

SWIN
BUR
NE

SWINBURNE
UNIVERSITY OF
TECHNOLOGY

The World Internet Project: Australian findings

Scott Ewing
Julian Thomas

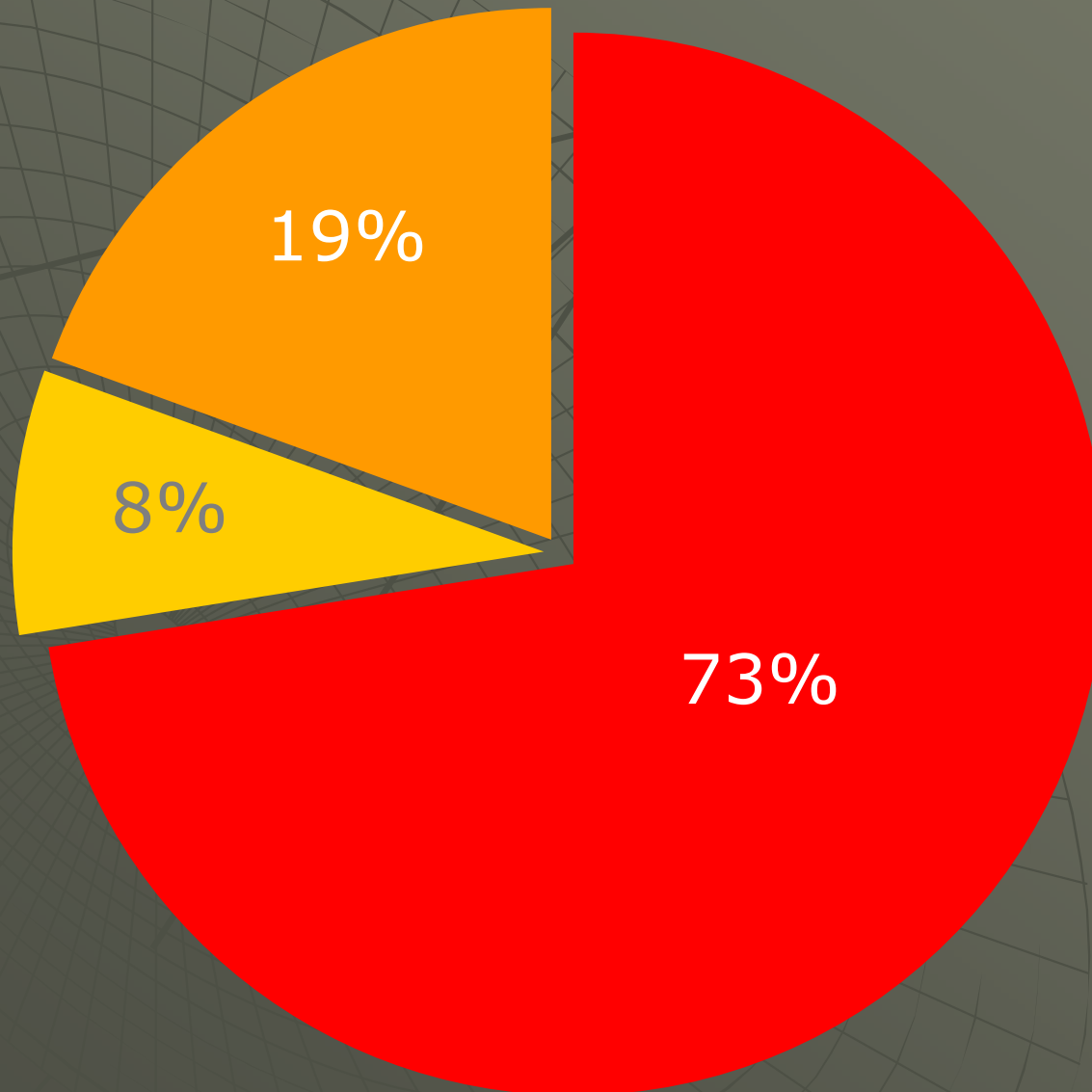
CCI
ARC CENTRE OF EXCELLENCE
FOR CREATIVE INDUSTRIES
AND INNOVATION

Methods

- ◆ **Telephone survey conducted June 2007**
- ◆ **1000 respondents across Australia**
- ◆ **Minimum age was 18**
- ◆ **Stratified by age, gender and location**

Users, Non-users & Ex-users

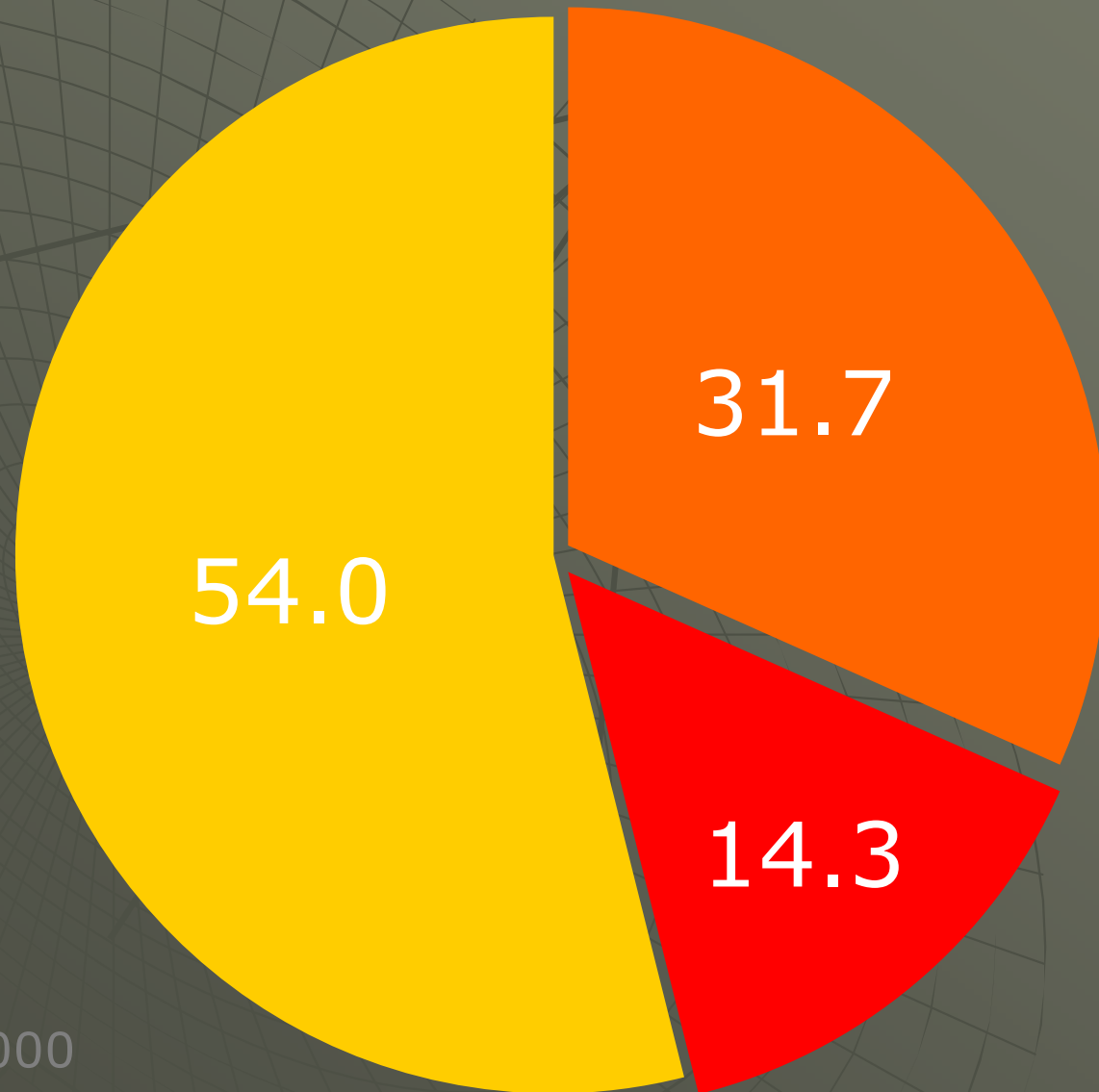
■ Use at present ■ Have used in the past ■ Have never used



N=1,000

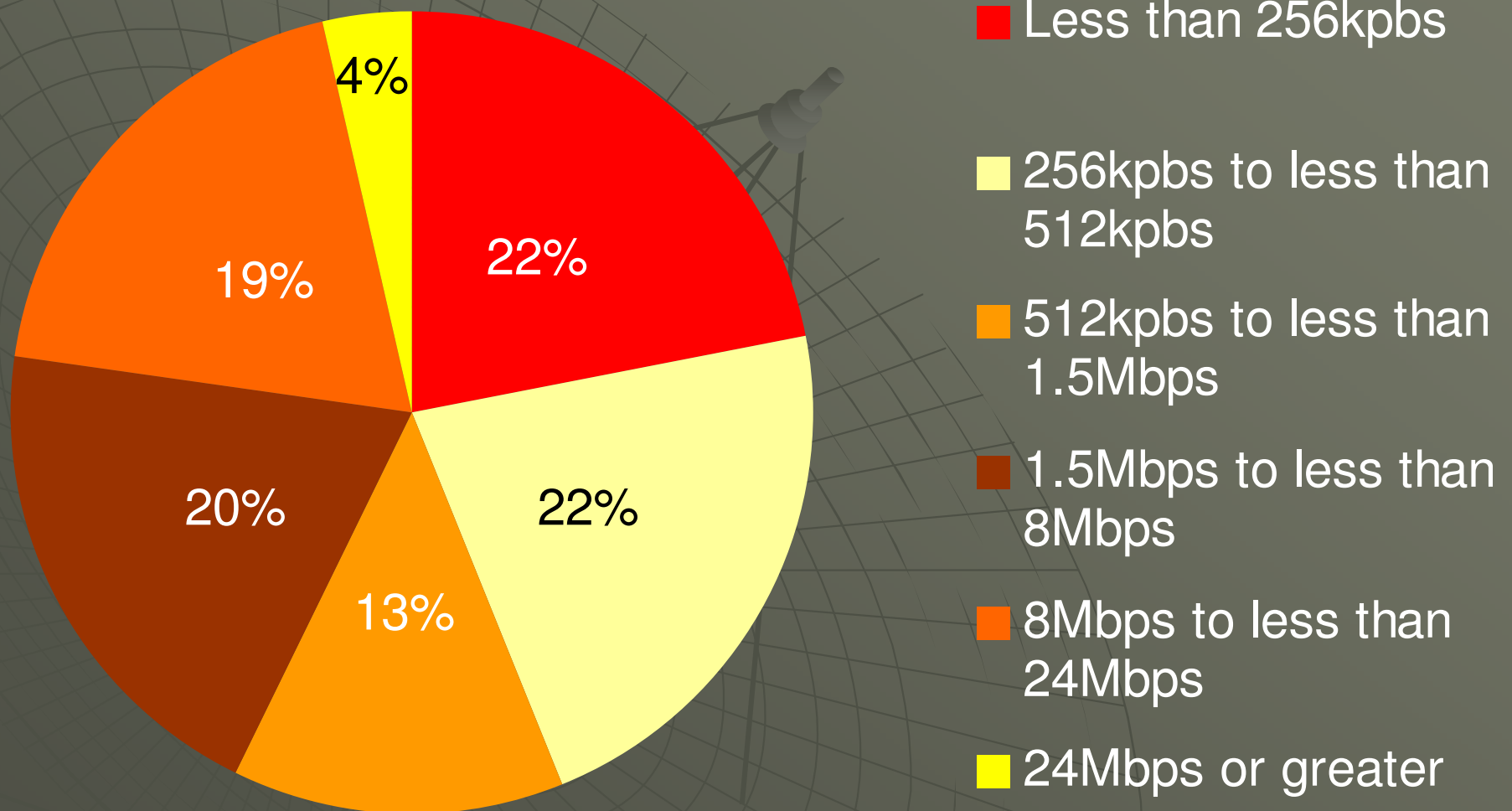
Home access

■ No home access ■ Dial-up ■ Broadband

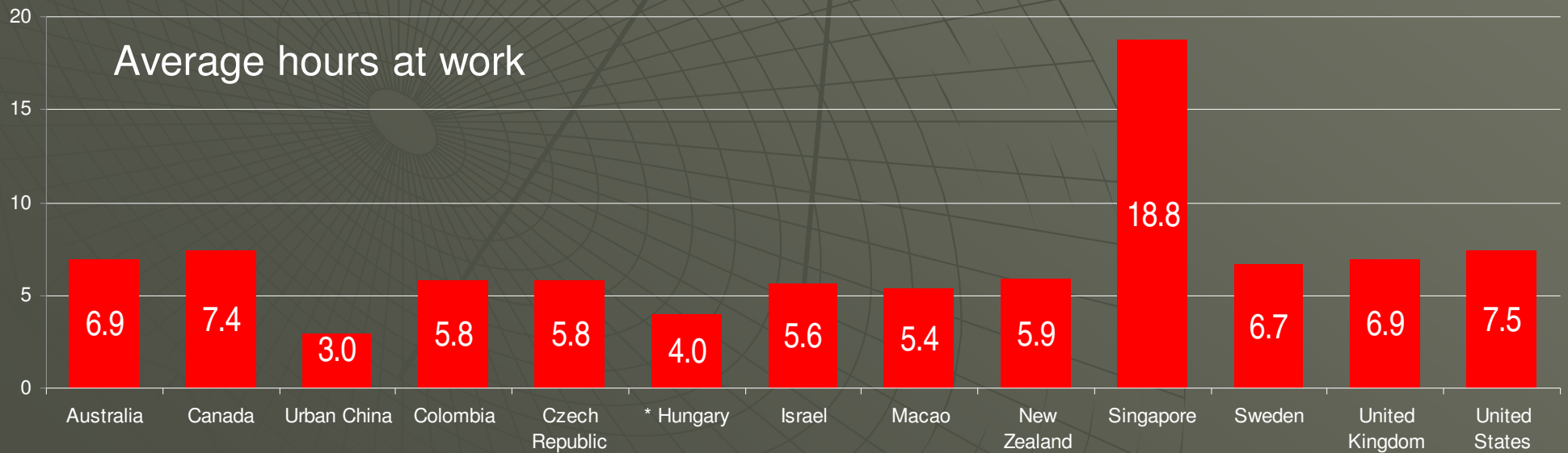
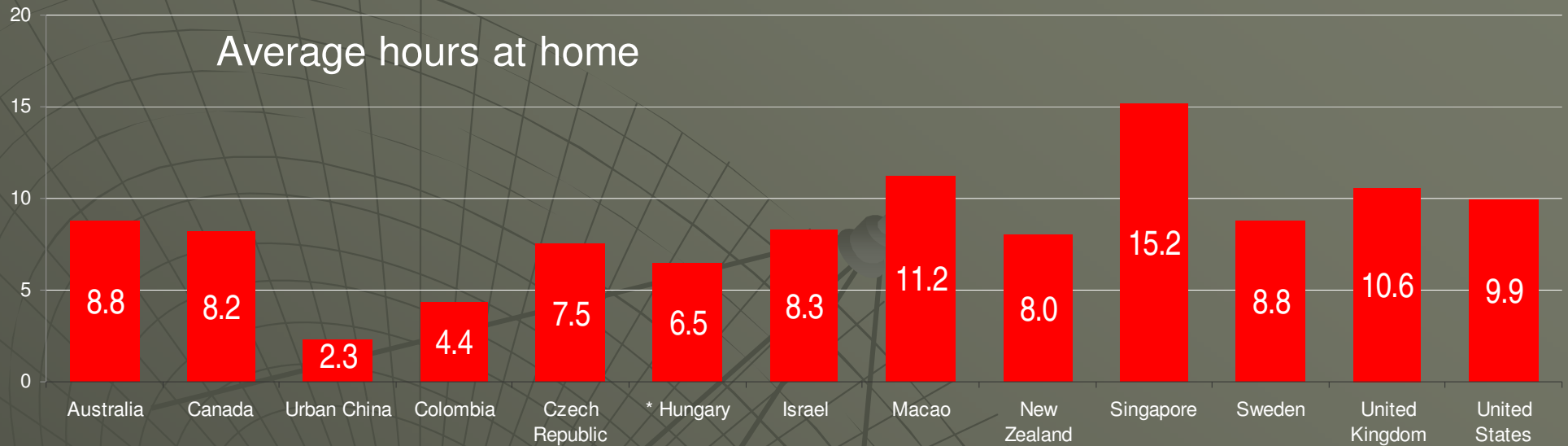


