Article No. 7727
Available on www.roymorgan.com
Link to Roy Morgan Profiles

ROY MORGAN

Friday, 28 September 2018

Digital inclusion improving across Australia, but digital divide continues to widen

The release of the third Australian Digital Inclusion Index (ADII) shows, with the exception of the Northern Territory, that digital inclusion is improving in all states and territories, with Australians also spending more time online than ever before. However, the gap between included and excluded Australians is substantial and continues to widen for some groups, particularly those with low levels of income and employment.

There have also been a handful of changes to the relative rankings of states and territories over the past year, most noticeably Tasmania recorded an eight point jump with evidence emerging that the NBN is starting to improve access across the state, where the rollout is largely complete.

The Index has been developed and produced by researchers at RMIT University's Digital Ethnography Research Centre and the Centre for Social Impact at Swinburne University of Technology, in partnership with Telstra and Roy Morgan, and measures digital inclusion by analysing three factors; access, affordability and digital ability.

On a national level, key findings of the 2018 ADII include:

- Australians are accessing the internet more often across a diverse range of technologies and are using larger data plans than ever before.
- Digital ability (which takes into account attitudes, basic skills and activities) has improved, but remains an important area for attention with policy makers, businesses, educators and community groups interested in improving digital inclusion.
- Although value for money spent on internet services has improved with more data per dollar, the share of total household budgets spent on these services has grown.
- More than four million Australians access the internet solely through a mobile connection, often linked with socio economic factors including low income, unemployment and low levels of education.
- Digital inclusion in Indigenous communities is low, but improving. The largest gap is in affordability, where the score for Indigenous Australians (49.7) is 7.9 points below the national average (57.6). The prevalence of mobile-only connectivity amongst Indigenous Australians which carry higher costs per gigabyte than fixed connections contributes to this affordability result.

The Index also reveals geography is playing a critical role with substantial differences observed between rural and urban areas. While the Capital-Country gap has narrowed in New South Wales (NSW), Tasmania, Victoria, and Western Australia (WA) over the past 12 months, it has expanded in Queensland (QLD) and South Australia (SA).

All states registered an overall increase in their digital inclusion scores this year except for the Northern Territory (NT) which remains flat. The Australian Capital Territory remains at the top, followed by Victoria (up one place), NSW (down one place), WA (up one place), QLD (up one place), NT (down two places), TAS (up one place) and SA (down one place).

Lead researcher, Professor Julian Thomas from RMIT's Digital Ethnography Research Centre said there are still more than 2.5 million Australians who are not online and as a result are missing out on the education, health, social, and financial benefits that come with connection.

"What we've found is that nationally, digital inclusion is improving, but there is much more work to be done," said Professor Thomas. "Poorer and more vulnerable communities are more likely to be digitally excluded, and are not enjoying all the benefits of being online. As an increasing number of essential services and essential communications move online, the divide is getting deeper."

Professor Jo Barraket, Director of the Centre for Social Impact Swinburne, said that while digital inclusion is improving, it's important we don't lose sight of the gaps, which are widening for some groups, including those with low levels of income and employment.

"With the growing number of connected devices per household, we are seeing a greater proportion of household income being spent on being digitally included. This is going to exert more pressure on those households that can least afford it. This is particularly important to acknowledge as we move to a greater reliance on being online when accessing education, health, social, and financial resources."

Telstra's General Manager of Digital Inclusion Michael Parks said the ADII continues to provide valuable insights for Telstra's partners across the community, government, education, and corporate sectors who are focused on addressing digital inclusion and bridging noticeable gaps.

"Australia is going digital – education, government services, banking, and the way we interact with businesses is increasingly moving online. As the digital world continues to transform the way we live our lives, the benefits of being online are becoming more paramount and the cost of not being online is becoming significant." Mr Parks said.

The ADII is based on data from more than 16,000 Australians captured in the annual cycle of the Roy Morgan Single Source survey.

The 2018 ADII is available to download from http://digitalinclusionindex.org.au.

Media contacts

RMIT
Michael Quin
Mob: 0499 515 417
michael.quin@rmit.edu.au

Centre for Social Impact Swinburne
Nicola Hannigan, National Communications Manager
Mob: 0407 075 307
n.hannigan@unsw.edu.au

Telstra
Chris Marks, Media Manager
Mob: 0475 963 824
media@team.telstra.com

To learn more about the Australian Digital Inclusion Index, call (+61) (3) 9224 5309 or email askroymorgan@roymorgan.com**.**

Please click on this link to the Roy Morgan Online Store**.**

Roy Morgan Enquiries
Office: +61 (3) 9224 5309
askroymorgan@roymorgan.com

About Roy Morgan

Roy Morgan is the largest independent Australian research company, with offices in each state of Australia, as well as in the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan has over 70 years' experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	**Percentage Estimate**			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
10,000	±1.0	±0.9	±0.6	±0.4
50,000	±0.4	±0.4	±0.3	±0.2