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ACCC DPSI Consumer Survey Research Report

February 2025

Written by Lonergan Research

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Section 01

Research Background

1. Research Background

1.1. Client background

In February 2020, the Treasurer directed the Australian Competition and Consumer Commission (ACCC) to conduct the Digital Platform Services Inquiry (DPSI), an inquiry into the markets for and supply of digital platform services. Reports have been delivered to the Treasurer every six months as of September 2020, with the tenth and final report due in March 2025.

At the direction of the Treasurer, the DPSI has considered a number of matters over its duration, including the level of competition in the markets for the supply of digital platform services, practices of suppliers within these markets that may cause consumer harm, market trends, changes over time in the nature, characteristics and quality of digital platform services, and international developments in markets for the supply of digital platform services.

1.2. Research objectives

The current research aimed to provide the ACCC with a better understanding of Australian consumers' views of digital platforms, including:

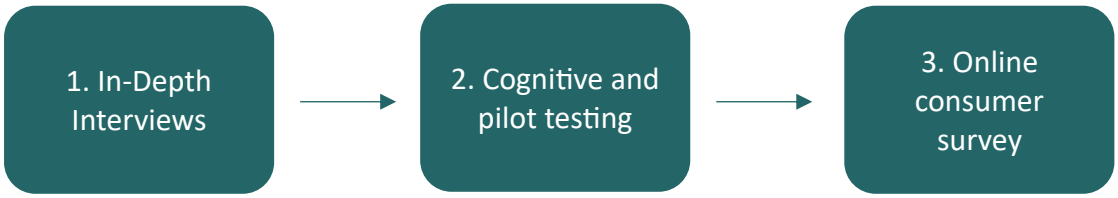
- Australian consumers' usage of various digital platform services, including online messaging and video call services, generative artificial intelligence (AI), smartphone operating systems (OS), online gaming services and general online retail marketplaces
- Australian consumers' experiences with using these digital platform services, particularly concerns stemming from such experiences that may have caused consumer harm and how these have impacted usage of these services
- the extent to which consumers may become 'locked in' to particular digital platform services or ecosystems and find it difficult to switch to a different service or ecosystem, and
- how supportive Australian consumers are of various consumer protection measures, including the establishment of a dispute resolution body, for these digital platform services.

To gain a representative view of the ways these issues impact Australian consumers, the ACCC wished to conduct this research amongst consumers from a broad range of age groups, including those as young as 14 and those over the age of 75.

1.3. Research methodology

Considering both the breadth and depth of the topic areas covered by the research objectives, Lonergan Research conducted in-depth interviews (IDIs) with both consumers and subject matter experts. The results from this qualitative research informed the consumer survey.

The current research project methodology is outlined below:



1.3.1. In-Depth Interviews

To inform the contents and direction of the consumer survey, IDIs were conducted with both Australian consumers (n=10) and subject matter experts (n=2). To gather insights from a broad range of Australian consumers, consumer IDIs were conducted amongst those who used a variety of different digital platform services, as well as those from varying age groups (including two 14–17-year-olds and one 81-year-old) and those with varying levels of digital literacy.[1]

The table below details the final sample recruited for the consumer and subject matter expert IDIs.

Figure 1: In-depth interviews sample matrix

Participant type	Participant specifications	Recruitment and process
Subject matter expert	Consumer body	Email
Subject matter expert	Academic	Email
Consumer	Parent - Younger children 7-12	Panel
Consumer	Parent - Teens 13-17	Panel
Consumer	Parent - Teens 13-17	Panel
Consumer	Teenager 14-16	Panel
Consumer	Teenager 14-16	Panel
Consumer	Adult 20-35 Low digital literacy	Panel
Consumer	Adult 20-35 Switched phone & laptop brand within the past 18 months	Panel
Consumer	Adult 20-35 Switched laptop brand within the past 18 months	Panel
Consumer	Adult 50-70 (empty nester) Switched phone & laptop brand within the past 18 months	Panel
Consumer	Older Adult 75+ Low digital literacy	Panel

[1] Respondents were asked about their ability to carry out four different tasks, including switching between different windows and applications or logging into online accounts, as well as how they would respond to a scenario involving a potential virus. Those who were not confident in their abilities or responded to the scenario in a certain manner were deemed as having low digital literacy.

Topic areas covered in the consumer IDIs included:

- usage of different digital platform services, reasons for use and level of trust towards these services,
- experiences with practices that may have caused consumer harm on any of these digital platform services,
- support for and perceived necessity of having access to an external dispute resolution body for each digital platform service discussed,
- experiences with switching between different digital services or ecosystems, as well as family usage of similar or different services and ecosystems, and
- parents' level of monitoring and concern for digital services used by their children, including their approach to choosing which services their children use, if applicable.

Interviews with subject matter experts focussed on their work within the field of consumer protections for users of digital platform services, as well as their views on recent legal and research developments in the field.

1.3.2. Cognitive and pilot testing

Following analysis of the IDIs, Lonergan collaborated with the ACCC to develop the consumer survey. To ensure the contents and wording of the consumer survey would be easily understood by the general public, and to confirm the validity of the questions within the survey, n=6 cognitive tests were conducted with Australian consumers. Cognitive testing was conducted amongst consumers from a broad range of age groups and levels of digital literacy.

The table below details the final sample of consumers recruited for cognitive testing.

Figure 2: Cognitive testing sample matrix

Participant type	Participant specifications	Recruitment and process
Consumer	Teenager 15-17	Panel
Consumer	Teenager 15-17	Panel
Consumer	Adult Parent of child aged 7-13	Panel
Consumer	Adult 20-49	Panel
Consumer	Adult 50-70	Panel
Consumer	Older Adult 75+	Panel

Various amendments were made to the consumer survey following the cognitive tests to improve survey flow and participants' ability to understand the questions asked. The majority of these changes were relatively minor in nature, with only a few questions receiving major changes in their wording or placement within the survey. To reduce survey length and subsequent respondent fatigue, some questions were omitted or merged with others. Modules examining experience using individual digital platform services were randomised to improve the quality of responses.

Prior to launching the consumer survey fully, a pilot test of the survey was conducted amongst n=100 participants recruited through an online panel. This was carried out not only to ensure the survey was functioning as intended, but also to confirm question validity amongst a wider range of respondents. Following pilot testing, two questions were edited to improve participants' understanding.

1.3.3. Online consumer survey

Recruitment of participants for the online consumer survey was carried out through two online panels.

For 15-17-year-olds, direct recruitment through this second panel was sufficient. However, as the minimum sign-up age for this panel was 15 years, indirect recruitment through parents was required for participants aged 14 years. Consent was sought from parents of 14-year-old children. By confirming, the parents agreed to their child completing the remainder of the survey.

The online consumer survey was conducted during October and November 2024.

The full online consumer survey can be found in **Appendix A**.

1.4. Research sample

Following recruitment and data cleaning, the final quantitative sample consisted of n=3,075 Australians aged 14 and over. This included those with high, moderate and low self-reported levels of confidence with technology, as well as different usage levels of varying digital platform services, parental status, highest level of education, and cultural and language background.

Figure 3: Research sample matrix

		Weighted %	n
Total		100%	3,075
Gender	Male	49%	1,483
	Female	51%	1,580
	Non-binary	<1%	11
	Other	<1%	1
Age	14 – 17 years	6%	342
	18 - 29 years	20%	529
	30 - 44 years	26%	561
	45 - 59 years	21%	560
	60 - 74 years	18%	564
	75+ years	10%	519
Location	Metropolitan[2]	64%	1,933
	Regional[3]	36%	1,142
Confidence with technology (devices and internet)[4]	Low (1 – 5)	10%	350
	Moderate (6 – 8)	48%	1,473

[2] Metropolitan is classified as Australians who live in any of following major cities: Sydney, Melbourne, Brisbane, Adelaide or Perth.
[3] Regional is classified as Australians who live in the areas that aren't 'Metropolitan', such as: NSW (outside Sydney), the ACT, Victoria (outside Melbourne), Tasmania, Queensland (outside Brisbane), South Australia (outside Adelaide), Western Australia (outside Perth) or the Northern Territory.
[4] Survey respondents were asked to rate their confidence from 1 to 10; the groupings low, moderate and high were constructed afterwards.

		Weighted %	n
	High (9 – 10)	42%	1,252
Supports specialised dispute resolution body	Yes	82%	2,522
	No	8%	230
	Don't know	10%	323
Number of messaging services used	0	8%	301
	1 - 2	36%	1,140
	3 - 4	29%	873
	5+	26%	761
Number of online retail marketplaces purchased from	0	17%	602
	1 - 2	49%	0
	3 - 4	26%	758
	5+	8%	225
Age of children (filtered to adults 18+)	0 - 4 years	10%	231
	5 – 8 years	11%	234
	9 – 11 years	9%	197
	12 - 13 years	7%	165
	14 - 15 years	7%	156
	16 - 17 years	7%	176
	18+ years[5]	2%	45
	No children under 18	66%	1,956
Work status (filtered to adults 18+)	Employed full-time	45%	1,043
	Employed part-time	18%	457
	Self-employed	5%	131
	Long service leave	<1%	9
	On a career break	1%	27
	Unemployed, looking for work	3%	81
	Retired	22%	843
	Studying full-time	2%	39
	Studying part-time	<1%	5
	Homemaker	4%	98

[5] People within this cell were also parents or guardians of children under the age of 18.

1.5. Reading the results

The following report is split into six key aspects of digital platform services that consumers were asked about in the online survey. These sections contain data presented via both tables and charts.

In tables, numbers that are bolded and are followed by an asterisk (e.g. **85%***) are statistically significant, using a p-value of 0.05.

In text, results which were found to be statistically significant are indicated as such. Results which are not explicitly stated to be statistically significant are not.

In charts, the data labels of any values less than 3% (rounded) are omitted.

Note that all values are rounded to the nearest whole percent.

1.5.1. Tests of Statistical Significance

Within this report, tests of statistical significance were conducted using non-parametric, two-tailed t-tests with Bessel's correction, with a false discovery rate (FDR) of 5%. Specifically, the Second Order Rao-Scott Test of Independence of a Contingency Table was used for a majority of significance tests.[6] Associations indicated as statistically significant have a p value of <0.05. Significance is calculated with regards to the effective sample size, rather than sample size.[7]

Significance tests between two specific subsets of the overall sample will indicate such, e.g. "females were statistically significantly less likely than males to…", where the two groups compared are 'females' and 'males'. In these instances, significance tests have compared only these two groups' data, excluding the remainder of the sample (e.g. in this case, data from non-binary respondents would not be included in this particular significance test).

In all other cases unless otherwise specified, tests of statistical significance have made comparisons between the indicated group and the remainder of the applicable sample. For instance, where a result amongst 18-29-year-olds was indicated as being statistically significant, this has been tested against the remainder of the applicable sample who were not 18-29 years old. In these instances, the overall average of all respondents, including the group used in testing, is often presented alongside the statistically significant figure. Whilst this is not necessarily the figure used in significance testing, this has been presented to aid readability.

