Consumer Views and Behaviours on Digital Platforms

Final Report

November 2018

Prepared for:
Australian Competition and Consumer Commission

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2. Executive summary

This report was prepared for the Australian Competition and Consumer Commission (ACCC) and contains findings from an online consumer survey of 4,308 Australian digital platform users[1] conducted by Roy Morgan Research. The survey was conducted in July-August 2018.

The purpose of the research was to inform matters relevant to the ACCC's Digital Platforms Inquiry, in particular, to assist the objectives of:

- understanding the views and behaviours of digital platform users in relation to digital platforms, and
- understanding the perceptions and views of digital platform users on the choice of online news available to them.

2.1 Views and behaviours of Digital Platforms users

2.1.1 Use of Digital Platforms

The most commonly used digital platforms reported to be used by over half of Digital Platforms Users (DP users) were a combination of search platforms (Google Search – 96%), social media platforms (YouTube – 91%, Facebook – 81%, and Messenger – 73%) and internet browsers (Google Chrome – 80%, Internet Explorer – 67%, and Safari – 51%). On average, DP users reported using at least 4 different platforms on a daily basis, and an additional 2 different platforms on a weekly basis.

Those who spoke language other than English, younger users (aged 18-24) and those with at least some tertiary level education generally reported using used more platforms on average and on a more frequent basis.

Where set up was required, most users reported setting up their own accounts.

2.1.2 Views of digital platform information collection and use

Most DP users indicated that they did not want their personal data to be used or shared beyond the particular requirements of a Digital Platform, and particularly not for the purposes of developing targeted advertising. More than half of DP users (54%) reported being more concerned about the privacy of their personal information on digital platforms now than they were one year ago.

The survey also asked DP users their opinions on what they viewed digital platforms (as a whole) may do with information they collect and use from them. These questions were asked in aggregate, so the responses did not identify whether views of users may have varied between types of digital platforms that may be used by DP users. Further, as these views applied to digital platforms in aggregate, it is unable to be verified whether these views matched the practices of digital platforms they use.

[1] A digital platform user, was a user of a 'digital platform' (defined to be a search engine, social networking site or other content aggregator site) who was aged 18 and over and living in Australia.

However, the survey found that there were varying opinions of how digital platforms may collect and use the information of DP users:

- Around a third were of the view that the existence of a privacy policy meant that digital platforms would not share their information with anyone else and that the information which mobile and tablet apps sought permission to access from a user, was only that information that was required for the app to function.
- Around three quarters of DP users were of the view that digital platforms have the ability to follow a person's activities across the web and exchange information about a DP user with third parties.

Further, when asked who owns the data a DP user shares online, around one in three believed that either they owned their own data (29%), or that the company they gave the information to owned their data, but needed to give them access to, and seek their consent to share, the data (37%). The opinions on these responses also differed by demographics, for example, users who spoke a language other than English generally reported a lower level of agreement with statements related to the ability of digital platforms to collect and use information in various ways.

2.1.3 Actions of Digital Platforms users in relation to privacy and personal data

DP users were asked to report on actions they had taken to protect their privacy and personal data on digital platforms in the past year.

DP users reported taking at least 8 different actions to protect their privacy over the past year, with only 7% having taken no actions at all. The most commonly reported actions to be undertaken were:

- Clearing browsing history (58%)
- Selecting 'opt out' options where available (57%)
- Deleting an app from their phone (53%)
- Deleting cookies from Internet browsers (52%)
- Refusing to provide personal information to a platform (50%), and
- Denying an app permission to access information on their phone (50%).

In reviewing these results, however, it is important to note that the results do not disclose whether a DP user regularly undertook each action across all platforms they used or whether they performed this action irregularly or only for certain platforms (and not others) during the year.

With respect to privacy settings, 44% reported adjusting their settings on an existing account, 37% set or adjusted the privacy settings on a new account, 34% indicated that they read a privacy policy or notification before providing personal data, and 22% did something in direct response to an updated privacy policy. In general, the youngest (18-24 years) and the 65 years or over users reported undertaking fewer actions to protect their privacy.

The majority of users (72%) indicated that they undertook actions to protect their data due to a desire to be more cautious. A little under half indicated that their actions were taken as a result of recent news reports on significant data breaches (43%) or use of consumer data by digital platforms (40%).

However only 34% of users indicated that they adjusted the ad settings on their online accounts to reduce the number of targeted ads being received, despite around three-quarters or more of users, indicating that they did not like receiving or having platforms deliver targeted advertising to them.

Less than one in five users (18%) indicated that they read privacy policies for internet sites or apps most or every time, with three in five (60%) indicating that they rarely or never did so.

2.2 Accessing online news

2.2.1 Online news accessed

Most DP users (91%) indicated that they had encountered news online in the last month. Around two in three DP users (64%) reported using a variety of active and passive methods to access online news, with around one in seven using only active (13%) or only passive (14%) methods. A little under one in ten (9%) indicated that they had not accessed any news online in the past month.

Most DP users considered online news to be a good adjunct, rather than replacement for ‘offline’ news[2]. This corroborated the finding that the most commonly utilised source of online news for DP users is the website (or app) of a newspaper or broadcaster. Around three in five users indicated that they used a range of different sources to gather news to try and balance what they were exposed to (59%). However cross-tabulation results suggest that users with specific news interests that fall outside mainstream news (such as indigenous communities, immigrants and minority communities) feel that online sources are better able to meet their news needs than the traditional offline sources, which cannot be easily accessed or tailored to their needs.

Around two in three DP users understood that digital platforms ‘tailored’ news stories shown based on user likes and preferences (64%), with a little under half believing that stories were also ‘tailored’ based on the preferences and likes of their online ‘friends’ (47%). Three in ten users (30%) indicated that they liked having digital platforms tailor their news for them. Three in ten users also indicated that they did not understand how digital platforms curated online news. A little over half (54%) agreed that everyone should be exposed to the same (rather than tailored) news.

2.2.2 Perceived accuracy of online news

Three quarters (73%) of DP users agreed that they considered the source and author of online news to assess its validity. The youngest and oldest users were the least likely to consider the source and author of the news to assess the validity of the content with 61% of those aged 18-24 and 64% of those aged 80 or more agreeing with the statement.

Two thirds of DP users agreed or strongly agreed that they were aware of being exposed to fake news online (67%) and a similar proportion thought they were capable of knowing what real or fake

[2] DP users were not provided a definition of ‘offline’ news. However, DP users were asked (Q.21) to indicate whether they used the following forms of online news sources: websites or apps of newspapers or broadcasters, online newspapers, news aggregators or social media. DP users were then asked a series of questions around preferences with online and offline news (Q.23). Offline sources are therefore implied to be those not available ‘online’ (such as non online broadcasted TV and radio or printed newspapers and publications).

news (64%) is. This suggests that, while the importance of reliable news is generally acknowledged, most people believe they are equipped to identify fake news when they come across it. Those aged 18-24 years and those aged 80 years were also the least likely to agree or strongly agree that they were aware of being exposed to fake news online (64% and 47% respectively) or that they were capable of knowing what is real news and what is fake news (54% and 53% respectively).

Two in five (40%) users agreed or strongly agreed that they can trust the news they consume, but only 21% agreed or strongly agreed that most people can trust the news they consume. This suggests that, on average, users tend to rate the online news they consume personally as being more reliable than that being consumed by other people in general.

3. Introduction

This report was prepared for the ACCC and contains findings from an online consumer survey of 4,308 DP users across Australia conducted by Roy Morgan.[3]

3.1 Background

On 4 December 2017, the Treasurer directed the ACCC to conduct an inquiry into digital platforms. The inquiry is required to examine the effect that digital search engines, social media platforms and other digital content aggregation platforms ('digital platforms') have on competition in media and advertising services markets. In particular, the inquiry looks at the impact of digital platforms on the supply of news and journalistic content and the implications of this for media content creators, advertisers and consumers.

The ACCC commissioned Roy Morgan to conduct a survey of DP users in Australia to assist in informing their inquiry. There are two core objectives for the research, these were to examine:

- the views and behaviours of digital platform users in relation to digital platforms, and
- the perceptions and views on the choice of online news available to digital platform users.

To address these objectives, the survey sought to explore the following themes:

- The views Australian consumers have about the data digital platforms collect from them and what they view that data is used for
- The extent to which consumers engage with the terms and conditions of digital platforms, take steps to protect privacy and whether their behaviour has changed over time
- Whether DP users actively or passively engage with news through digital platforms and what sources they engage with, and
- How digital platforms users view the accuracy of online news sources and levels of trust in them.

The survey more broadly sought to examine the extent to which the responses of DP users across all research objectives may vary by demographics or particular characteristics (including age, gender and location).

Although there have been a range of studies conducted in relation to topics explored in this study, this is the first study to focus solely on a subset of Australian consumers, with DP users as an area of focus. This should be considered when comparing the findings of this study with other studies.

[3] A digital platform user, was a user of a 'digital platform' (defined to be a search engine, social networking site or other content aggregator site) who was aged 18 and over and living in Australia.

3.2 Methodology

The findings of this report are based on an online survey of 4,308 digital platform users in Australia. Eligible respondents to the survey had to be aged 18+ years, living in Australia, and users of digital platforms such as search engines, social networking sites and other content aggregator sites. Examples of Digital Platforms include:

- Search Engines, including sites like Google or Bing, which can be accessed through web browsers like Safari, Chrome or Internet Explorer.
- Social Media Platforms, including sites like Facebook, Twitter, LinkedIn, WhatsApp or Snapchat.
- News Aggregator platforms, including sites like Apple News, Google News or Flipboard.

Minimum interlocking quotas were set for age by sex by region (metro vs regional) to ensure representativeness across those areas and sufficient numbers in each quota group to enable deeper analysis into each as required.

Reliability
The margin of error associated with this survey is +/- 1.5%, given a 95% confidence level. For example, if 50% of customers surveyed reported having accessed a digital platform in the last 3 months, we could be 95% sure that the true incidence among the broader consumer market would be between 48.5% and 51.5%.

Tests for significance
The tests for statistical significance have been conducted on particular sub-groups of interest in this report. Tests have been undertaken at a 95% confidence level (please note significance testing could not be undertaken on sample sizes smaller than n=30).

An outline of the full methodology is outlined in the Appendices.

3.3 Structure of the report

The remainder of this report is set out in three main sections, as follows:

- Behaviours, views and awareness of Digital Platforms
- Use and understanding of online news, and
- Appendices.

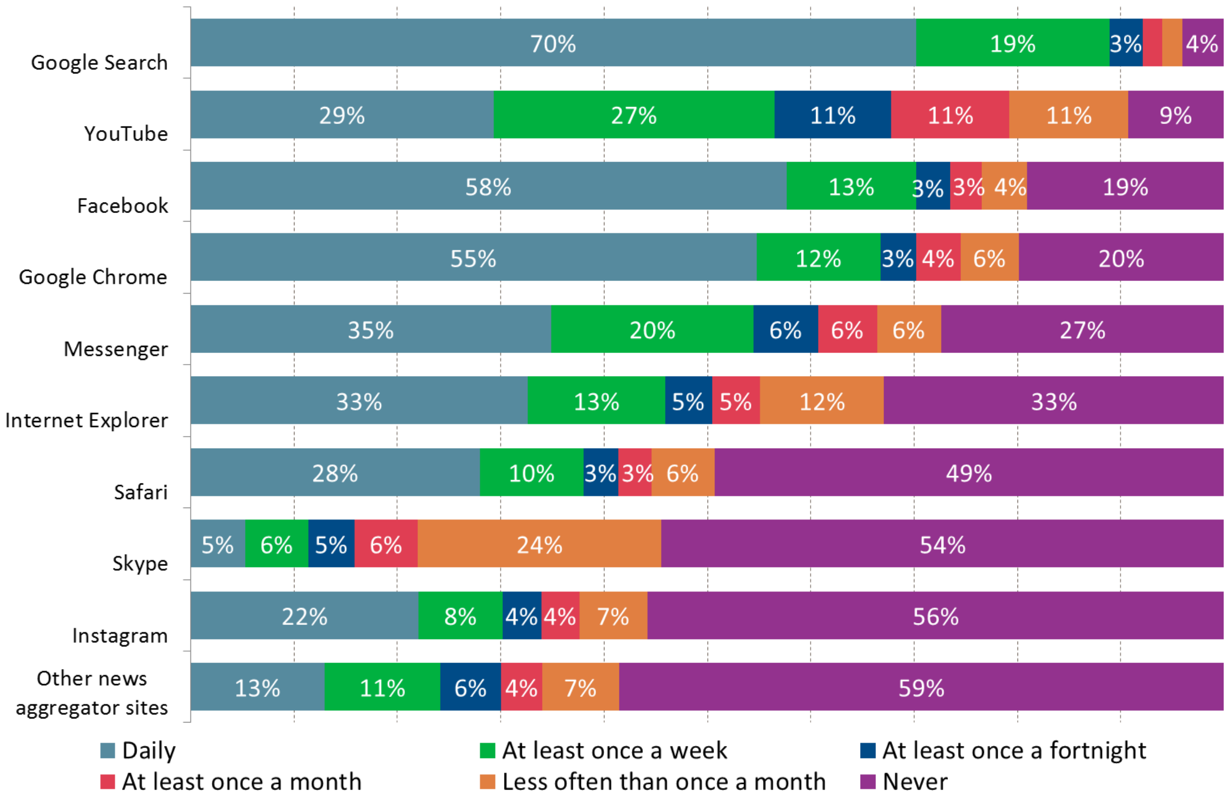
4. Views and use of Digital Platforms

4.1 General use of Digital Platforms

As shown in Figure 1, the ten most commonly used digital platform services reported by DP users were Google Search (96%), YouTube (91%), Facebook (81%), Google Chrome (80%), Messenger (73%), Internet Explorer (67%), Safari (51%), Skype (46%), Instagram (44%) and Other news aggregator sites (41%).

The Google suite (Google Search – 70% and Google Chrome – 55%) were reported as being used on a daily basis by over half of DP users, with Facebook (58%) being reported as most commonly used on a daily basis amongst the social networking sites.

Figure 1: General use of online services – higher use[4]

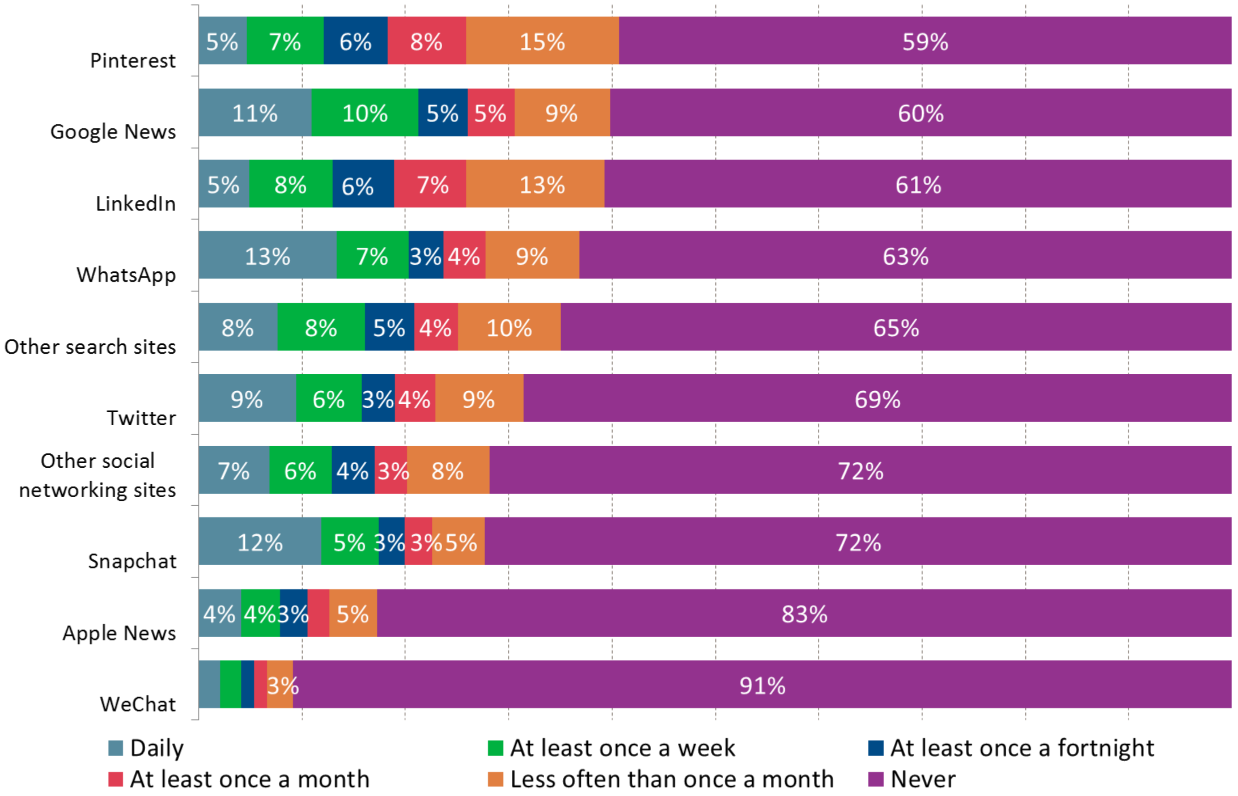


Source: ACCC Digital Platform User Survey 2018. *Q3. Based on the last 3 months, how often would you say you use each of the following online sites or apps?*

Base: Australian DP users aged 18 or more (n=4,308)

[4] Data labels for results of less than 3% not shown in the chart.

Figure 2: General use of online services – lower use[5]



Source: ACCC Digital Platform User Survey 2018. *Q3. Based on the last 3 months, how often would you say you use each of the following online sites or apps?*

Base: Australian DP users aged 18 or more (n=4,308)

[5] Data labels for results of less than 3% not shown in chart.