N=1,000

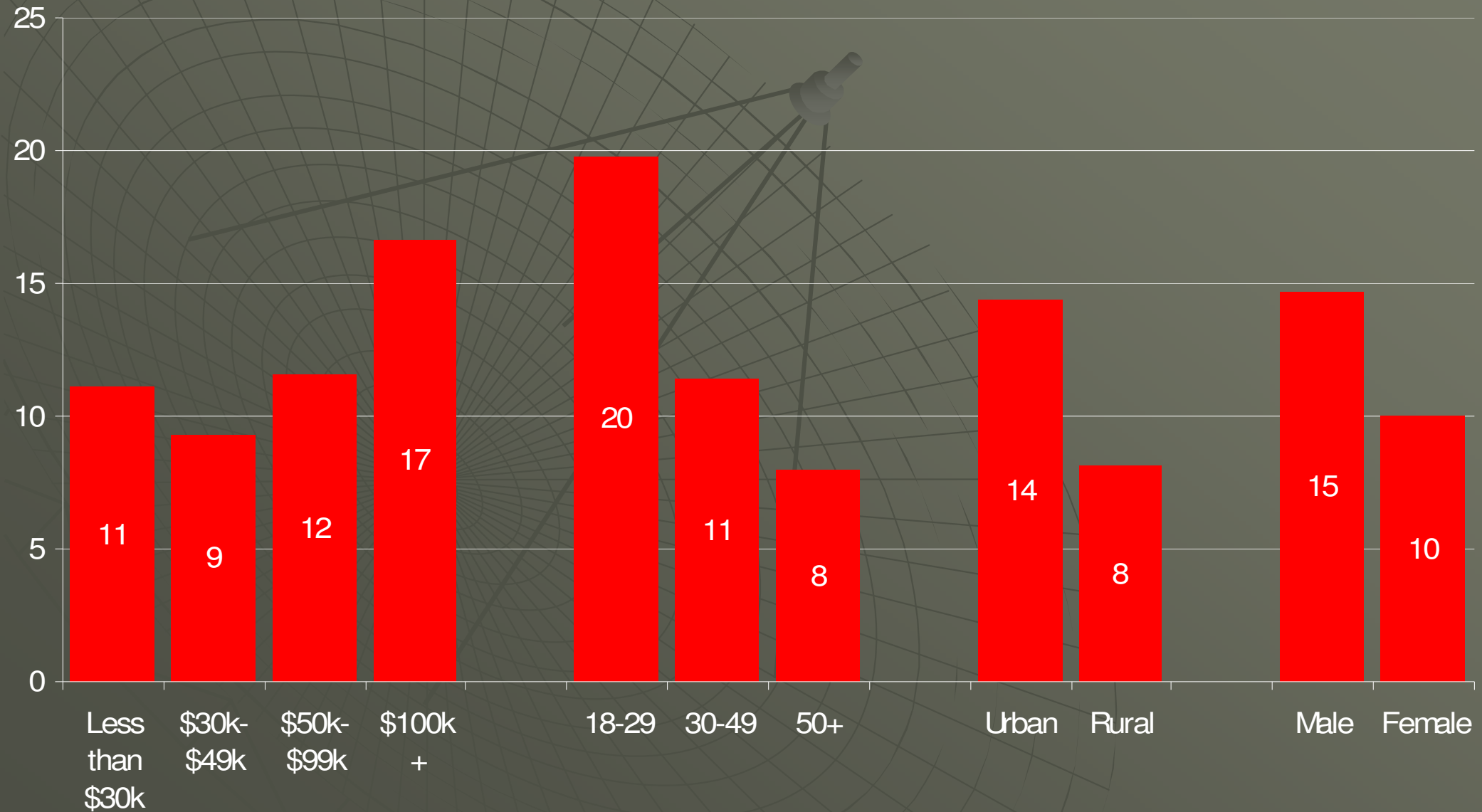
Australian download speeds, June 2008



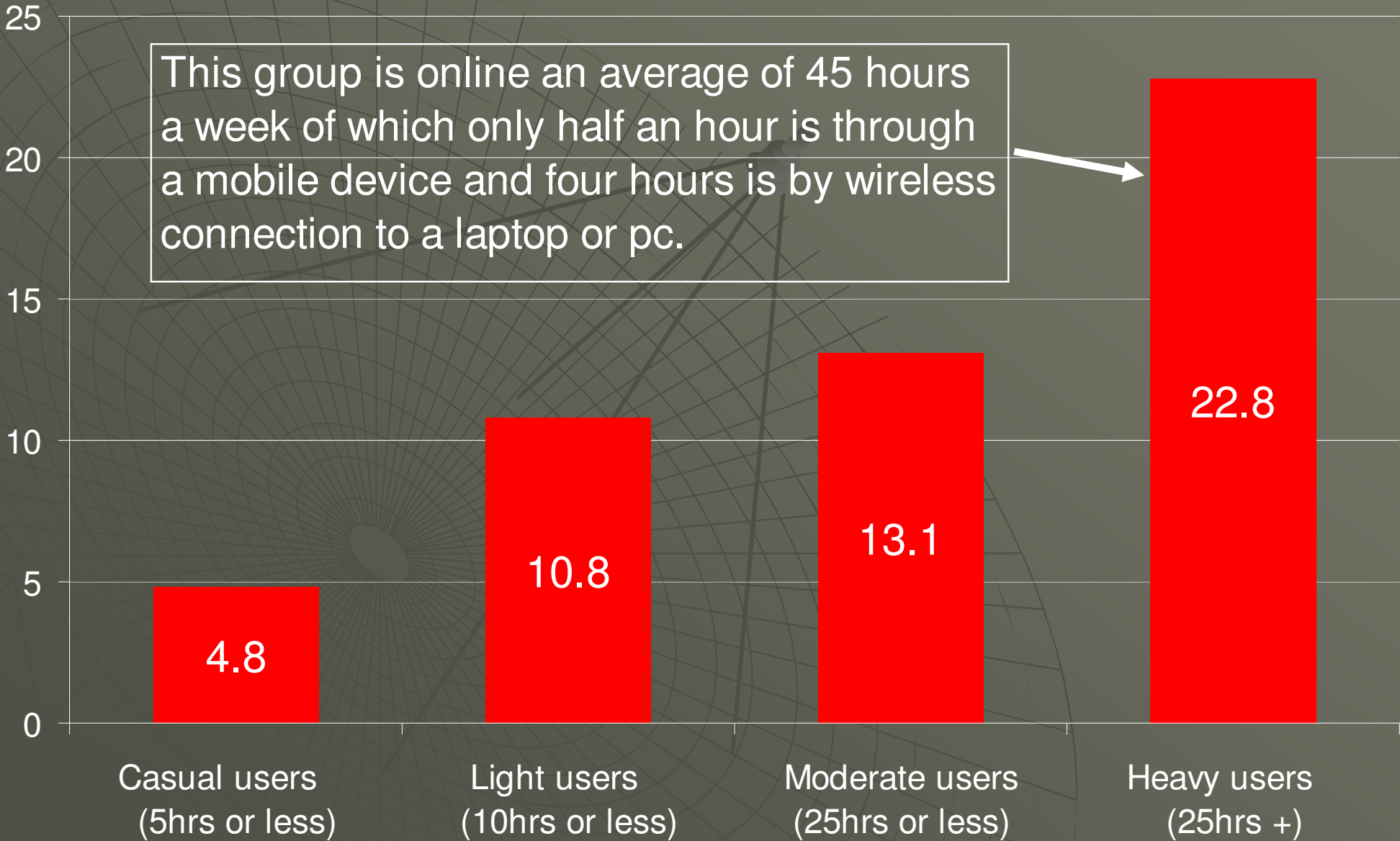
Hours used, selected countries



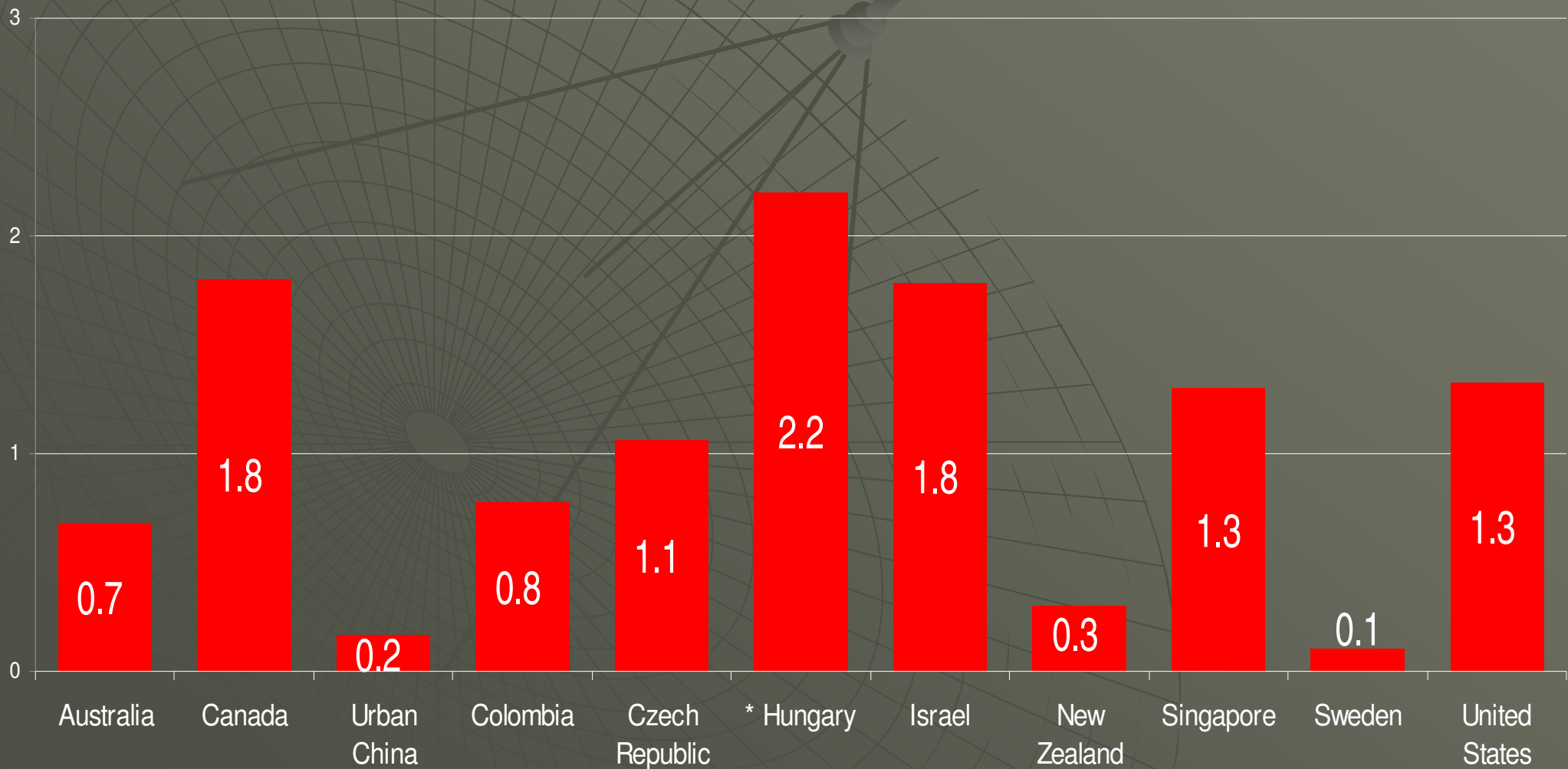
Mobile access amongst internet users



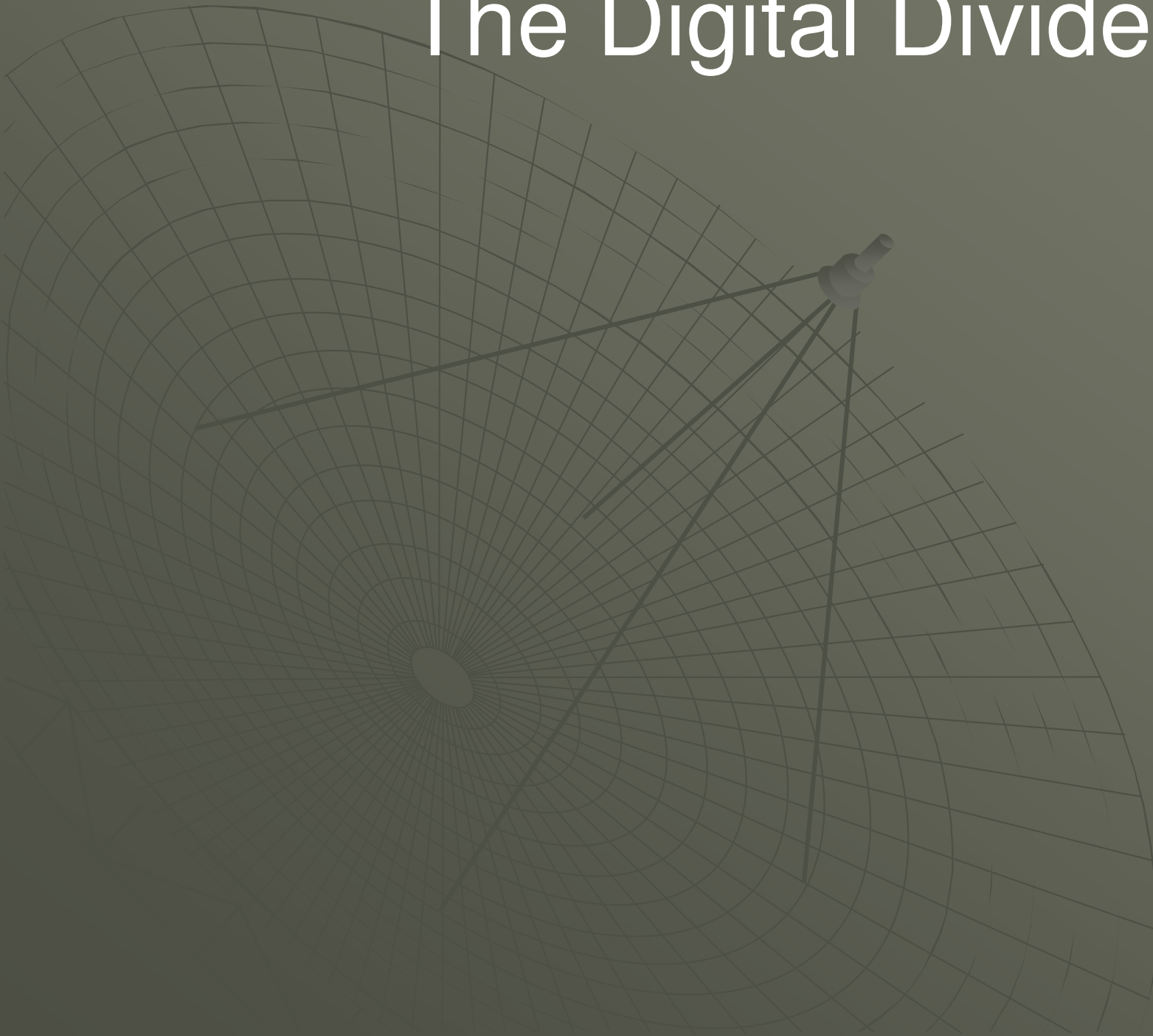
Mobile internet access by total internet use