[6] https://wiki.q-researchsoftware.com/wiki/Second_Order_Rao-Scott_Test_of_Independence_of_a_Contingency_Table

[7] https://wiki.q-researchsoftware.com/wiki/Weights,_Effective_Sample_Size_and_Design_Effects

Section 02

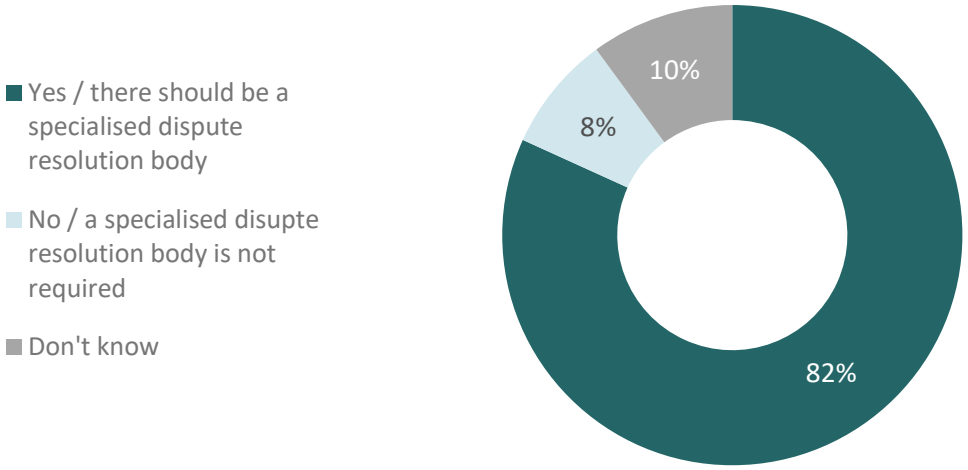
Dispute resolution body

2. Dispute resolution body

2.1. Overall support

Overall, the majority (82%) of Australians believed there should be an independent external dispute resolution body for users of digital platform services to escalate complaints which cannot be resolved with platforms directly.

Figure 4: Support for a specialised dispute resolution body for digital platform services



H1. Do you think that you should be able to raise a complaint with an independent external dispute resolution body if you cannot resolve a dispute with these types of digital services?
Base: Australians 14+ (n=3,075), October-November 2024.

Australians aged 45-59 and those aged 60-74 were statistically significantly more likely than other age groups to support an independent external dispute resolution body for digital platform services (45-59 years 85%, 60-74 years 87%; overall average 82%), while 18-29-year-olds were statistically significantly more likely than other age groups to think that a body would not be required (15%; overall average 8%). Australians with low confidence using technology were also statistically significantly more likely to not know or not have strong feelings about it (18%; overall average 10%).

Females were also statistically significantly more likely than males to support the need for an independent dispute resolution body (84%; cf. 79% Males).

Figure 5: Support for a specialised dispute resolution body across different demographics

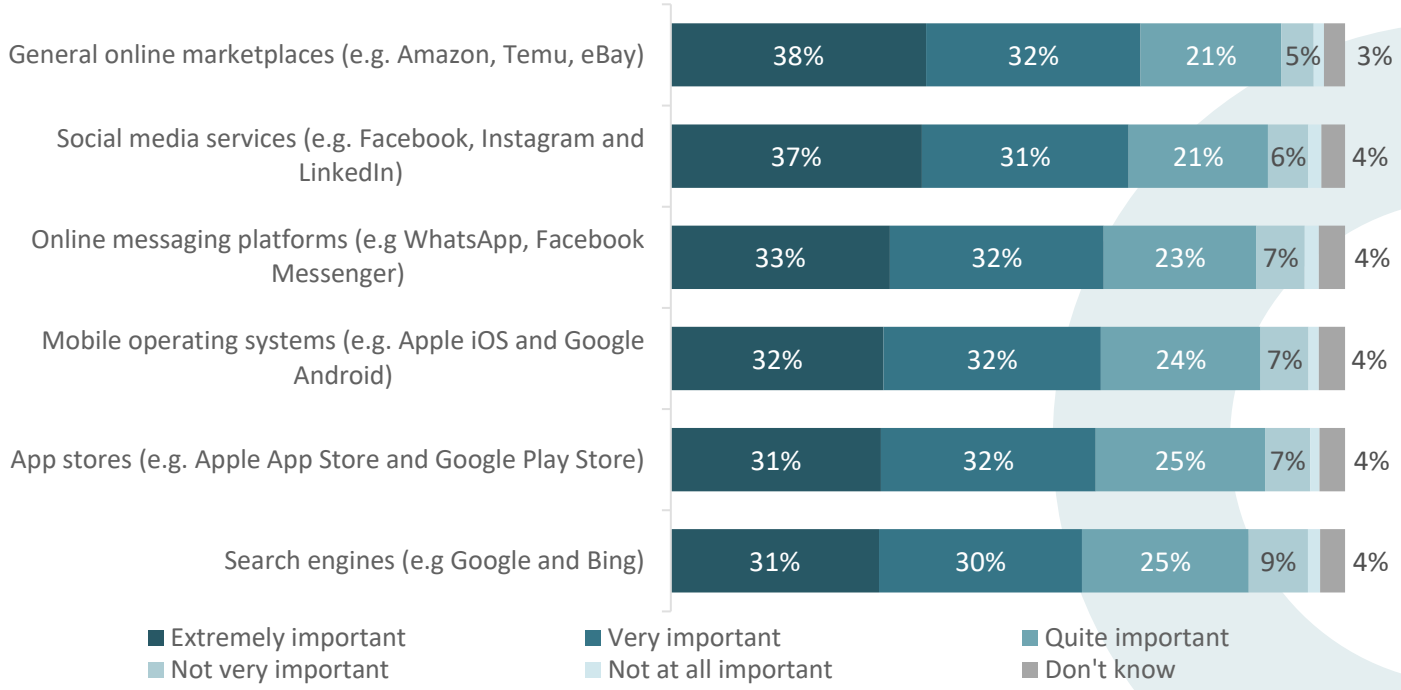
	Age						Confidence with technology		
	14-17	18-29	30-44	45-59	60-74	75+	Low (1-5)	Moderate (6-8)	High (9-10)
Yes	79%	74%	81%	**85%***	**87%***	85%	69%	81%	**86%***
No	7%	**15%***	10%	6%	4%	4%	**13%***	9%	6%
Don't know	**14%***	11%	10%	8%	9%	12%	**18%***	10%	8%

H1. Do you think that you should be able to raise a complaint with an independent external dispute resolution body if you cannot resolve a dispute with these types of digital services? A2. How old are you? Z12. On a scale of 1 to 10, where 1 is not confident at all and 10 is extremely confident, how would you rate your confidence using and navigating devices and the internet?
Base: Australians 14+ (n=3,075), October-November 2024.
*Bolded text indicates the cohort is statistically significantly more likely to think this way.

2.2. Support by service

Overall, the majority of Australians believed a dispute resolution body was necessary across all types of digital platform services, with total importance (extremely or very important) having a small range from 61% to 70%. In particular, Australians thought it was most necessary for general online retail marketplaces (70% extremely or very important).

Figure 6: Support for a specialised dispute resolution body by type of digital platform service

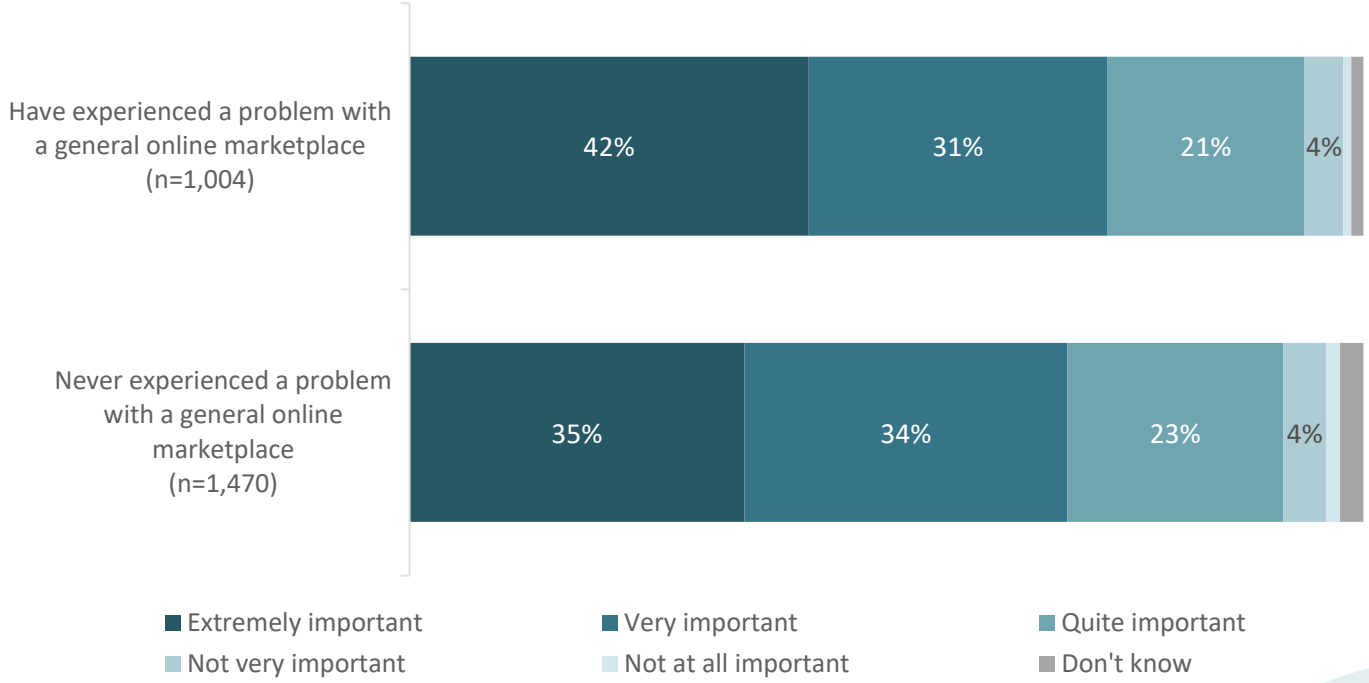


H2. How important do you think it is to have a specialised, independent external dispute resolution body to raise complaints to if you cannot resolve a dispute with the following types of digital services?
Base: Australians 14+ (n=3,075), October-November 2024.

For general online retail marketplaces, most Australians believed a specialised, independent external dispute resolution body was required for these services, irrespective of whether they had ever experienced a problem where they felt entitled to a refund or not. Specifically, nearly three-quarters (73%) of Australians who had

made a purchase from a general online retail marketplace within the last 12 months and had ever experienced a problem with an online retail marketplace where they felt entitled to a refund believed it is extremely or very important for a specialised, independent external dispute resolution body to exist for general online marketplaces (cf. 69% of those who had never had a significant problem).

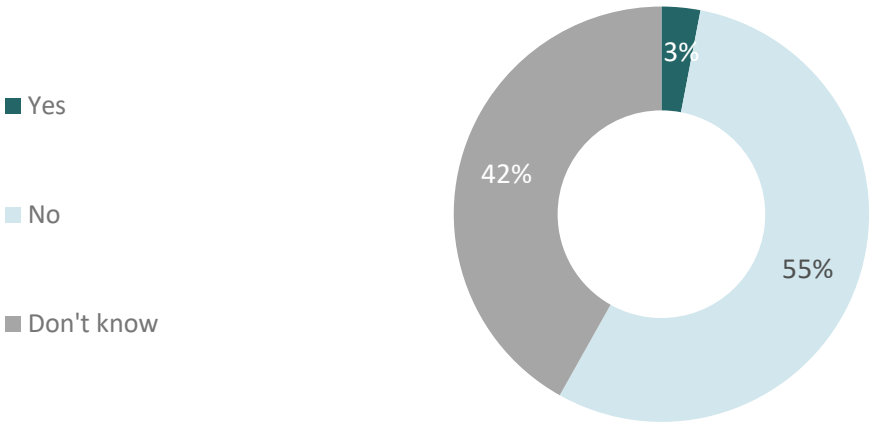
Figure 7: Support for a specialised dispute resolution body for general online marketplaces by whether the consumer had experienced a problem with an online marketplace before



H2_1. General online marketplaces (e.g. Amazon, Temu, eBay): How important do you think it is to have a specialised, independent external dispute resolution body to raise complaints to if you cannot resolve a dispute with the following types of digital services? G3. Have you ever had a problem with a general online retail marketplace, where you felt entitled to a refund? Base: Australians 14+ who purchased from a general online marketplace in the last 12 months (n=2,474), October-November 2024.