Figure 3 shows the proportion of DP users who reported having used a range of different digital platforms (inclusion in the list below is based on at least 20 respondents nominating the platform). The most frequently used (as reported by DP users) search site was Google Search, the most frequently used social media platform was Facebook, and the most frequently used news aggregator site was Google News.

Figure 3: Proportion of Australian DP users who have used platform

Digital Platform	Proportion Ever Used*	Digital Platform	Proportion Ever Used*	Digital Platform	Proportion Ever Used*
Google Search	95.9%	Pinterest	40.7%	Bing	5.7%
YouTube	90.7%	Google News	39.8%	Mozilla Firefox	3.1%
Facebook	80.9%	LinkedIn	39.3%	Reddit	2.3%
Google Chrome	80.1%	WhatsApp	36.9%	DuckDuckGo	2.3%
Messenger	72.6%	Other search sites	35.0%	Flipboard	0.7%
Internet Explorer	67.1%	Twitter	31.4%	Google Plus	0.5%
Safari	50.7%	Other social networking sites	28.1%	Myspace	0.4%
Skype	45.6%	Snapchat	27.7%	Facetime	0.4%
Instagram	44.2%	Apple News	17.3%	LINE	0.4%
Other news aggregator sites	41.4%	WeChat	9.2%		

Source: ACCC Digital Platform User Survey 2018. *Q3. Based on the last 3 months, how often would you say you use each of the following online sites or apps?*

Note: This question allowed for multiple responses and therefore the response percentages will not sum to 100%. *'Proportion Ever Used' includes DP Users using the platform on daily basis, at least once a week, at least once a fortnight, at least once a month and less often than once a month.

Base: Australian DP users aged 18 or more (n=4,308)

On average, Australian DP users reported using around 4 different platforms on a daily basis, 2 platforms at least once a week, nearly 1 platform either once a fortnight or once a month, and 2 platforms less often than once per month.

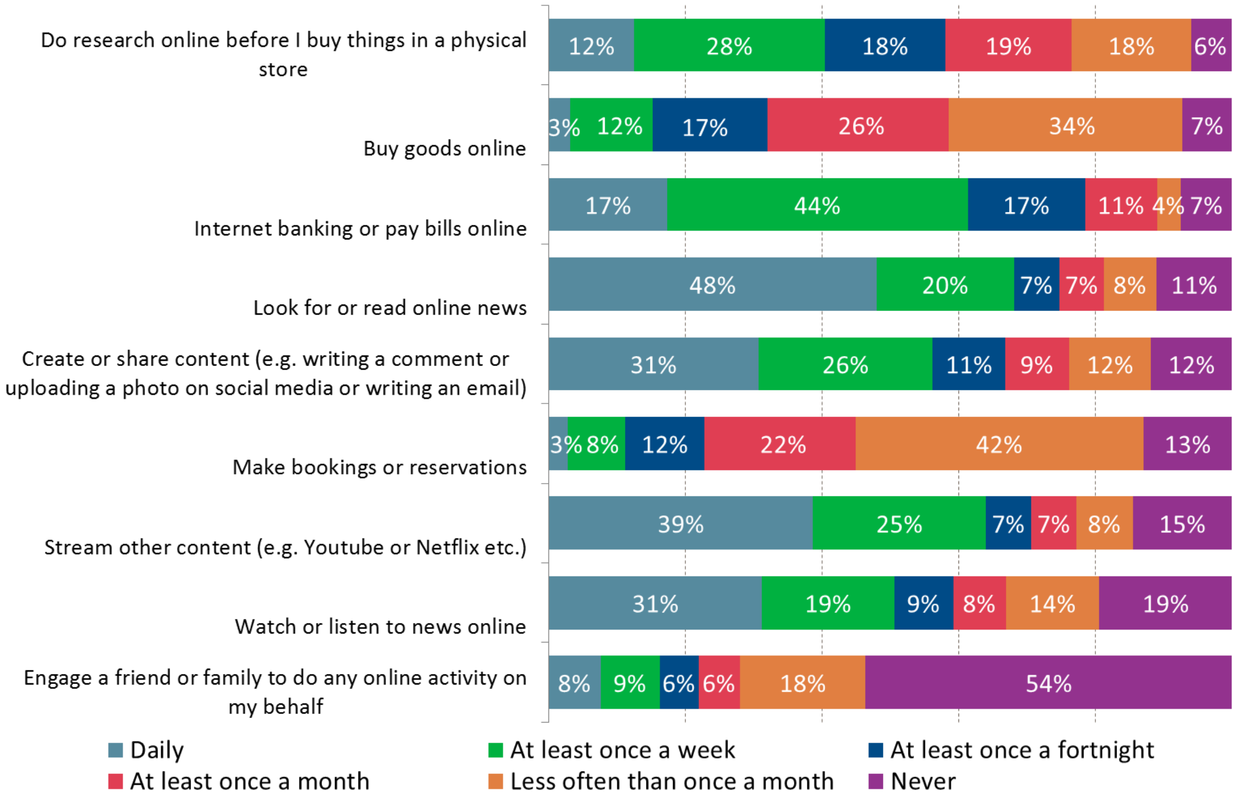
4.1.1.1 Key differences between groups in frequency of DPs used

The number of different platforms reported being used on a daily basis generally decreased with age, with 18-24 year olds reporting the use of an average of 6 platforms daily, and those aged 80 years or more reporting use of an average of 2 different platforms daily. Those who speak a language other than English also reported using more platforms on a daily basis than others (5 compared with 4 platforms).

4.1.1.2 Online activities undertaken

As shown in Figure 4, at least four in five DP users reported undertaking each of the surveyed online activities, except for engaging family or friends to do activities on their behalf, which were reported as being undertaken by a little under half (46%) of users. The activities most commonly reported by DP users as being undertaken on a daily basis were looking for or reading online news (48%), streaming content (39%), watching or listening to news (31%) or creating and sharing content (31%).

Figure 4: Frequency of undertaking online activities



Source: ACCC Digital Platform User Survey 2018. *Q7. How often do you do each of the following online activities?*

Base: Australian DP users aged 18 or more (n=4,308)

Older users (i.e. those aged 65 or more) were less likely to report having undertaken any of the surveyed online activities, as were those users in regional areas.

4.2 How Digital Platforms collect and handle data

The survey asked DP users their opinions on what they viewed digital platforms (as a whole) may do with information they collect and use from them. These questions were asked in aggregate, so the responses did not identify whether views of users may have varied between types of digital platforms that may be used by DP users. Further, as these views applied to digital platforms in aggregate, it is unable to be verified whether these views matched the practices of digital platforms they use.

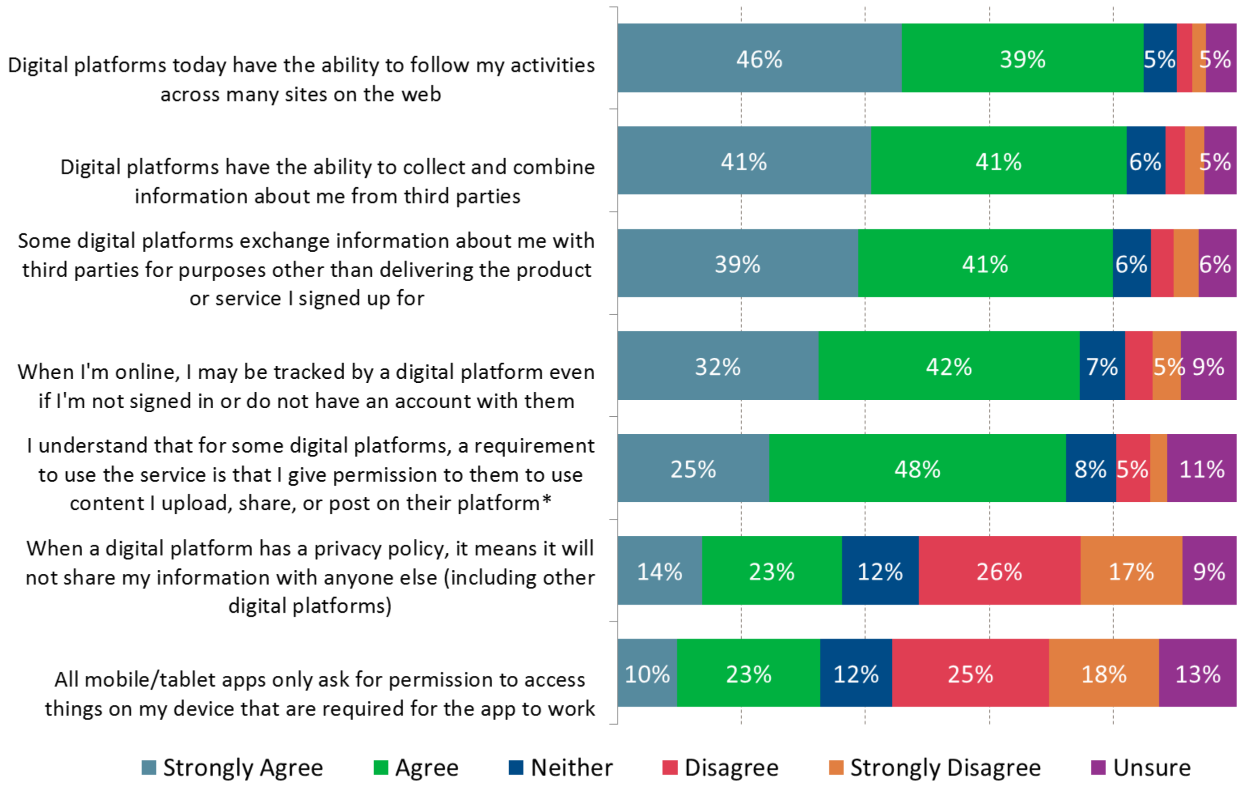
As shown in Figure 5, at least three-quarters of DP users agreed or strongly agreed that Digital Platforms:

- Have the ability to follow their activities across the web (85%)
- Have the ability to collect and combine information about them from third parties (82%)
- Exchange information about them with third parties (80%), and
- Track their online activities, even if they are not signed in or don't have an account (75%).

A little under three-quarters (72%) agreed or strongly agreed that for some digital platforms, a requirement of usage was allowing the platform to use any content uploaded or shared. There were differences in views of how Digital Platforms may use their information. In particular, less than half of digital platforms users agreed that:

- A digital platform having a privacy policy meant it would not share a user's information with others (43% disagreed or strongly disagreed with the statement)
- Mobile and tablet apps would only ask permission to access things on a user's devices that were required for the app to work (43% disagreed or strongly disagreed with the statement).

Figure 5: Agreement with statements on how Digital Platforms collect information[6]



* Please note that approximately 5% of the total sample did not answer this question, as it was not asked of the pilot sample, as such, results for this population were included with the 'unsure' responses.

Source: ACCC Digital Platform User Survey 2018. *Q9. Please indicate to what extent you agree or disagree with the following statements as best reflects your opinion on digital platforms.*

[6] Data labels for results of less than 5% not shown in chart.

Base: Australian DP users aged 18 or more (n=4,308)

Both the youngest (18-24 year olds) and oldest (80 years or more) users showed lower understanding (agreement/disagreement with relevant statements) than average across all statements.

Figure 6: Agreement with statements on how Digital Platforms collect information by age

Strongly Agree (%)	DP Users 18-24 years	DP Users 80 years or more
Digital platforms today have the ability to follow my activities across many sites on the web	36%	24%
Digital platforms have the ability to collect and combine information about me from third parties (like information other companies might collect about me from, for example, a shopping loyalty card)	28%	27%
Some digital platforms exchange information about me with third parties for purposes other than delivering the product or service I signed up for	26%	19%
When I'm online, I may be tracked by a digital platform even if I'm not signed in or do not have an account with them	27%	14%
I understand that for some digital platforms, a requirement to use the service is that I give permission to them to use content I upload, share, or post on their platform*	21%	12%
When a digital platform has a privacy policy, it means it will not share my information with anyone else (including other digital platforms)	15%	14%
All mobile/tablet apps only ask for permission to access things on my device that are required for the app to work	16%	4%

* Please note that approximately 5% of the total sample did not answer this question, as it was not asked of the pilot sample, as such, results for this population were included with the 'unsure' responses.

Source: ACCC Digital Platform User Survey 2018. *Q9. Please indicate to what extent you agree or disagree with the following statements as best reflects your opinion on digital platforms.*

Base: Australian DP users aged 18-24 years (n=664); DP users aged 80 years or more (n=450)

In addition, users who spoke a language other than English whilst having reported highest levels of online activity reported a lower level of understanding (or agreement/disagreement) with each of the relevant statements.

4.2.1.1 How Digital Platforms handle data

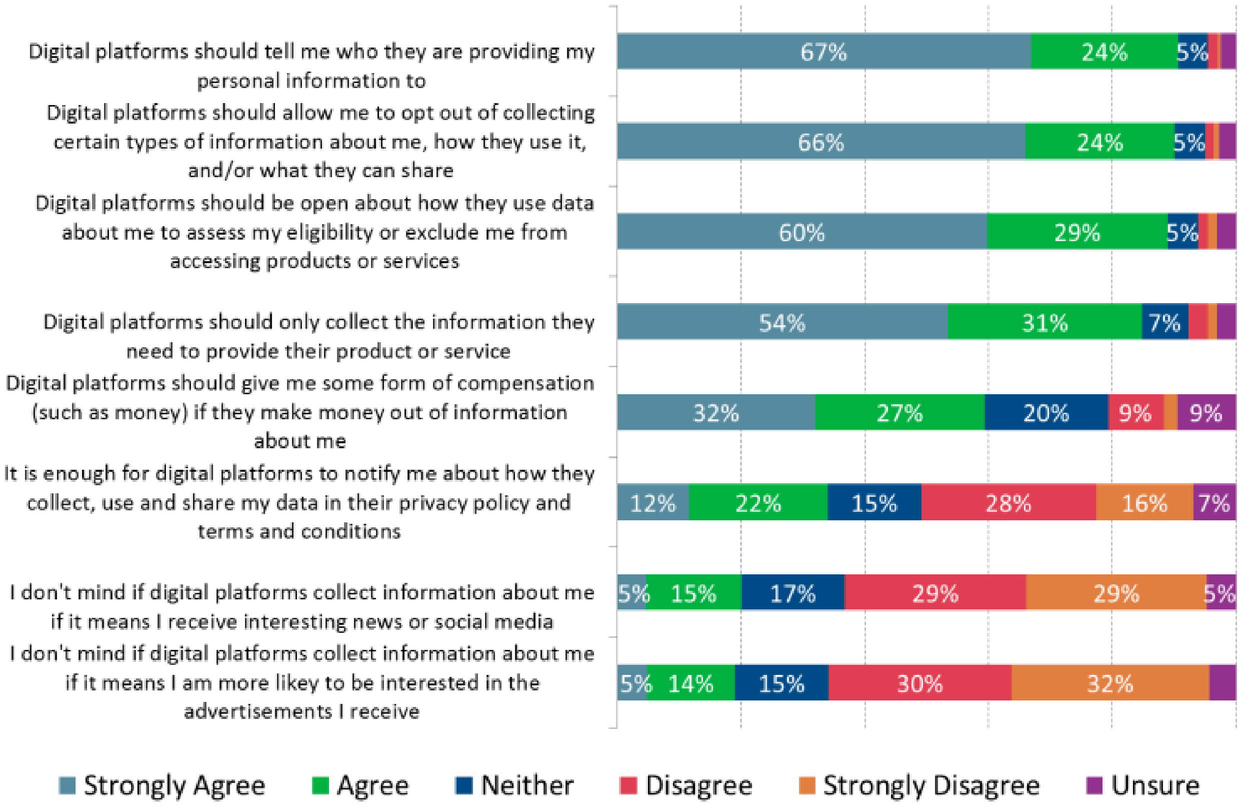
As shown below, in general, DP users reported that they did not want their data to be collected or used beyond the specific needs of each platform. At least four in five DP users indicated that they agreed or strongly agreed that digital platforms should:

- Tell users who they are providing personal information to (91%)
- Allow users to opt out of collection certain types of information (90%)
- Be open about how they use data about users and assess eligibility for products and services (89%), and
- Should only collect information needed to provide their products or services (85%).

Around three in five (59%) agreed or strongly agreed that digital platforms should provide some form of compensation to them for the platform making money out of the data. One third (34%) agreed or strongly agreed that it was enough for digital platforms to notify them about how they collect, use and share information in a privacy policy or terms and conditions document, with 44% disagreeing or strongly disagreeing with this statement.

Around three in five users disagreed or strongly disagreed that that it was okay if digital platforms collected information about them if it meant they received interesting news or relevant advertising (59% and 61% respectively).

Figure 7: Agreement with statements on how Digital Platforms handle information[7]



Source: ACCC Digital Platform User Survey 2018. *Q19. How strongly do you agree or disagree with the following regarding how digital platforms should handle your data?*

Base: Australian DP users aged 18 or more (n=4,308)

[7] Data labels for results of less than 5% not shown in chart.

Younger users (those aged 18-34) were significantly less likely to agree or strongly agree with statements relating to how digital platforms handle information, in particular those statements relating to advising users who information is being shared with, allowing users to 'opt out' of data collection and sharing, using data for eligibility assessments and collecting information not needed for the specific product or service. For this cohort against these statements, results were generally 13 to 17 percentage points lower than the average.

Persons aged 18-24 years were more likely to agree or strongly agree that it is enough for digital platforms to notify them about how they collect, use and share data via a privacy policy or terms and conditions document (44% compared to 34% of all DP users). Eighteen (18)-34 year olds were also the most likely to agree or strongly agree that they were okay with digital platforms sharing their information if it meant them getting more interesting news or advertisements. The older groups (50 years and over) were more likely to disagree with this statement, indicating their higher level of concern with digital platforms sharing their information for the purpose of targeted advertising.

