

Thursday, 11 October 2018

Australian Digital Inclusion Index above 60 for first time

The [2018 Australian Digital Inclusion Index \(ADII\)](#) shows that progress on improving Australia's Digital Inclusion is being made across all three measures of Access, Digital Ability and Affordability. However there are significant demographic groups which still require more targeted investment and development to bridge the gaps on access and digital ability in particular.

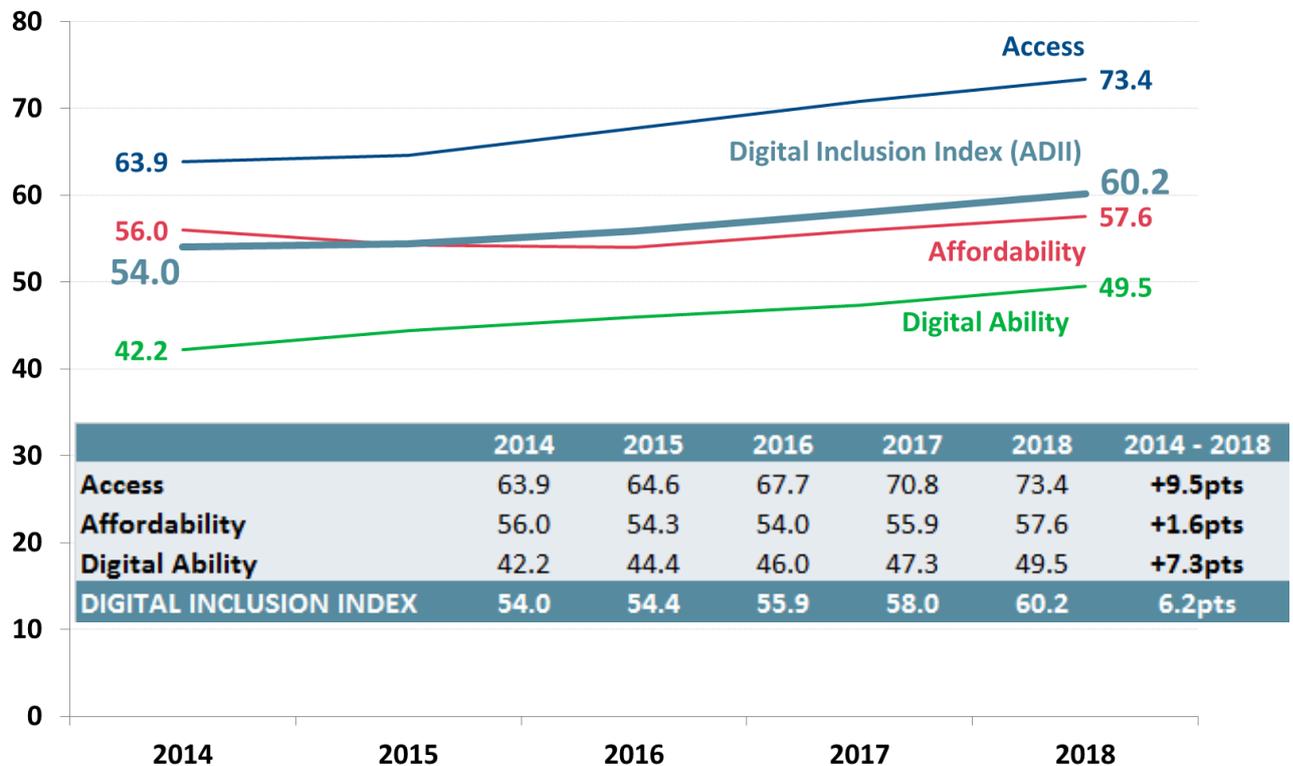
Telstra together with RMIT University and the Centre for Social Impact at Swinburne University of Technology use Roy Morgan Single Source – a nationwide annual survey of 50,000 in-depth personal interviews conducted face-to-face in people's homes to measure and monitor levels of digital inclusion across the various demographics of the Australian population.

The three key elements of Digital Inclusion – Access, Affordability and Digital Ability are each comprised of underlying measures that combine to produce the top-line scores.

