



Summary of ACCAN Youth Check-In Research Report

Introduction

For most young people, living online is not an option. It's not a luxury, choice, or preference. Young people need phones and internet for study, work, life admin, and accessing online services and telehealth. Like other age groups, they need to keep connected with friends and family, for safety and wellbeing. Access to phone and internet services are an essential part of living online.

A new report released by ACCAN today delves into young people's experiences and issues with accessing and using phone and internet services.

We know that digital exclusion is a major challenge facing some communities across Australia.¹ We also know that young people are affected by phone and internet problems in unique ways.² We wanted to develop an empirical evidence base to build on this understanding, and to highlight systemic issues and opportunities for community education and engagement with young people about their phone and internet services, as well as identify areas for advocacy.

Our research focused on:

- The services used by young people, and their needs,
- How they navigate the market, make choices and deal with issues
- What is important to them when it comes to communications services.

¹ Thomas et al. 2019, 'Measuring Australia's Digital Divide: The Australian Digital Inclusion Index 2019', RMIT University and Swinburne University of Technology, for Telstra. Accessed online:

https://digitalinclusionindex.org.au/wp-content/uploads/2019/10/TLS_ADII_Report-2019_Final_web_.pdf

² The Smith Family 2019, 'The Digital Divide: Does it impact on students in 2019?', presentation. Accessed online: <https://www.thesmithfamily.com.au/-/media/files/research/industry-presentations/the-digital-divide-national-future-schools.pdf?la=en&hash=B42876981EBEDDB4B38457684487BB8F>

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Our research provides valuable insights about the significance of connectivity to young people, with over 97% of respondents having access to a mobile phone. It shows that access to communications, particularly to mobile phones with a suitable amount of data, is vital for young people to connect with their communities and manage all aspects of their lives, especially work and study. Our survey also provides insights on:

- Profiles of disadvantage when it comes to digital access,
- Affordability challenges,
- Consumer confidence and decision-making, and
- Young people's perceptions and feelings towards data privacy and security.

Profiles of disadvantage

Our survey found several distinct groups that experienced lower levels of access to communications, indicating that these groups are at a higher risk of digital exclusion. Intervention is needed to ensure these cohorts have equal access to communications.

Aboriginal and Torres Strait Islander young people

In our survey, young people in Aboriginal and Torres Strait Islander households reported significantly less access to communications compared to those in non-Indigenous households. Respondents also signaled higher levels of financial distress, like being contacted by their telco about money owed, or having an expensive plan despite being on a comparatively low personal income.

- Aboriginal and Torres Strait Islander young people were less likely to own a mobile phone (85% owned a mobile phone compared to 93% of non-Indigenous young people).
- Aboriginal and Torres Strait Islander young people were less likely to own a laptop or have access to a home internet connection. 45% of Aboriginal and Torres Strait Islander young people had access to a laptop, and 29% had access to a home internet connection. Comparatively, 72% of non-Indigenous young people had access to a laptop, and 62% had a home internet connection.
- 1 in 3 Aboriginal and Torres Strait Islander young people were more likely to be on a high cost plan, despite 3 in 4 of them reporting a personal weekly income of under \$99. A little under a half (41%) of Aboriginal and Torres Strait Islander young people had experienced unexpected mobile charges, compared to a fifth (19%) of non-Aboriginal and Torres Strait Islander young people.
- A third of Aboriginal and Torres Strait Islander young people were contacted by their telco about money they owe. This was 5 times more likely than non-Indigenous young people.

Regardless of who pays the bills, which of the following do you personally own, or have access to? Base: All respondents (n=595) (Multiple Response)

	All Responses (n=595)	Non-Indigenous Households (n=508)	Aboriginal/Torres Strait Islander Households (n=68)
Your own mobile phone	91%	93%	85%
A laptop (personal or shared)	67%	72%	45%
A home internet connection	57%	62%	29%
A tablet (personal or shared)	32%	34%	21%
A desktop (personal or shared)	27%	29%	18%
A home phone (landline or VOIP)	20%	22%	14%
A mobile phone you share with someone else	6%	4%	20%
None of these	3%	3%	6%

Figures in boxes are statistically significant.