In addition to the six key categories listed above, 3% of Australians believed there are additional digital services that require an independent external dispute resolution body.

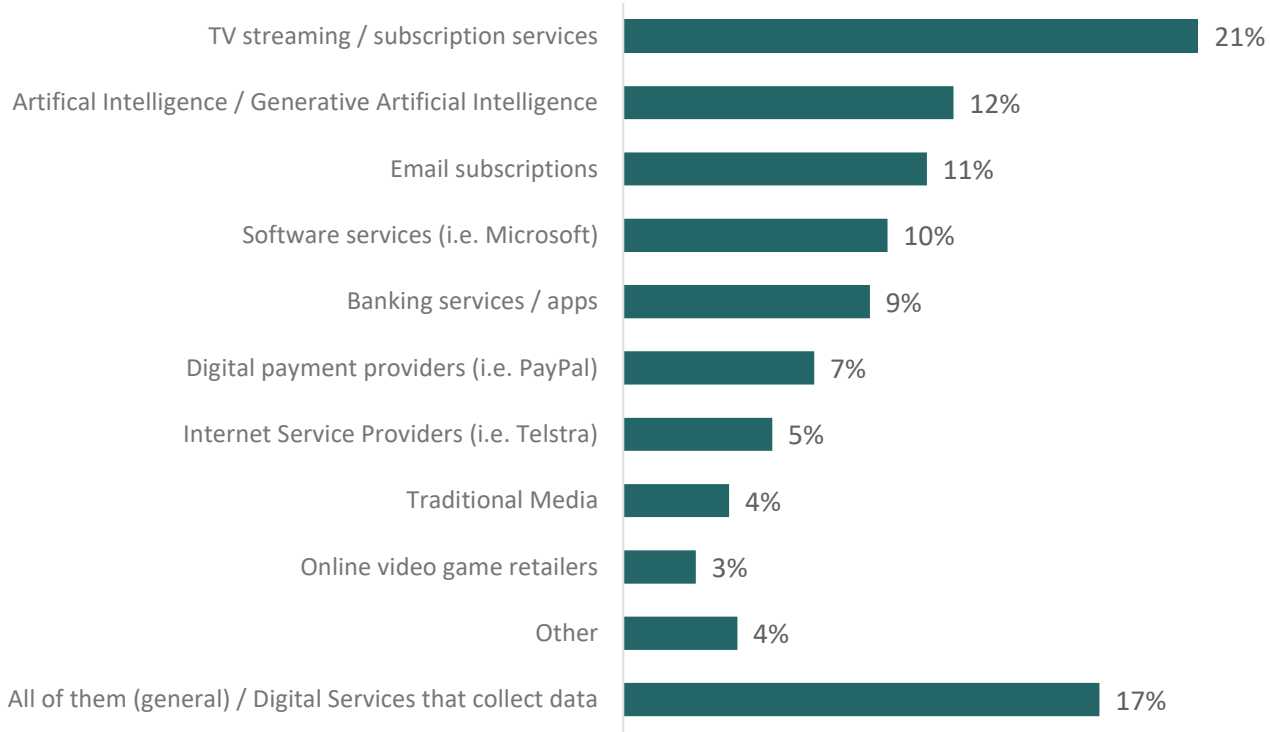
Figure 8: Whether other digital services require a dispute resolution body



H3. Are there any other digital services that you believe require an independent external dispute resolution body?
Base: Australians 14+ (n=3,075), October-November 2024.

These additional services, provided as free-text responses, included TV streaming/subscription services, AI/generative AI tools, email subscriptions, and more. Note, however, that these percentages are based on a small subset of Australians who said Yes in Figure 8.

Figure 9: Other digital services that require a dispute resolution body



H3. Are there any other digital services that you believe require an independent external dispute resolution body? – Yes (open-ended response)
Base: Australians 14+ who said there are other digital services that they believe require an independent external dispute resolution body (n=64)[8], October-November 2024.

[8] 27 responses were removed as the respondents repeated categories from H2.

Section 03

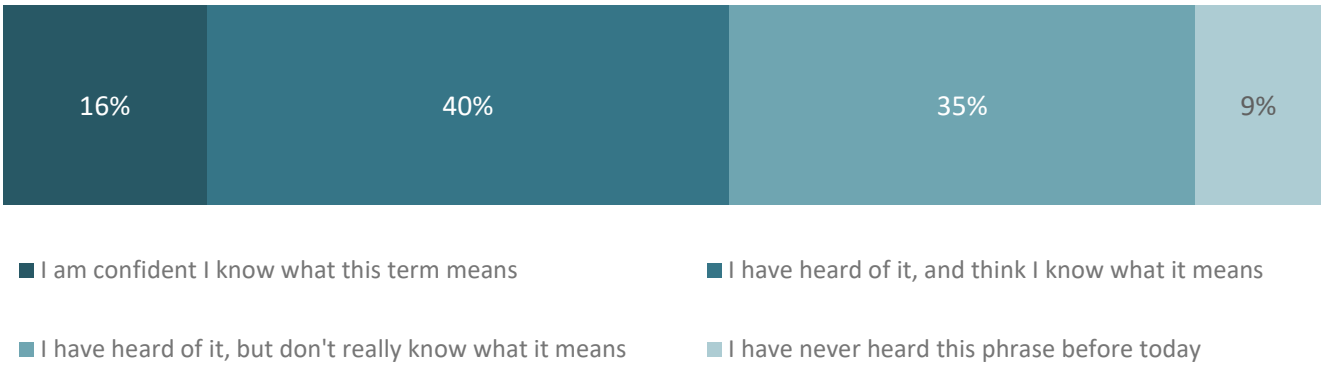
Generative artificial intelligence

3. Generative artificial intelligence

3.1. Awareness of generative AI

Generative AI remains a relatively new concept whose meaning is unclear for many Australians. While 91% of Australians 14+ had heard of the phrase "generative AI" before, only 16% felt confident in their understanding of what it means, indicating a potential knowledge gap around this emerging technology.

Figure 10: Understanding of the phrase "generative AI"



C1. How much do you know about the phrase generative artificial intelligence (AI)?
Base: Australians 14+ (n=3,075), October-November 2024.

Confidence in the understanding of the phrase "generative AI" decreased with age and increased with confidence in using technology.

Figure 11: Understanding of the phrase "generative AI" across different demographics

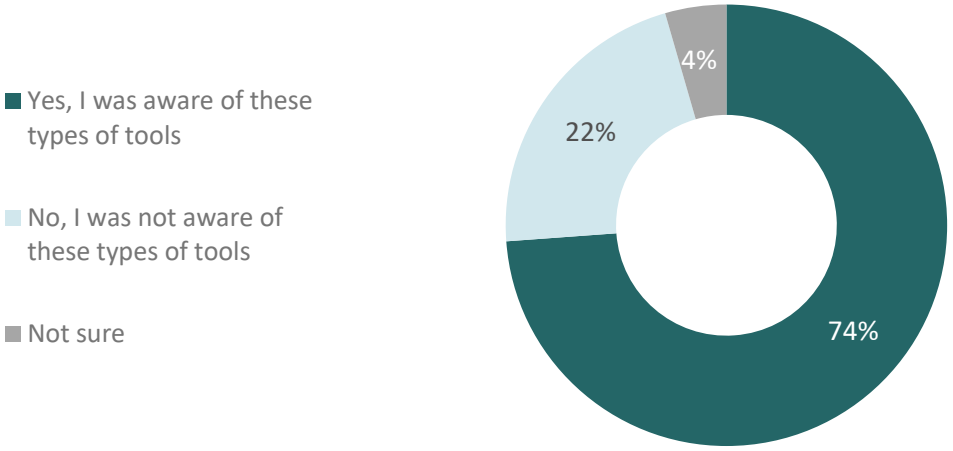
	Age						Confidence with technology		
	14-17	18-29	30-44	45-59	60-74	75+	Low (1-5)	Moderate (6-8)	High (9-10)
Confident in understanding	**30%***	**24%***	17%	13%	8%	5%	7%	9%	**24%***
Heard of it, think they understand	40%	40%	40%	43%	38%	34%	26%	42%	41%
Heard of it, unsure of meaning	22%	26%	37%	36%	**43%***	**44%***	**49%***	**40%***	27%
Never heard of it before	8%	10%	7%	8%	11%	**16%***	**18%***	9%	8%

C1. How much do you know about the phrase generative artificial intelligence (AI)? A2. How old are you? Z12. On a scale of 1 to 10, where 1 is not confident at all and 10 is extremely confident, how would you rate your confidence using and navigating devices and the internet?
Base: Australians 14+ (n=3,075), October-November 2024.
*Bolded text indicates the cohort is statistically significantly more likely to think this way.

Even after a definition and examples were provided (see **Appendix A, question C2**), 26% of Australians remained unsure or not aware that generative AI tools existed. Notably, Australians aged 14-44 were statistically significantly more likely than other age groups to be aware of generative AI tools after the explanation (14-17 years 87%, 18-29 years 84%, 30-44 years 81%; overall average 74%), with awareness decreasing with age.

Australians with low levels of confidence using technology were also statistically significantly more likely to not be aware of generative AI tools (45%; overall average 22%) or still be unsure even after the explanation (11%; overall average 4%). Males were also statistically significantly more likely to be aware than females (77% Males; cf. 71% Females).

Figure 12: Awareness of generative AI tools



C2. Before now, were you aware that these types of tools existed?[9]
Base: Australians 14+ (n=3,075), October-November 2024.

After being shown a list of 15 generative AI tools, 84% of Australians were aware of at least one tool or suggested one that wasn't on the list, compared to the 74% of Australians who said they were aware of generative AI tools before being shown the list. In fact, 54% of Australians who were initially unaware of generative AI tools were able to recognise at least one tool on the list. 36% of Australians who were initially unaware of generative AI tools but were able to recognise at least one listed generative AI tool were 60+ years old and 85% had moderate to high self-reported levels of confidence with technology (6 or higher out of 10).