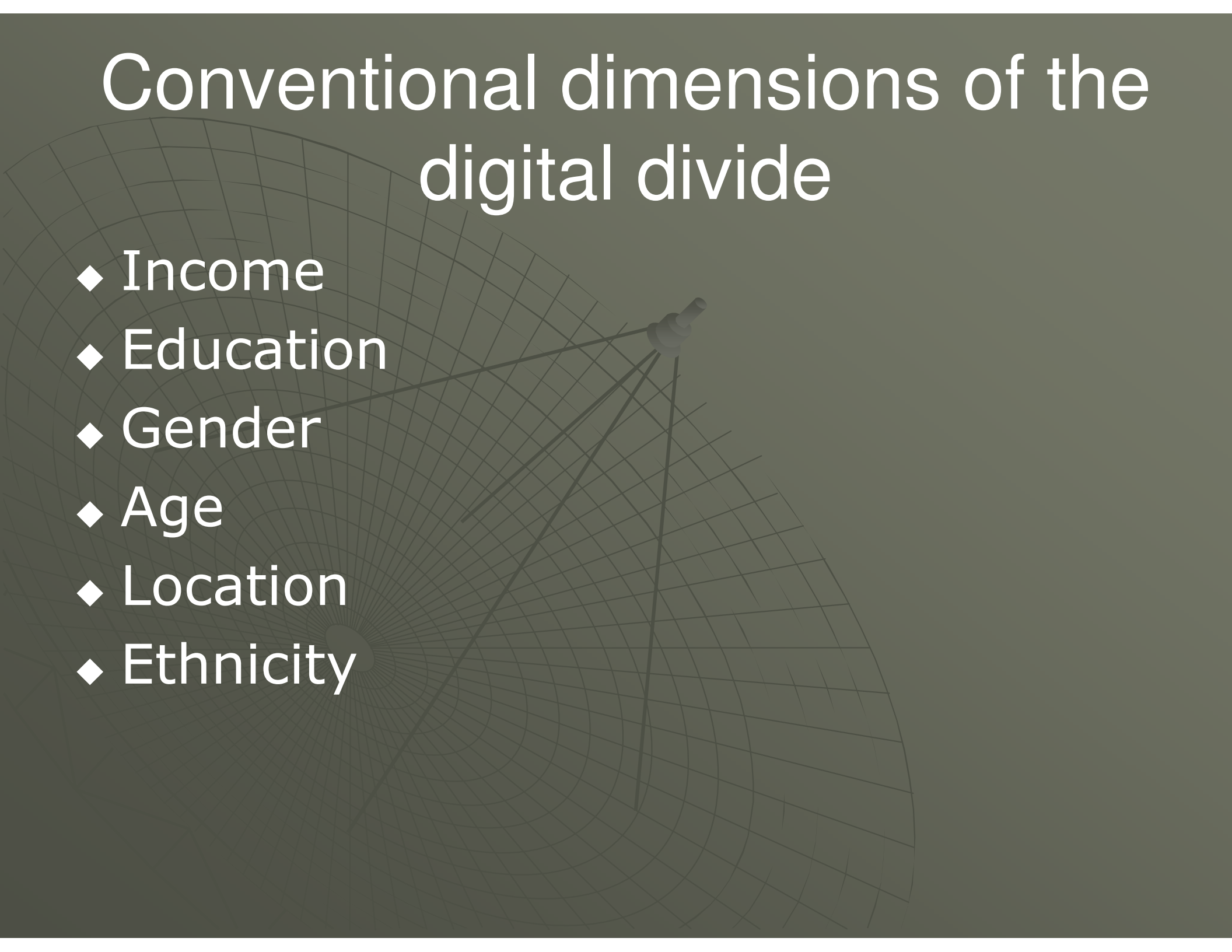
Average hours of mobile access, selected countries



The Digital Divide



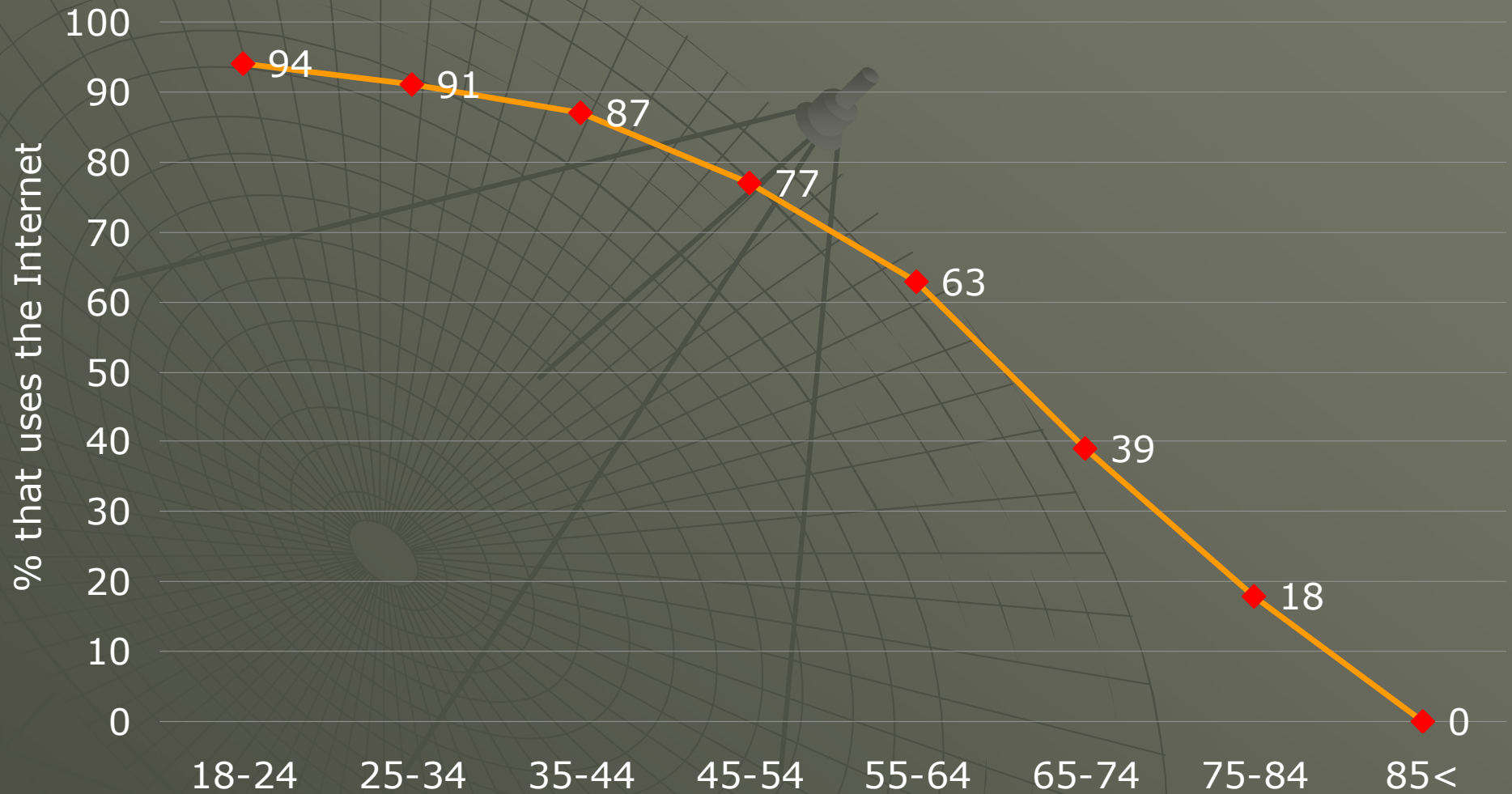
Conventional dimensions of the digital divide

- ◆ Income
 - ◆ Education
 - ◆ Gender
 - ◆ Age
 - ◆ Location
 - ◆ Ethnicity
- 

Policy questions

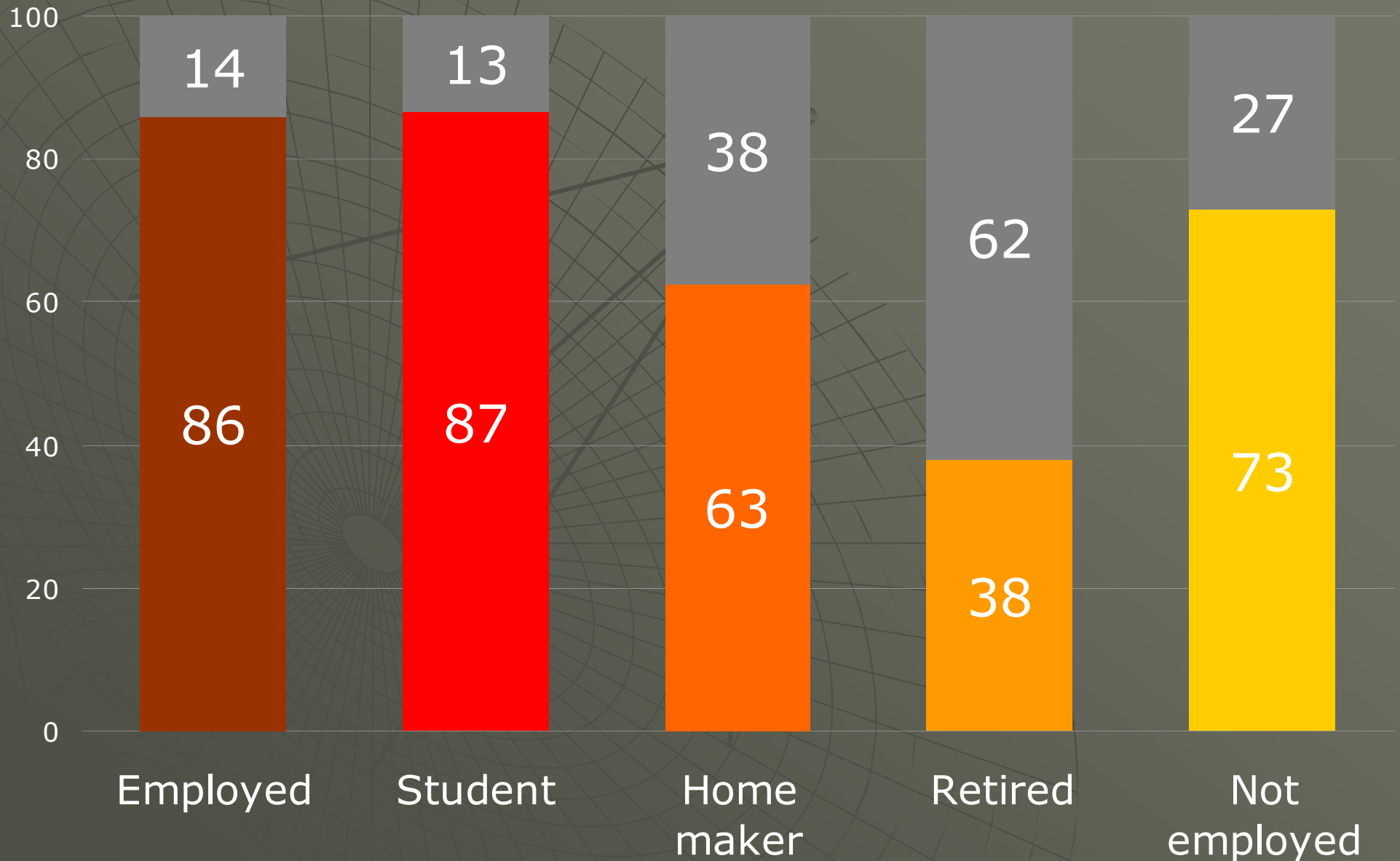
- ◆ Who should pay?
- ◆ Is broadband civic infrastructure?
- ◆ Virtues and vice
(education/engagement/informed public/egov vs entertainment/gossip/leisure)
- ◆ Maintaining commitment to traditional information and entertainment services