Young people on limited incomes

Young people on limited incomes reported lower levels of connectivity in some respects and were also more likely to be restricted to a data cap of 9GB or less.

- Young people on limited incomes (less than \$99 a week before tax) were significantly less likely to have access to a home internet connection. Only 20% of young people on a weekly income of \$99 or less had access to home broadband, compared to the 57% average.
- A little under half of young people on lower incomes had access to 9GB of mobile data or less per month. This limit may be insufficient for the data needs of mobile-only internet users.

To the best of your knowledge, what is your data allowance each month? Base: Those who have access to a mobile (n=557) (Single response)

	All Responses	Income per week			
		<\$10 - \$99	\$100 - \$399	\$400 - \$900	\$1,000 or more
Less than 9GB	35%	43%	20%	27%	34%
10GB – 49GB	40%	34%	55%	41%	37%
50GB or more	20%	16%	24%	27%	26%
Don't Know	4%	6%	1%	5%	3%
NET	100%	100%	100%	100%	100%

Young people living alone

95% of young people currently living alone began to pay their phone bill before turning 18. They also reported heavier reliance on their mobile phone for work - 64% felt their work would be heavily impacted if they didn't have access to a mobile, compared to the 45% average.

Young people living alone, that is, those living independently without other people, reported lower levels of digital connectivity when it came to accessing laptops (47% compared to the 67% average) and home internet services (34% compared to the 57% average).

While we can't be certain of the reasons that those living alone have lower levels of access to laptops and home internet services, we have to consider that the cost barriers of these products and services may play a role.

Young people in regional, rural and remote areas

Young people in the regions reported a heavier reliance on Telstra, and were overall less likely to access services online.

- **45% of young people living outside a capital city used Telstra as their mobile phone provider, compared to 28% of those within capital cities.** Telstra’s monopoly status as the dominant mobile phone provider in regional Australia means that young people in these areas have less or no choice except to use Telstra services, which are generally more expensive.
- **Young people from regional and rural areas are more likely to experience telco problems but not seek assistance.** 15% of young people outside a capital city reported feeling this way, compared to 7% within the capital cities.
- **Generally, young people from the regions are less likely to access services online compared to those in the capital cities.** There are multiple possible explanations for this, for example less availability of public Wi-Fi or mobile coverage. More research is needed to better understand the reasons underlying this trend.

Thinking of when you need to access services online. What type of internet connection do you regularly use?

	ALL RESPONSES	Capital City	Rest of Australia *
	% of respondents accessing the internet using this service		
Your home internet connection	68%	71%	63%
Mobile data from your phone	58%	60%	53%
Wi-Fi at school or uni	38%	43% 	28%
Wi-Fi at work	18%	21%	12%
Wi-Fi in a public place	20%	22%	17%
Someone else’s connection	9%	8%	11%
I never need to access a service online	4%	2%	6%
Note maximum % of respondents using any of the services listed above is 100%			

** Includes: regional, rural, remote locations in all states plus all of Tasmania and Northern Territory due to sample size. Figures in boxes are statistically significant.*