Figure 13: Awareness of generative AI tools before and after being shown a list of generative AI tools

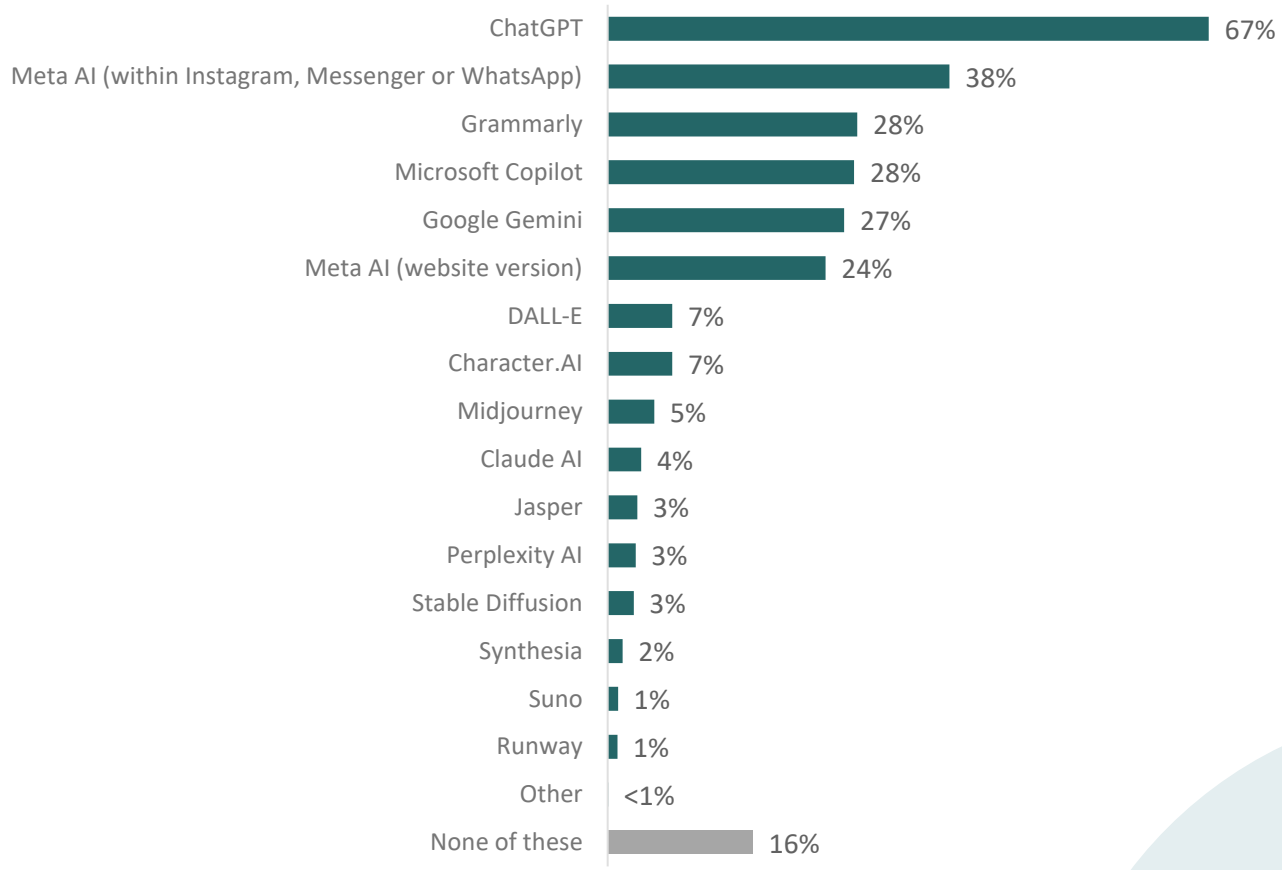
	Awareness of listed generative AI tools	
Previous awareness	Aware of no tools	Aware of at least one tool
Yes, I was aware of these types of tools (n=2,208)	6%	**94%***
No, I was not aware of these types of tools (n=718)	**46%***	54%
Not sure (n=149)	**46%***	54%

C2. Before now, were you aware of these types of tools existed? C3. Which of these generative AI tools, if any, were you aware of before today? (Multiple responses)
Base: Australians 14+ (n=149-2,028), October-November 2024.
*Bolded text indicates the cohort is statistically significantly more likely to be aware or not aware of generative AI tools

[9] Question C2 was originally only shown to survey respondents who weren't confident they understood the term 'generative AI' (i.e. did not answer 'I am confident I know what this term means' in question C1). Those that were confident (from question C1) were added to the response 'Yes, I was aware of these types of tools' in question C2 afterwards.

Of the shown generative AI tools, Australians were most aware of ChatGPT (67%), followed by Meta AI within apps (38%), Grammarly (28%), and Microsoft Copilot (28%).

Figure 14: Awareness of specific generative AI tools



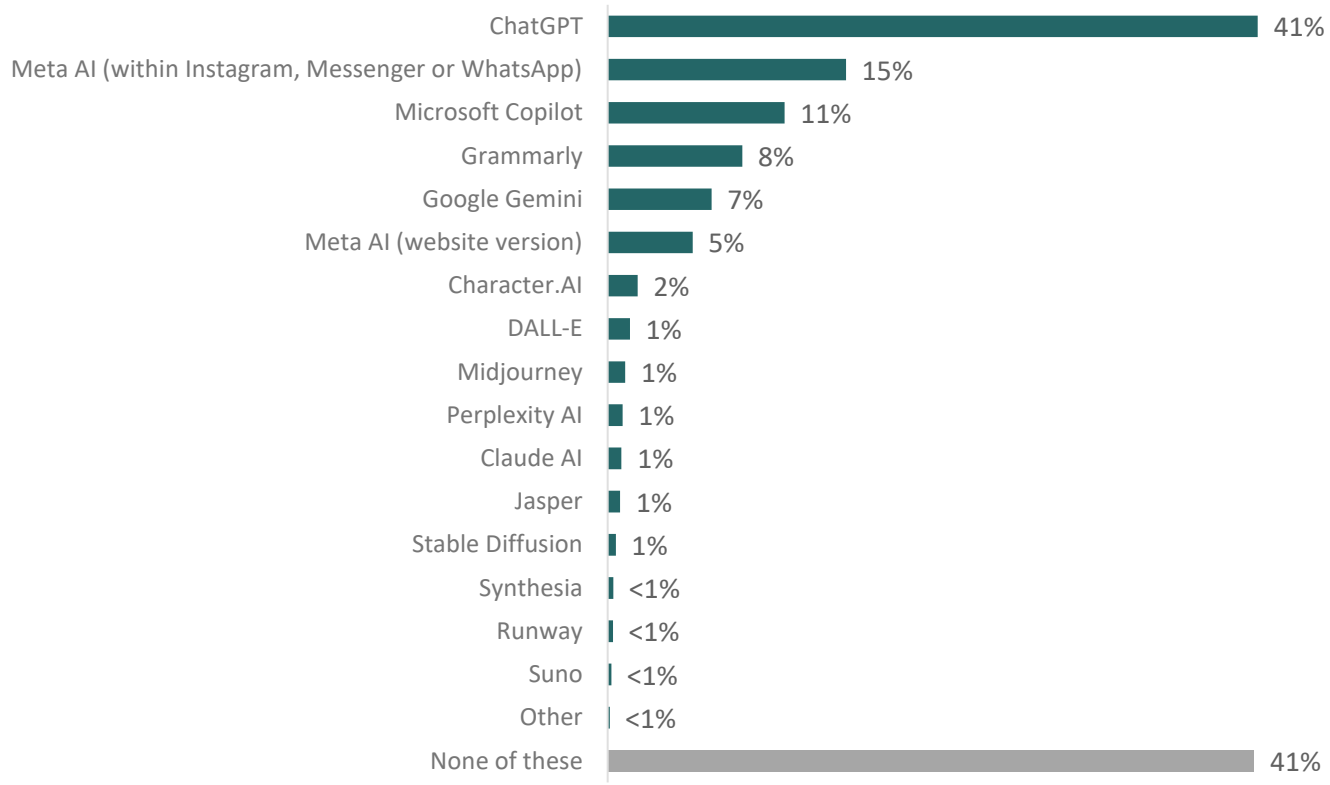
C3. Which of these generative AI tools, if any, were you aware of before today? (Multiple responses)
Base: Australians 14+ (n=3,075), October-November 2024.

3.2. Usage of generative AI tools

Of the 84% of Australians who were aware of generative AI tools, 59% of them had used at least one of those AI tools in the last 6 months, with ChatGPT the most commonly used (41%).

Children aged 14-17 were most commonly using ChatGPT (69%) and Grammarly (22%). ChatGPT was also the most common generative AI tool used in the last 6 months for people with low confidence with their digital literacy (24%).

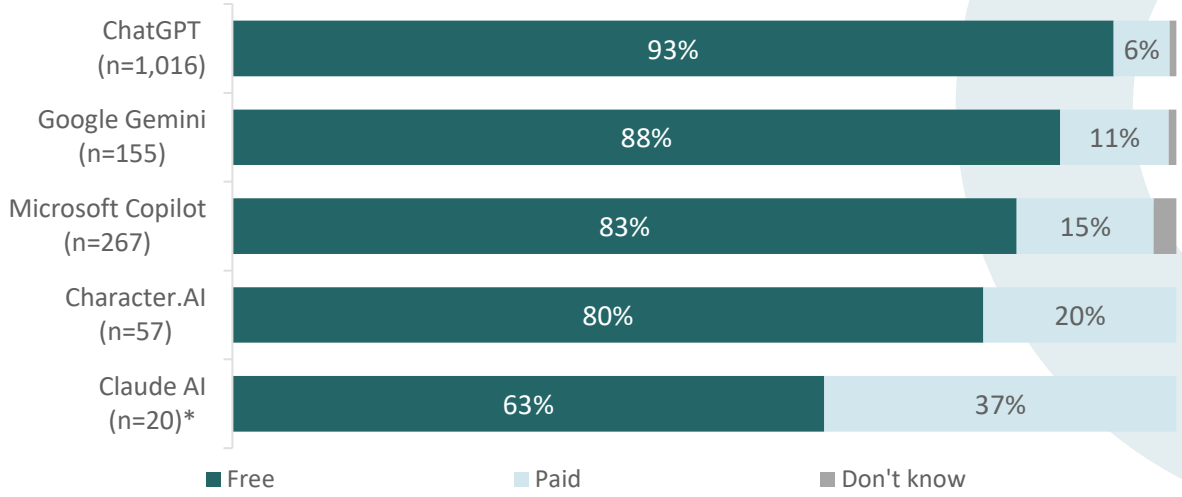
Figure 15: Usage of specific generative AI tools



C4. Which of these AI tools, if any, have you used in the past 6 months? (Multiple responses)
Base: Australians 14+ who were aware of any generative AI tools before completing the survey (n=2,507), October-November 2024.

The majority of Australians who used generative AI tools in the last 6 months were using a free version of the service. Of Australians that had used ChatGPT in the past 6 months, almost all (93%) used the free version and only 6% paid for the service. In comparison, 11% and 15% of Google Gemini and Microsoft Copilot users respectively used the paid version.