Use by age



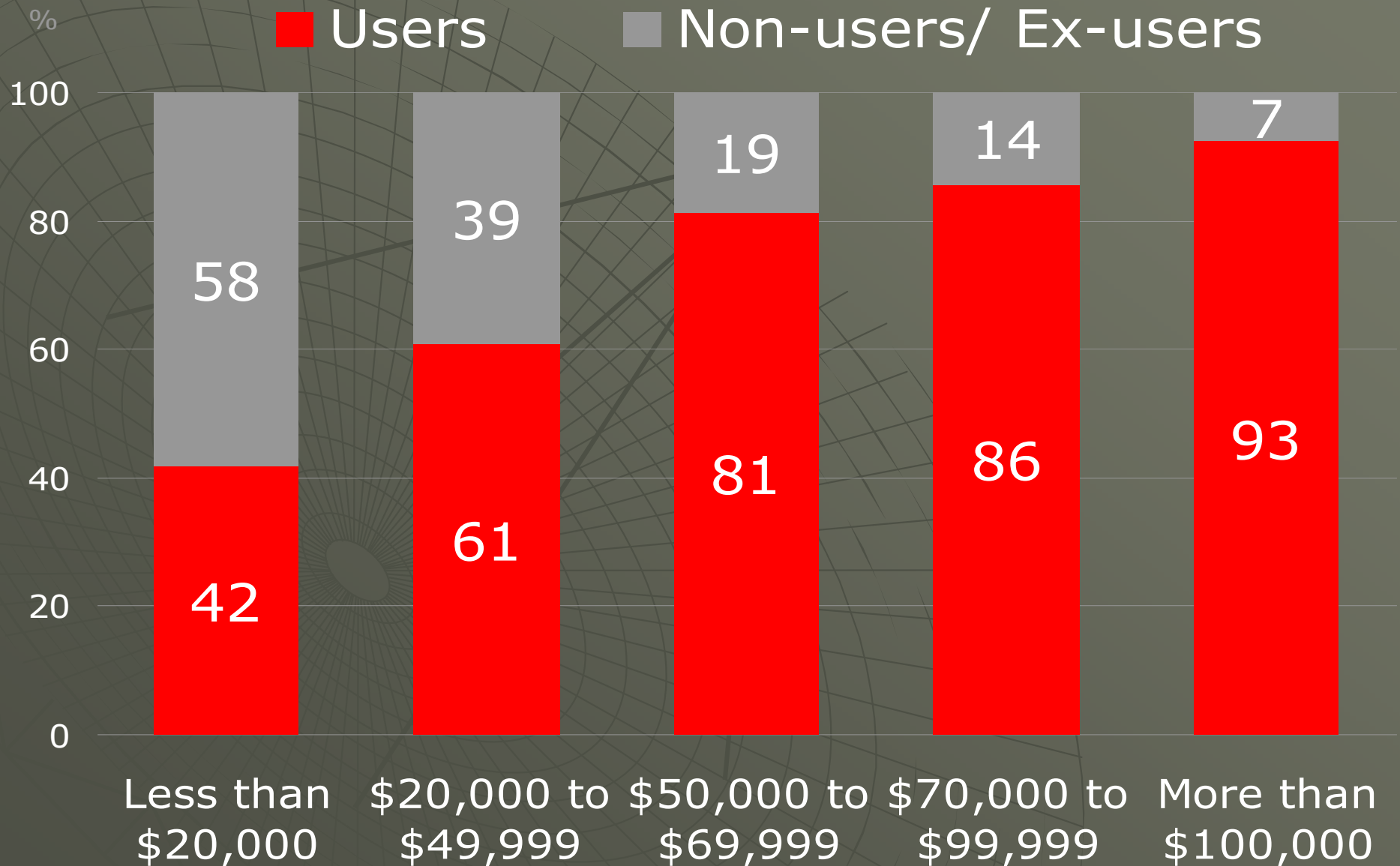
Source: Australian WIP

Internet use by lifestage



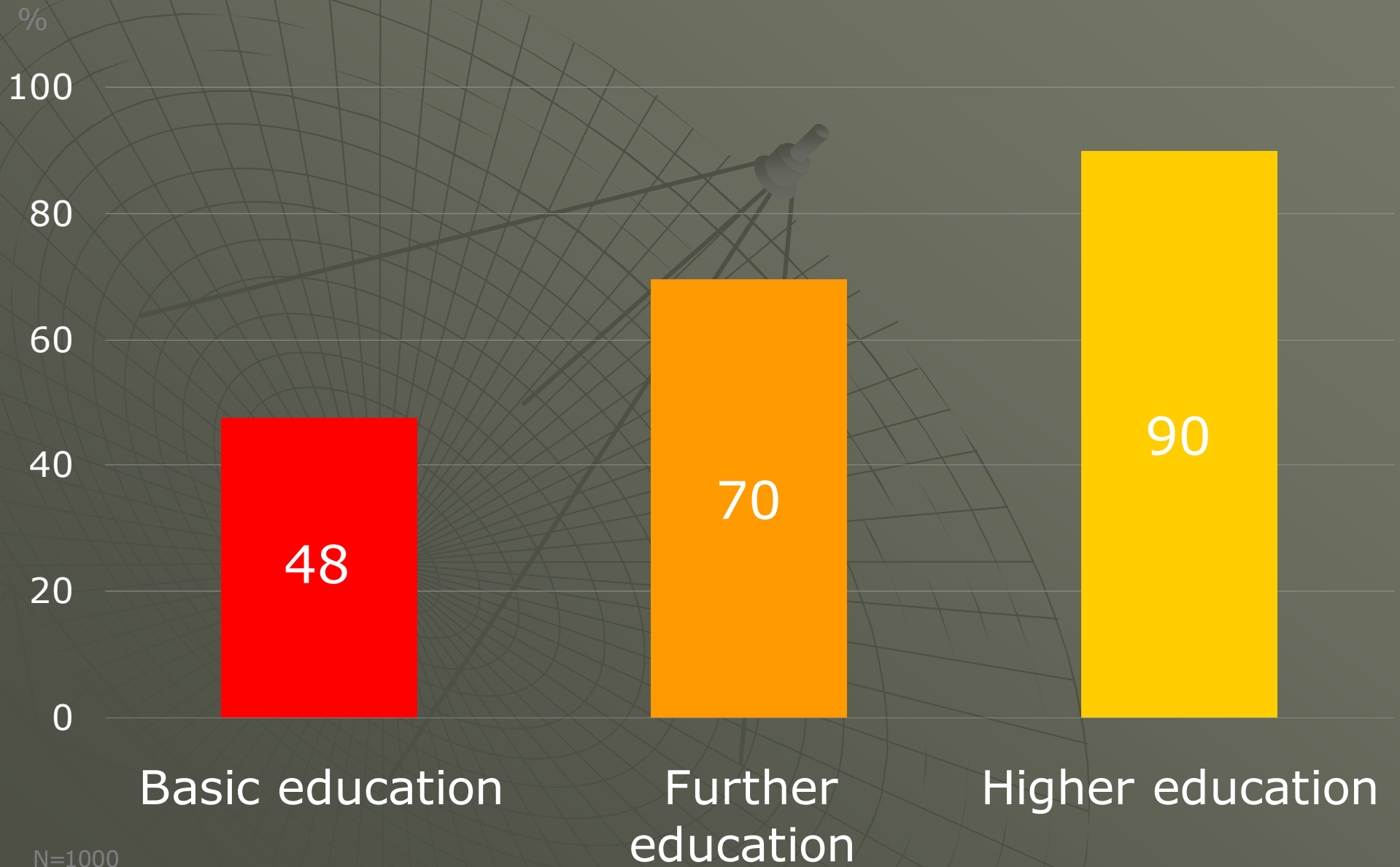
N=1,000

Internet use by income



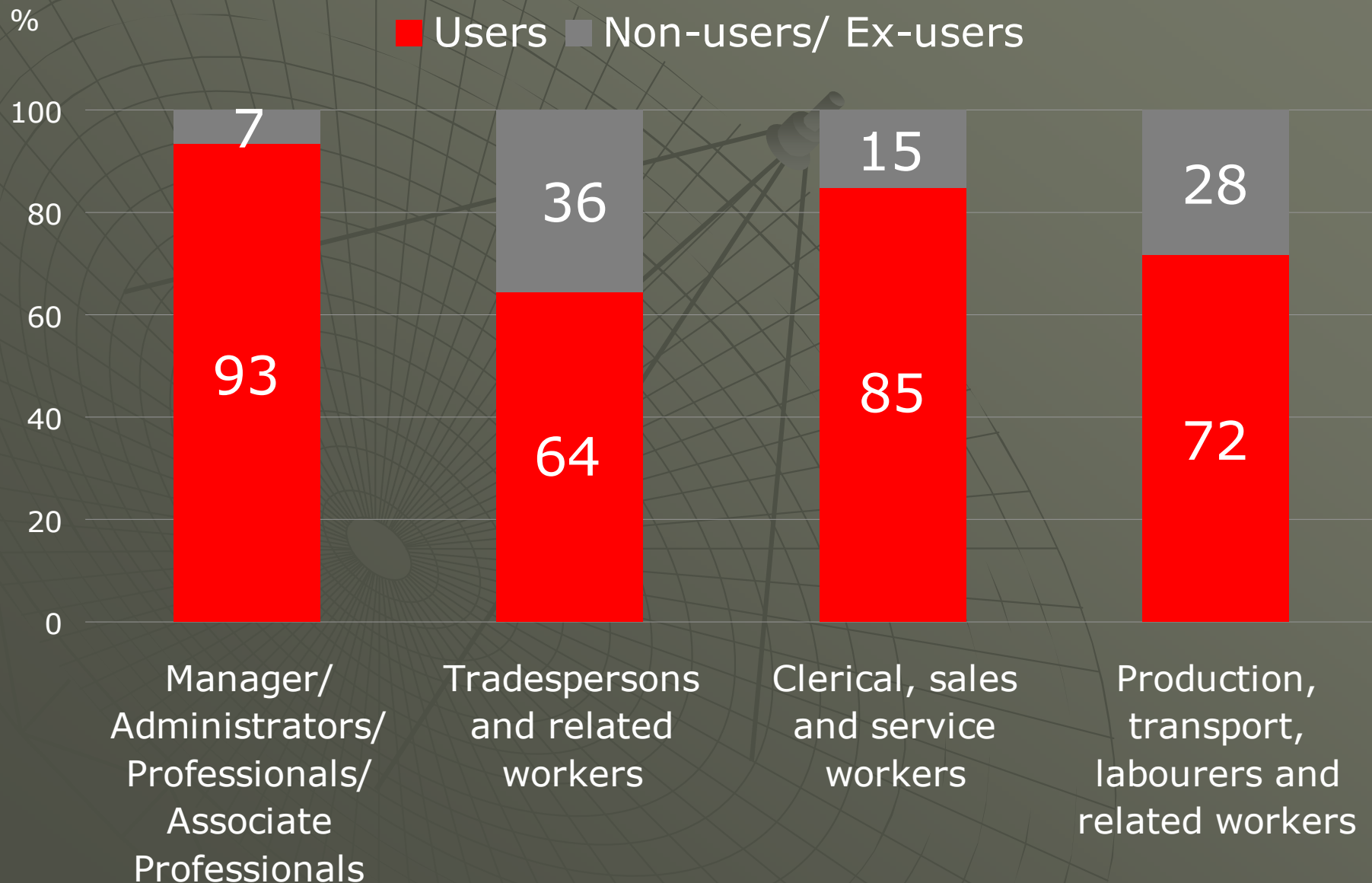
N= 1000

Internet use by education

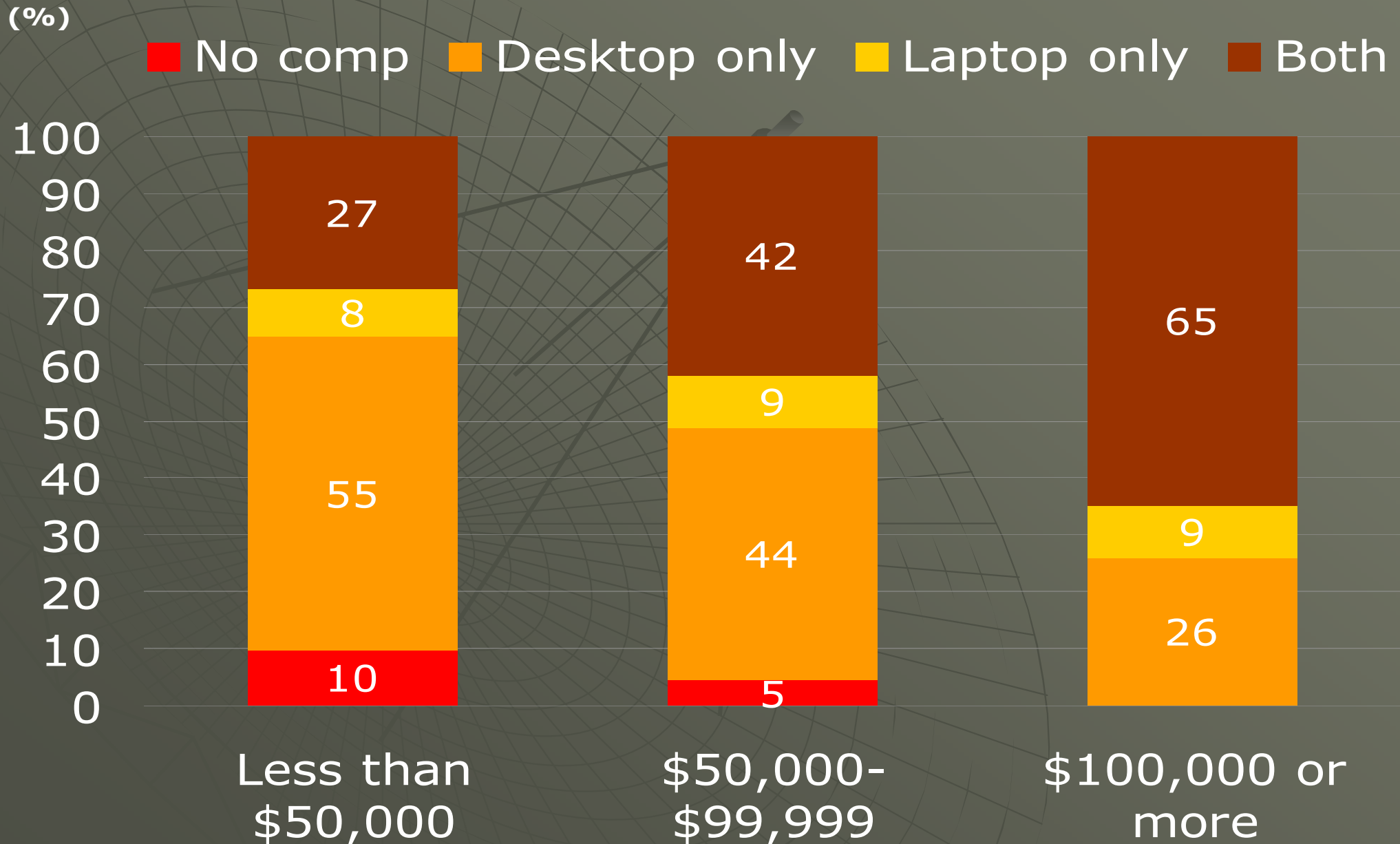


N=1000

Internet use by occupation



Computer at home by income, households with children only



Home access by income and children

■ No home access

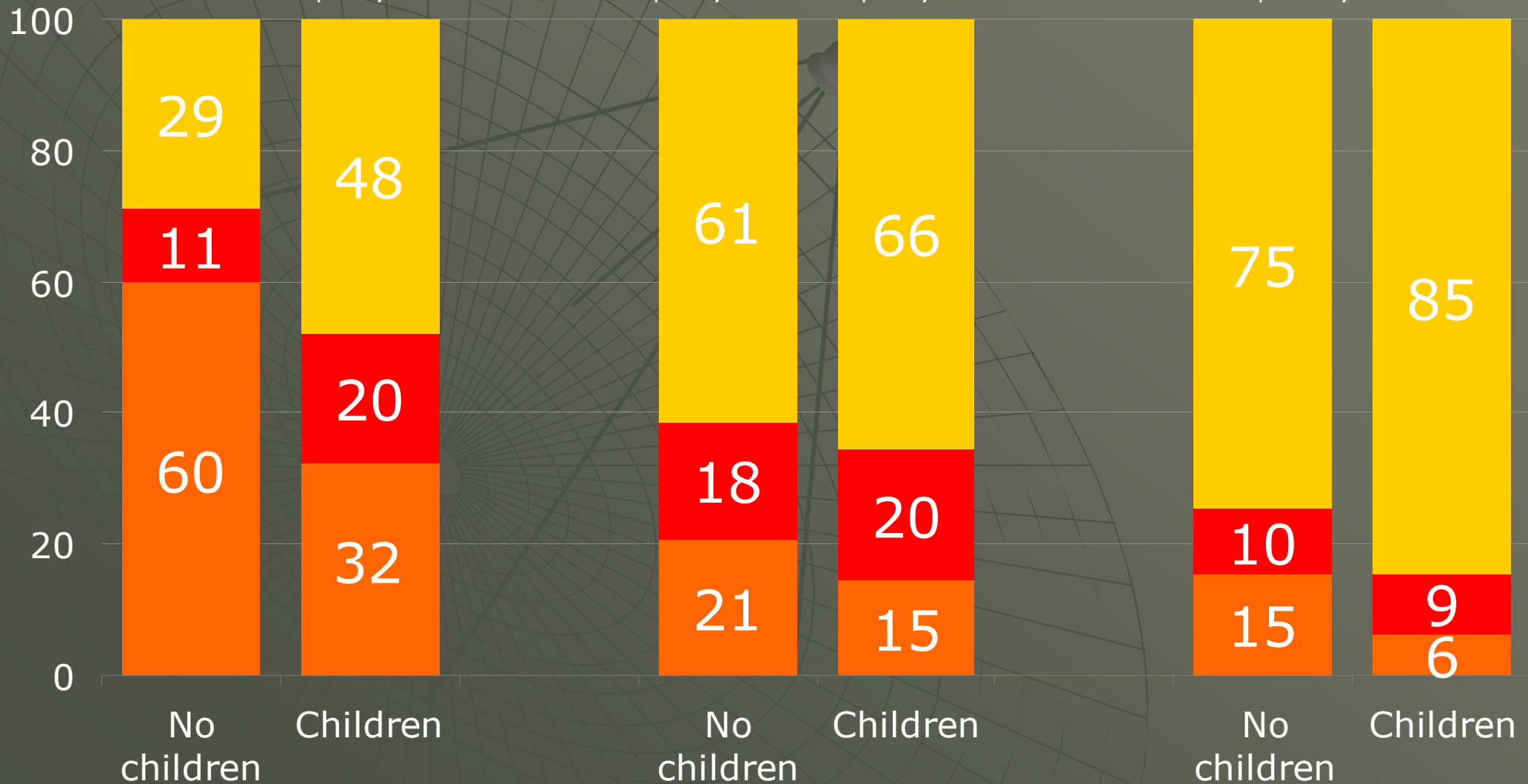
■ Dial-up

■ Broadband

Less than \$50,000

\$50,000 to \$99,999

\$100,000 +

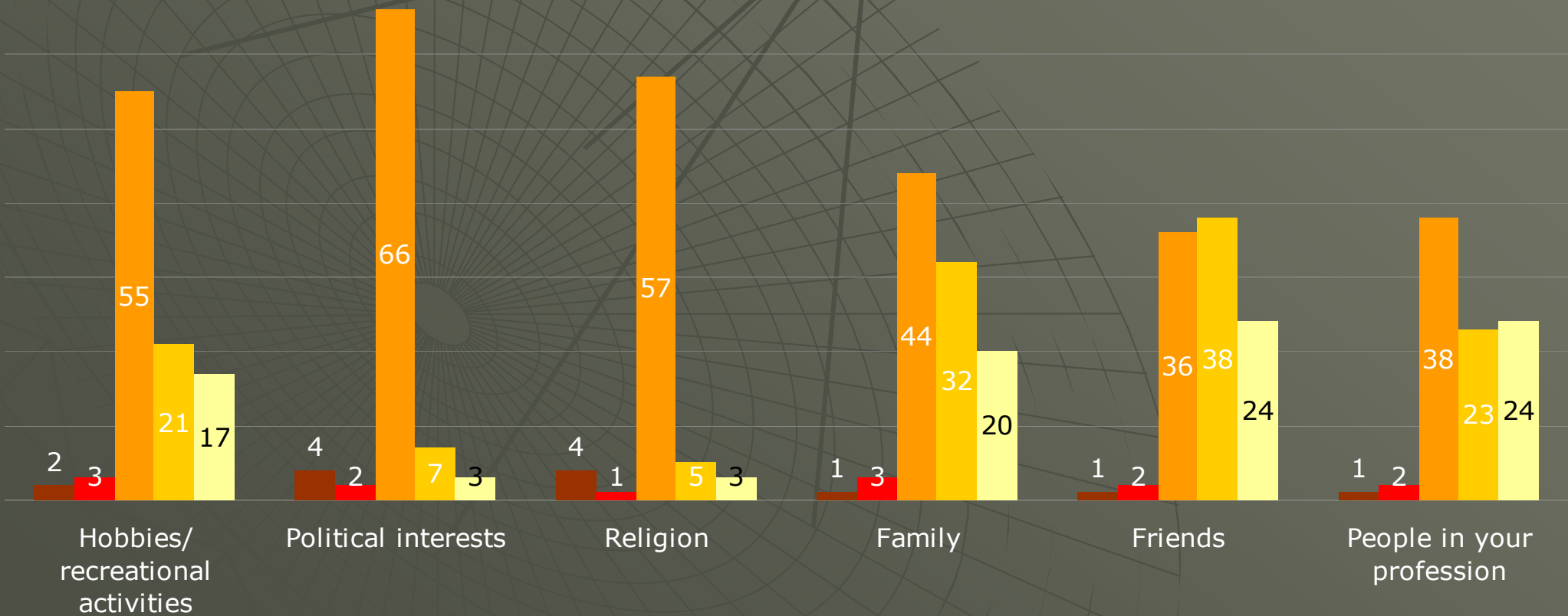


Interacting online

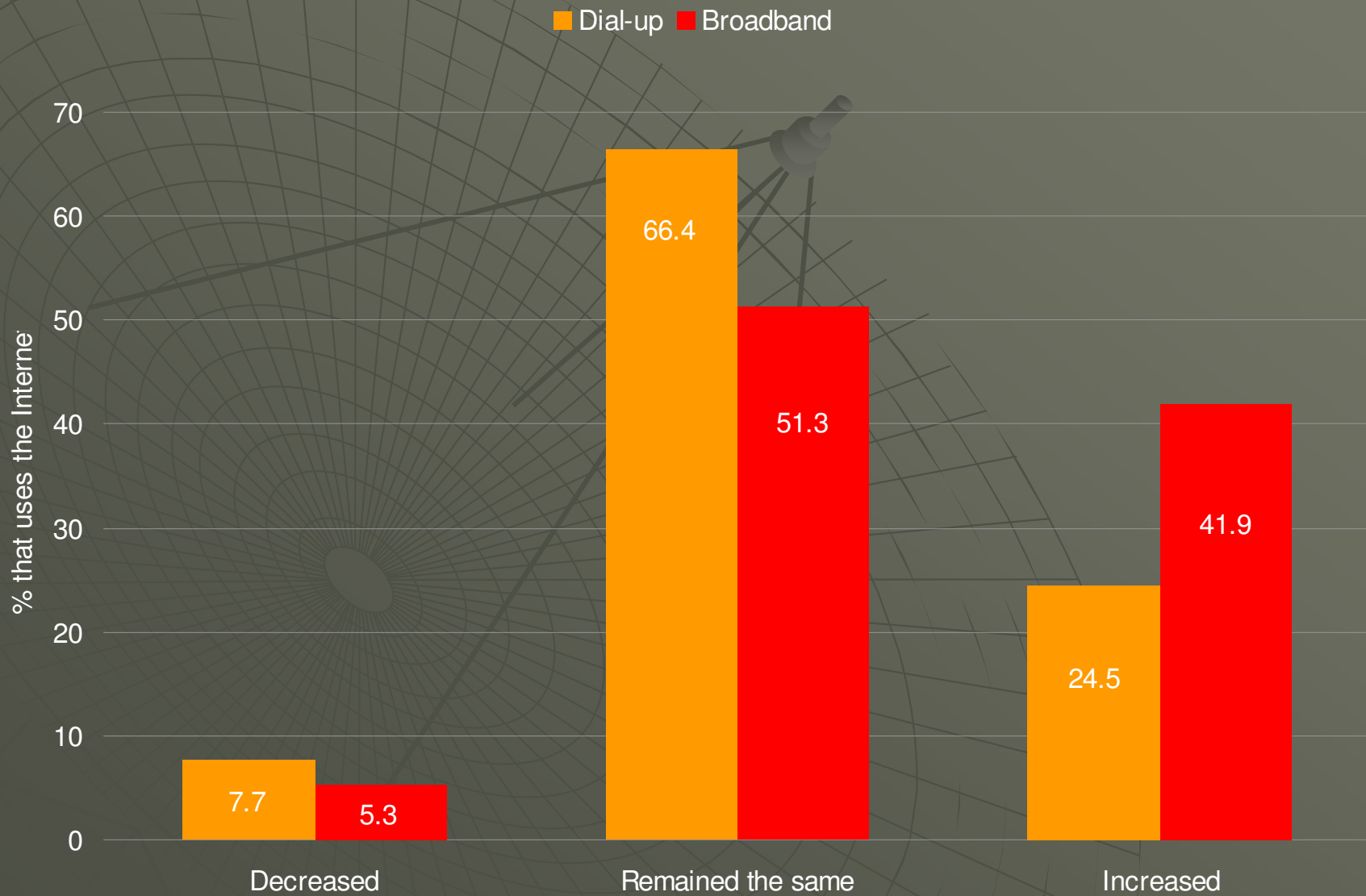


Contact with various groups since connection

Greatly decreased Somewhat decreased Remained the same Somewhat increased Greatly increased



People who share hobbies



Viewing and Creating Content

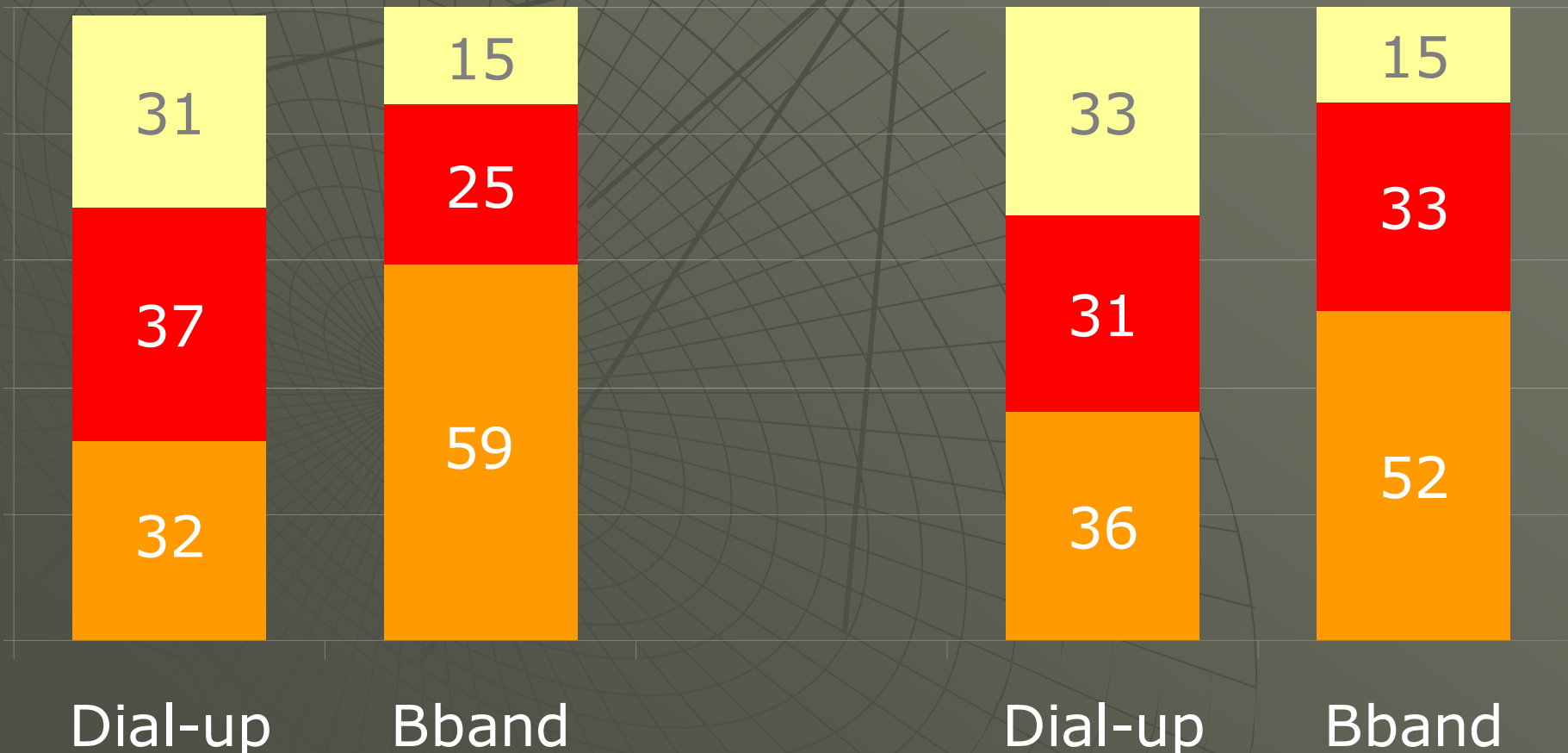


Importance of internet by gender

Very important Important Not important

Women

Men



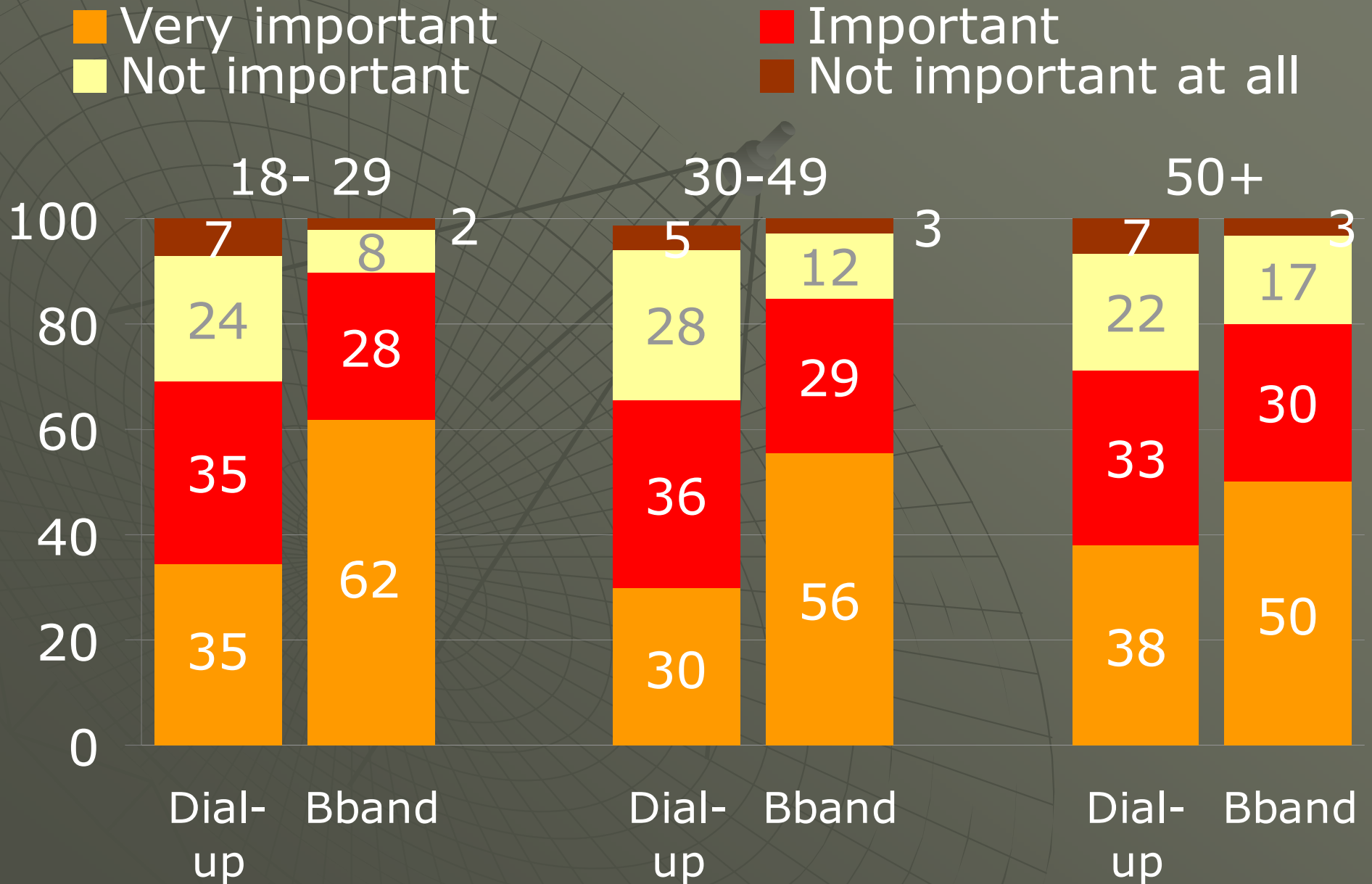
Downloading and surfing by gender

	Download video		Download music		Surf the web	