4.3 Collection and use of information by Digital Platforms

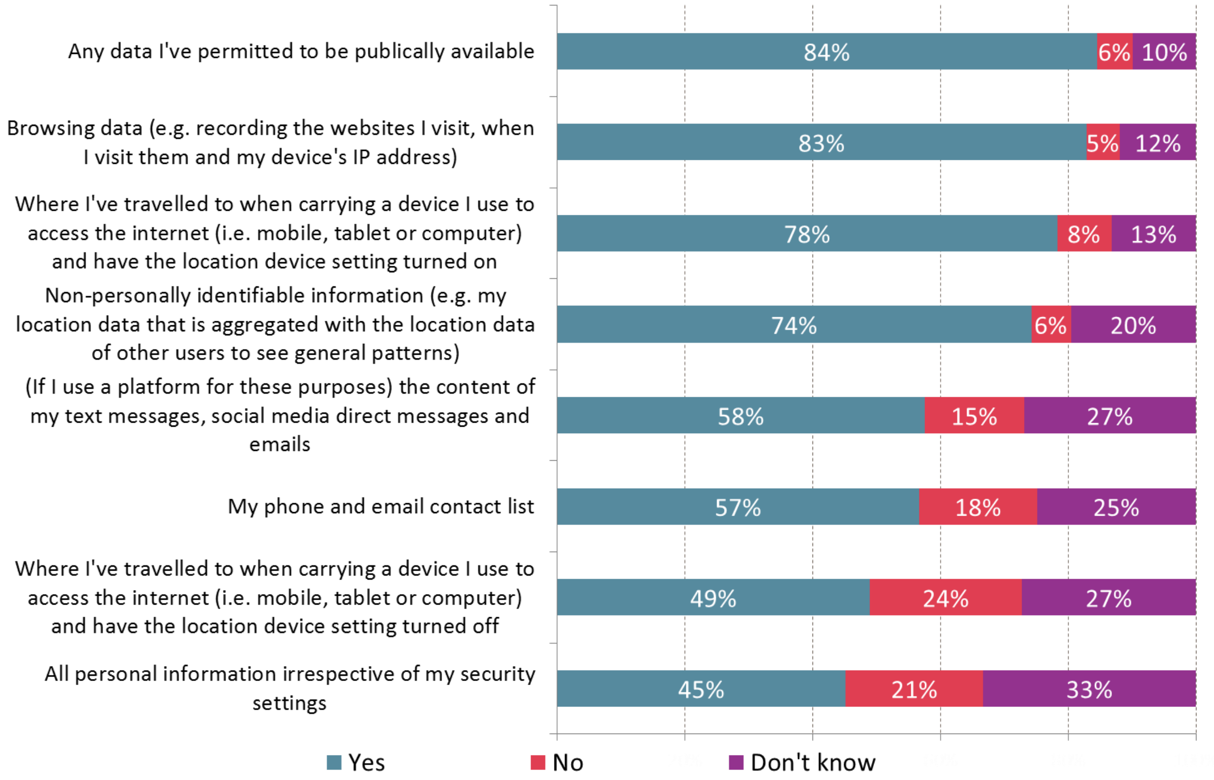
4.3.1.1 Types of information collected by Digital Platforms

The survey asked DP users what information they believed digital platforms (as a whole) may collect. As above, these questions were asked in aggregate, so the responses did not identify whether views of users may have varied between types of digital platforms that may be used. Further, as these views applied to digital platforms in aggregate, it is unable to be verified whether the users' views and expectations matched the practices of digital platforms they use.

Around three-quarters of DP users reported that they believed that digital platforms collect any publically available data (84%), browsing data (83%), location data when their location settings are turned on (78%), and non-personally identifiable information (74%).

Almost three in five reported they believed that digital platforms collect the content of their messages and emails (58%) and phone and email contact lists (57%). Just less than half of all users reported they believed that digital platforms may also collect location data when their location settings are turned off (49%) and personal information irrespective of their security settings (45%) (as shown in Figure 8).

Figure 8: Types of information collected by Digital Platforms



Source: ACCC Digital Platform User Survey 2018. *Q10. Do you believe that the following types of information are being collected by digital platforms?*

Base: Australian DP users aged 18 or more (n=4,308)

Those in the youngest (18-24) or oldest (80 or more) age brackets were usually less likely than average to report that they thought the types of information listed in Figure 8 were being collected by digital platforms.

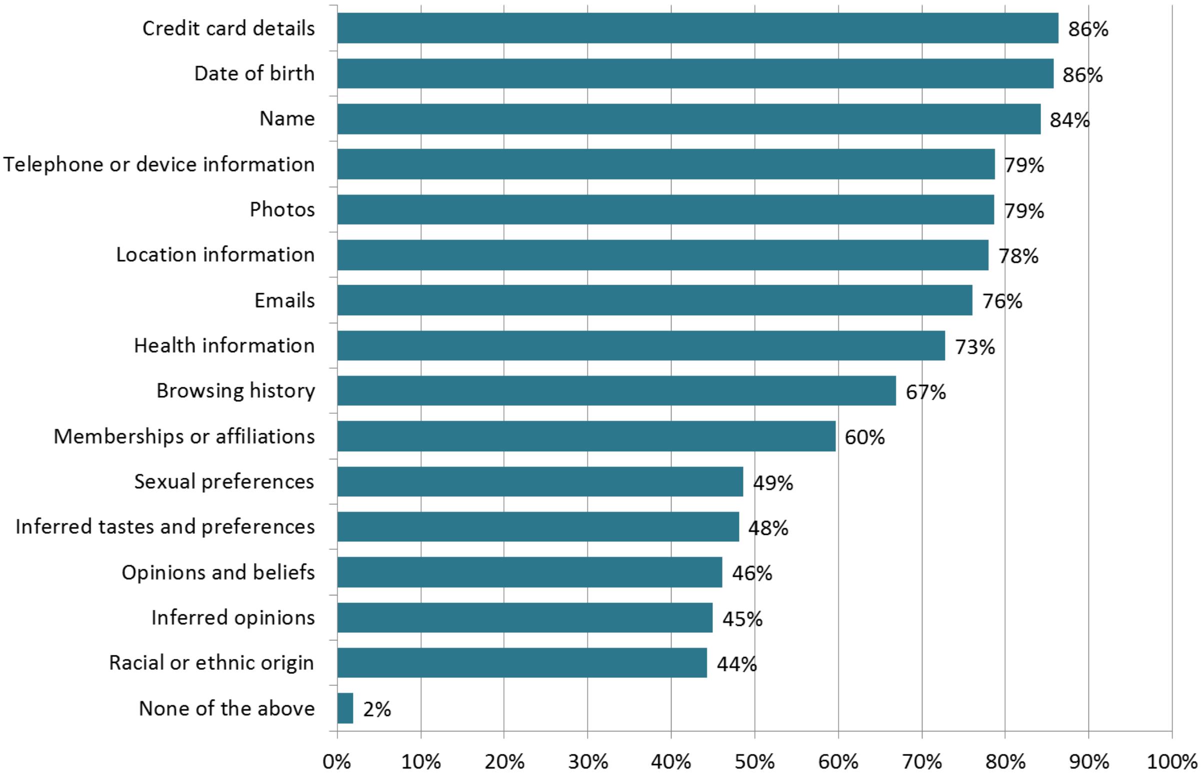
4.3.1.2 Use of personal information

The survey sought DP users' views on the use of their 'personal information' by digital platforms. DP users were asked what they considered to be their personal information.

As shown in Figure 9, around four in five DP users reported that they considered their credit card details (86%), date of birth (86%), name (84%), their telephone or device information (79%), photos (79%) and location information (78%) to be their personal information.

At least three in five also considered the content of their emails (76%), health information (73%), browsing history (67%) or memberships or affiliations (60%) to be personal data. Less than half considered their sexual preferences (49%), inferred tastes and preferences (48%), actual (46%) or inferred (45%) opinions and beliefs, or their racial or ethnic origin (44%) to be personal information.

Figure 9: Information considered as personal data



Source: ACCC Digital Platform User Survey 2018. *Q8. When doing things online, which of the following would you consider to be your 'personal information' (that is, information that could reasonably be used to identify you)?*

Note: This question allowed for multiple responses and therefore the response percentages will not sum to 100%.

Base: Australian DP users aged 18 or more (n=4,308)

Users with no tertiary level education, those aged 18-24 and those aged 65 or more were significantly less likely than other DP users to consider all items to be personal data (with the exception of their name amongst older respondents). Those with incomes under $50,000 were less likely to consider almost all items to be personal data, although the differences were generally less than ten percentage points.

4.3.1.3 Misuse of personal information

Together with considerations of misuse of information when signed in to a platform, survey results suggest that whether signed in or not signed into an account, DP users consider it a misuse for platforms to use their personal data to provide (or help other companies provide) targeted advertising. They are also generally unfavourable towards platforms gathering information about them (or their connections) without their express consent and awareness.

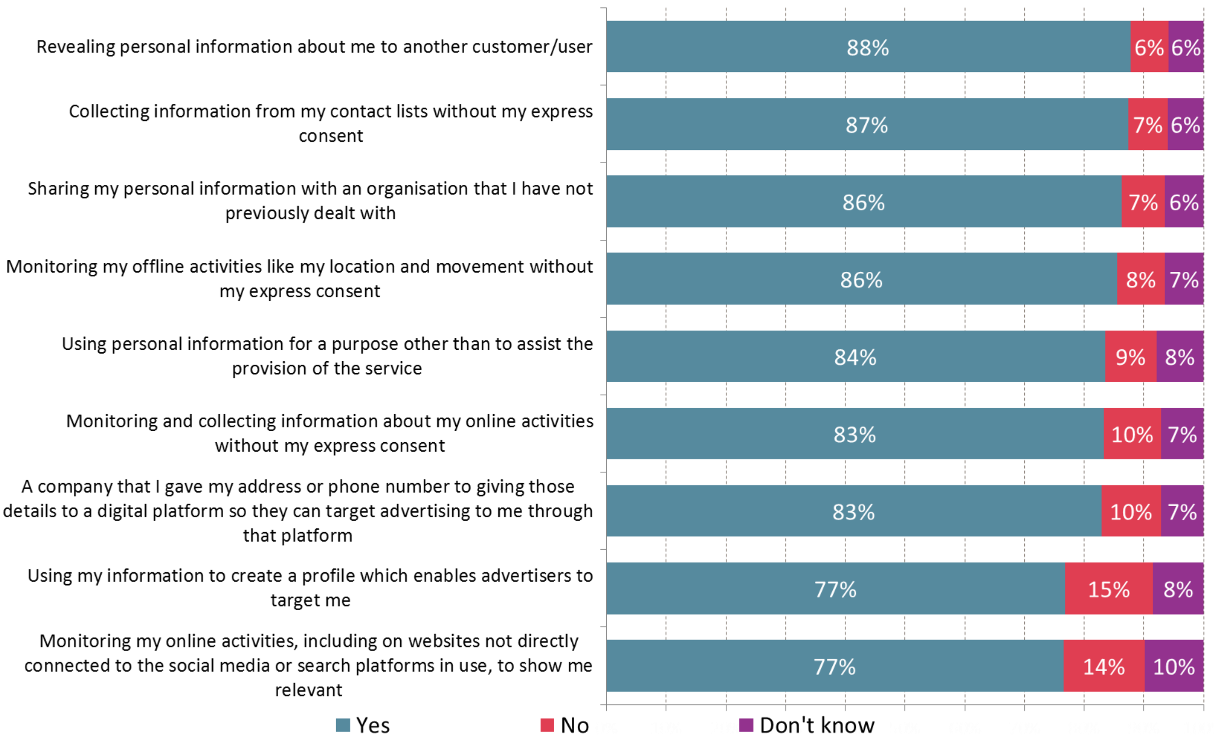
Misuse of personal information: when signed in to a Digital Platform

As shown in Figure 10, over three-quarters of DP users reported that they considered that all items surveyed constituted a misuse of their personal information when signed in to an account with a digital platform, with over four in five DP users considering the following to be a misuse:

- Revealing personal information about them to other users (88%)
- Collecting information from contact lists without express consent (87%)
- Sharing information with unknown third parties (86%)
- Monitoring offline activities like location without express consent (86%)
- Using personal data for unrelated purposes (84%)
- Monitoring online activities without express consent (83%), and
- Sharing information with third parties to enable targeted advertising (83%).

Over three quarters of DP users (77%) considered it a misuse of their personal information to create profiles or monitoring online activities to enable targeted advertising.

Figure 10: Perceived misuse of personal information when signed in



Source: ACCC Digital Platform User Survey 2018. *Q14. If you are signed into an account with a digital platform, would you consider any of the following instances a misuse of your personal information?*

Base: Australian DP users aged 18 or more (n=4,308)

Despite some variations between groups, at least two-thirds of DP users continued to agree that all items constituted a misuse of their information. Users aged 18-24 or over 80 were generally less likely to consider the surveyed aspects a misuse of their personal data.

Figure 11: Perceived misuse of personal information when signed in by age

Yes (%)	18-24 years	80 years or more
Revealing personal information about me to another customer/user	74%	81%
Collecting information from my contact lists without my express consent	74%	79%
Sharing my personal information with an organisation that I have not previously dealt with	71%	82%
Monitoring my offline activities like my location and movement without my express consent	74%	75%
Using personal information for a purpose other than to assist the provision of the service	69%	80%
Monitoring and collecting information about my online activities without my express consent	68%	81%
A company that I gave my address or phone number to giving those details to a digital platform so they can target advertising to me through that platform	66%	80%
Using my information to create a profile which enables advertisers to target me	64%	80%
Monitoring my online activities, including on websites not directly connected to the social media or search platforms in use, to show me relevant advertisements and offers	60%	76%

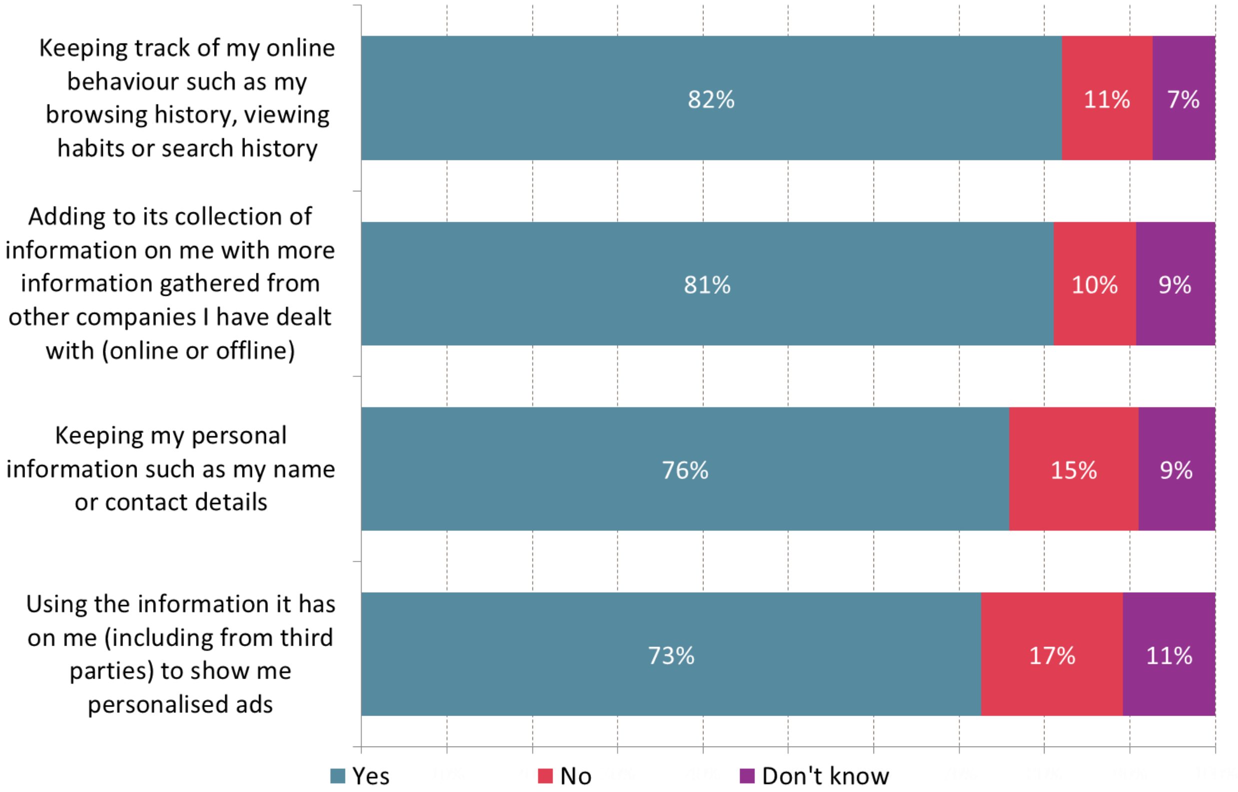
Source: ACCC Digital Platform User Survey 2018. *Q14. If you are signed into an account with a digital platform, would you consider any of the following instances a misuse of your personal information?*

Base: Australian DP users aged 18-24 years (n=664); DP users aged 80 years or more (n=450)

Misuse of personal information: when not signed in to a Digital Platform

Over four in five DP users reported that they considered keeping track of their online behaviour (82%) and gathering information from third parties (81%) to be a misuse of their data when not signed in to a digital platform. Around three in four also considered keeping personal information (such as name and contact details – 76%) and using their information to show targeted ads (73%) to also be a misuse of information when not signed in to a platform (see Figure 12).

Figure 12: Perceived misuse of personal information when not signed in



Source: ACCC Digital Platform User Survey 2018. *Q15. If you are not signed into an account with a digital platform, would you consider any of the following actions by them a misuse of your personal information?*

Base: Australian DP users aged 18 or more (n=4,308)

Eighteen (18)-34 year olds, and those who speak a language other than English were less likely than average to consider these to be a misuse of personal information.