Affordability challenges

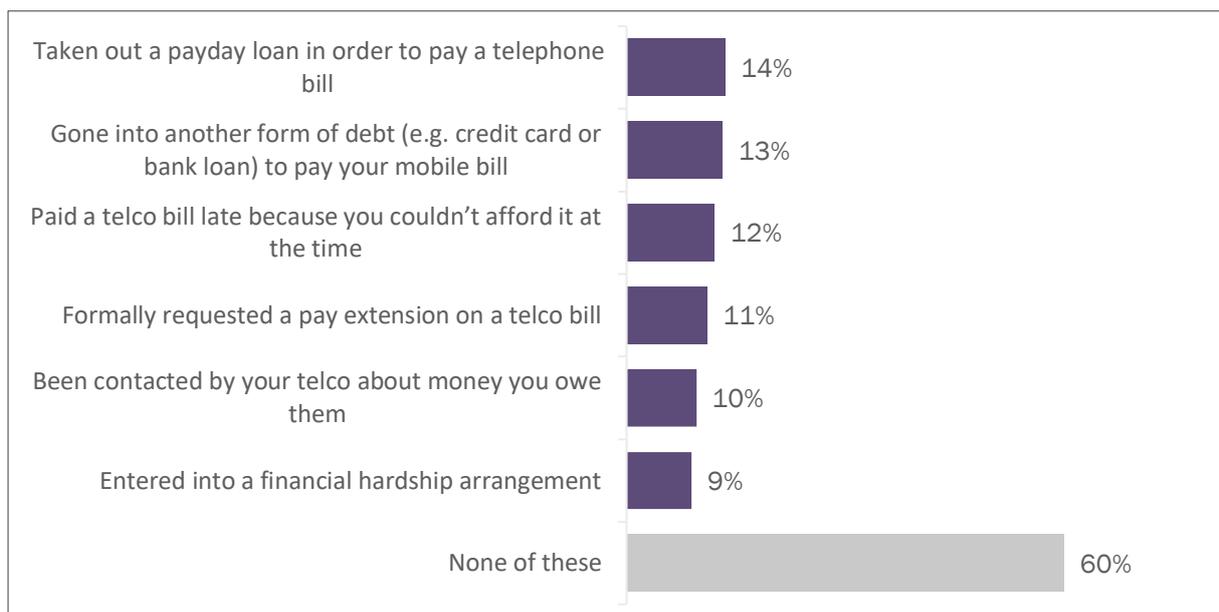
It is clear from our survey that affordability challenges exist for many young people when accessing communications.

- Payment difficulty:** Concerningly, 40% of respondents indicate experiencing some form of payment difficulty in relation to their phone or internet bill. This includes going into another form of debt (13% of respondents) or paying a bill late (12% of respondents). Those experiencing payment difficulties are also more likely to spend more on their telco bill, and unexpected excess data charges.
- Gigabyte value:** Young people on more limited incomes are more likely to have a comparatively lower data limit per month. Given the correlation between low income and not having home internet access, it's concerning that some young people on limited incomes may have inadequate data limits for their needs as mobile-only users.
- Device access:** Indigenous young people, young people living alone, and young people on limited incomes reported disproportionately lower levels of access to devices like tablets, laptops, and desktop computers. Difficulties accessing devices can heavily impact on education, job-hunting and accessing government services, so this finding is indicative of broader disadvantage and exclusion.

Access the internet via	All Responses	Experienced at least one form of payment difficulty	
		Yes (n=116)	No (n=178)
Home internet connection	68%	47%	82%
Mobile data from your phone	58%	55%	74%
Wi-Fi at school or university	38%	29%	44%
Wi-Fi at work	18%	26%	19%
Wi-Fi in a public place	20%	25%	17%
Someone else's connection	9%	14%	4%

Figures in boxes are statistically significant.

Have you ever done any of the following? Base: Those who participate in the payment of their phone service (n=294)



Consumer confidence and tools for decision-making

Our survey found that on the whole, young people confidently navigate the mobile phone market, and resolving issues about their connections comes relatively easy. However, we found that more than half of young people are not willing to shop around for the best deal, and a large number would like to change the mobile plan they are on.

- **3 in 4 young people are confident about their ability to navigate the mobile phone market** and see themselves as being able to choose products that meet their needs. 2 in 3 feel confident that they can afford the mobile services they need.
- **Smaller telecommunications providers appear to meet the financial needs of young people** better, delivering fewer financial surprises. However, only 43% of young people would consider providers outside of those that are familiar to them or their parents/carers.
- **Dealing with connection issues is relatively easy for confident young people**, most of whom will seek advice from family and friends as well as providers. When dealing with providers many do get the outcome they are looking for, but nearly half of customers of bigger providers report they would likely give up if it got too difficult to resolve an issue

Thinking about the mobile plan you currently use. To what extent do you agree or disagree with each of the following statements?