	Participate	At least weekly	Participate	At least weekly	Participate	At least weekly
Female dial-up	5	2	23	7	55	32
Female Bband	30	19	48	27	53	35
Male dial-up	20	10	41	25	59	39
Male Bband	41	28	62	34	64	47

Blogging and posting photos, access type by gender

	Own website		Post photos	
	Participate	At least weekly	Participate	At least weekly
Female dial-up	1	1	13	5
Female Bband	12	9	28	12
Male dial-up	12	5	31	23
Male Bband	16	11	26	12

Importance of internet by age



Downloading and surfing by age

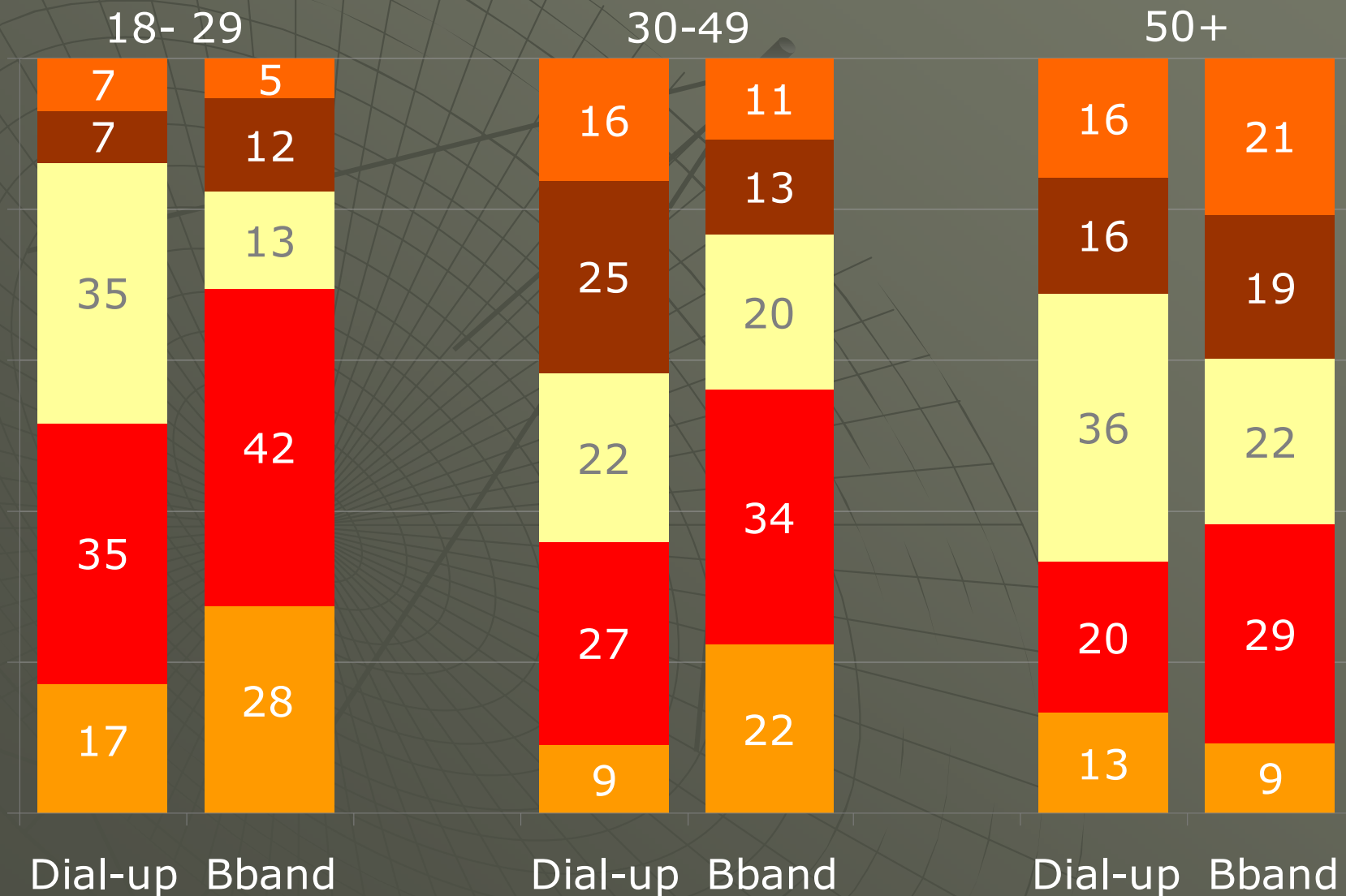
	Download video		Download music		Surf the web	
	Participate	At least weekly	Participate	At least weekly	Participate	At least weekly
18-29 dial-up	31	21	48	35	72	52
18-29 Bband	57	45	83	57	75	62
30-49 dial-up	9	3	36	14	58	30
30-49 Bband	37	23	54	29	58	41
50+ dial-up	2	0	11	4	44	16
50+ Bband	16	6	35	11	46	22

Blogs and websites by age

	Own blog		Own website	
	Participate	At least weekly	Participate	At least weekly
18-29 dial-up	21	7	14	10
18-29 Bband	20	12	25	20
30-49 dial-up	0	0	2	0
30-49 Bband	5	2	14	8
50+ dial-up	2	2	7	2
50+ Bband	4	1	7	5