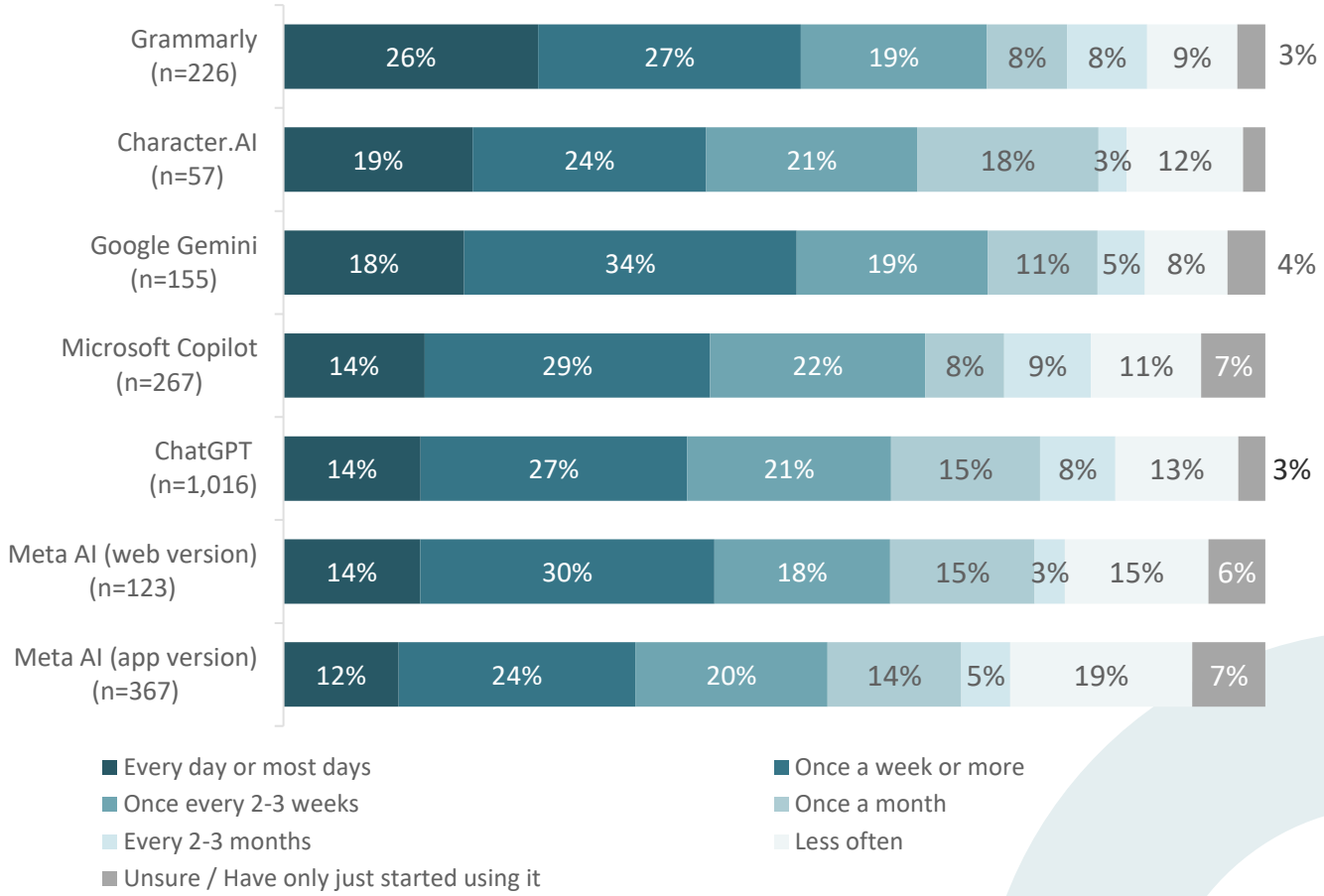
Figure 16: Usage of free or paid generative AI tools



C4b. Of these AI tools, do you use the free or paid version?
Base: Australians 14+ who have used these AI tools in the past 6 months (n=20-1,016), October-November 2024.
** Indicative results only as n<30.*

Of the most commonly used generative AI tools, Grammarly saw the most frequent use, with one-quarter (26%) of its users using the tool every day or most days.[10] In comparison, ChatGPT was statistically significantly more likely than other generative AI tools to be used on a monthly basis (15%; overall average once a month 11%). Meta AI (within apps) (7%), Microsoft Copilot (7%), and Meta AI (web version) (6%) had a higher proportion of infrequent or first-time users.

Figure 17: Frequency of use of popular generative AI tools



C5. How often do you use these generative AI tools?
Base: Australians 14+ who have used these AI tools in the past 6 months (n=57-1,016), October-November 2024.

[10] Note that Grammarly includes both generative AI and non-generative AI services, while the other tools only offer generative AI services, meaning that the usage of Grammarly is likely overrepresented.

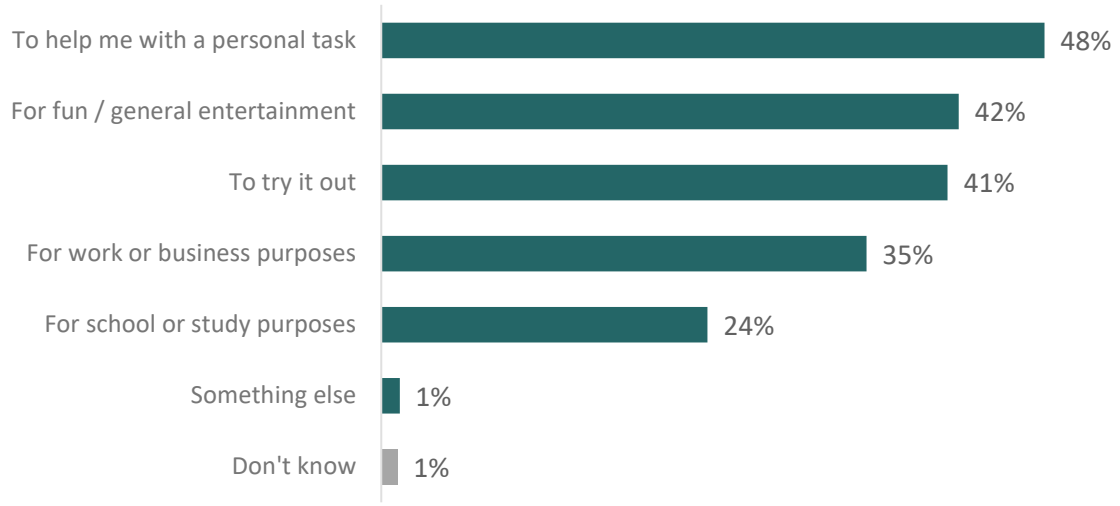
Figure 18: Frequency of use of other generative AI tools

	Frequency						
	Every day or most days	Once a week or more	Once every 2-3 weeks	Once a month	Every 2-3 months	Less often	Unsure / Have only just started using it
Claude AI (n=20)*	27%	41%	10%	6%	7%	2%	6%
Perplexity AI (n=26)*	21%	16%	11%	29%	2%	14%	7%
Jasper (n=17)*	13%	18%	40%	19%	5%	3%	3%
DALL-E (n=32)	6%	10%	17%	17%	21%	26%	2%
Midjourney (n=24)*	3%	18%	24%	10%	20%	17%	7%
Stable Diffusion (n=14)*	0%	26%	19%	8%	22%	17%	8%
Synthesia (n=8)*	0%	21%	79%	0%	0%	0%	0%
Runway (n=7)*	0%	56%	12%	16%	0%	0%	16%
Suno (n=7)*	0%	54%	46%	0%	0%	0%	0%
Other (n=4)*	0%	15%	0%	0%	53%	32%	0%

C5. How often do you use these generative AI tools?
Base: Australians 14+ who have used these generative AI tools in the past 6 months (n=4-32), October-November 2024.
** Indicative results only as n<30.*

Australians who had used a generative AI tool in the past 6 months most often used the tool(s) to help them with a personal task (48%). Around 4 in 10 Australians had also used a generative AI tool for fun or general entertainment (42%) or just to try it out (41%).

Figure 19: Purpose for using generative AI tools



C6. For which of the following purposes have you used generative AI tools? (Multiple responses)
Base: Australians 14+ who have used any generative AI tools in the past 6 months (n=1,449), October-November 2024.

Australians aged 60-74 (53%) were statistically significantly more likely than other age groups (14-17 years 31%, 18-29 years 36%, 30-44 years 42%, 45-59 years 46%, 75+ years 46%) to have used generative AI tools just to try them out, while those aged 18-44 were statistically significantly more likely to have used the tools for work or business (18-29 years 42%, 30-44 years 43%; cf. 14-17 years 8%, 45-59 years 33%, 60-74 years 21%, 75+ years 12%). Many children and student-aged Australians used them for school or study purposes (14-17 years 79%, 18-29 years 33%; overall average 24%).

Meanwhile, Australians with high confidence in using technology were statistically significantly more likely than Australians with low or moderate confidence to have used generative AI:

- to help them with a personal task (54%; cf. Low 33%, Moderate 43%),
- for fun or general entertainment (45%; cf. Low 30%, Moderate 38%), or
- for work or business purposes (40%; cf. Low 30%, Moderate 29%).

Figure 20: Purpose for using generative AI tools across different demographics

	Age						Confidence with technology		
	14-17	18-29	30-44	45-59	60-74	75+	Low (1-5)	Moderate (6-8)	High (9-10)
To help me with a personal task	49%	51%	51%	40%	41%	49%	33%	43%	**54%***
For fun / general entertainment	44%	45%	43%	38%	37%	33%	30%	38%	**45%***
To try it out	31%	36%	42%	46%	**53%***	46%	35%	40%	42%
For work or business purposes	8%	**42%***	**43%***	33%	21%	12%	30%	29%	**40%***
For school or study purposes	**79%**	**33%***	14%	10%	2%	1%	23%	21%	25%
Something else	<1%	<1%	1%	3%	**5%***	**5%***	2%	1%	1%

C6. For which of the following purposes have you used generative AI tools? (Multiple responses) A2. How old are you? Z12. On a scale of 1 to 10, where 1 is not confident at all and 10 is extremely confident, how would you rate your confidence using and navigating devices and the internet?
Base: Australians 14+ who have used any generative AI tools in the past 6 months (n=1,449), October-November 2024.
*Bolded text indicates the cohort is statistically significantly more likely to think this way

Specifically, Australians were most commonly using generative AI tools to search for information on a specific topic (as a browsing tool) (39%) and to summarise information or advice on a specific topic (37%).

Children aged 14-17 were statistically significantly more likely than other age groups to use generative AI tools:

- to summarise information or advice about a specific topic (55%; overall average 37%)
- to review and improve their written content (50%; overall average 35%), or
- to create or get ideas for written content (44%; overall average 33%).

Figure 21: Specific tasks generative AI tools are used for

C7. For what specific tasks have you used generative AI? (Multiple responses)
Base: Australians 14+ who have used any generative AI tools in the past 6 months (n=1,449), October-November 2024.

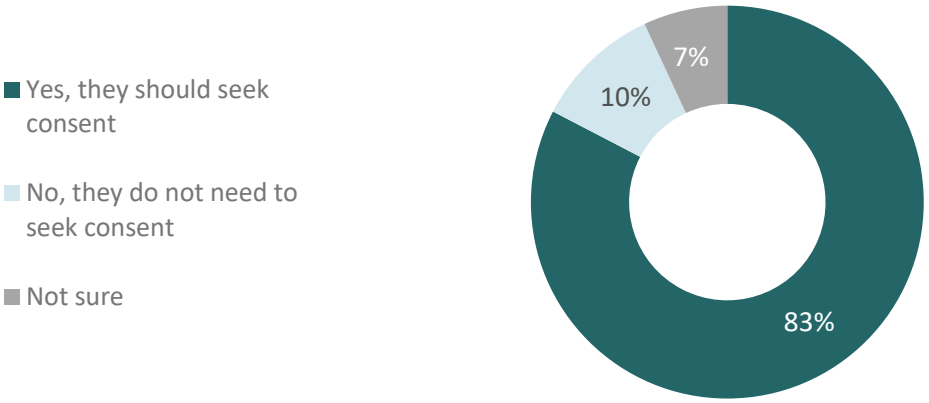
3.3. Concerns with generative AI

At the time this survey was conducted, some digital platforms (such as Facebook[11] and LinkedIn[12]) used data shared by users to train their AI models. Meta (the parent company of Facebook and Instagram) does not seek consent from Australians to use their data to train its AI models and Australians cannot opt-out. Users of LinkedIn are opted-in by default and are required to manually change their settings to prevent their data being used in the training of AI models.

The majority (83%) of Australians believed companies should obtain consent before using personal data to train AI models. This preference for consent was stronger among individuals with higher self-reported confidence in using technology (73% Low, 82% Moderate, 86% High).

[11] Source: https://www.facebook.com/privacy/genai/, accessed 10 December 2024; https://www.facebook.com/privacy/dialog/your-public-content-genai, accessed 10 December 2024.
[12] Source: https://www.linkedin.com/help/linkedin/answer/a5538339?hcppcid=search, accessed 10 December 2024.