Figure 13: Perceived misuse of personal information when not signed in by age

Yes (%)	18-24 years	Speak language other than English
Keeping my personal information such as my name or contact details	62%	70%
Keeping track of my online behaviour such as my browsing history, viewing habits or search history	70%	77%
Using the information it has on me (including from third parties) to show me personalised ads	57%	66%
Adding to its collection of information on me with more information gathered from other companies I have dealt with (online or offline)	66%	75%

Source: ACCC Digital Platform User Survey 2018. *Q15. If you are not signed into an account with a digital platform, would you consider any of the following actions by them a misuse of your personal information?*

Base: Australian DP users aged 18-24 years (n=664); DP users aged 80 years or more (n=450)

4.3.1.4 Actions taken to protect data

Account set-up and engagement with terms of use and privacy policies

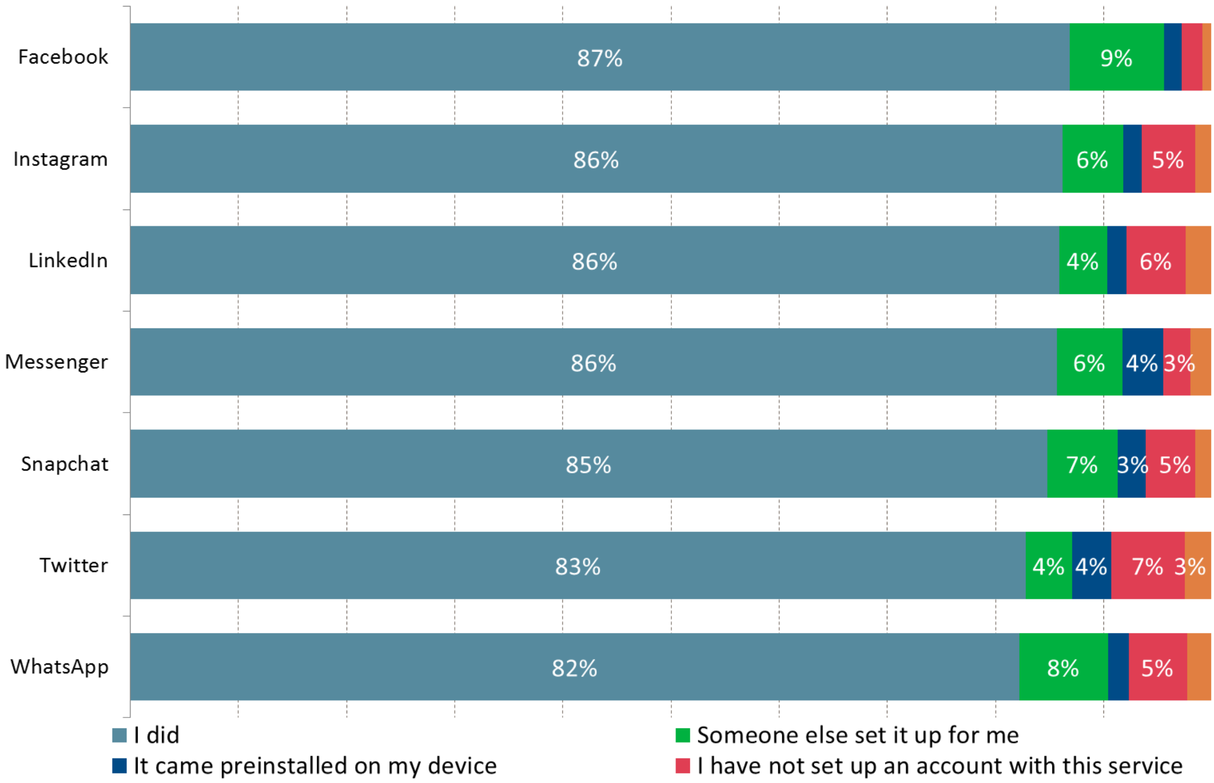
The setting up of an account with a digital platform usually triggers a user to review the terms and conditions upon which they use a service. Accordingly, the survey sought to examine the extent to which users actively set up their own accounts.

Over 80% of Australian DP users indicated that they set up their own accounts for Facebook (87%), Instagram (86%), LinkedIn (86%), Messenger (86%), Snapchat (85%), Twitter (83%) and WhatsApp (82%). Less than one in ten indicated that someone else set it up for them, and less than one in twenty indicated that the platform came preinstalled on their device (see Figure 14).

As shown in Figure 14, most users indicated that they either set up their account themselves, the platform or app came preinstalled on their device or they did not have an account with the given platform. However, even with this group, less than one in ten indicated that someone else set up the account for them, excepting those who used Skype or WeChat (Figure 15), where 13% indicated that someone else set up their account for them.

Older users (i.e. those aged 65 or more) were less likely to report having set up their accounts themselves. A higher proportion of this cohort either does not know how their accounts were set up or they think it came pre-installed on their device.

Figure 14: How accounts were set up - Higher range of self set up[8]



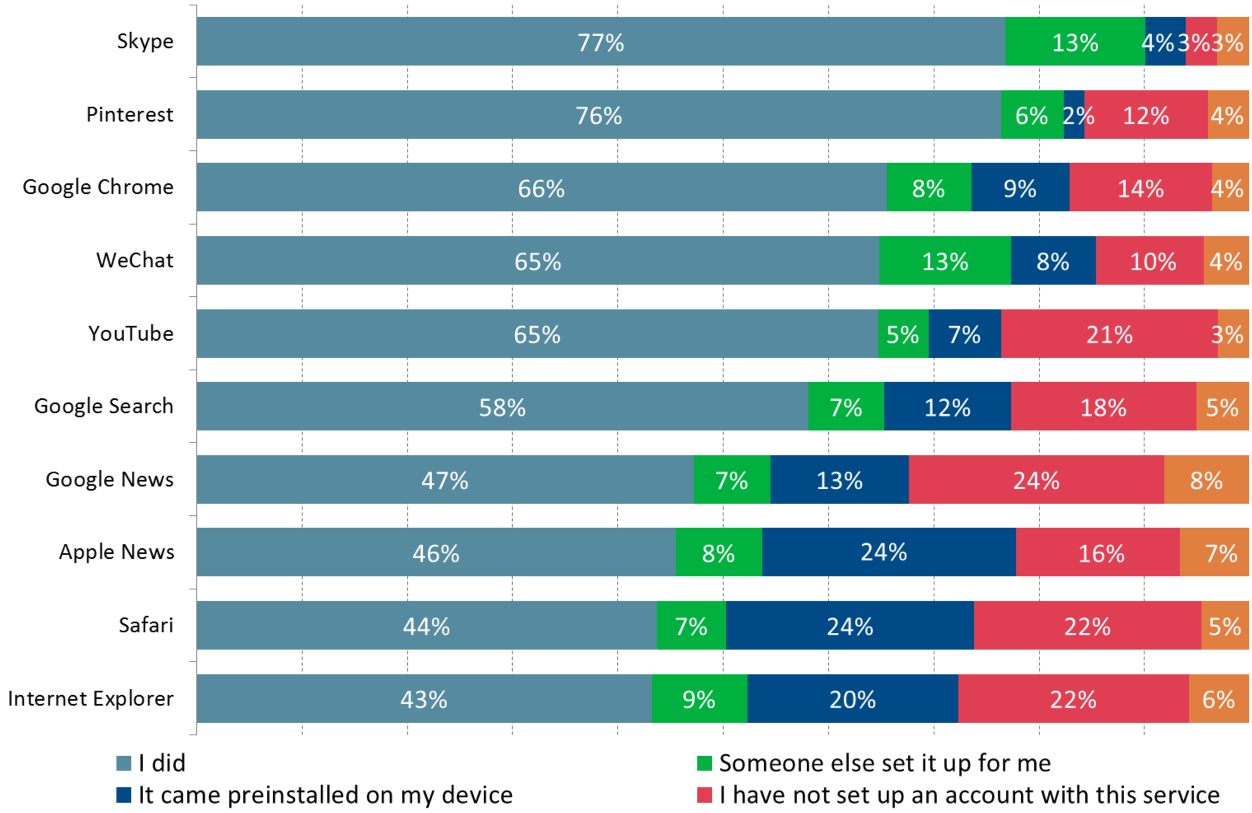
Source: ACCC Digital Platform User Survey 2018. *Q4. If you have an account with this service, who set up your user account or profiles for this service?*

Base: Australian DP users aged 18 or more who used the relevant platform (n=1,144 – 3,344)

[8] Data labels for results of less than 3% not shown in chart.

Figure 15: How accounts were set up – Lower range of account self set up

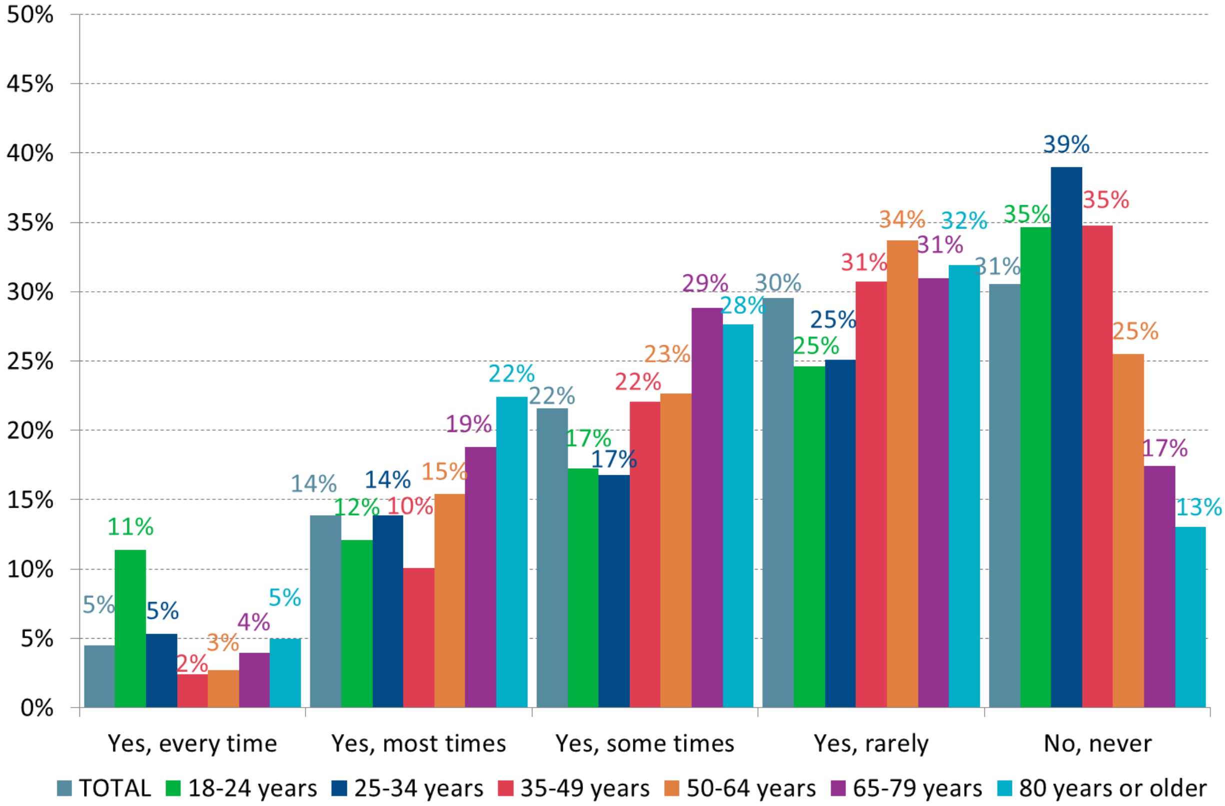
Source: ACCC Digital Platform User Survey 2018. *Q4. If you have an account with this service, who set up your user account or profiles for this service?*



Base: Australian DP users aged 18 or more who used the relevant platform (n=333 – 4,087)

As noted earlier, the setting up of an account usually triggers a user to review the terms and conditions of service. However, as shown in Figure 16, less than one in five users (18%) indicated that they read privacy policies or terms and conditions for internet sites or apps most or every time. Further, three in five (60%) indicated that they rarely or never did so.

Figure 16: How often users read privacy policies



Source: ACCC Digital Platform User Survey 2018. *Q12. Do you normally read all the privacy policy or terms and conditions for an internet site or app?*

Base: Australian DP users aged 18 or more total (n=4,308);

Older (65 years or more) respondents reported they were more likely to read privacy policies or terms and conditions most or every time (23% – 27% compared to 18% on average), and less likely to indicate that they rarely or never did so (45% – 48% compared to 60% on average).

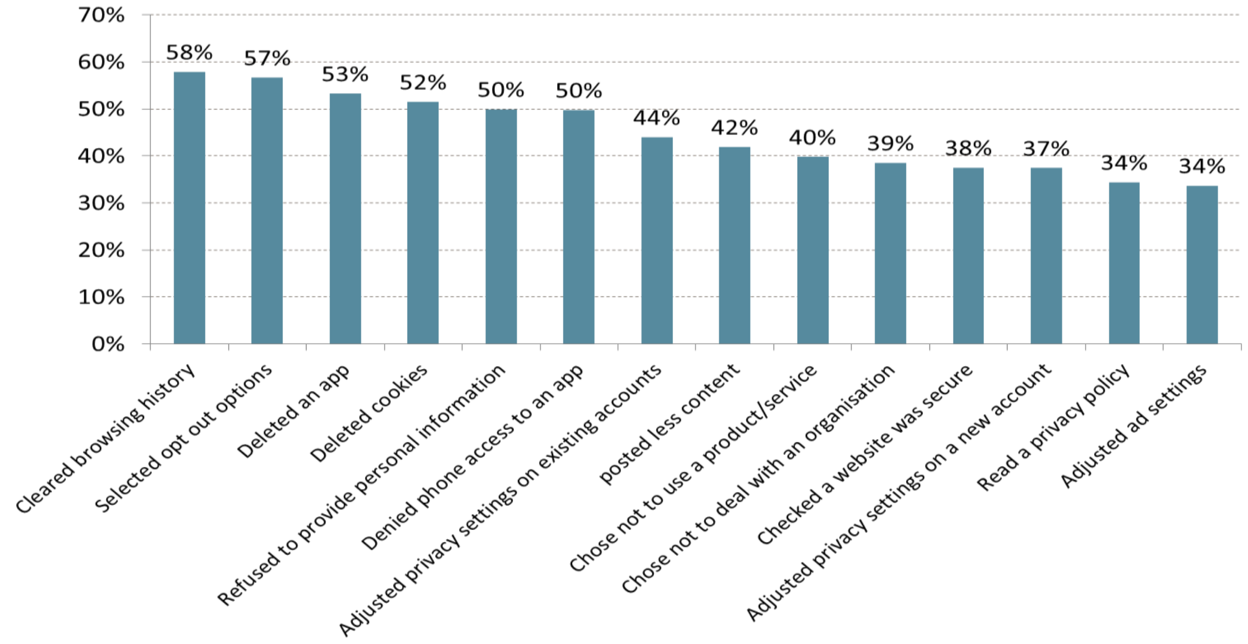
Actions to protect data

On average, DP users reported taking around 8 different actions to protect their privacy over the past year, with 7% reported having taken no actions at all. The most commonly undertaken actions reported by users were:

- Clearing browsing history (58%)
- Selecting ‘opt out’ options where available (57%)
- Deleting an app from their phone (53%)
- Deleting cookies from Internet browsers (52%)
- Refusing to provide personal information to a platform (50%), and
- Denying an app permission to access information on their phone (50%).

To note, this question was asked in aggregate so it is not clear whether a DP user applied this to all platforms they reported using, nor the frequency in which they undertook these actions. For example, whether a DP user regularly undertook each action across all platforms they used or whether they performed this action irregularly or for certain platforms and not others during the year.

Figure 17: Actions taken to protect data – most common

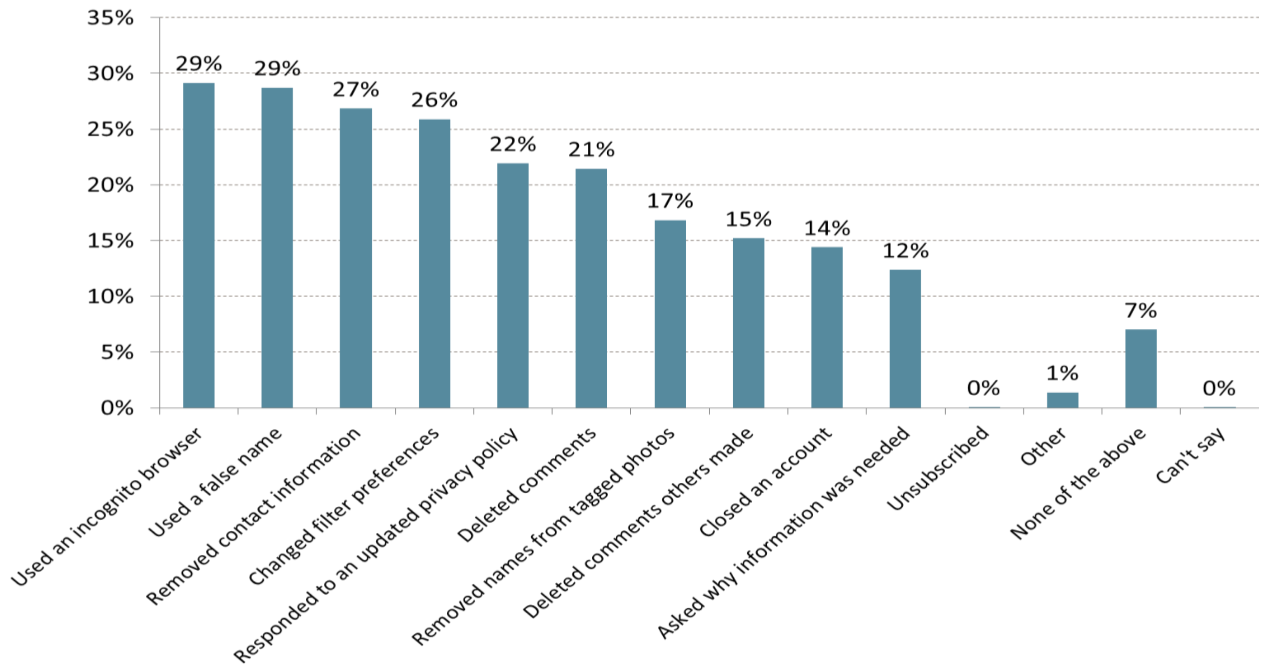


Source: ACCC Digital Platform User Survey 2018. *Q17. In the past year, have you tried to reduce the amount or type of personal data you have online, or otherwise protect your data, by doing any of the following?*

Note: This question allowed for multiple responses and therefore the response percentages will not sum to 100%.

