.

10 Methodology

Working with BehaviourWorks Australia and The Shannon Company, Australia Post conducted a telephone survey of 1,584 Australians between April and June, 2016. An additional survey of 27 homeless persons (administered via a shorter hard copy questionnaire) was also conducted to ensure they, as well as other minority groups, had a voice in the study.

While other research studies have typically focused on measuring the extent of digital inclusion and the depth of the nation's digital divide, our aim was to gather information that more directly addressed why and how people are using (or not using) the internet and engaging in the digital world.

In other words, how Australians behave in relation to the internet, what activities they prefer to do online (e.g. social, informational or transactional), what their

attitudes toward the internet and online activities are, what motivates them and what stops them from maximising the benefits of greater online capability and confidence.

The results of this study will inform the design, trial and implementation of a number of interventions to enhance key audiences' digital capability so that the full benefits of a digitally inclusive society can be enjoyed by all Australians.



This white paper is just another way
we are delivering a better future
for everyone, everywhere, everyday.

Digging Deeper

This white paper provides a snapshot of the findings uncovered in the Australia Post commissioned *BehaviourWorks Australia* Digital Inclusion Study.

For more detail and analysis of this study, or to read further about Australia Post's commitment to corporate responsibility please view the full study at <https://auspost.com.au/DigitalInclusion>

Contact us

Email: corporateresponsibility@auspost.com.au

Website: auspost.com.au