Figure 22: Whether consent should be required before using your data to train AI models

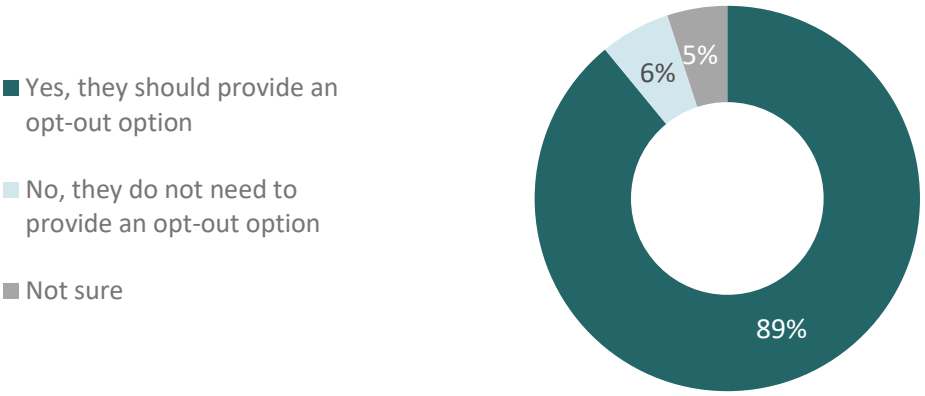


C8. In your opinion, should companies that train AI models using your data gain your consent before they use your data in this way?
Base: Australians 14+ (n=3,075), October-November 2024.

Meta has confirmed that it uses public posts on Facebook and Instagram to train its AI models. With Facebook and Instagram widely used across Australia, almost all Australians (89%) believed Meta should provide an opt-out option, allowing users the choice to prevent this use of their data.

60-74-year-olds were the most likely age group to agree with the need for an opt-out option (94%), while 18-29-year-olds were the least likely age group to agree (84%; cf. 14-17 years 92%, 30-44 years 87%, 45-59 years 90%, 75+ years 91%).

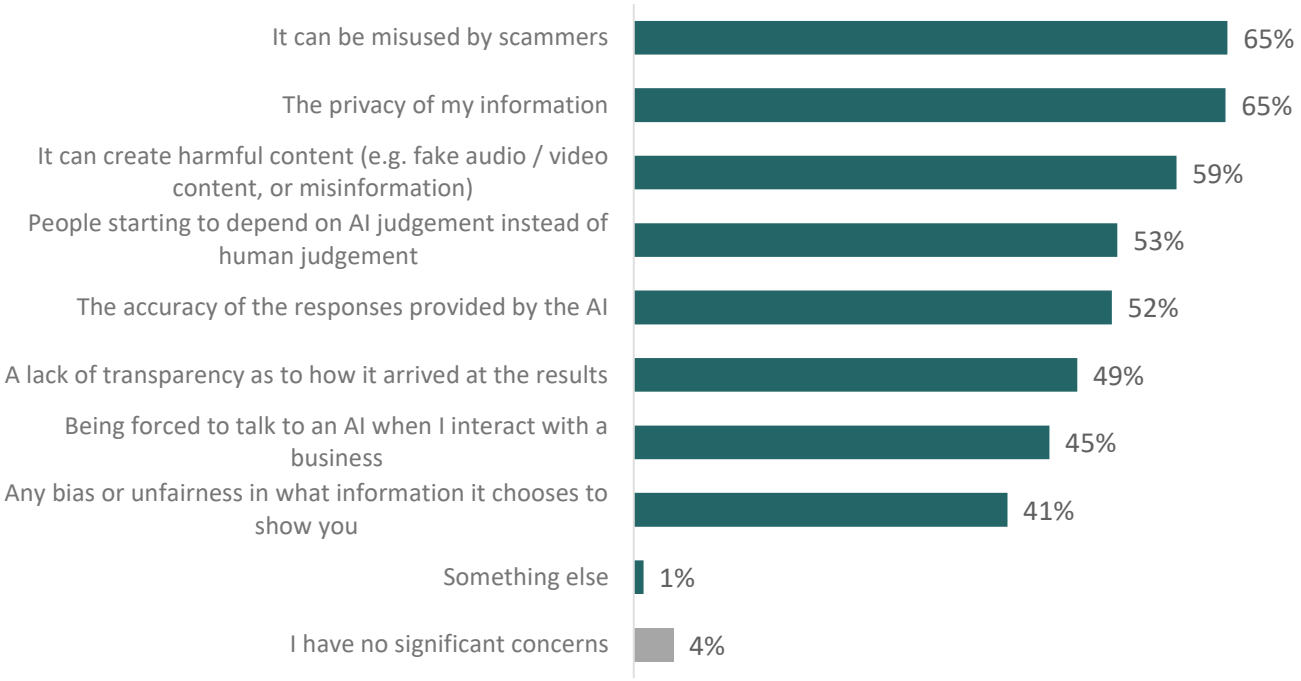
Figure 23: Opinion on Meta providing an opt-out option



C9. Do you think Meta should give Australians the ability to opt out?
Base: Australians 14+ (n=3,075), October-November 2024.

Australians' biggest concerns with generative AI included it being misused by scammers (65%), the privacy of their information (65%), and it being used to create harmful content (59%). Australians who were not aware of any generative AI tools were statistically significantly more likely to have had no significant concerns about generative AI (10% Those who were aware of no tools; cf. 3% Who were aware of at least one tool).

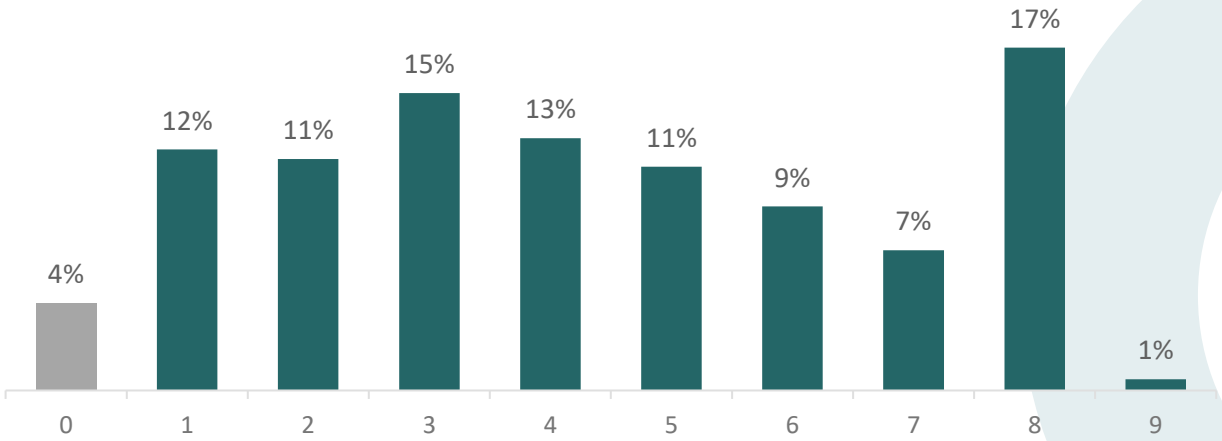
Figure 24: Concerns about generative AI



C10. What concerns, if any, do you have about generative AI? (Multiple responses)
Base: Australians 14+ (n=3,075), October-November 2024.

A vast majority of Australians (96%) had at least one significant concern with generative AI (including the concerns listed above), with only 4% saying they had no significant concerns.

Figure 25: Number of concerns Australians had about generative AI



C10. What concerns, if any, do you have about generative AI? (Multiple responses)
Base: Australians 14+ (n=3,075), October-November 2024.

Section 04

Online private messaging

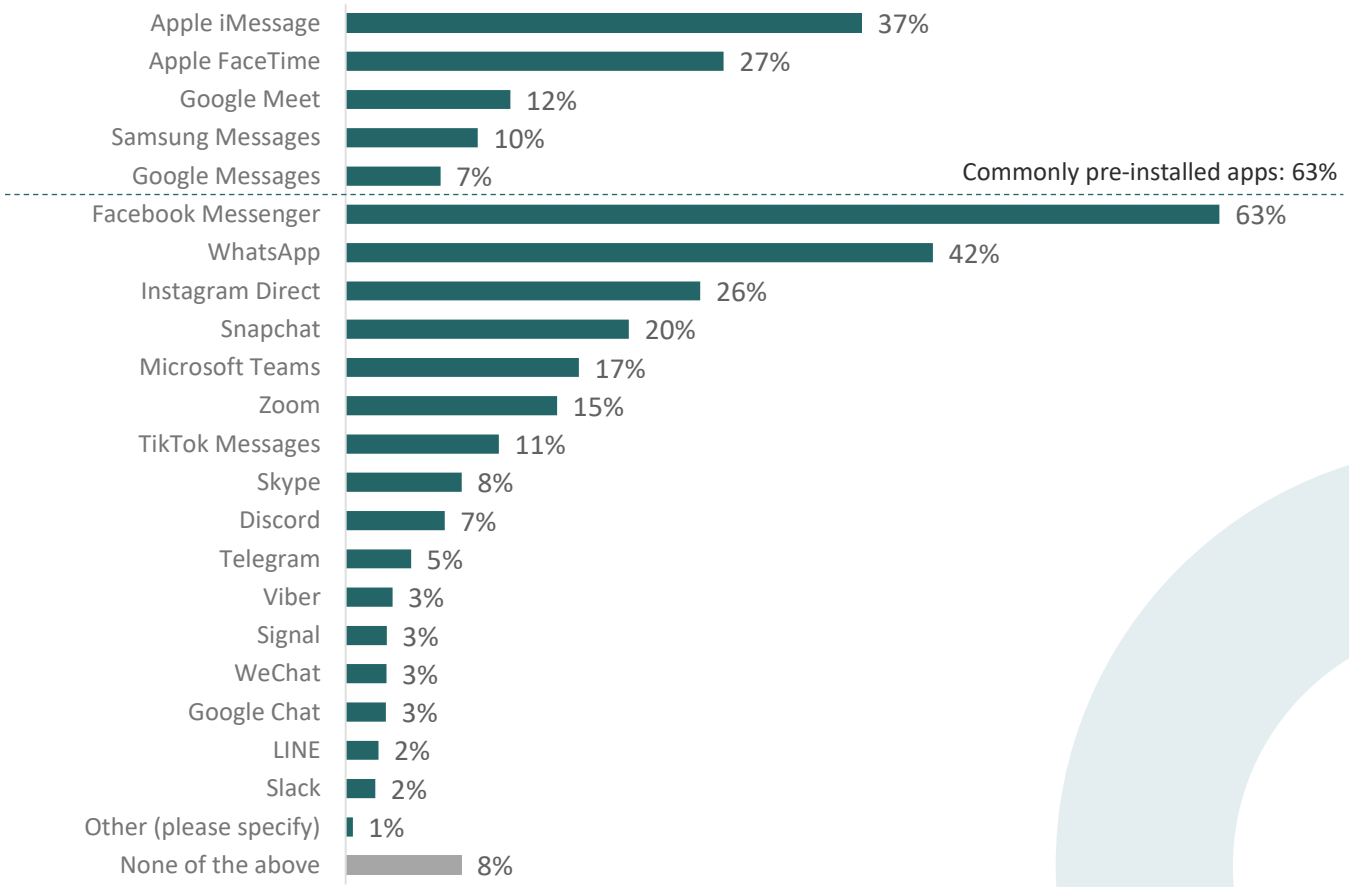
4. Online private messaging

4.1. Usage of online private messaging services

Some of the notable online private messaging services used in the last month were:

- Facebook Messenger (63%)
- WhatsApp (42%), and
- Apple iMessage (37%).

Figure 25: Online private messaging services used in the last month



B1. Which of the following have you used to either send messages and/or make audio or video calls in the last month? (Multiple responses)
Base: Australians 14+ (n=3,075), October-November 2024.