Base: Australian DP users aged 18 or more (n=4,308)

Figure 18: Actions taken to protect data – least common



Source: ACCC Digital Platform User Survey 2018. *Q17. In the past year, have you tried to reduce the amount or type of personal data you have online, or otherwise protect your data, by doing any of the following?*

Note: This question allowed for multiple responses and therefore the response percentages will not sum to 100%.

Base: Australian DP users aged 18 or more (n=4,308)

Figures 17 and 18 also show that in the past year, with respect to privacy settings in particular, some DP users reported that in the past year they had taken the following actions:

- 44% adjusted their settings on an existing account
- 37% set or adjusted the privacy settings on a new account
- 34% indicated that they read a privacy policy or notification before providing personal data, and
- 22% did something in direct response to an updated privacy policy.

As above, however, from this response it is not clear whether a DP user may have undertaken this action for all, some or a singular account they have with digital platforms.

Despite around three-quarters or more previously indicating that they did not like receiving or having platforms deliver targeted advertising to them (as shown in Figure 10), only 34% of users indicated that they adjusted the ad settings on their online accounts to reduce the number of targeted ads being received.

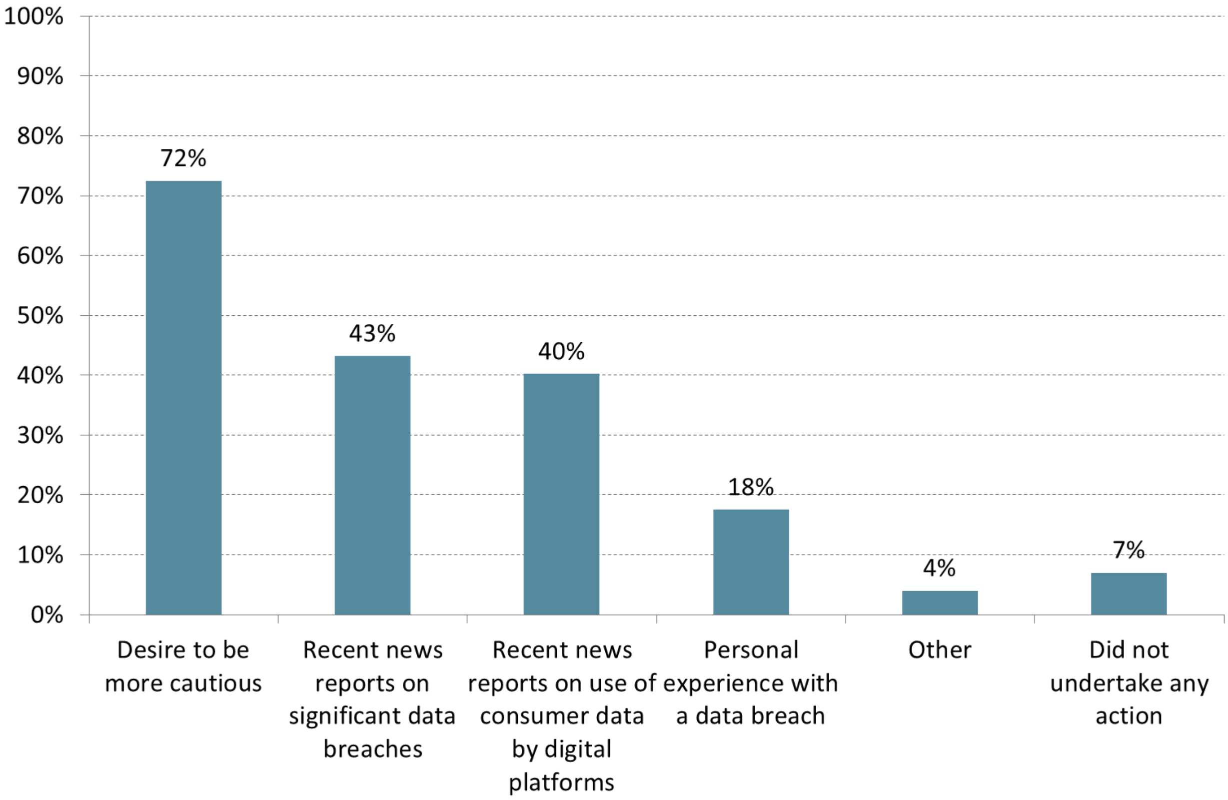
There were considerable differences amongst age groups with respect to actions taken to protect privacy over the last year. Those aged 80 or more generally took the fewest actions (5). This may reflect that these DP users reported being online less than others and use fewer platforms in general. Those aged 65-79 years (7) and 18-24 years (7) also reported undertaking fewer actions on average than others. On average, results for all three age groups were lower than other DP users across most aspects, although 18-24 year olds were more likely than other users to use incognito browsers (39%).

DP users who did not have at least some tertiary level education undertook fewer actions (7) as compared to other DP users.

4.3.1.5 Reasons for protecting data

When asked why they undertook various actions to protect their data, the majority of DP users (72%) indicated that it was out of a desire to be more cautious. However, a little under half indicated that their actions were taken as a result of recent news reports on significant data breaches (43%) or use of consumer data by digital platforms (40%). Less than one in five (18%) indicated that it was due to a personal experience with a data breach. This may suggest there may have been a cumulative effective of publicity on data breaches impacting the behaviour of DP users. These results generally held true across most key demographics.

Figure 19: Reasons for taking actions to protect data



Source: ACCC Digital Platform User Survey 2018. *Q18. What prompted you to take this action/these actions?*

Note: This question allowed for multiple responses and therefore the response percentages will not sum to 100%.

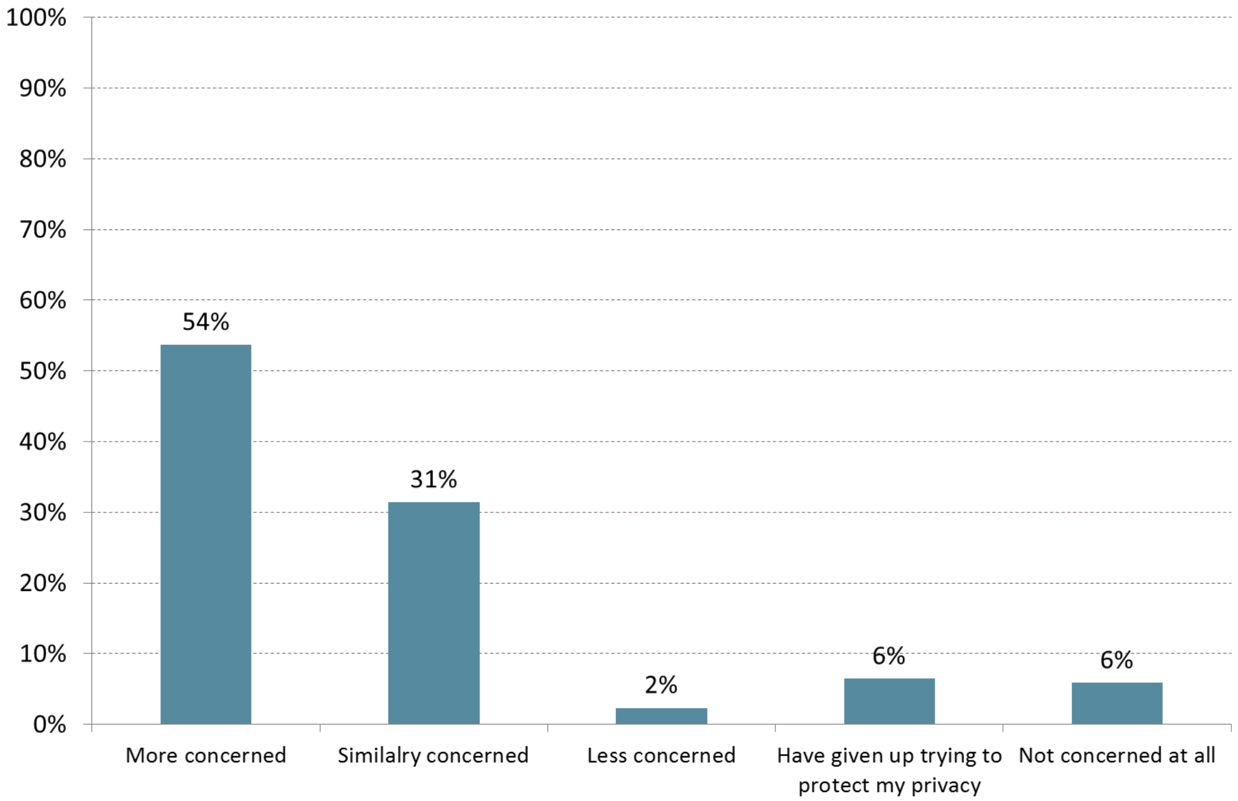
Base: Australian DP users aged 18 or more (n=4,308)

4.4 Concerns and views around privacy and personal data

4.4.1.1 Changing concerns about privacy of personal information

Figure 20 shows that more than half of DP users (54%) reported being more concerned about the privacy of their personal information on digital platforms now than they were one year ago, with a little under one-third (31%) similarly concerned. Six (6%) indicated that they have given up trying to protect their privacy, and less than one in ten indicated that they are equally unconcerned (6%). A very small number (2%) indicated being less concerned than one year ago.

Figure 20: Change in concerns about privacy of personal information over 12 months



Source: ACCC Digital Platform User Survey 2018. *Q13. Compared to one year ago, how concerned are you about the privacy of your personal information on digital platforms?*

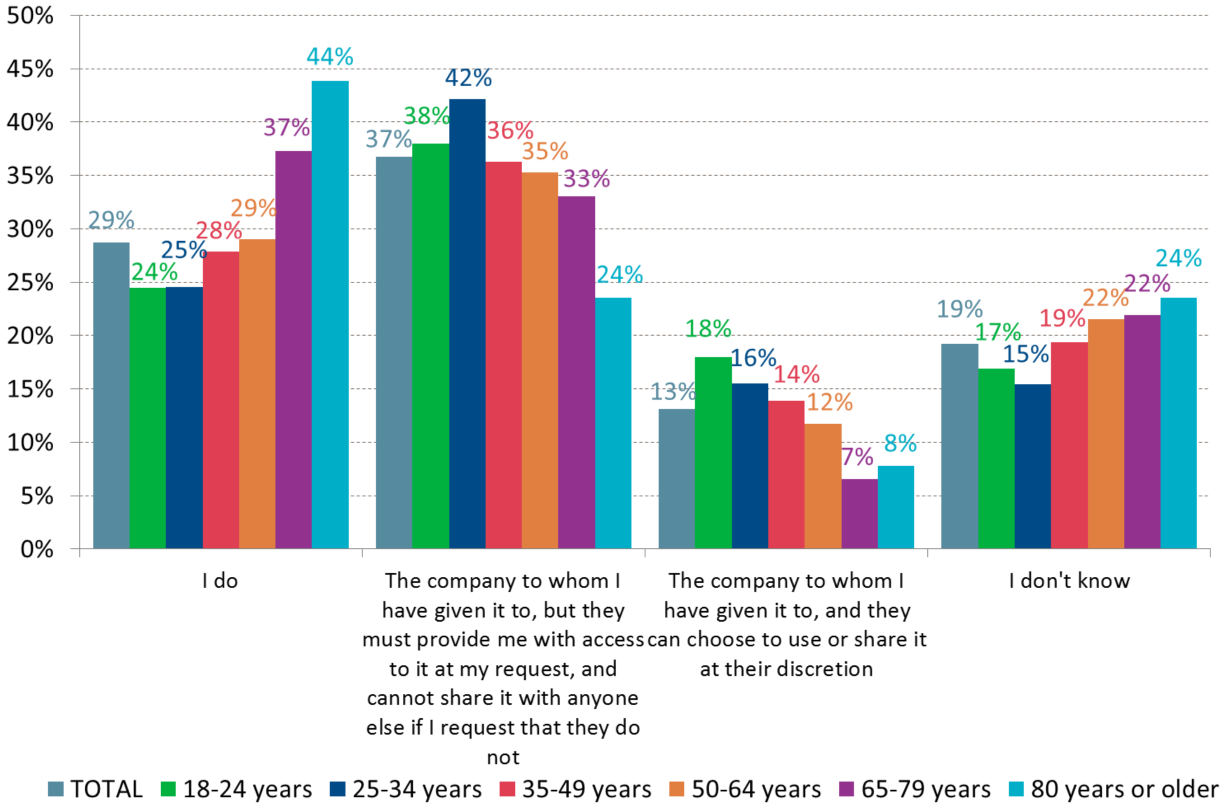
Base: Australian DP users aged 18 or more (n=4,308)

The only difference of note was in relation to age, with younger users (those aged 18-24) *less* likely to indicate that they were more concerned than one year ago (44%).

4.4.1.2 Data ownership

Little over one in three DP users (37%) reported that they believed that their data was owned by the company they gave it to, but believed that the company was required to allow them access to their data and must seek their permission to share the data. A further three in ten (29%) believed that they owned their own data. Less than one in seven (13%) believed that their data was owned by the company they gave it to, and that the company could choose what to do with their data at its own discretion.

Figure 21: Perceived owners of data shared online



Source: ACCC Digital Platform User Survey 2018. *Q16. Who do you think owns the data and information you share online?*

Base: Australian DP users aged 18 or more total (n=4,308);

Older users were more likely than other users to believe that they owned their own data, with 37% of those aged 65 to 79 year and 44% of those aged 80 year or more indicating this. DP users who speak languages other than English, were most likely to believe that the company owned their data, but needed permission to share it (45%).

5. Use and understanding of online news

5.1 Behaviours and preferences around online news accessed

Most DP users (91%), indicated that they had encountered news online in the last month.

DP users were further asked to indicate the ways in which they came across news stories (Figure 22) to explore the extent to which DP users actively or passively[9] engaged with news through digital platforms and what sources they engaged with. 'Active' methods of online news access were classified to include:

- Going directly to a news website or app
- Using a newsreader site or app that aggregates news links
- Using a search engine and typing in a keyword about a particular news story
- Using a search engine and typing in a keyword for the name of a particular website

'Passive' methods of online news access were classified to include:

- Using social media and coming across news that way
- Getting news via an email newsletter or email alert
- Receiving a news alert or notification on mobile phone/tablet
- Someone forwarding an article on a website
- Suggestion to look at an article or news site by a website that was visited
- Seeing an advertisement or link to an interesting looking article on another website that was visited

In total, around one in seven reported that they access news using only active methods (13%) with a similar number only accessing news via passive methods (14%). Just under one in ten (9%) indicated that they had not accessed any online news in the past month (as shown in Figure 22). A little under two in three (64%) DP Users reported that they had accessed news via both active and passive methods in the past month, with around half having gone directly to a news website or app (56%), coming across news via social media (48%) or using a search engine and typing in a keyword on a particular story (47%).

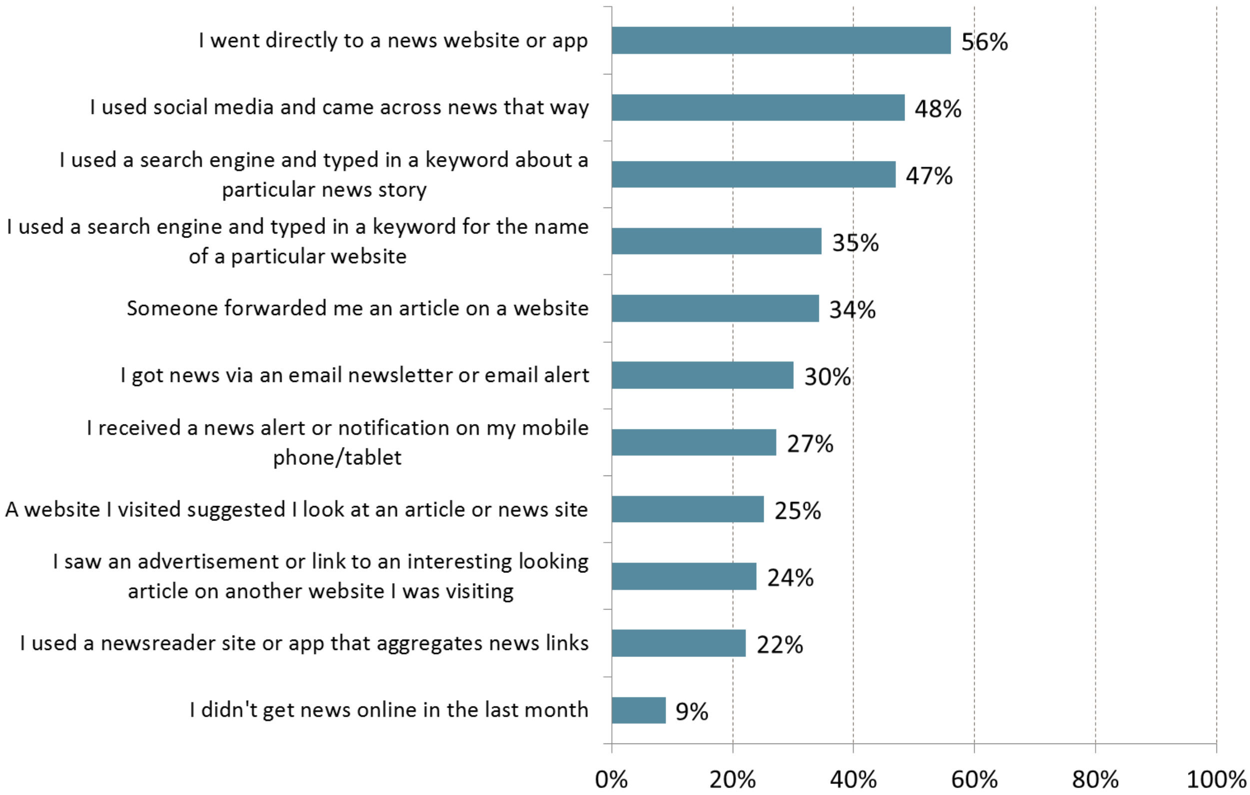
Eighteen (18)-24 year olds were more likely than other users to report having accessed news only passively (22%), with those aged 80 years or more most likely to have not accessed any online news in the last month (28%). Users with no tertiary level education were more likely than average to be in both of these groups, with 14% indicating they did not access any news in the past month, and 20% having only accessed passive news.