- **Access** is about how and where we access the Internet, the kinds of devices we use and how much data we can use when going online.
- **Affordability** is about how much data we get for our dollar and how much we spend on internet services as a proportion of our income.
- **Digital Ability** is about our skill levels, what we do online, our attitudes towards technology, and our confidence in using it.

In a world in which essential and community services and other interactions with the world around us are increasingly moving online, from paying our bills to organising our next social outing and planning our day, it is absolutely critical to understand how different demographics and sub-groups across Australia are handling the transition to an all-encompassing digital world.

Australian Digital Inclusion Index and sub-index scores (2014-2018)



Source: Roy Morgan Single Source. April 2013 – March 2018.

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Nationally, Australia scored 73.4 on Access in the 12 months to March 2018 up from 70.8 a year ago and up nearly 10.0 points since 2014. The nbn™ rollout has had a positive effect on access as seen by the 2018 ADII results for Tasmania. The nbn™ rollout is largely complete in Tasmania and between 2017 and 2018 we saw a rise of 8.0 points in its digital inclusion score.

The Affordability score of 57.6 represents an increase of 2.1pts from a year ago. While cost per gigabyte of data is falling, Australians are spending more time online and more money on internet services.

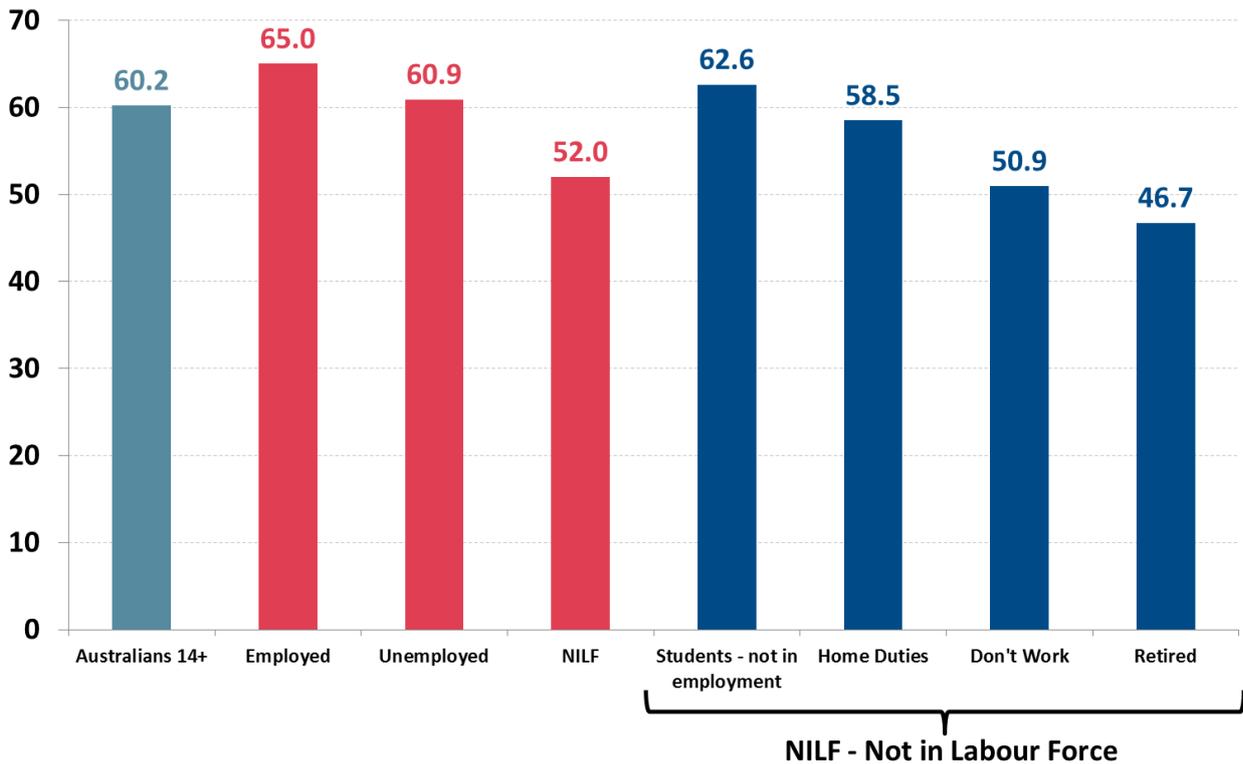
The Digital Ability score of 49.5 is the lowest of the three sub-indices but has improved significantly over the last four years, increasing by 7.3 points since 2014. The increases in Digital Ability reflect steady improvements in the three core components of Digital Ability including Attitudes, Basic Skills and Activities. All three components have increased in every year since 2014.