Of the commonly used online private messaging services, Facebook Messenger and WhatsApp were most used by 30-44-year-olds – within this age range, 70% of consumers had used Facebook Messenger and 50% had used WhatsApp in the past month (overall averages of 63% and 42% respectively). Apple iMessage, Apple FaceTime, Instagram Direct, and Snapchat had a broad usage demographic, but were most popular with consumers aged 14 to 17 years old. More specifically, 58% of consumers within this age group had used iMessage (Overall average 37%), 47% had used FaceTime (overall average 27%), 51% had used Instagram Direct (overall average 26%) and 64% had used Snapchat within the past month (overall average 20%). While less commonly used overall, it is also notable that many consumers aged 14-17 used TikTok Messages (37%; overall average 11%) as well as Discord (33%; overall average 7%).

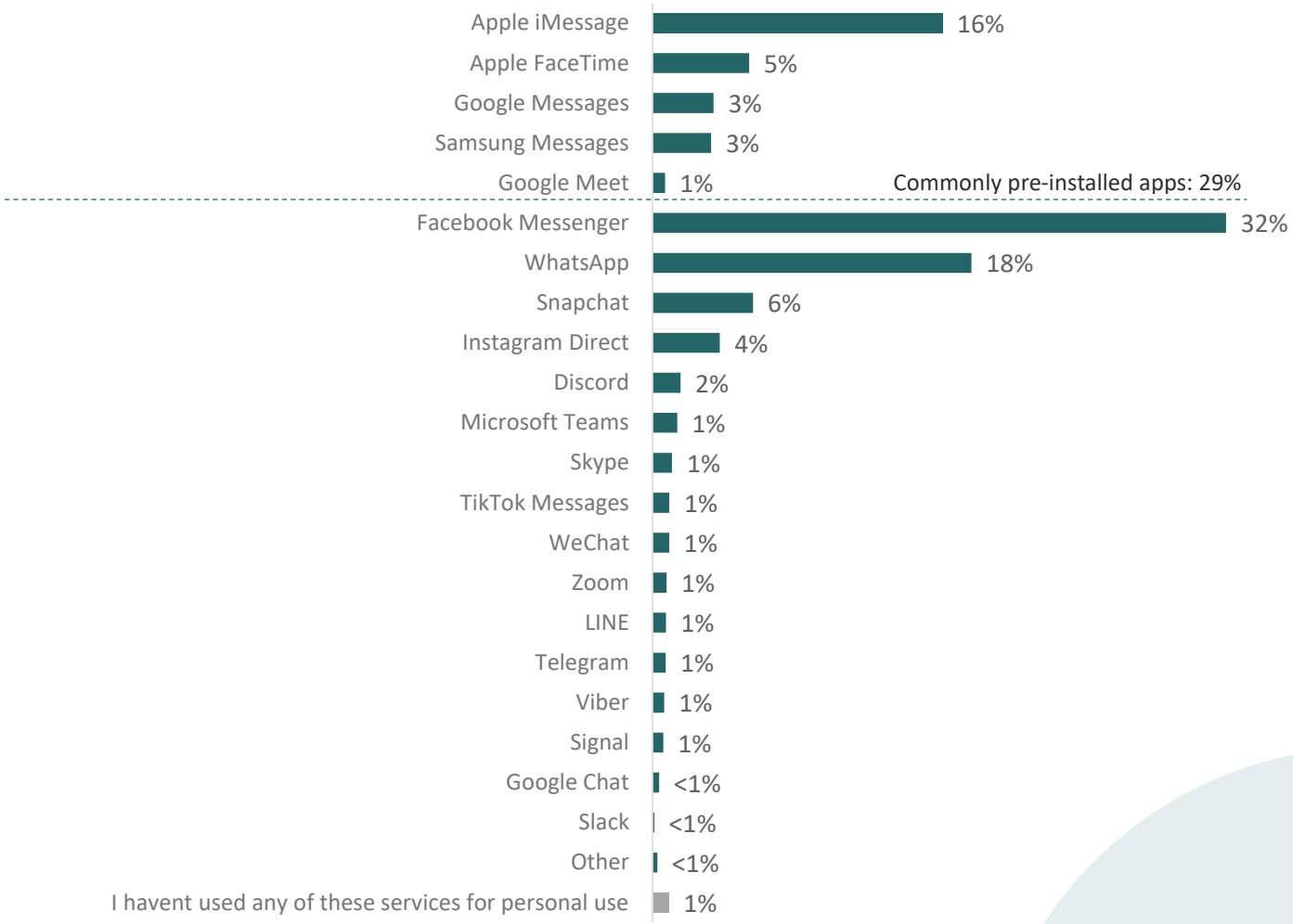
Figure 26: Some of the messaging/calling services used in the last month by age

	14-17	18-29	30-44	45-59	60-74	75+
Facebook Messenger	36%	67%	**70%***	65%	60%	53%
WhatsApp	41%	42%	**50%***	**47%***	35%	30%
Apple iMessage	**58%***	**55%***	**42%***	34%	22%	12%
Apple FaceTime	**47%***	**38%***	29%	25%	19%	10%
Instagram Direct	**51%***	**47%***	**36%***	13%	6%	3%
Snapchat	**64%**	**43%***	20%	10%	4%	1%
TikTok Messages	**37%***	**23%***	13%	4%	1%	0%
Discord	**33%***	**17%***	5%	2%	1%	<1%

B1. Which of the following have you used to either send messages and/or make audio or video calls in the last month? (Multiple responses). A2. How old are you?
Base: Australians 14+ (n=3,075), October-November 2024.
*Bolded text indicates the cohort is statistically significantly more likely to use that service.

For users of multiple services, Facebook Messenger, WhatsApp, and Apple iMessage were still the most frequently used online private messaging services.

Figure 27: Online private messaging service used most often in the last month

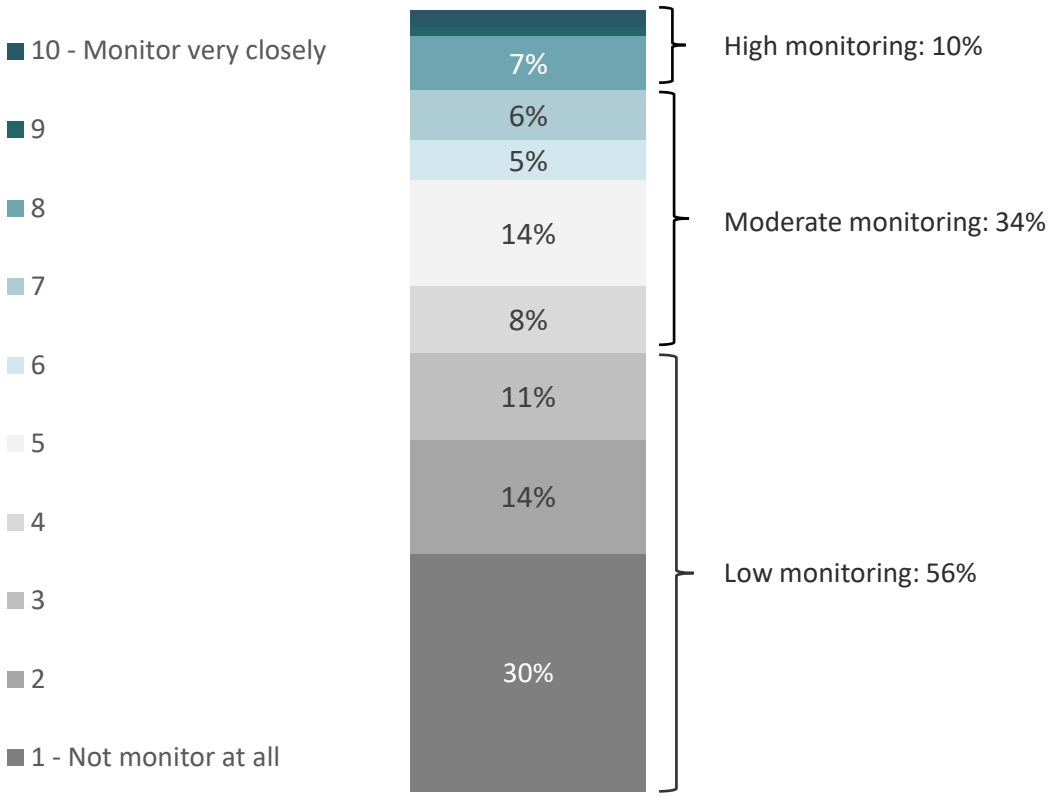


B2. Which of the following have you used most often for personal use to either send messages and/or make audio or videos calls in the last month?
Base: Australians 14+ who used more than one messaging/calling service in the last month (n=2,190), October-November 2024.

4.2. Parental supervision of online messaging

56% of Australians aged 14-17 said they experienced low levels of monitoring of their online activity from their parents or guardians. Children aged 16-17 were statistically significantly more likely than children aged 14-15 to experience low monitoring (64%; cf. 14-15 years 39%), while almost half of 14-15-year-olds experienced moderate monitoring (45%; cf. 16-17 years 28%).

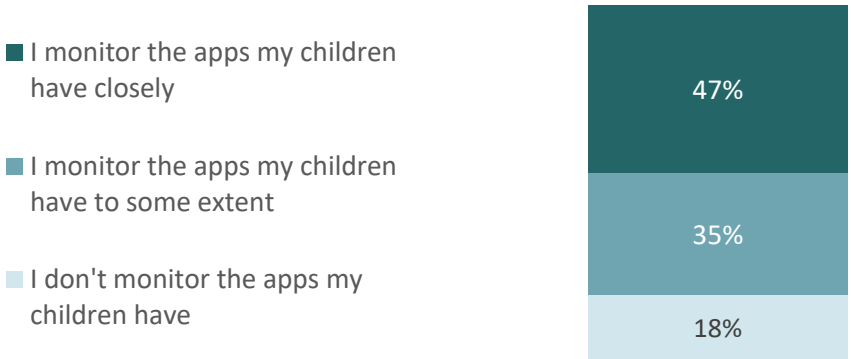
Figure 28: Extent of parental monitoring of online activity from child's perspective



B7. To what extent do your parents or another adult monitor your online activity (e.g. social media or website you use, online messaging, online games you play, etc)?
Base: Australians 14-17 (n=342), October-November 2024.

While most 14-17-year-olds did not feel their online activity was heavily monitored, almost half (47%) of parents/guardians of children under 18 said they monitored their children's online messaging apps closely.

Figure 29: Extent of parental monitoring of online messaging apps from parent's perspective



B4. To what extent do you monitor which online messaging apps your children have?
Base: Australian parents/guardians of children aged 0-17 (n=777), October-November 2024.

Close monitoring was more common if parents had a younger child, with more than half (58%) of parents/guardians of children below 12 monitoring those children's apps closely. Findings from the IDIs support this, where parents of younger children, typically aged 12 and below, were more likely to monitor their children's online activity more strongly. On the other hand, parents of children aged 16 and over were more likely to not monitor which apps their children used at all.