Share creative work I like by age

■ Strongly agree ■ Agree ■ Neither
■ Disagree ■ Strongly disagree



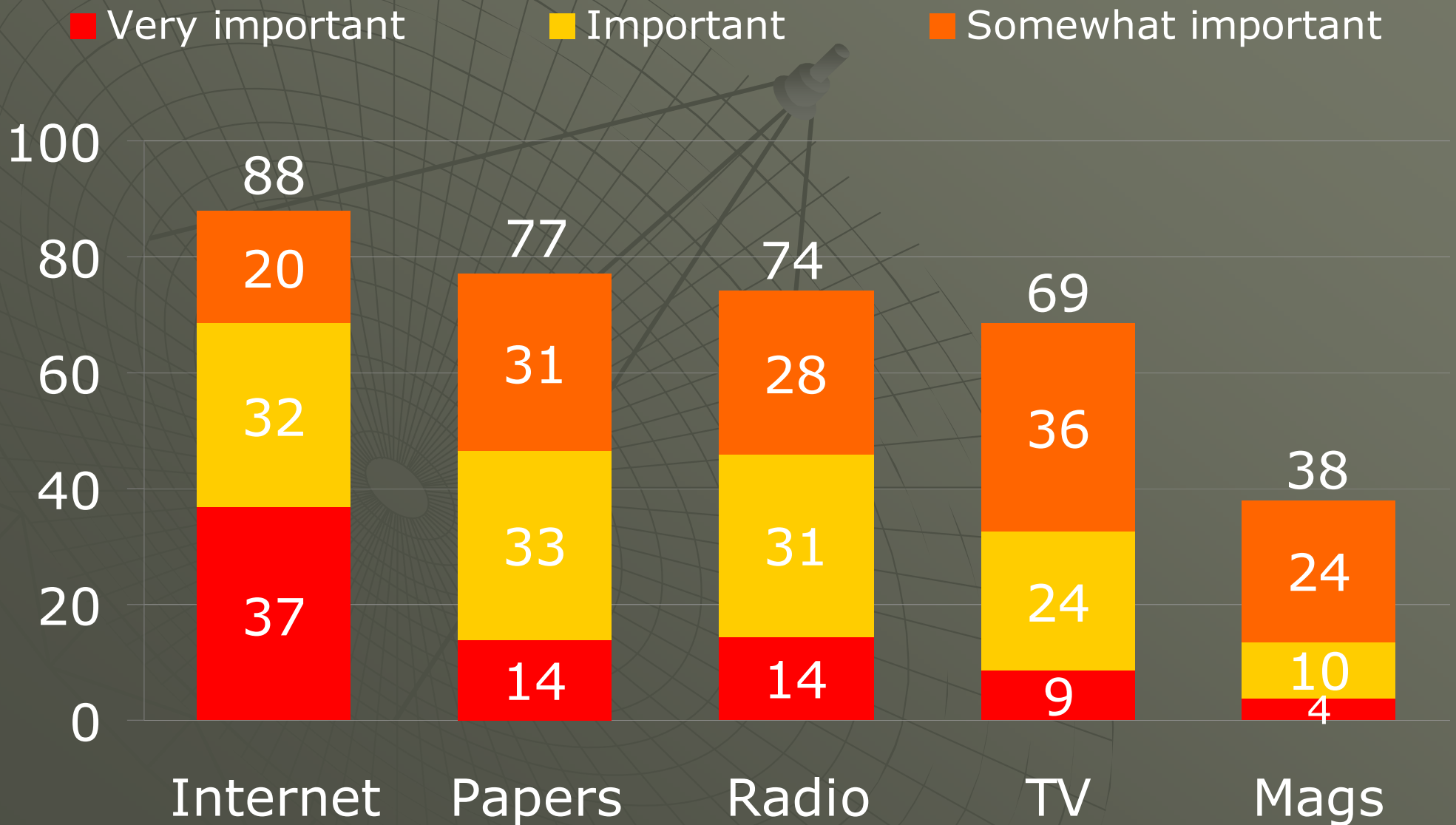
Online and Offline Media Consumption



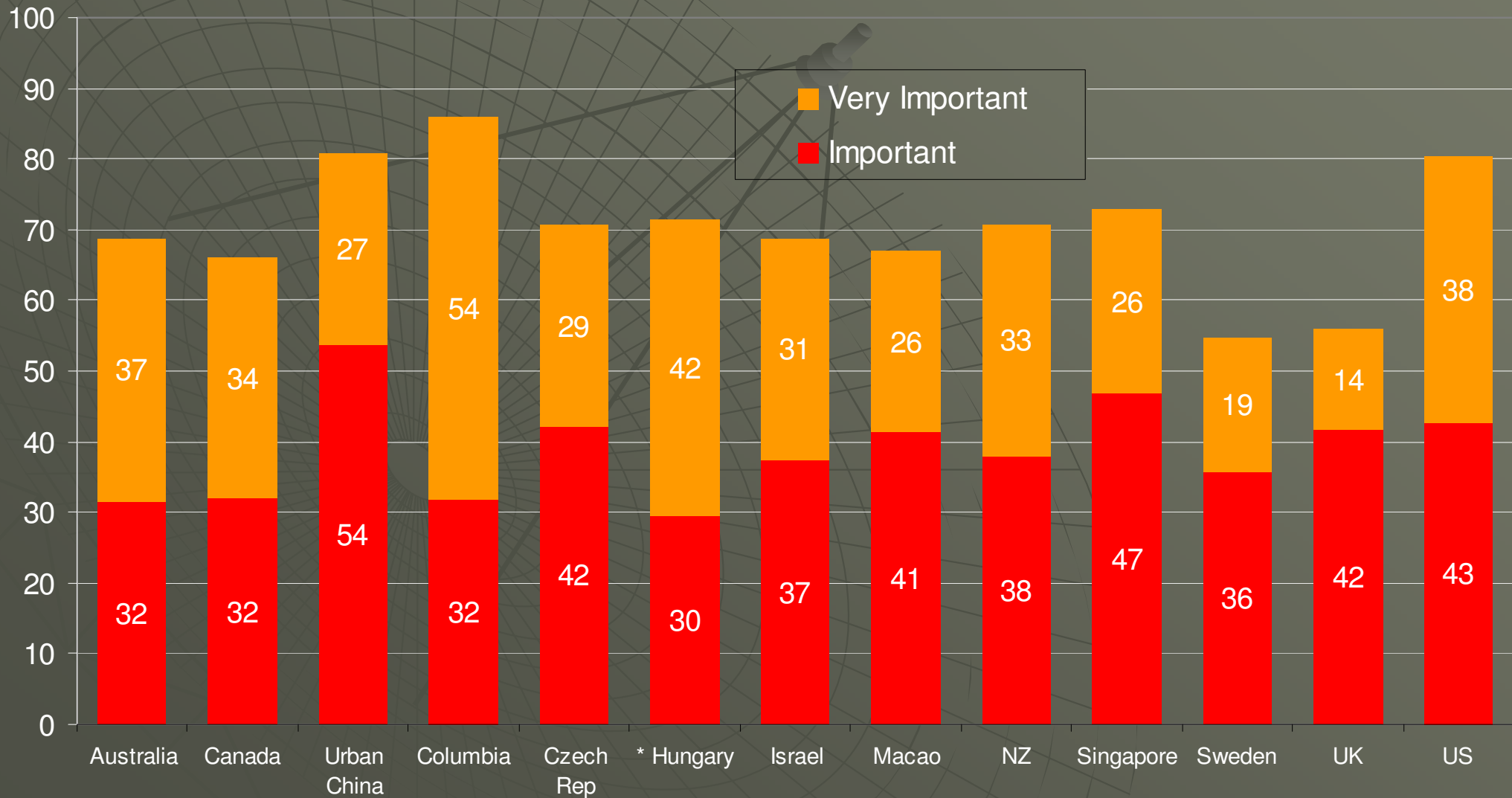
Impact of internet access on other media use by age

	Television		Reading books		Reading papers/mags	
	More	Less	More	Less	More	Less
18-29 dial-up	14	35	14	31	14	14
18-29 Bband	3	61	12	33	9	30
30-49 dial-up	0	25	10	10	2	13
30-49 Bband	5	43	11	24	10	27
50+ dial-up	2	38	11	20	2	20
50+ Bband	5	31	10	13	6	15

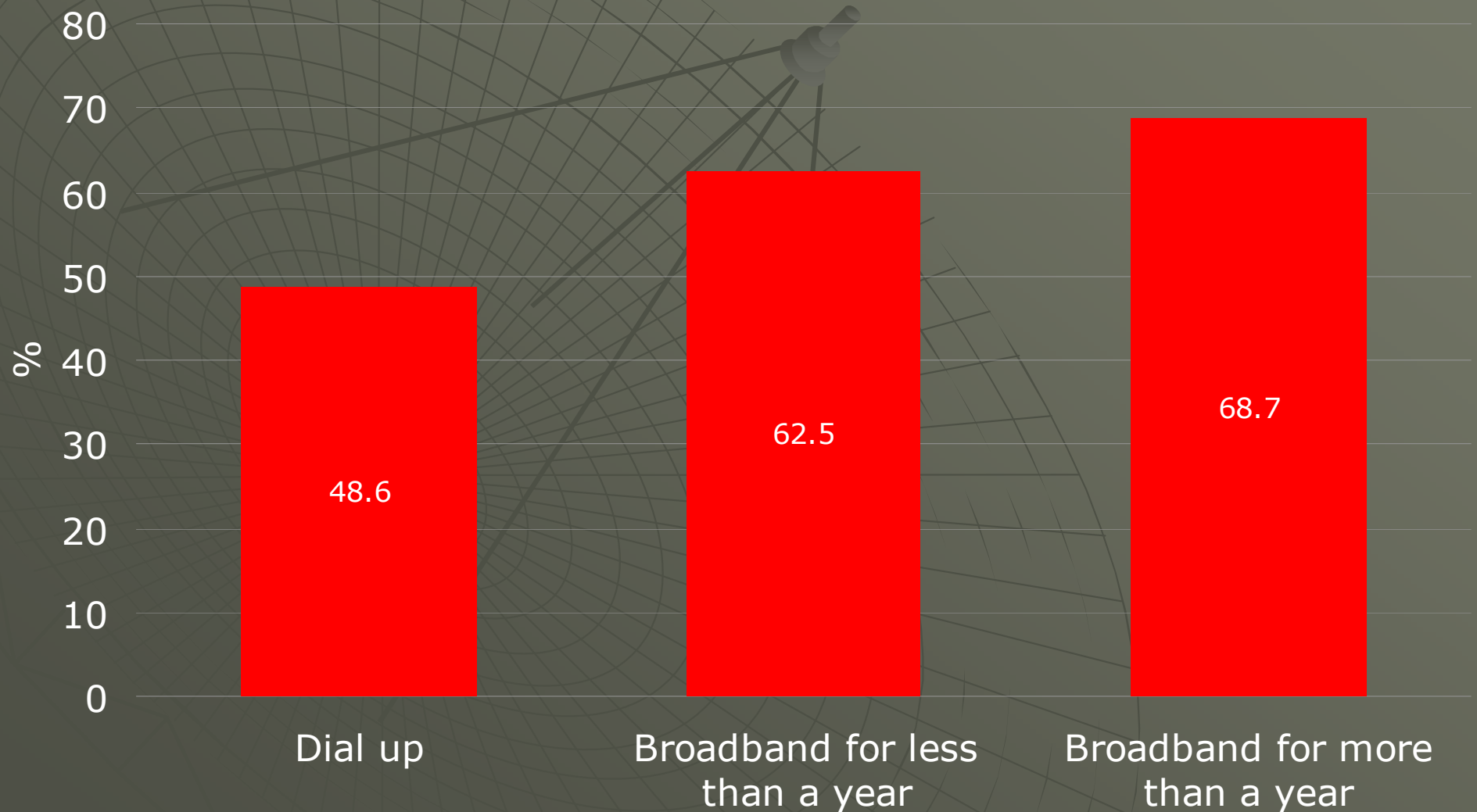
Importance of various media for information



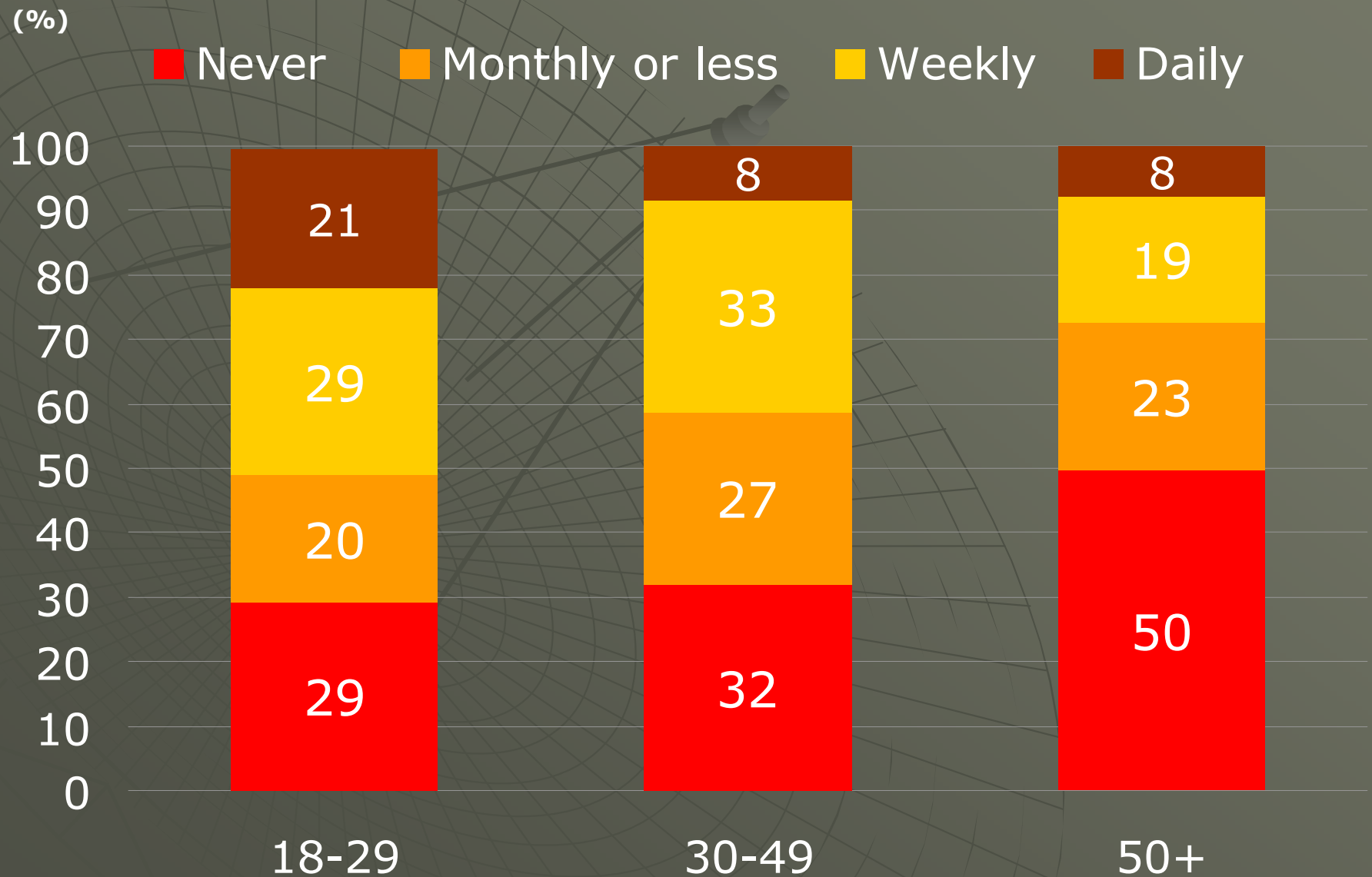
Importance of internet for information, selected countries



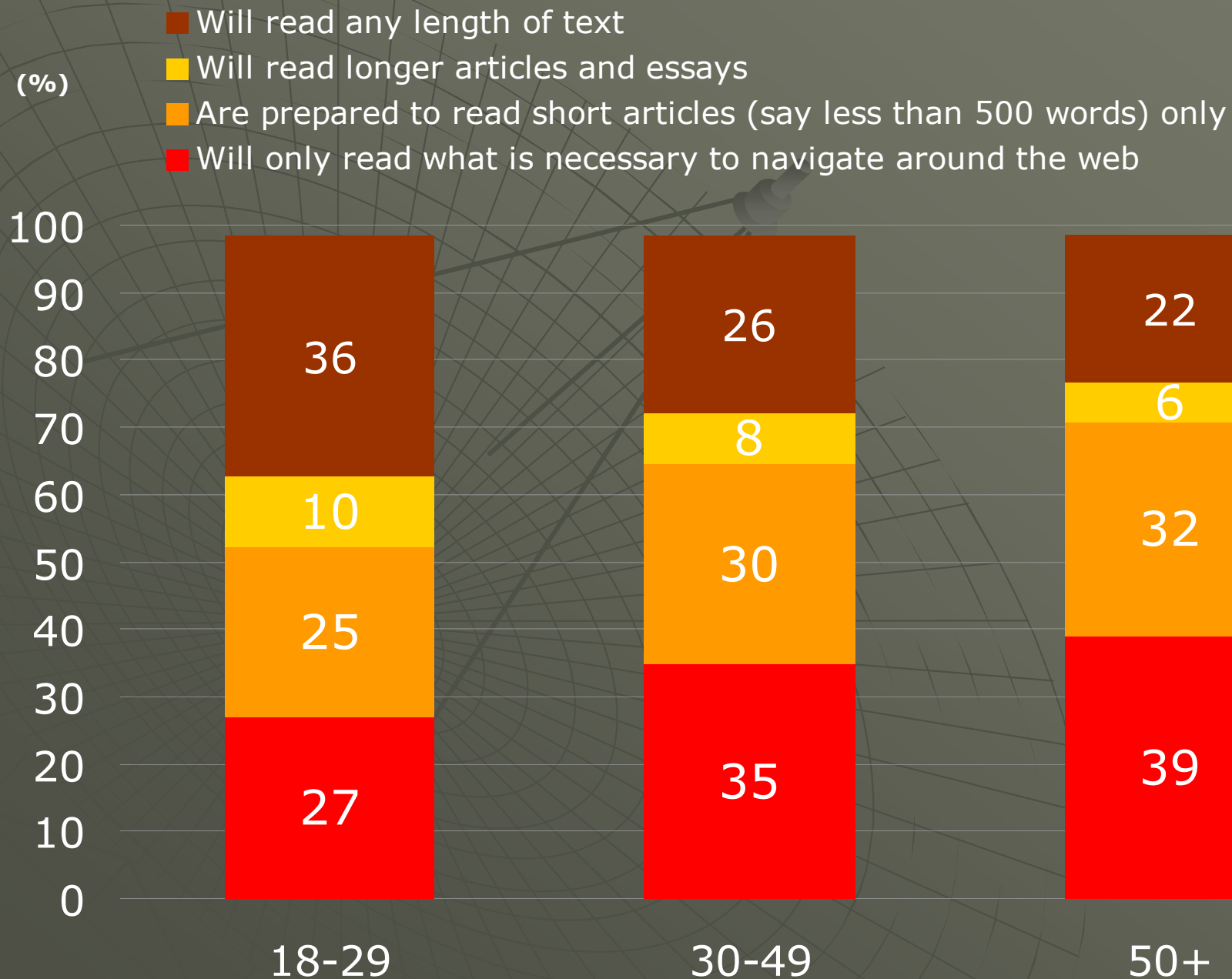
If a large international story was breaking I would access an online news service