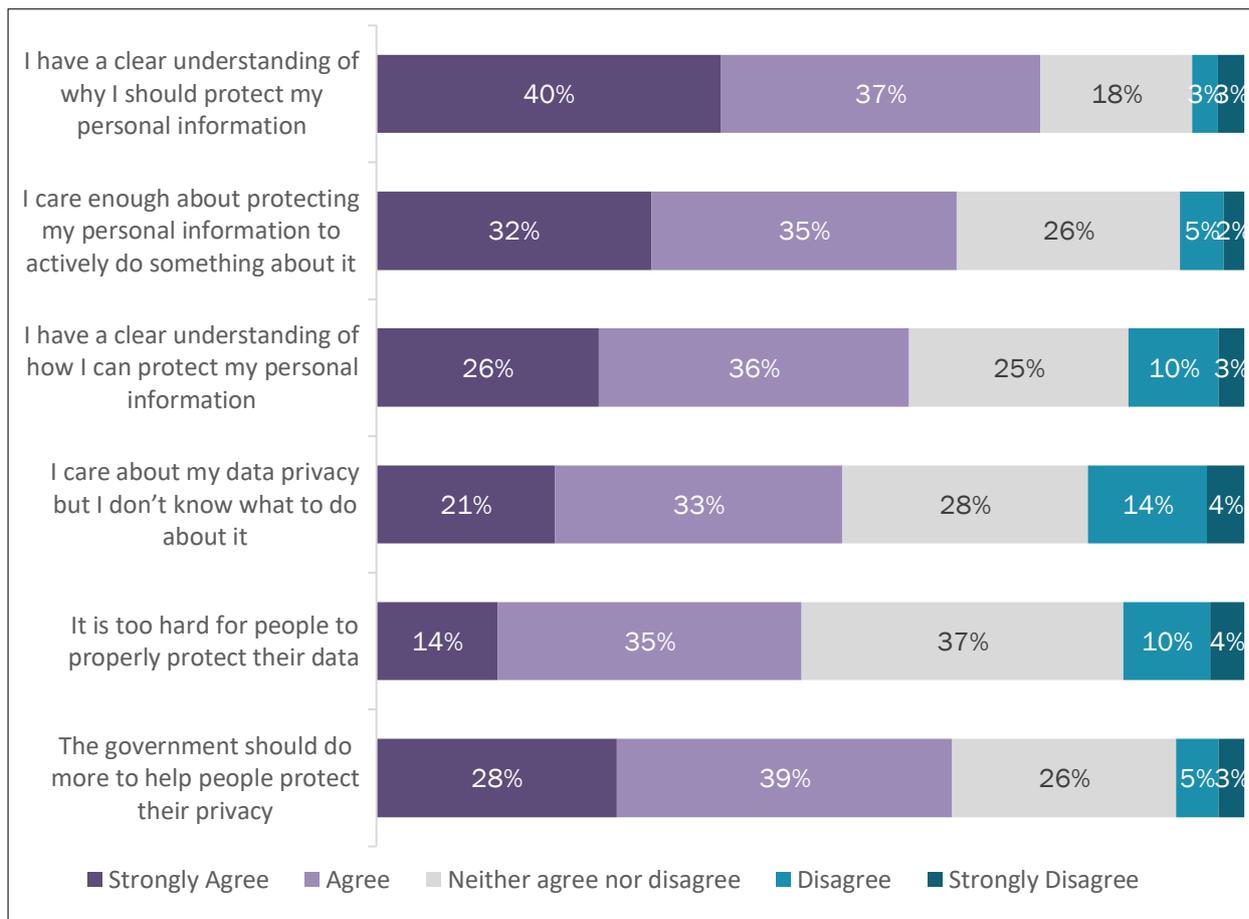
Attitude Statement	Strongly Agree/Agree	Neither	Disagree/Strongly Disagree	DK	NET
I'm confident I can choose the right mobile plan for me	75%	16%	7%	3%	100%
My mobile plan is covering all my needs	73%	16%	8%	3%	100%
I can afford all the mobile phone services I need in my day-to-day life* (those who pay their phone themselves)	68%	20%	10%	2%	100%
I would change my mobile plan if I could	37%	23%	36%	3%	100%
I would only use a telecommunications provider that is recommended by someone I know	46%	27%	22%	5%	100%
I would try an unfamiliar telecommunications provider if it were cheaper	43%	27%	26%	4%	100%