Employment Sub-groups show divergent results

Employed Australians with a Digital Inclusion Score of 65.0 not only have a higher level of digital inclusion than the average Australian (60.2) but also a higher level than unemployed Australians (60.9) or those Australians 'Not in the Labour Force' (NILF) (52.0).

However this top-line view of Australians 'Not in the Labor Force' doesn't show there are clear differences within that broad category which includes students not in employment (62.6), those conducting home duties (58.5), those who don't work (50.9) and retired Australians (46.7).

Australian Digital Inclusion Scores by Employment & Non-Employment Status – 2018



Source: Roy Morgan Single Source. April 2017 – March 2018.

Australians who 'Don't work' or are 'Retired' are lower than the average Australian across all three sub-indices of Access, Affordability and Digital Ability. The common characteristic that significantly lowers the overall digital inclusion scores for both categories is Digital Ability.

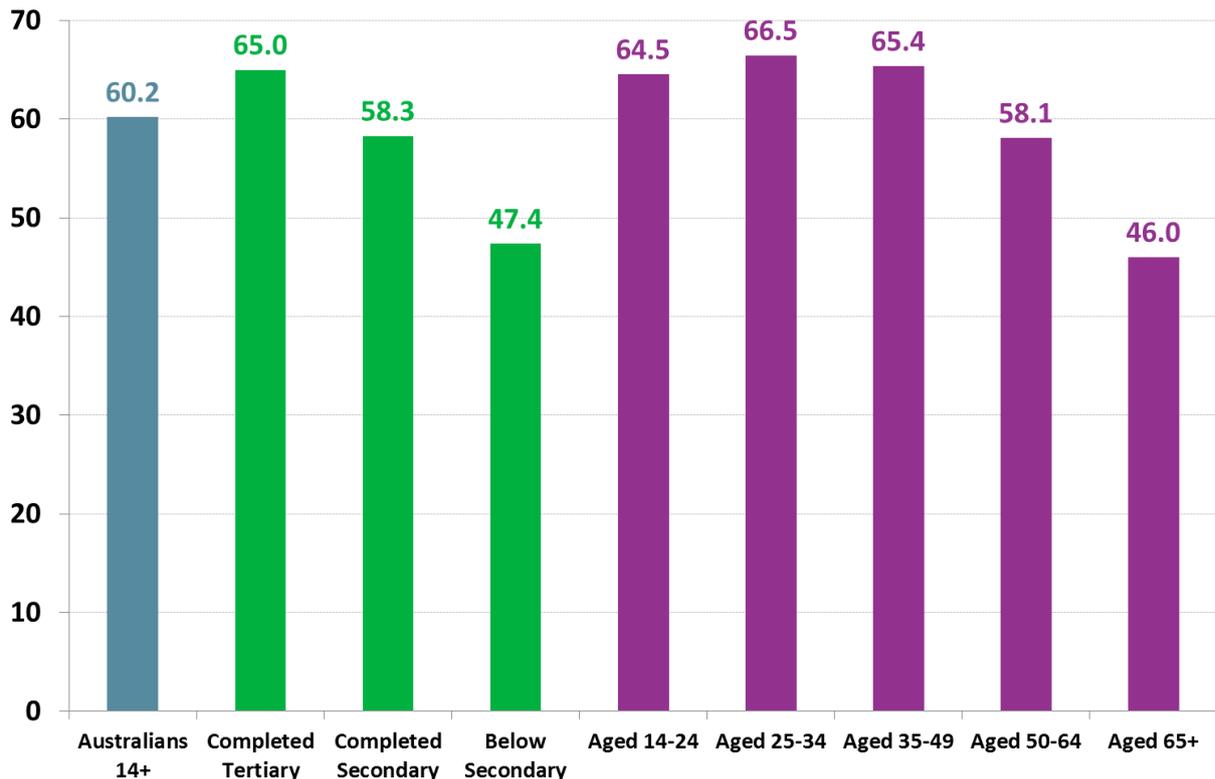
Australians in the 'Don't Work' category have a Digital Ability of only 40.3 which is nearly 20% lower than the national figure for Digital Ability of 49.5 while Retired Australians have a Digital Ability of only 32.6 – around a third lower than the national average.