How often do you look for general information on a site such as Wikipedia, by age



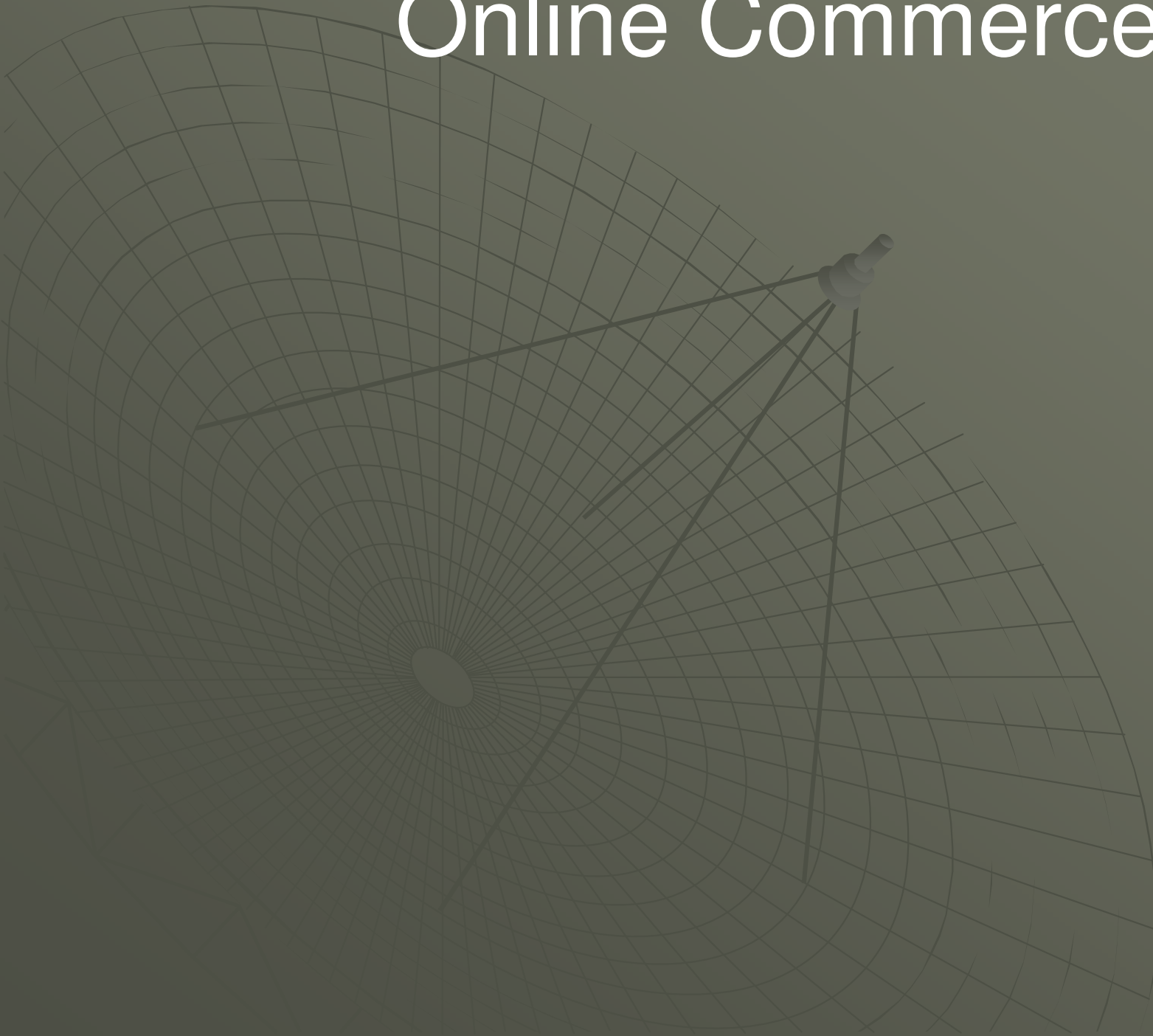
Attitude to reading online, by age



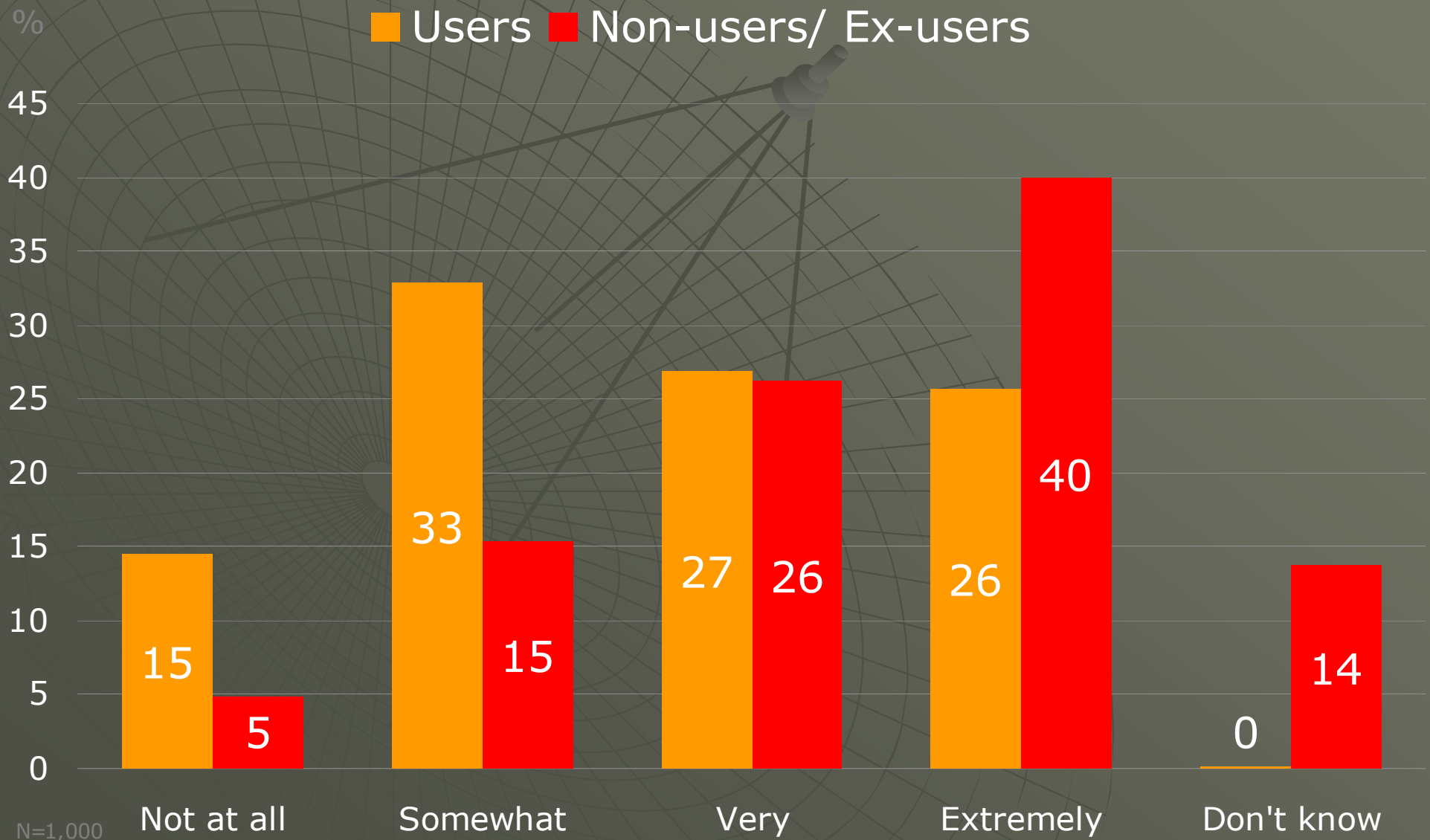
The internet has become important for the political campaign process



Online Commerce



Concern about credit card security



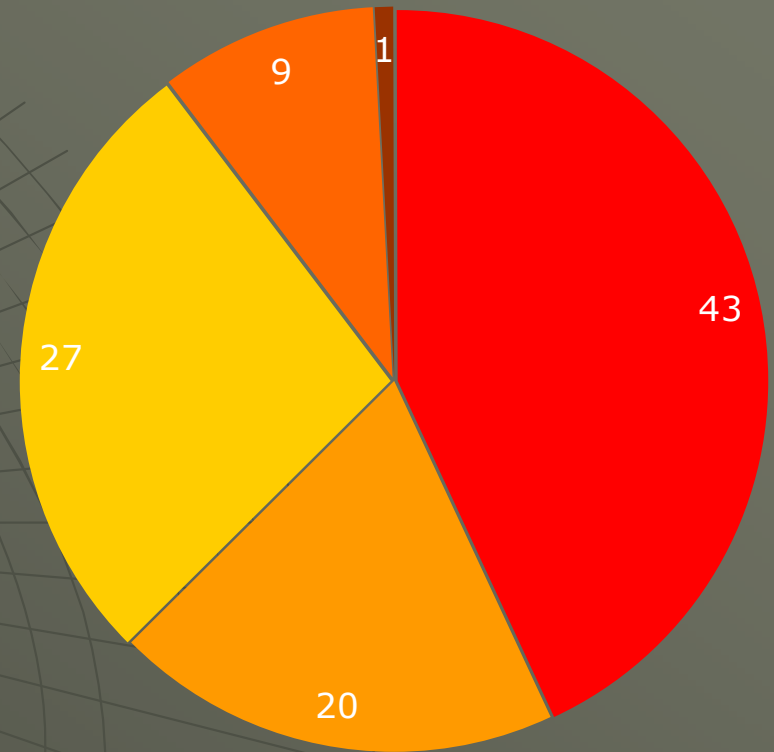
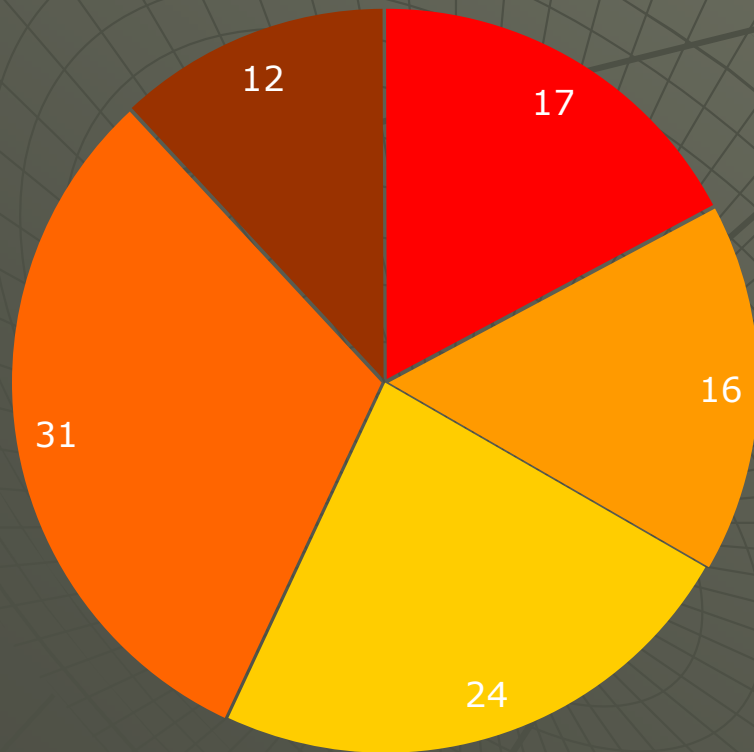
Research products