The extent of active engagement with news by DP users is relevant as the survey had also posed (see Figure 4 above) how often DP users had (or had ever) undertaken certain activities online. This found that older users (i.e. those aged 65 or more) and those in regional areas were more likely to report 'never':

[9] At the analysis stage, the methods of accessing news stories were classified into 'active' and 'passive'. Methods which would require a DP user to look out for a particular news source were classified as 'active'. On the other hand, methods that provided DP users with news stories without them actively seeking it were classified as 'passive'.

- Looking for or reading online news (reported as never undertaken by 31% of those aged 80 years or older, 19% of those aged 65-79 years and 15% of those in regional areas, as compared to 11% of other DP users); or
- Watching or listening to news online (reported as never undertaken by 44% of those aged 80 years or older, 29% of those aged 65-79 years old and 24% of those in regional areas, as compared to 20% of other DP users).

Figure 22: Ways of accessing news online



Source: ACCC Digital Platform User Survey 2018. *Q20. Which of the following ways have you come across news stories (via your mobile, computer or other device) in the last month?*

Note: This question allowed for multiple responses and therefore the response percentages will not sum to 100%.

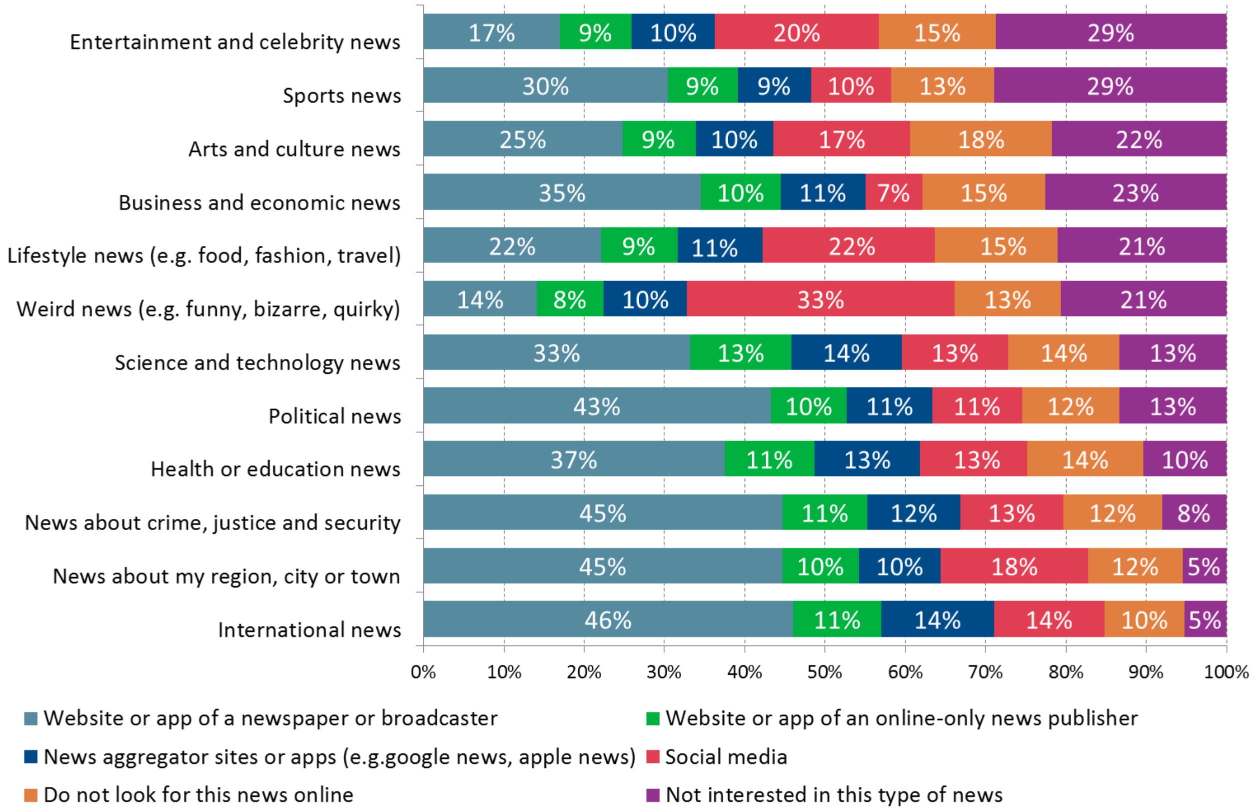
Base: Australian DP users aged 18 or more (n=4,308)

5.1.1.1 Preferred sources for online news access

As shown in Figure 23, DP users who accessed news online in the last month indicated that international news (85%), news about an individual's region, city or town (83%) and news about crime, justice and security (80%) were news types commonly sought online. These were most commonly sought via the website or app of a newspaper or broadcaster (by just under half of all users for each).

The news types most-commonly reported by these DP users as being sourced via social media were 'weird news' (33%), lifestyle news (22%), and entertainment or celebrity news (20%). Around one in seven DP users who accessed news online in the last month indicated that they did not actively look for different news types online, and around one in ten indicated they specifically looked at news aggregator sites or website of online only newspapers.

Figure 23: Preferred sources for online news access



Source: ACCC Digital Platform User Survey 2018. *Q21. Which of the following online news sources do you prefer to get the following types of news?*

Base: Australian DP users aged 18 or more who accessed online news in the past month (n=3,815)

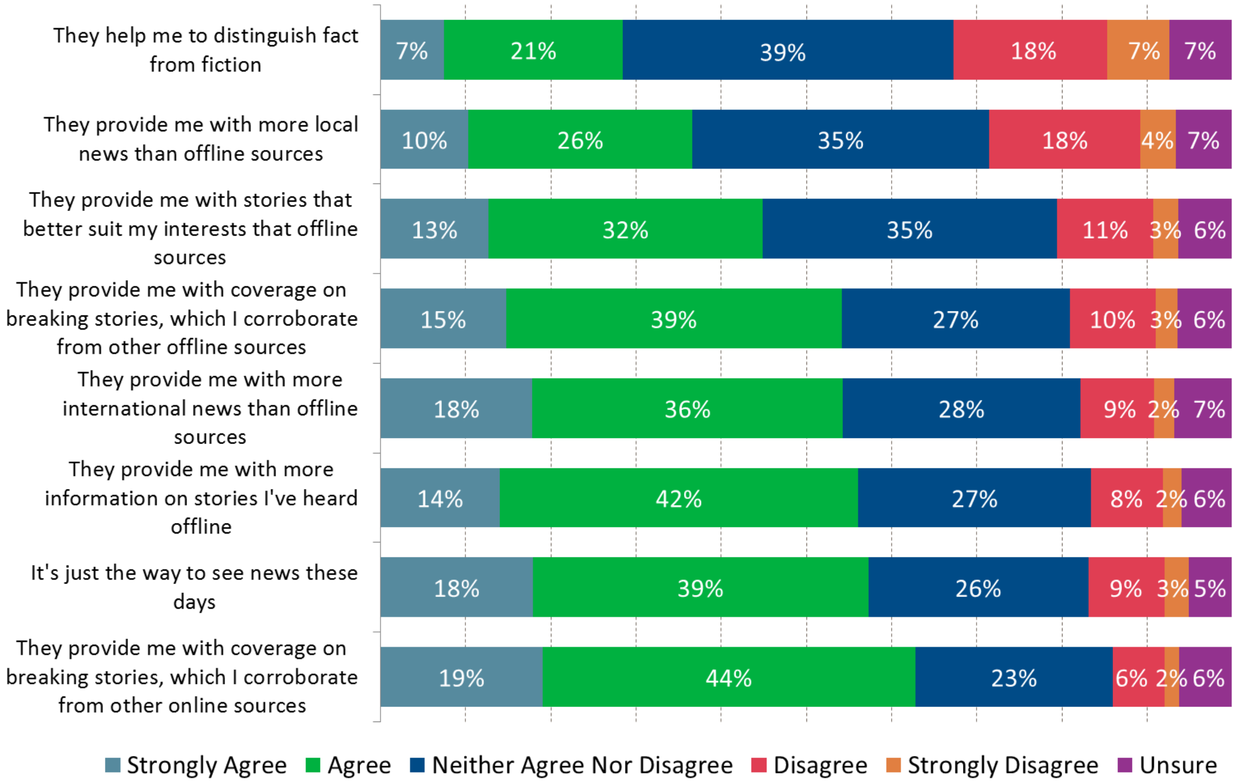
5.1.1.2 Benefits of online news

Figure 24 shows that at least half of all DP users agreed or strongly agreed that online news:

- Provides coverage on breaking stories, which can be corroborated elsewhere online (63%)
- Is just the way to see the news these days (57%)
- Provides more information on stories heard offline (56%)
- Provides more international news than offline sources (54%), and
- Provides coverage on breaking stories, which can be corroborated elsewhere offline (54%).

Less than half of DP users agreed or strongly agreed that online sources were better able to provide stories they are interested in than offline sources (45%) or that they provide more local news than offline sources (37%; 22% disagreed or strongly disagreed). A similar proportion of users agreed or strongly agreed (28%) that online news helped them distinguish fact from fiction as users which held the opposing view (with 25% disagreeing or strongly disagreeing that online news helped them distinguish fact from fiction).

Figure 24: Benefits of online news



Source: ACCC Digital Platform User Survey 2018. *Q23. To what extent do you agree or disagree with the following statements about news sourced online?*

Base: Australian DP users aged 18 or more (n=4,308)

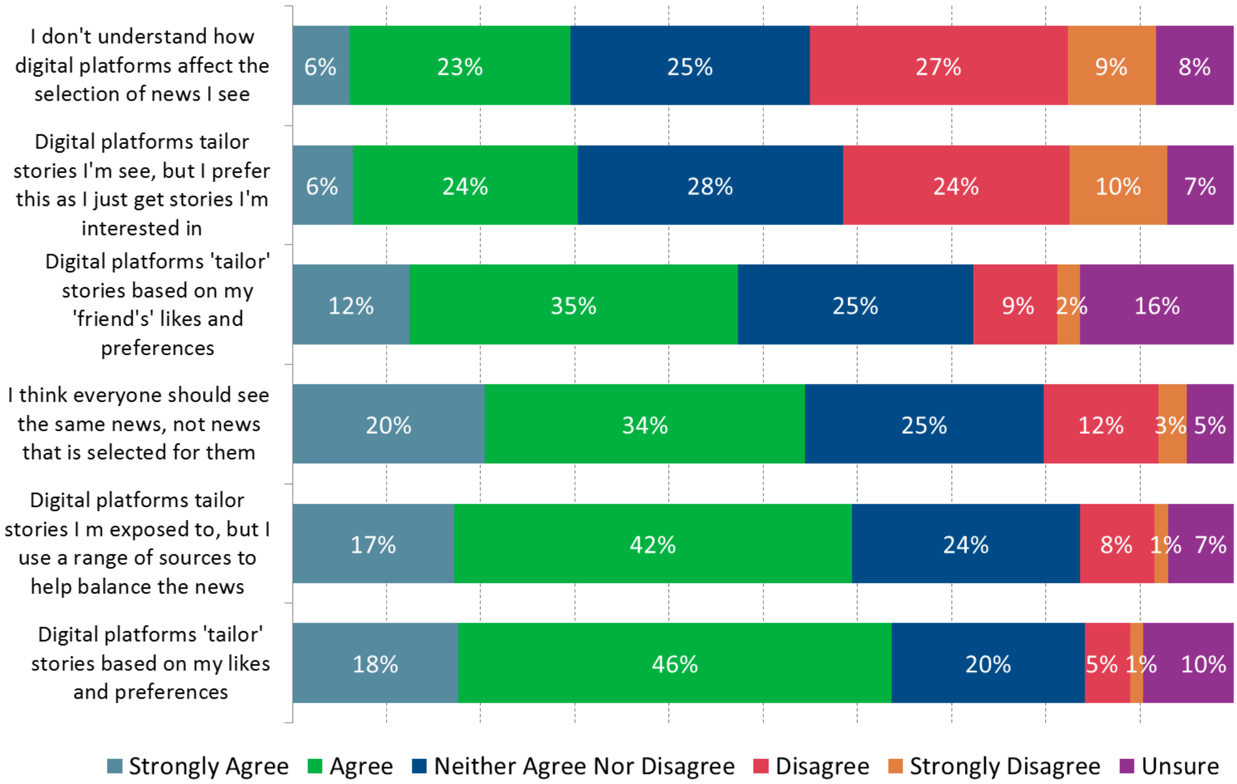
On average, older users (aged 80 or more) were less likely than others to agree or strongly agree with all statements. Those who speak a language other than English were both more likely than average to agree or strongly agree that online news sources could help them distinguish fact from fiction (37%), and that online news sources are better able to provide them with stories that suit their interest than offline sources (53%). These users were also more likely to agree or strongly agree that online sources provide them with more local (44%) and international (62%) stories than offline sources, suggesting that users with specific news interests that fall outside mainstream news feel that online sources are better able to meet their news needs; whereas DP users overall saw online news sources as an adjunct (rather than a replacement) for offline news consumption.

5.1.1.3 Online news curation

As shown in Figure 25, around three in five DP users agreed or strongly agreed that digital platforms 'tailored' the news stories shown based on user likes and preferences (64%), but that they used a range of different sources to gather news to try and balance what they were exposed to (59%). A little over half (54%) agreed or strongly agreed that everyone should be exposed to the same (rather than tailored) news, and less than one in three (30%) agreed or strongly agreed that they liked having digital platforms tailor their news for them.

Less than half agreed or strongly agreed that digital platforms 'tailored' stories shown based on the preferences and likes of an individual's online 'friends' (47%), and three in ten (30%) agreed or strongly agreed that they did not understand how digital platforms curated online news.

Figure 25: Understanding of online news curation



Source: ACCC Digital Platform User Survey 2018. *Q25. Please indicate to what extent you agree or disagree with the following statements as best reflects your opinion.*

Base: Australian DP users aged 18 or more (n=4,308)

When looking at differences between groups, users aged under 50 years were generally more likely to agree or strongly agree (and those aged 50 years or more conversely less likely to do so) that digital platforms 'tailor' stories based on their own or their 'friend's' likes, and that they prefer their stories to be tailored. However, the older user group was more likely to agree or strongly agree that everyone should have access to the same news stories (with younger users less likely to agree or strongly agree). Around one third of both the oldest (those aged 65 to 79 years – 35%; and those aged 80 years or more – 37%) and the youngest (those aged 18 to 24 years - 35%) agreed or strongly agreed that they did not understand how digital platforms affected or curated the news they were exposed to.

5.2 Perceived accuracy of online news

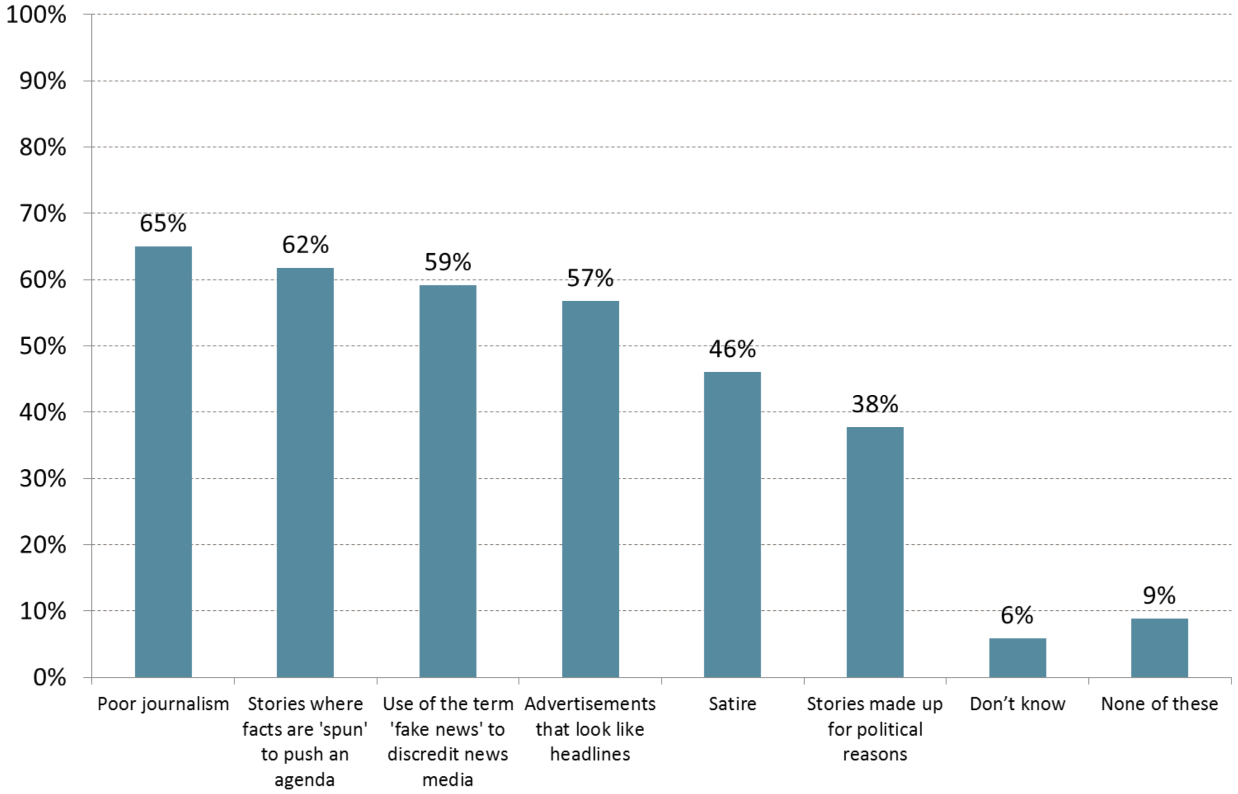
5.2.1.1 Exposure to 'inaccurate' news

Over half of DP users indicated that in the last month, they had personally come across instances of poor journalism (65%), stories where the facts were 'spun' to push a particular agenda (62%), use of the term 'fake news' by politicians or others to discredit new media they didn't like (59%) and advertisements that looked like real headlines or 'clickbait' (57%). Less than half reported they had personally come across satire (46%) or completely false stories that were made up for political reasons (38%).