Older Australians and less educated Australians lag on Digital Inclusion

Australians who have completed tertiary education have a Digital Inclusion score of 65.0 which is clearly higher than the average Australian (60.2) and much higher than Australians who have only completed secondary education (58.3) and those who did not complete secondary school (47.4).

When we look at age, Australians aged 25-34 years old have the highest digital inclusion of 66.5 just ahead of those aged 35-49 years old (65.4) and younger Australians aged 14-24 (64.5). Digital Inclusion then drops below the national average for 50-64 year olds (58.1) and well below that for older Australians aged 65+ years old (46.0).

Australian Digital Inclusion Scores by Age & Education – 2018



Source: Roy Morgan Single Source. April 2017 – March 2018.

Australians with a below secondary education level and older Australians aged over 65 years trail the average Australian significantly by at least eight points across all three sub-indices of Affordability, Access and Digital Ability.

Australians in these two categories both have low Access scores – over 12 points below the national average. Australians with a below secondary education level have an Access score of 60.8 while Australians aged over 65 years old have an Access score of only 58.9 – both falling into the low range for this measure.

The Digital Ability of both Australians with a below secondary education level (32.2) and those aged over 65 years old (31.5) are both at least 17 points below the national Digital Ability of Australians (49.5).

Michele Levine, CEO Roy Morgan, says the Australian Digital Inclusion Index (ADII) shows continuing progress made to improve Access, Affordability and Digital Ability across Australia with overall ADII improving over 10% in four years:

“The Australian Digital Inclusion Index (ADII) measures progress on improving Access to the Internet, the Digital Abilities of Australians encompassing online skills and activities, and attitudes to learning about new technologies, and the Affordability for Australians taking advantage of growing digital infrastructure around Australia.

“The integration of these three variables into one digital measurement, the ADII, delivers an ongoing portrait of Australia’s digital inclusion. When assessed across demographics and geography, governments, industry bodies, and technology businesses are able to pinpoint and work to minimise the divide between the ‘haves and have-nots’ of digital inclusion.

“If Affordability falls it will have a negative impact on the digital inclusion of Australians on lower incomes because they have less discretionary income to spend than wealthier Australians. In 2018 the Affordability score of 57.6 represents an increase of 2.1pts from a year ago, and is now above the initial score of 56.0 in 2014. While cost per gigabyte of data continues to fall, Australians are spending more time online and more money on internet services.

“It appears the nbn™ rollout has had a definite impact on the increasing Access score, as seen by the 2018 ADII results for Tasmania. The nbn™ rollout is largely complete in Tasmania and between 2017 and 2018 we saw a rise of 8.0 points in its digital inclusion score.

“However, although improvements have been shown across the board there are some key demographics that still require more investment and attention to bring their digital inclusion closer to the national averages.

“In particular Australians who are ‘Not in the Labour Force’ and don’t work, Australians who are retired, older Australians and Australians who never completed secondary school are well behind the average Australian when it comes to their Digital Ability.”

To learn more about the Australian Digital Inclusion Index and understand the Digital Inclusion of your target audience call Roy Morgan on (03) 9224 5309 or email askroymorgan@roymorgan.com.

Please click on this link to the [Roy Morgan Online Store](#).

The 2018 ADII is available to download: <https://digitalinclusionindex.org.au/the-index-report/report/>

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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 75 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