Navigating data privacy and security

Our survey found that young people are concerned about the privacy of their personal information and data, but there is a discrepancy between understanding the importance of protecting personal information and their ability to do so.

- **3 in 4 Australian young people clearly understood the importance of protecting their personal information online.** However, fewer (2 in 3) actively took steps to protect it. Only 61% had a clear understanding of how they can protect their personal information and more than half reported that while they care about data privacy, they don't necessarily know what to do about it.
- Just over two thirds of young people would consider changing providers if they found out their telco was using their data in a way they weren't comfortable with. However, 53% of young people said they had no idea how their telcos use their data.

Thinking about data privacy, to what extent do you agree or disagree with each of the following statements?



So what next?

ACCAN’s survey investigated a wide variety of issues to do with young people’s phone and internet usage and experiences. But what needs to happen in order to better ensure young people can get connected and stay connected, free from digital exclusion and financial difficulty?

- Re-shape the narrative:** Stop thinking about phone and internet services as luxuries. We need to change the narrative that ‘all young people do is sit on their phones, message their friends and look at memes’. It’s essential for work. It’s essential for accessing services. It’s essential for connection with friends and family, for safety. You must have access to a device if you want to get an education in Australia.
- Make home broadband more affordable:** We know anecdotally that many young people prefer to remain mobile-only users. This allows them flexibility and may end up being cheaper depending on needs and usage. However, for many people home internet is the best way to keep connected for work and study, especially for households with multiple internet users. ACCAN’s [No Australian Left Offline](#) initiative proposes a viable solution to make home broadband affordable for people receiving social support payments.

- **Expand free public Wi-Fi:** Public Wi-Fi is a good alternative to home broadband for many young people, especially for those whose families cannot afford home broadband, or those living in crowded or unsafe homes. The availability of public Wi-Fi should be expanded to be more widely accessible in public places, like libraries, shopping centres, parks and plazas.
- **Address device affordability:** Devices are essential for accessing the internet, and for students or young people in need of more advanced functionality a laptop or desktop is vital. However, price is a huge barrier. We need a co-ordinated national approach to device access that ensures no student or young people in need of a device goes without.
- **Reduce knowledge gaps:** Many young people who indicated an unwillingness to shop around and test providers they were unfamiliar with may be paying a price premium for quality services they could receive with a smaller provider. ACCAN's submission to [Consumer Safeguards Review Part C](#) establishes the need for a free independent online comparison tool service for consumers to provide accurate information about the telco plans that suit their needs and budget.

Research approach

A 15 minute-minute online survey was conducted with a national sample of young people aged 16-21 years of age (n=595). Two qualitative focus groups were conducted with young people within the same age bracket to inform the development of the questionnaire. This group included people with limited incomes and from culturally and linguistically diverse communities, to ensure their perspectives were incorporated into the study.

Limitations

Due to sample size constraints and budgeting, ACCAN was unable to investigate the unique experiences of young consumers with disability, or those who do not have internet access at all (NB: the survey questionnaire was delivered online). More work is needed to better understand the challenges these young people face, and how these might be addressed by government and industry.