These results are relatively consistent with the findings in Section 5.1 that DP users tend to prefer using online sources that are connected to a known and trusted offline source.

Key differences between groups showed that both younger (18-24 years) and older (80 years or more) users, as well as those with no tertiary education were generally less likely than average to report having been personally exposed to each item of inaccuracy over the last 12 months. However it's relevant to note that the 80 years and over group, unlike the 18-24 years group, indicated they generally read online news less than others.

Figure 26: Exposure to inaccurate news over the past month



Source: ACCC Digital Platform User Survey 2018. *Q24a. In the last month, which of the following have you personally come across?*

Note: This question allowed for multiple responses and therefore the response percentages will not sum to 100%.

Base: Australian DP users aged 18 or more (n=4,308)

5.2.1.2 Perceived accuracy of online news

Three quarters (73%) of DP users agreed or strongly agreed that they considered the source and author of online news to assess its validity. The youngest and oldest users were the least likely to report that they considered the source and author of the news to assess the validity of the content with 61% of those aged 18-24 years and 64% of those aged 80 years or more agreeing or strongly agreeing with the statement.

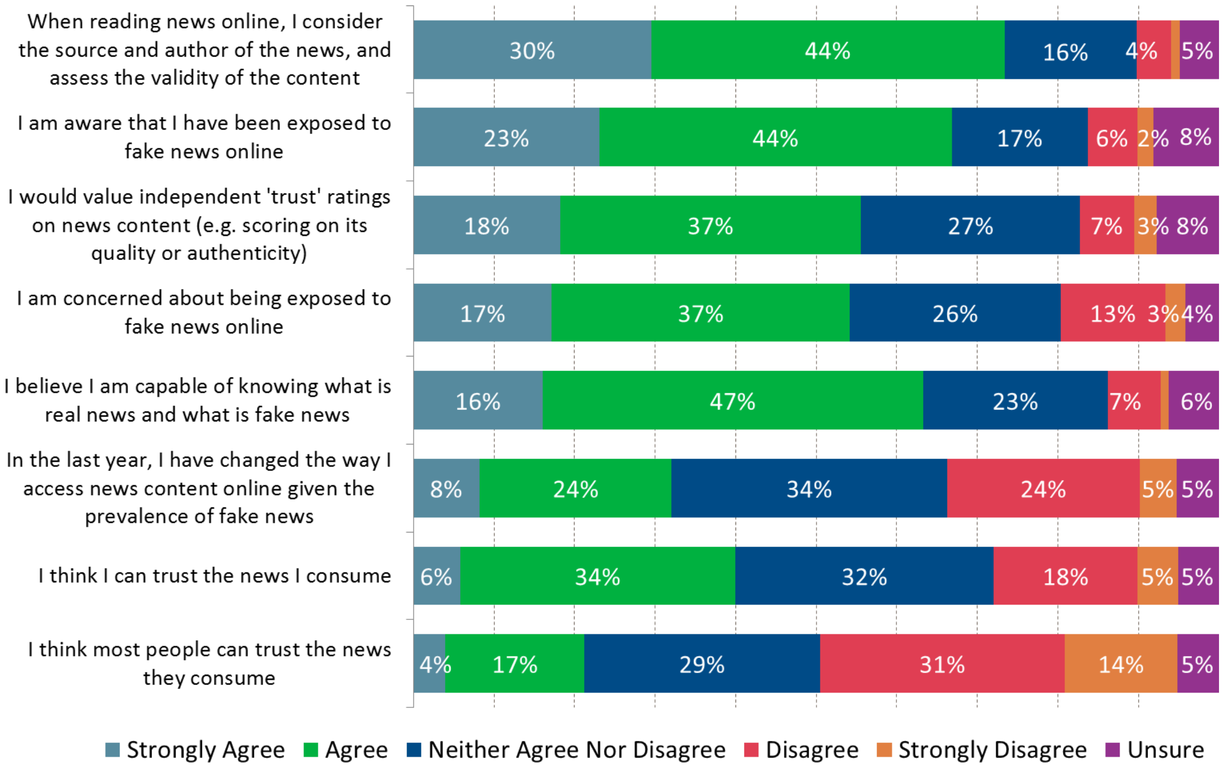
Two thirds of DP users agreed or strongly agreed that they were aware of being exposed to fake news online (67%) with a similar proportion also agreeing that they were capable of knowing what real or fake news (63%) is. This suggests that, while the importance of reliable news is generally acknowledged, most people believe they are equipped to identify fake news when they come across it. Those aged 18-24 years and those aged 80 years were also the least likely to agree or strongly agree that they were aware of being exposed to fake news online (64% and 47% respectively) or that they were capable of knowing what is real news and what is fake news (54% and 53% respectively).

Just over half of the users agreed or strongly agreed that they were concerned about fake news online (54%) or would value independent ‘trust’ rating on news content (55%). The level of disagreement in these areas was, however, quite low (16% and 10% disagreed or strongly disagreed respectively), with around a quarter of users having no opinion one way or the other. There was no significant difference across the age groups in terms of being concerned about being exposed to fake news online. However, the propensity to agree or strongly agree that they valued an independent trust rating on news content rose with age, from 49% among those aged 18-24 years to 60% for those aged 65 or older.

Two in five (40%) users agreed or strongly agreed that they can trust the news they consume, but only 21% agreed or strongly agreed that most people can trust the news they consume. This suggests that, on average, users tend to rate the online news they consume personally as being more reliable than that being consumed by other people in general.

Users aged 25-34 years (45%) were the most likely to agree or strongly agree that they can trust the news they consume, with those aged 80 years or older the least likely (31%) to do so. Those aged 18-24 years were the most likely (28%) to agree or strongly agree that other people can trust the news they consume, and those aged 50-64 years the least likely (17%) to do so. In addition, those with some tertiary education (20%) were less likely to agree or strongly agree that most people could trust the news they consume, compared to those without any tertiary education (24%).

Figure 27: Perceived accuracy of online news



Source: ACCC Digital Platform User Survey 2018. *Q24b. To what extent do you agree or disagree with the following statements about the accuracy of online news stories?*

Base: Australian DP users aged 18 or more (n=4,308)

Younger respondents were also more likely to agree or strongly agree that they had in the last year changed how they accessed online news due to the prevalence of fake news. Around two in five (41%) of those DP users aged 18-24 years to around one in four for those aged 50 years or more.

6. Appendices

6.1 Methodology

A quantitative survey was conducted online via Roy Morgan's Consumer Panel, and occurred in two parts:

- An initial **pilot** survey was conducted from 9 July to 14 July and obtained 205 respondents.
    - This survey was designed to test the overall readability and usability of the survey.
    - Based on results of the survey, it was decided to add one additional item (Q9g – see Appendices for details) and remove the clarifier "*(such as advertisers)*" from Q19h.
    - This sample was subsequently excluded from being invited to participate in the main survey.
    - However, because there was ultimately little variation between the two surveys, the pilot group were later included in the final database of respondents.
- The **main** survey was conducted from 19 July to 13 August and obtained 4,103 respondents.
    - Average survey length was 22 minutes.
    - An external contractor, SSI, was commissioned to assist in fulfilling specific hard to fill quota groups, namely Australians aged 18-24 and those aged 80+.
- The final database incorporated respondents from both the pilot and main surveys, giving a total final count of 4,308 respondents.

6.1.1 Sample selection

Eligible respondents to the survey had to be aged 18+ years, living in Australia, and users of digital platforms such as search engines, social networking sites and other content aggregator sites. Minimum interlocking quotas were set for age by sex by region (metro vs regional) to ensure representativeness across those areas and sufficient numbers in each quota group to enable deeper analysis into each as required.

Table 5 below shows the minimum quotas – please note that the total sample size achieved was higher, and is discussed later in this report.

Figure 28: Minimum quota requirements for the main survey

	METRO		REGIONAL		
AGE	Male	Female	Male	Female	TOTAL
18-24 years	300		300		600
25-34 years	150	150	150	150	600
35-49 years	150	150	150	150	600
50-64 years	150	150	150	150	600
65-79 years	150	150	150	150	600
80+ years	200		200		400
TOTAL					**3400**

The final survey sample (n=4,308) was weighted to the total population of Australian DP users aged 18 or more based on data from Roy Morgan Single Source.[10] The weights were applied by age, gender and region.

6.1.2 Questionnaire design

As there were two key objectives of the survey: (a) understanding behaviours and views of digital platform use and privacy in general; and (b) exploring perceptions and views on online news, the questionnaire was effectively designed (in conjunction with the ACCC) to be in three main parts:

- Use and perceptions of digital platforms (in particular in relation to data collection and use)
- Use and understanding of online news, and
- Demographic questions.

A copy of the questionnaire is available in Section 6.3.

6.1.2.1 Use and perceptions of Digital Platforms

This section formed the bulk of the survey, and looked at aspects of use of online services and digital platforms in general, perceptions and opinions around the collection and use of online data, and perceptions of privacy and use of personal data.

6.1.2.2 Use and understanding of online news

This section looked at preferences and behaviours with respect to accessing online news, as well as perceptions of accuracy and news curation in general.

6.1.2.3 Demographics and focus groups

The demographic questions were split between the beginning and end of the survey, with some questions being asked to assist with quota allocation (namely age, gender, and postcode), and others being asked at the end of the survey to assist with additional analysis (namely education, income, English as a second language, and Aboriginal and/or Torres Strait Islander status).

With respect to the gender variable, respondents were given three options (male, female, other). Respondents who selected ‘other’ were randomly allocated as either male or female to assist with weighting. This is standard practice to ensure that all respondent results are counted, as national statistics provided by both the ABS and Roy Morgan’s Single Source data do not include reliable weighting metrics (due to low numbers). Individuals who selected ‘other’ comprised 0.3% of the total respondents to this survey.

A breakdown of the demographic profile of respondents is shown in Table 6.

[10] Roy Morgan’s Single Source was able to provide an estimated total population of Australian DP users aged 18 and over.

Figure 29: Demographic profile of respondents

	Survey Respondents	Weighted Count ('000)	Percentage (of weighted)
Gender (Allocated)			
Male	2,062	8,340	49.0%
Female	2,246	8,680	51.0%
Age			
18-24 years	664	2,194	12.9%
25-35 years	735	3,499	20.6%
35-49 years	784	4,622	27.2%
50-64 years	828	3,922	23.0%
65-79 years	847	2,398	14.1%
80 years or older	450	386	2.3%
State			
NSW (inc. ACT)	1,326	4,953	29.1%
VIC	1,194	5,102	30.0%
QLD	894	3,195	18.8%
SA (inc. NT)	372	1,565	9.2%
WA	371	1,632	9.6%
TAS	151	573	3.4%
Region			
Metro	2,174	11,402	67.0%
Regional	2,134	5,618	33.0%
Education			
Some Tertiary	2946	12351	72.6%
No Tertiary	1277	4354	25.6%
Language Spoken at Home			
English Only	3,692	14,108	82.9%
Language other than English	616	2,912	17.1%
Aboriginal/Torres Strait Islander Origin			
ATSI Origin	92	344	2.0%
Not ATSI Origin	4,216	16,676	98.0%

6.1.3 Cross-tabulation results

Cross-tabulation results are included throughout the report, showing significant differences between groups where relevant. Demographic splits analysed include:

- Allocated Gender: (Male/Female)
- Age: (18-24/25-34/35-49/50-64/95-79/80+)
- State: (VIC/NSW (inc. ACT)/QLD/WA/SA (inc. NT)/TAS)
- Region: (Metro/Regional)
- ATSI (Yes/No)
- ESL (Only English/Other language)
- Education (Some tertiary education/No tertiary education)
- Income ($55,000 or more/Under $55,000)

The commentary in the report generally reported on differences in demographics where these were significant, could be reported on with a sufficient degree of statistical reliability and where it was considered reporting the difference could assist the reader to further contextualise the overall findings.

6.2 Questionnaire

Introduction

This survey is being conducted on behalf of the Australian Competition and Consumer Commission (ACCC), and aims to understand your views on and experiences using digital platforms. These include social media sites, internet search engines and news aggregator sites (sites that collect news from many different sources and present it to you in one location, like Google News or Apple News). There's no right or wrong answers, we're only interested in your opinions and experiences.

Screening and quota building

[Ask all] [Single]
SDGEN:
What is your gender?

1. Male
2. Female
3. Unspecified

[Ask all] [Single]
Q1. AGE
What is your age?

1. 17 years or under
2. 18-24 years
3. 25-34 years
4. 35-49 years
5. 50-64 years
6. 65-79 years
7. 80 years or older

99. Prefer not to answer

IF SDAGE = 1 OR 99 TERMINATE

[Ask all] [Single]
Q2. What is your postcode?

_____

IF INVALID POSTCODE, END SURVEY

RECODE RESPONSE FROM Q2 INTO DUMVARIABLE <DUMSTATE>

[Single] [Hidden]
<DUMSTATE>

1. Australian Capital Territory
2. Sydney
3. NSW excluding Sydney
4. Melbourne
5. Victoria excluding Melbourne
6. Brisbane
7. Queensland excluding Brisbane
8. Adelaide
9. South Australia excluding Adelaide
10. Northern Territory
11. Hobart
12. Tasmania excluding Hobart
13. Perth
14. Western Australia excluding Perth

RECODE RESPONSE FROM Q2 INTO DUMVARIABLE <DUMREGION>
[Single]
<DUMREGION>

1. Metro
2. Regional

[Ask all] [Single response per statement] [Grid] [Randomise statements]
Q3. Based on the last 3 months, how often would you say you use **each of the following** online sites or apps?

	DAILY	AT LEAST ONCE A WEEK	AT LEAST ONCE A FORTNIGHT	AT LEAST ONCE A MONTH	LESS OFTEN THAN ONCE A MONTH	NEVER
a. Facebook (i.e. the scrollable activity feed)						
b. Google Search						
c. Instagram						
d. Twitter						
e. Snapchat						
f. Messenger						
g. WhatsApp						
h. Skype						
i. WeChat						
j. YouTube						
k. LinkedIn						
l. Pinterest						
m. Google Chrome						
n. Internet Explorer						
o. Safari						
p. Google News						
q. Apple News						
r. Other social networking sites **[KEEP AT END]**						
s. Other search sites **[KEEP AT END]**						
t. Other news aggregator sites **[KEEP AT END]**						

IF Q3 = NEVER (CODE 6) FOR ALL ITEMS, TERMINATE

RECODE RESPONSE FROM SDGEN INTO DUMVARIABLE <DUMGEN>, BY RANDOMLY ALLOCATING ANY "UNSPECIFIED" (CODE 3) INTO EITHER MALE (CODE 1) OR FEMALE (CODE 2), WHICH PREFERENCE GOING TO THE LOWEST GENDER GROUP FOR EACH RELEVANT AGE x GENDER x REGION QUOTA PAIR

[Single] [Hidden]
<DUMGEN>

1. Male
2. Female

IF RESPONDENT DOES NOT QUALIFY BEYOND SCREENING, SKIP TO SCREENOUT MESSAGE
IF RESPONDENT FALLS INTO A FULL QUOTA, SKIP TO QUOTA FULL MESSAGE
IF RESPONDENT QUALIFIES, CONTINUE

FOR EACH ITEM TO Q3 WHERE RESPONSE IS ANY OF CODES 1 – 5 (I.E. NOT NEVER), ASK:

[Ask if Q3a-t is any of codes 1-4] [Only show items to which response at Q3 was NOT code 5] [Single response per statement]

Q4. If you have an account with this service, who set up your user account or profiles for this service?

	I DID	SOMEONE ELSE SET IT UP FOR ME	IT CAME PREINSTALLED ON MY DEVICE	I HAVE NOT SET UP AN ACCOUNT WITH THIS SERVICE	DON'T KNOW
a. Facebook (i.e. the scrollable activity feed)					
b. Google Search					
c. Instagram					
d. Twitter					
e. Snapchat					
f. Messenger					
g. WhatsApp					
h. Skype					
i. WeChat					
j. YouTube					
k. LinkedIn					
l. Pinterest					
m. Google Chrome					
n. Internet Explorer					
o. Safari					
p. Google News					
q. Apple News					
r. Other social networking sites (Please specify) **[KEEP AT END]**					
s. Other search sites (Please specify) **[KEEP AT END]**					
t. Other news aggregator sites (Please specify) **[KEEP AT END]**					

END IF

Questionnaire body

Digital literacy and usage

PROGRAMMING NOTE: PLEASE ALSO DISPLAY THE TEXT BELOW (HIGHLIGHTED IN BLUE) AS A HOVER OVER BOX FOR ALL REFERENCES TO DIGITAL PLATFORMS (ALSO HIGHLIGHTED IN BLUE THROUGHOUT THE SURVEY)

We're interested in your experiences in using digital platforms. Digital platforms include internet search engines, social media and online platforms which aggregate information (such as news) for you.

As an example:

- Search engines include sites like Google or Bing etc. You may be able to access search engines through web browsers like Safari, Chrome or Internet Explorer.
- Social media platforms include sites like Facebook, Twitter, LinkedIn, WhatsApp or Snapchat etc.
- News aggregator platforms include sites like Apple News, Google News or Flipboard etc.