Buy products

- Never
- Monthly
- Daily
- Less than monthly
- Weekly

- Never
- Monthly
- Daily
- Less than monthly
- Weekly

- Never
- Monthly
- Daily
- Less than monthly
- Weekly



N=726

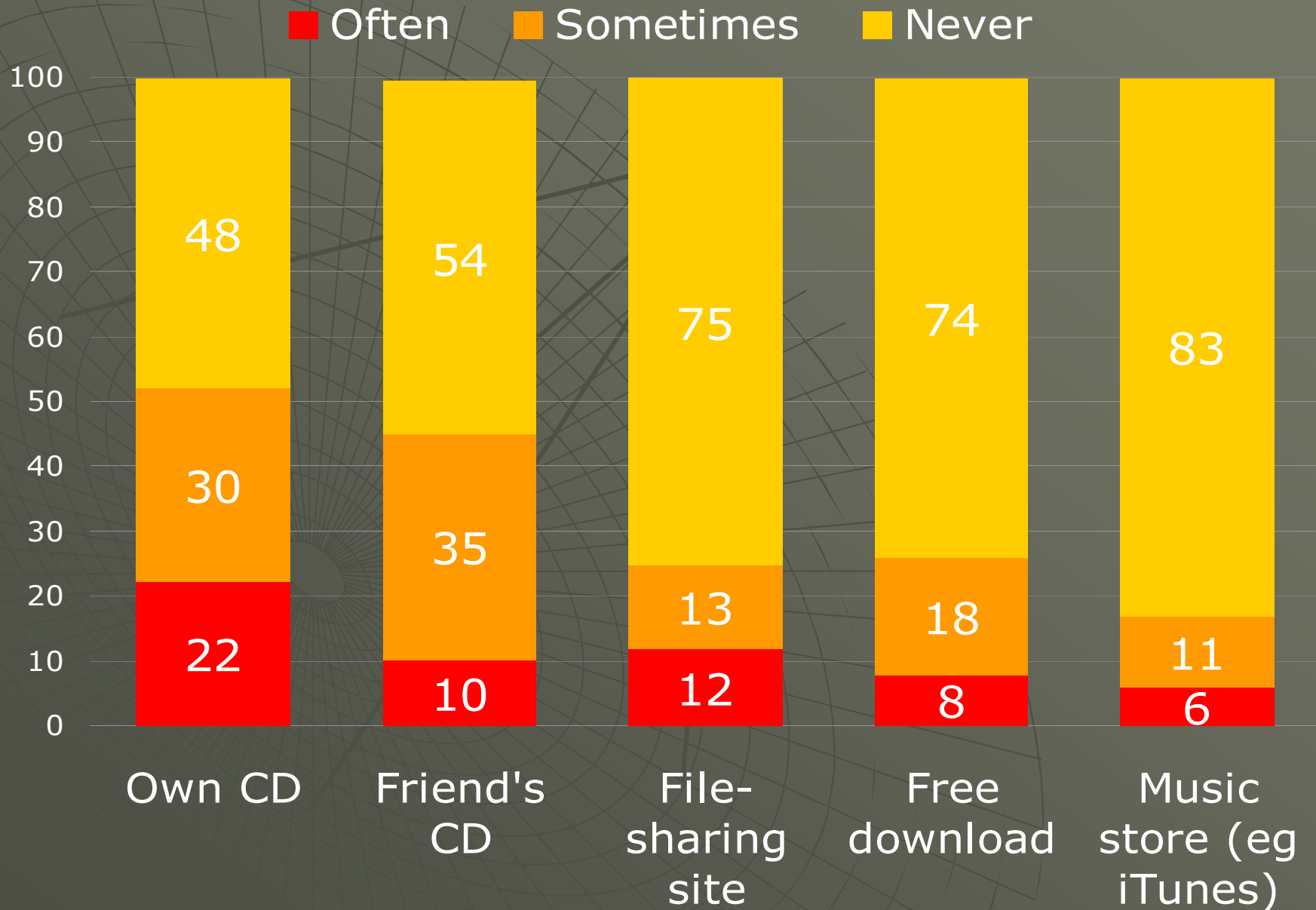
N=726

Banking



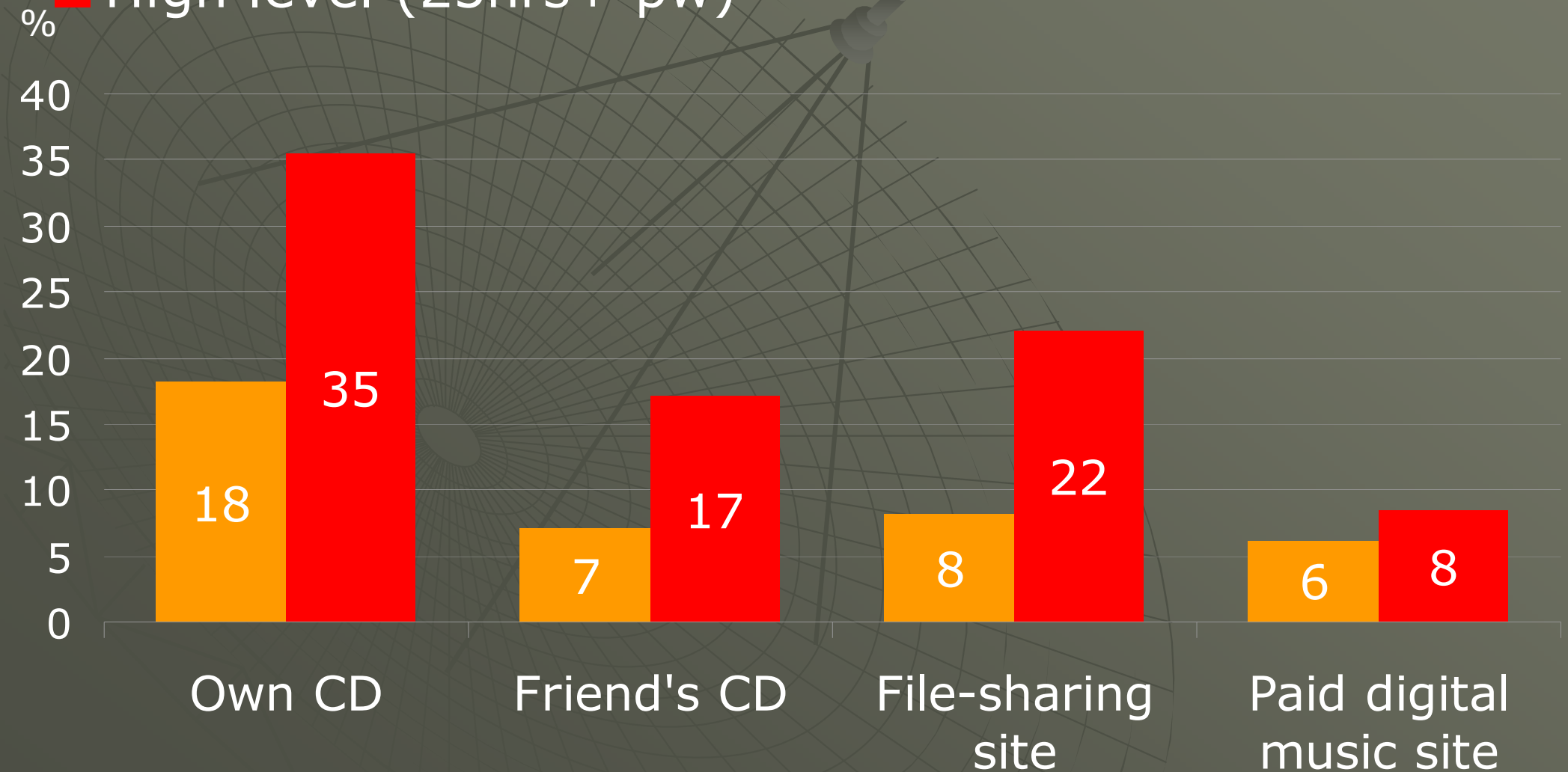
N=726

Where do you get your digital music

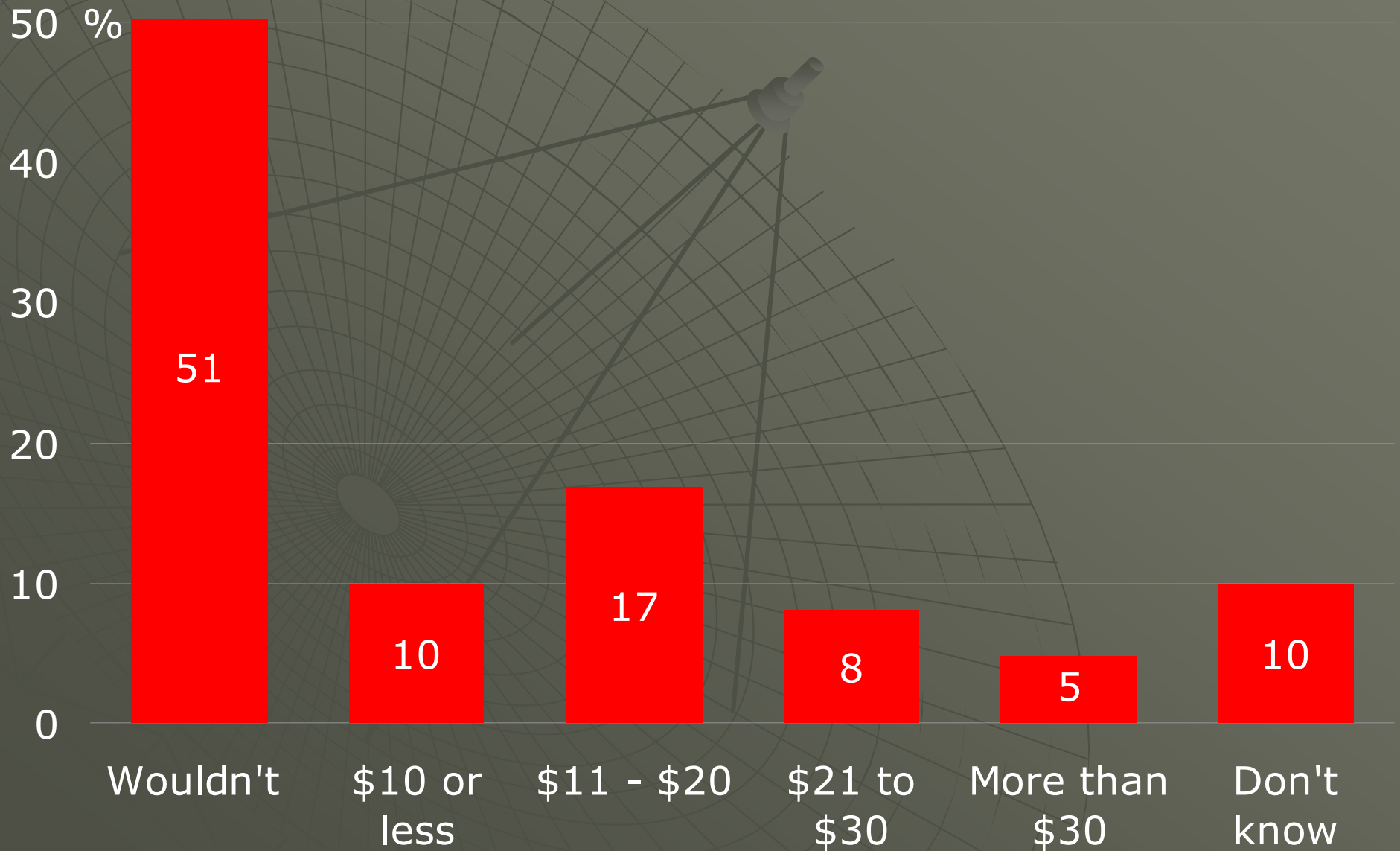


Where do you get digital music

- Moderate level (10 to less than 25hrs pw)
- High level (25hrs+ pw)

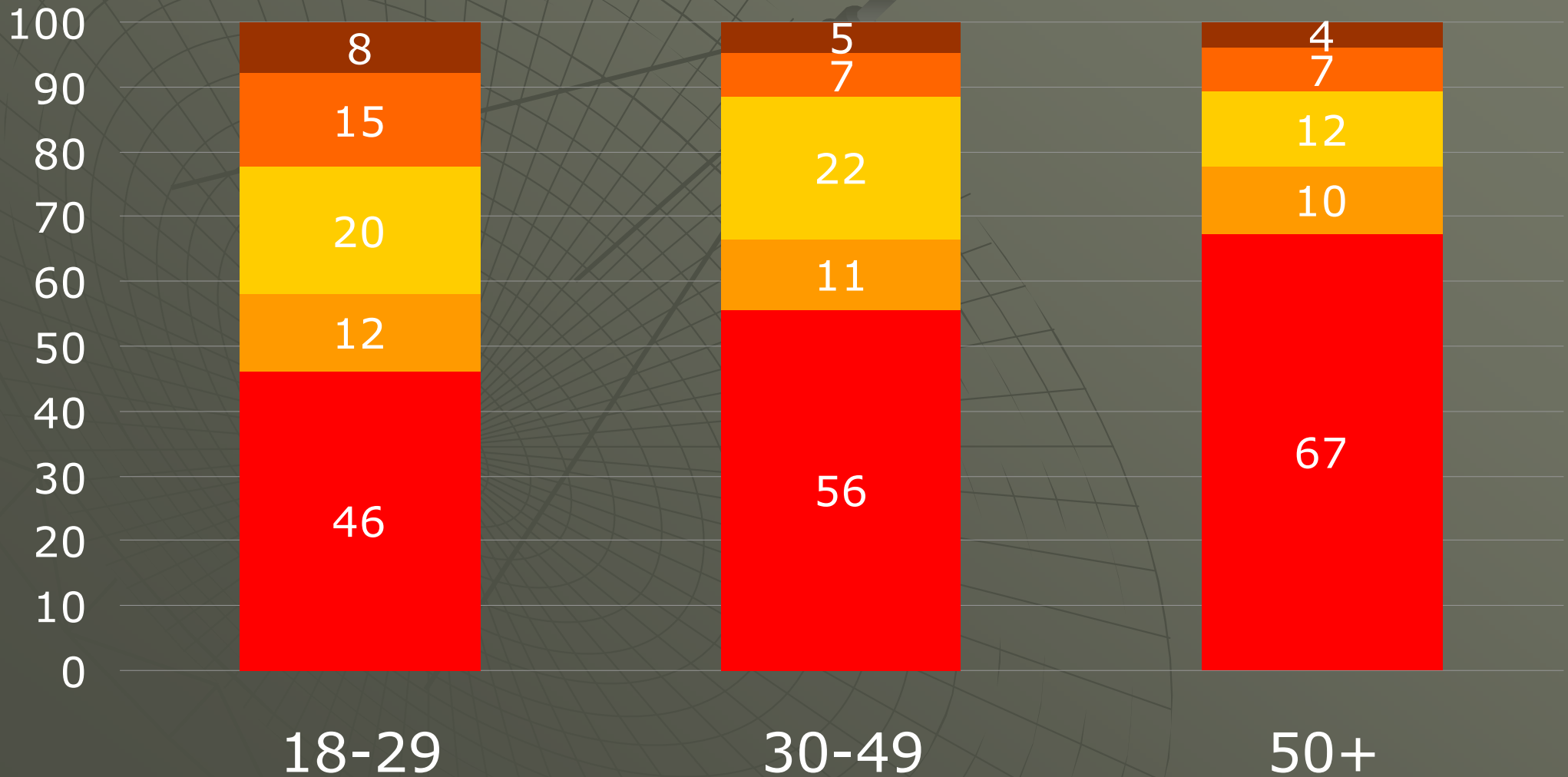


How much would you pay for a digital copy of a \$40 CD or DVD?

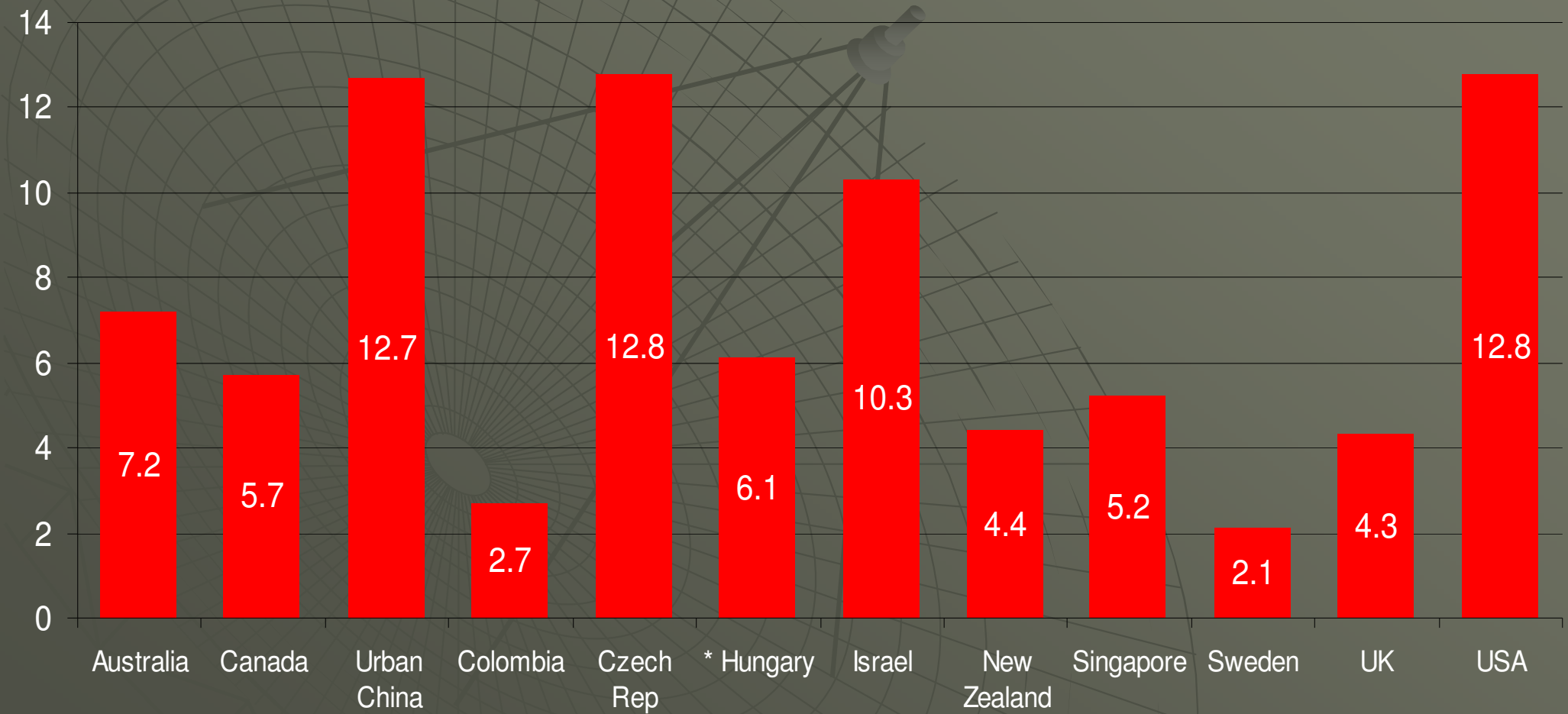


Online version value by age

■ Wouldn't ■ \$10 or less ■ \$11 - \$20 ■ \$21 to \$30 ■ More than \$30



View sexual content at least weekly



Summing up

- ◆ There is still a digital divide in Australia
- ◆ Households with children are more likely to be online and have broadband access
- ◆ The internet has become a very important source of news and information for users
- ◆ The internet has become a very important means of communication for users
- ◆ The internet is an important source of entertainment and this will grow as the network improves in speed and coverage

Summing up

- ◆ Mobile internet is coming but is still a relatively minor means of accessing the net
- ◆ E-commerce is developing but still for many consumers the internet is an information source rather than a place to buy
- ◆ What people do online is clearly influenced by what they *can* do (ie broadband makes a difference)
- ◆ Broadband access appears to make a bigger difference to women's online activities than men's
- ◆ There are different patterns of usage across age groups with younger people more likely to be posting content

First Australian report at
www.cci.edu.au/projects/digital-futures

More about WIP, including recent reports from the project can be found at
www.worldinternetproject.net