[Ask all] [Multiple] [Randomise]

Q5. Which of the following devices do you have for your personal use?

Please select all that apply

1. Smartphone (e.g. iPhone, Android phone)
2. A tablet (e.g. iPad or android tablet)
3. Laptop
4. Desktop computer
5. Smartwatch
6. Smart TV (internet connected TV)
7. Standalone GPS device (e.g. Navman, TomTom)
8. Voice controlled device (e.g. Google Home, Amazon Alexa, Amazon Echo, Apple HomePod etc.)

98. None of the above **[KEEP AT END]**

[Ask all] [Multiple] [Randomise]

Q6. In which of the following ways do you connect to the internet?

Please select all that apply

1. Connect using a home internet connection (e.g. using an internet cable or Wi-Fi)
2. Have data on a portable device such as a smartphone, laptop or tablet (i.e. on a plan or pre-paid)
3. Use your own devices via public Wi-Fi (e.g. on trains, shopping centres/malls, cafés and airports etc.)
4. Use a work internet connection
5. Use public devices to connect to the internet (e.g. using a computer at a library, community centre, place of study, internet café or kiosk etc.)
6. Connect using friend's or family's internet connection, using either your own or their devices

97. Other (please specify): _____ **[KEEP AT END]**

[Ask all] [Single response per statement] [Grid] [Randomise statements]
Q7. How often do you do each of the following online activities?

	DAILY	AT LEAST ONCE A WEEK	AT LEAST ONCE A FORTNIGHT	AT LEAST ONCE A MONTH	LESS OFTEN THAN ONCE A MONTH	NEVER
a. Create or share content (e.g. writing a comment or uploading a photo on social media or writing an email)						
b. Do research online before I buy things in a physical store						
c. Buy goods online						
d. Internet banking or pay bills online						
e. Make bookings or reservations						
f. Engage a friend or family to do any online activity on my behalf						
g. Look for or read online news						
h. Watch or listen to news online						
i. Stream other content (e.g. Youtube or Netflix etc)						

[Ask all] [Multiple] [Randomise]
Q8. When doing things online, which of the following would you consider to be your ‘personal information’ (that is, information that could reasonably be used to identify you)?
Please select all that apply

1. My name
2. My photos
3. My opinions and beliefs
4. My membership of particular groups or my affiliations
5. My racial or ethnic origin
6. My health information (including genetic information)
7. My sexual preferences
8. My date of birth
9. Information or opinions inferred from my online activities
10. My telephone or device information (e.g. device identifier)
11. My web browsing history
12. My tastes and preferences inferred from online purchases I’ve made
13. My credit card details
14. My location information
15. The content of my emails

99. None of the above **[Single Select] [Keep at end]**

[Ask all] [Single response per statement] [Grid] [Randomise statements]
Q9. Please indicate to what extent you agree or disagree with the following statements as best reflects your opinion on digital platforms.

	STRONGLY AGREE	AGREE	NEITHER	DISAGREE	STRONGLY DISAGREE	UNSURE
a. Digital platforms today have the ability to follow my activities across many sites on the web.						
b. When a digital platform has a privacy policy, it means it will not share my information with anyone else (including other digital platforms).						
c. Digital platforms have the ability to collect and combine information about me from third parties (like information other companies might collect about me from, for example, a shopping loyalty card).						
d. Some digital platforms exchange information about me with third parties for purposes other than delivering the product or service I signed up for.						
e. All mobile/tablet apps only ask for permission to access things on my device that are required for the app to work.						
f. When I'm online, I may be tracked by a digital platform even if I'm not signed in or do not have an account with them.						
g. I understand that for some digital platforms, a requirement to use the service is that I give permission to them to use content I upload, share, or post on their platform.						

[Ask all] [Single response per statement] [Grid] [Randomise statements]
Q10. Do you believe that the following types of information are being collected by digital platforms?

	YES	NO	DON'T KNOW
a. Browsing data (e.g. recording the websites I visit, when I visit them and my device's IP address)			
b. All personal information irrespective of my security settings			
c. Any data I've permitted to be publically available			
d. Non-personally identifiable information (e.g. my location data that is aggregated with the location data of other users to see general patterns)			
e. (If I use a platform for these purposes) the content of my text messages, social media direct messages and emails			
f. My phone and email contact list			
g. Where I've travelled to when carrying a device I use to access the internet (i.e. mobile, tablet or computer) and have the location device setting **turned on**			
h. Where I've travelled to when carrying a device I use to access the internet (i.e. mobile, tablet or computer) and have the location device setting **turned off**			

Digital transparency

[Ask all] [Single]
Q12. Do you normally read all the privacy policy or terms and conditions for an internet site or app?

1. Yes, every time
2. Yes, most times
3. Yes, some times
4. Yes, rarely
5. No, never

Protecting privacy

[Ask all] [Single]

Q13. Compared to one year ago, how concerned are you about the privacy of your personal information on digital platforms?

1. More concerned that it will be shared with/can be intercepted by other companies, including other digital platforms, without my knowledge or consent
2. Similarly concerned
3. Less concerned that it will be shared with/can be intercepted by other companies, including other digital platforms, without my knowledge or consent
4. I have given up on trying to protect the privacy of my personal information when on digital platforms
5. I wasn't concerned then and I'm not concerned now

97. Other (please specify) _____

The following two questions specifically focus on instances where you have signed in to a digital platform. 'Signing in' means that you have had to enter a username and/or password to be able to access information or a profile, and can include things like:

- signing in to a Facebook or Instagram account in order to access your personal page or feed, or other accounts you would otherwise not be able to view; or
- signing into a Google Chrome account in order to access websites saved on different devices you use.

It does not include using other digital platforms where a login or password are not required, such as when doing a browser search.

[Ask all] [Single response per statement] [Grid] [Randomise statements]

Q14. If you are signed into an account with a digital platform, would you consider any of the following instances a misuse of your personal information?

	YES	NO	NOT SURE
a. Monitoring my online activities, including on websites not directly connected to the social media or search platforms in use, to show me relevant advertisements and offers			
b. Monitoring my offline activities like my location and movement without my express consent			
c. Monitoring and collecting information about my online activities without my express consent			
d. Sharing my personal information with an organisation that I have not previously dealt with			
e. Collecting information from my contact lists without my express consent			
f. Revealing personal information about me to another customer/user			
g. Using personal information for a purpose other than to assist the provision of the service			
h. Using my information to create a profile which enables advertisers to target me			
i. A company that I gave my address or phone number to giving those details to a digital platform so they can target advertising to me through that platform			

[Ask all] [Single response per statement] [Grid] [Randomise statements]

Q15. If you are **not** signed into an account with a digital platform, would you consider any of the following actions by them a misuse of your personal information?

	YES	NO	NOT SURE
a. Keeping my personal information such as my name or contact details?			
b. Keeping track of my online behaviour such as my browsing history, viewing habits, or search history?			
c. Using the information it has on me (including from third parties) to show me personalised ads?			
d. Adding to its collection of information on me with more information gathered from other companies I have dealt with (online or offline)?			

[Ask all] [Single response]

Q16. Who do you think owns the data and information you share online?

1. I do
2. The company to whom I have given it to, but they must provide me with access to it at my request, and cannot share it with anyone else if I request that they do not
3. The company to whom I have given it to, and they can choose to use or share it at their discretion
4. I don't know

98. None of the above

[Ask all] [Multiple] [Randomise]
Q17. In the past year, have you tried to reduce the amount or type of personal data you have online, or otherwise protect your data, by doing any of the following?
Please select all that apply

1. Closed a social media account
2. Removed contact information (e.g. email, phone) from a social media account
3. Deleted comments I have made
4. Deleted comments others had made on my profile
5. Removed my name from photos I had been tagged in
6. Posted less content on a social media account
7. Used a false name or nickname
8. Changed my filter or selection preferences
9. Set/adjusted my privacy settings on a new account
10. Increased/adjusted my privacy settings on an existing account
11. Read and responded to an updated privacy policy (i.e. by closing an account or adjusting privacy settings)
12. Used an incognito browser
13. Adjusted ad settings on online accounts to reduce ads targeted to me
14. Chose not to use a product or service collecting my data/information
15. Denied permission to access information from a mobile phone after installing and opening an app
16. Deleted cookies on my internet browsers
17. Cleared my browsing history
18. Selected 'opt out' options where available, denying a digital platform permission to target information or advertising to me
19. Refused to provide personal information to a platform or website that requested it
20. Checked a website was secure before providing personal information
21. Chose not to deal with an organisation because of concerns regarding privacy
22. Asked an organisation why they needed my personal information
23. Deleted an app from my phone
24. Read a privacy policy or a notification *before* providing personal information
97. Other (please specify): ______ **[KEEP AT END]**
98. None of the above **[KEEP AT END] [SINGLE SELECT]**

IF PROTECTED PERSONAL DATA (Q17=ANY OF CODES 1-24 or 97], ASK:

[Ask if protected personal data] [Multiple] [Random]
Q18. What prompted you to take this action/these actions?
PROGRAMMER NOTE: IF ONLY ONE RESPONSE TO Q17, DISPLAY 'THIS ACTION' IN Q18 IF MULTIPLE RESPONSES TO Q17, SHOW 'THESE ACTIONS' AT Q18
Please select all that apply

- 1. Recent news reports on use of consumer data by digital platforms
- 2. Recent news reports on significant data breaches
- 3. Personal experience with a data breach
- 4. Desire to be more cautious
- 97. Other (please specify): _____ **[KEEP AT END]**

END IF

[Ask all] [Single response per statement] [Grid] [Randomise statements]
Q19. How strongly do you agree or disagree with the following regarding how digital platforms should handle your data?

	STRONGLY AGREE	AGREE	NEITHER	DISAGREE	STRONGLY DISAGREE	UNSURE
a. It is enough for digital platforms to notify me about how they collect, use and share my data in their privacy policy and terms and conditions.						
b. Digital platforms should allow me to opt out of collecting certain types of information about me, how they use it, and/or what they can share.						
c. Digital platforms should only collect the information they need to provide their product or service.						
d. I don't mind if digital platforms collect information about me if it means I am more likely to be interested in the advertisements I receive.						
e. Digital platforms should be open about how they use data about me to assess my eligibility or exclude me from accessing products or services.						
f. Digital platforms should give me some form of compensation (such as money) if they make money out of information about me.						
g. I don't mind if digital platforms collect information about me if it means I receive interesting news or social content.						
h. Digital platforms should tell me who they are providing my personal information to.						

Accessing news through digital platforms

We are now going to ask you some questions around accessing news articles online.

[Ask all] [Multiple] [Randomise]
Q20. Which of the following ways have you come across news stories (via your mobile, computer or other device) in the last month?
Please select all that apply

1. I used social media and came across news that way
2. I got news via an email newsletter or email alert
3. I received a news alert or notification on my mobile phone/tablet
4. I used a newsreader site or app that aggregates news links
5. I used a search engine and typed in a keyword about a particular news story
6. I used a search engine and typed in a keyword for the name of a particular website
7. I went directly to a news website or app
8. Someone forwarded me an article on a website
9. A website I visited suggested I look at an article or news site
10. I saw an advertisement or link to an interesting looking article on another website I was visiting
11. I didn't get news online in the last month **[Single response] [Keep at end]**

IF ACCESSED NEWS (Q20=ANY OF CODES 1-10], ASK:

[Ask all] [Single per statement] [Randomise]

Q21. Which of the following online news sources do you prefer to get the following types of news?

	WEBSITE OR APP OF A NEWSPAPER OR BROADCASTER	WEBSITE OR APP OF AN ONLINE-ONLY NEWS PUBLISHER	NEWS AGGREGATOR SITES OR APPS (E.G. GOOGLE NEWS, APPLE NEWS)	SOCIAL MEDIA	DO NOT LOOK FOR THIS NEWS ONLINE	NOT INTERESTED IN THIS TYPE OF NEWS
a. News about my region, city or town						
b. International news						
c. News about crime, justice and security						
d. Health or education news						
e. Science and technology news						
f. Political news						
g. Lifestyle news (e.g. food, fashion, travel)						
h. Weird news (e.g. funny, bizarre, quirky)						
i. Business and economic news						
j. Arts and culture news						
k. Sports news						
l. Entertainment and celebrity news						

END IF

[Ask all] [Single per statement] [Randomise statements]

Q23. To what extent do you agree or disagree with the following statements about news sourced online?

	STRONGLY AGREE	AGREE	NEITHER AGREE NOR DISAGREE	DISAGREE	STRONGLY DISAGREE	UNSURE
a. They help me to distinguish fact from fiction						
b. They provide me with coverage on breaking stories, which I corroborate from other **online** sources						
c. They provide me with coverage on breaking stories, which I corroborate from other **offline** sources						
d. They provide me with more information on stories I've heard offline						
e. They provide me with stories that better suit my interests than offline sources						
f. They provide me with more local news than offline sources						
g. They provide me with more international news than offline sources						
h. It's just the way to see news these days						

[Ask all] [Multiple] [Randomise statements]

Q24a. In the last month, which of the following have you personally come across?

Please select all that apply

1. Poor journalism (factual mistakes, dumbed down stories, misleading headlines/clickbait)
2. Stories where *facts are spun or twisted* to push a particular agenda
3. Stories that are *completely made up* for political or commercial reasons
4. Headlines that look like news stories but turn out to be advertisements
5. Stories that are completely made up to make people laugh (satire)
6. The use of the term fake news (e.g. by politicians, others) to discredit news media they don't like

98. Don't know

99. None of these

[Ask all] [Single per statement] [Randomise statements]
Q24b. To what extent do you agree or disagree with the following statements about the **accuracy** of online news stories?

	STRONGLY AGREE	AGREE	NEITHER AGREE NOR DISAGREE	DISAGREE	STRONGLY DISAGREE	UNSURE
a. I am concerned about being exposed to fake news online						
b. I am aware that I have been exposed to fake news online						
c. I believe I am capable of knowing what is real news and what is fake news						
d. When reading news online, I consider the source and author of the news, and assess the validity of the content						
e. In the last year, I have changed the way I access news content online given the prevalence of fake news						
f. I would value independent 'trust' ratings on news content (e.g. scoring on its quality or authenticity)						
g. I think I can trust the news I consume						
h. I think most people can trust the news they consume						

[Ask all] [Single per statement] [Randomise]

Q25. Please indicate to what extent you agree or disagree with the following statements as best reflects your opinion.

	STRONGLY AGREE	AGREE	NEITHER AGREE NOR DISAGREE	DISAGREE	STRONGLY DISAGREE	UNSURE
a. Social media, news sites and other digital platforms ‘personalise’, ‘tailor’ and ‘filter’ stories I’m exposed to based on my likes and preferences						
b. Social media, news sites and other digital platforms ‘personalise’, ‘tailor’ and ‘filter’ stories I’m exposed to based on the likes and preferences of my ‘friends’						
c. I don’t understand how social media, news sites and other digital platforms affect the selection of news that I see						
d. I understand that social media, news sites and other digital platforms ‘personalise’, ‘tailor’ and ‘filter’ the stories I’m exposed to, but I prefer this as it means I just get the stories I’m interested in						
e. Social media, news sites and other digital platforms ‘personalise’, ‘tailor’ and ‘filter’ the stories I’m exposed to, but I use a range of sources to help me balance the news I am exposed to						
f. I think everyone should see the same news, not news that is selected for particular people						

Consumer characteristics

[Ask all] [Single]
SDEDU. STANDARD DEMOGRAPHIC QUESTION
What is the highest level of education you've reached?

1. Some Primary School
2. Finished Primary School
3. Some Secondary School
4. Some Technical Or Commercial/ TAFE
5. Passed School Certificate / Passed 4th Form / Passed Intermediate / Year 10 / Junior or Achievement certificate
6. Passed 5th Form / Year 11 / Passed Leaving or Sub-senior certificate
7. Finished Technical School / Commercial College / TAFE (including trade certificate) / other certificate or apprenticeship
8. Finished or now studying for Matriculation, Higher School Certificate (H.S.C.), V.C.E., Year 12, or Senior Certificate
9. Some University or some college of Advanced Education training
10. Diploma from College of Advanced Education or TAFE (Not Degree), Tertiary or Management Training (including Diploma other than University Degree)
11. Now at University or College of Advanced Education
12. Degree from University or College of Advanced Education
13. Higher Degree or Higher Diploma (e.g. Ph.D, Masters)
99. Prefer not to say

[Ask all] [Single]
SDINR. STANDARD DEMOGRAPHIC QUESTION
Please indicate your current approximate annual income from all sources before tax.
If you are not certain, please give your best estimate.

1. Less than $6,000
2. $6,000 - $$9,999
3. $10,000 - $14,999
4. $15,000 - $19,999
5. $20,000 - $24,999
6. $25,000 - $29,999
7. $30,000 - $34,999
8. $35,000 - $39,999
9. $40,000 - $44,999
10. $45,000 - $49,999
11. $50,000 - $59,999
12. $60,000 - $69,999
13. $70,000 - $79,999
14. $80,000 - $89,999
15. $90,000 - $99,999
16. $100,000 - $109,999
17. $110,000 - $119,999
18. $120,000 - $129,999
19. $130,000 Or More

98. Can't Say
99. Prefer not to answer

IF SDINR=98 OR 99, ASK SDINRR

[Ask if SDINR = 1-19] [Single]
SDINRR. STANDARD DEMOGRAPHIC QUESTION
Could you please tell me whether your income would be over $50,000 or under $50,000 per annum?

1. Under $50,000
2. $50,000 Or More
98. Can't Say
99. Prefer not to answer

END IF

[Ask all] [Single]

Q26. Do you, yourself, speak a language other than English at home?

1. Yes
2. No

[Ask all] [Single]
Q27. Are you of Aboriginal or Torres Strait Islander Origin?

1. Yes, Aboriginal
2. Yes, Torres Strait Islander
3. Yes, both Aboriginal and Torres Strait Islander
4. Neither