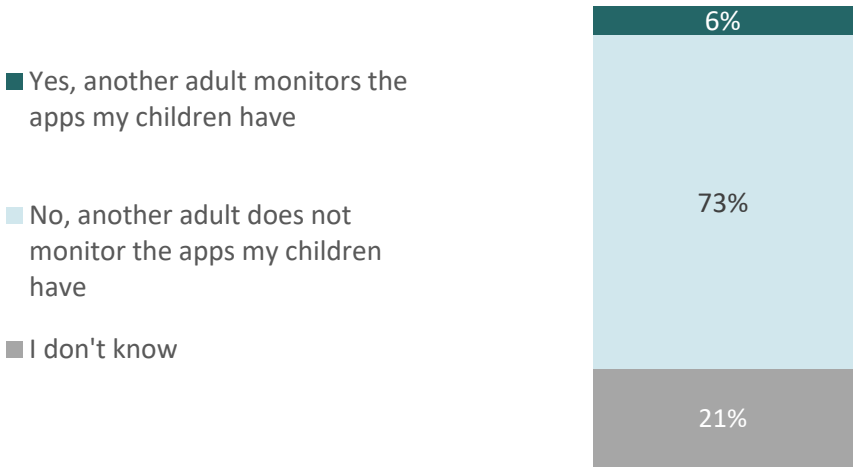
Figure 30: Extent of parent monitoring online messaging apps from parent's perspective by age of child

	Has a child aged			
	0-11	12-13	14-15	16-17
Monitor closely	**58%***	48%	30%	20%
Monitor to some extent	29%	**43%***	**50%***	40%
Don't monitor	13%	9%	20%	**40%***

B4. To what extent do you monitor which online messaging apps your children have? A5. In which of the following age groups are the children under your care? (Multiple responses)
Base: Australian parents/guardians of children aged 0-17 (n=777), October-November 2024.
*Bolded text indicates the cohort is statistically significantly more likely to do this.

Of the 18% of parents/guardians of under 18-year-olds that don't monitor the apps their children have, 6% have an alternate adult who monitors them instead.

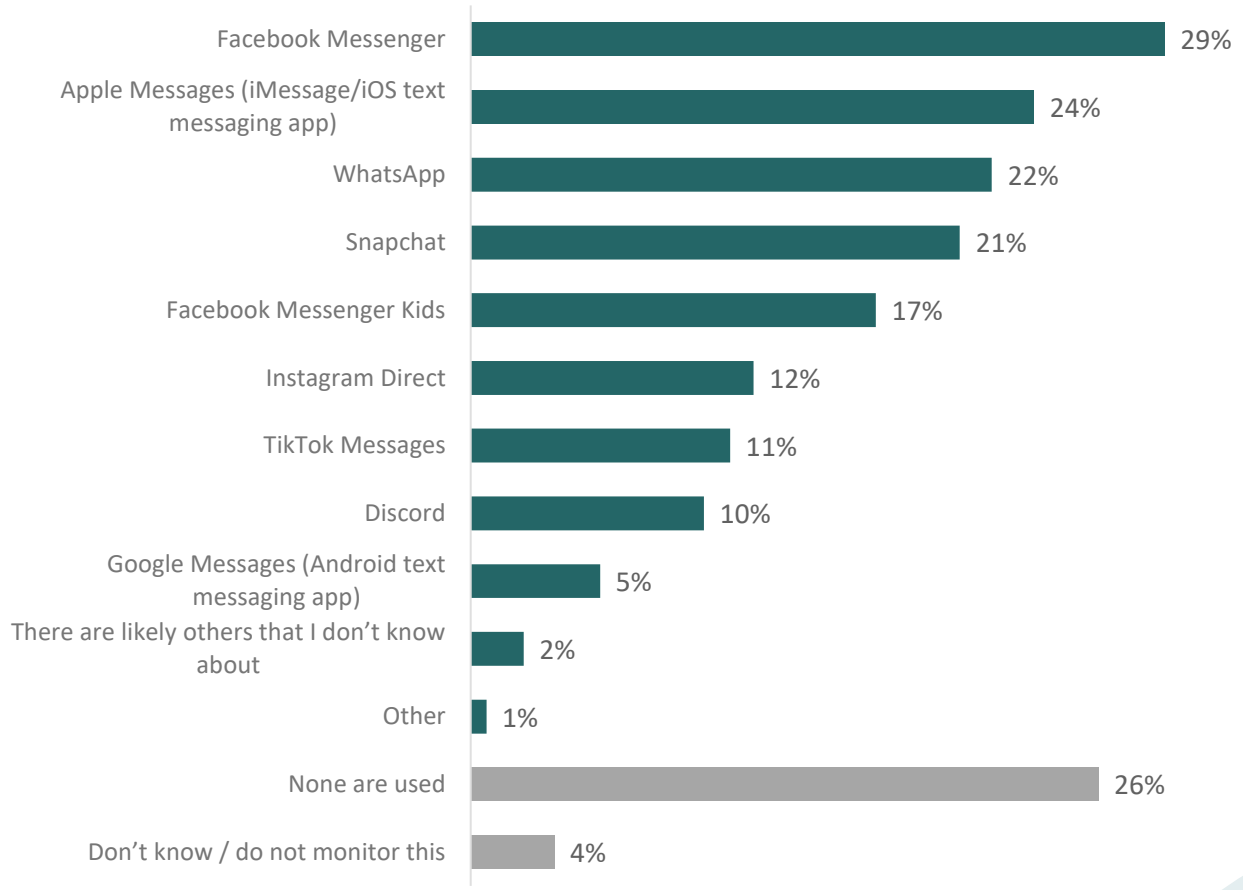
Figure 31: Alternate adult monitoring of apps



B4b. To the best of your knowledge, does another adult monitor the apps your children have (e.g. could be another parent, other family member, or friend)?
Base: Australian parents/guardians of children aged 0-17 and do not monitor their children's app usage (n=146), October-November 2024.

Parents and guardians believed that Facebook Messenger (29%), iMessage (24%), and WhatsApp (22%) were the most commonly used online messaging services by the children in their household, with almost a quarter (26%) saying their children used no online messaging services once a month or more. Parents of children under 12 years old were statistically significantly more likely than parents of children aged 12 years or over to have said their children had not used any messaging service once a month or more (38%; overall average 26%). Parents of 12-15 year-olds were statistically significantly more likely than parents of younger children to have reported that children in their households were using Discord (Parents of 12-13 year-olds 17%, Parents of 14-15 year-olds 16%; cf. Parents of 0-11 year-olds 8%).

Figure 32: Online messaging services parents/guardians believe their children use regularly



B3. To the best of your knowledge, which online messaging services are used by any children in your household once a month or more? (Multiple responses)
Base: Australian parents/guardians of children aged 0-17 (n=777), October-November 2024.

There was a discrepancy in what online private messaging services parents/guardians of 14-17-year-olds thought their children commonly used, compared to what they actually used. The following were the online messaging services that parents and guardians thought were most common among their teenagers in this age group were (in order):

- Facebook Messenger
- Snapchat
- WhatsApp
- Apple iMessage, and
- Instagram Direct.

However, 14-17-year-olds said their most commonly used services were actually:

- Snapchat
- Apple iMessage
- Instagram Direct
- Apple FaceTime[13], and
- WhatsApp.

[13] This was not an option for parents/guardians to choose from.

This suggests parents and guardians may not always be aware of which apps their teenagers are using, or how often they use them.

Figure 33: Most reported messaging services used by children aged 14-17 years old from parents' and children's perspectives

Rank	What parents/guardians thought were the most common	What children most commonly used
1	Facebook Messenger	**Snapchat**
2	**Snapchat**	**Apple iMessage**
3	**WhatsApp**	**Instagram Direct**
4	**Apple iMessage**	Apple FaceTime[14]
5	**Instagram Direct**	**WhatsApp**

B3. To the best of your knowledge, which online messaging services are used by any children in your household once a month or more? (Multiple responses) B1. Which of the following have you used to either send messages and/or make audio or video calls in the last month? (Multiple responses)
Base: Australian parents/guardians of children aged 14-17 (n=292); Australians 14-17 (n=342), October-November 2024.

Figure 34: Online messaging services used by children 14-17 from children's and parents' perspectives

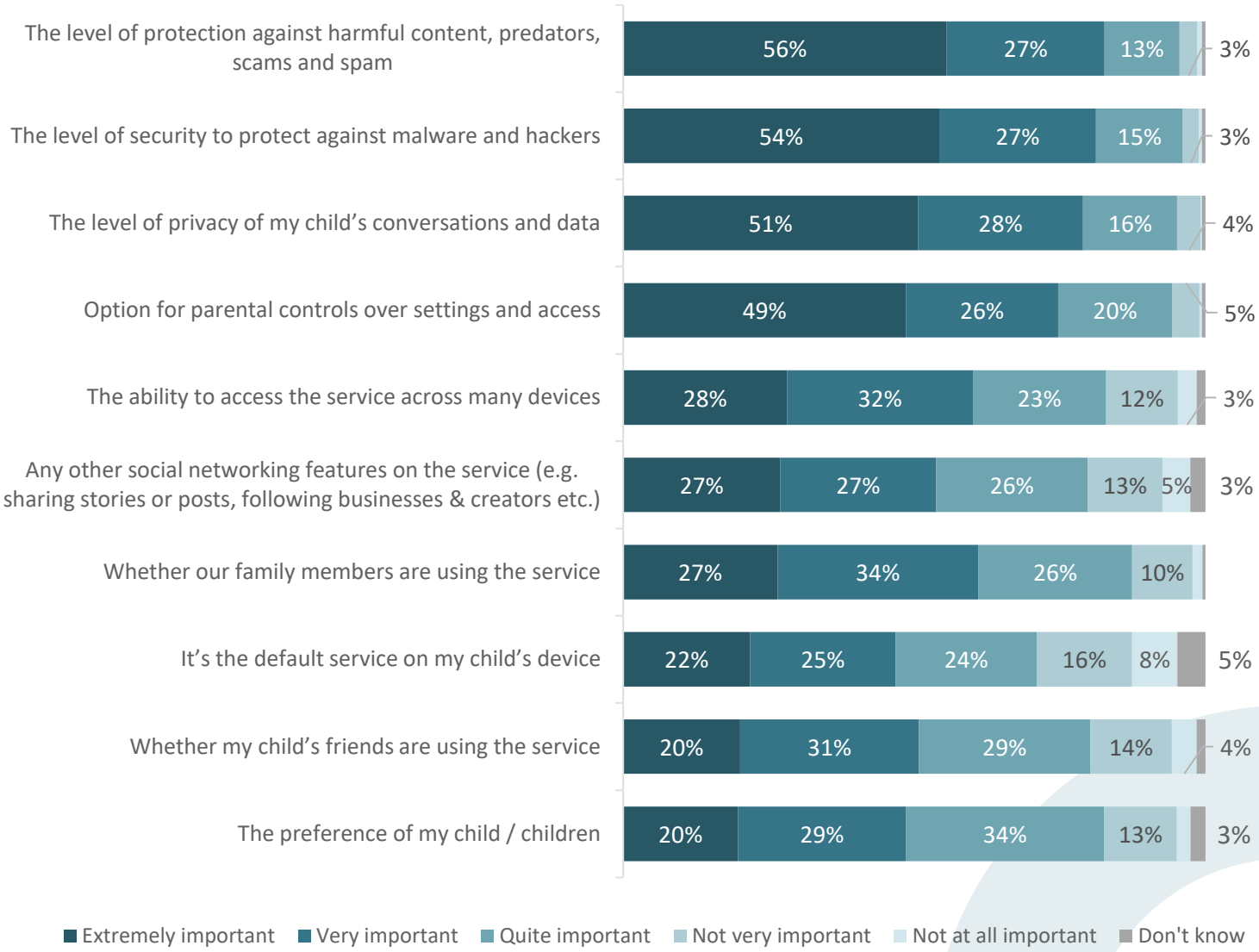
	What parents/guardians believed their children's commonly used services are	Children's commonly used services
Facebook Messenger	40%	36%
Snapchat	37%	64%
WhatsApp	35%	41%
Apple iMessage	35%	58%
Instagram Direct	20%	51%
TikTok Messages	17%	37%
Discord	14%	33%

B3. To the best of your knowledge, which online messaging services are used by any children in your household once a month or more? (Multiple responses) B1. Which of the following have you used to either send messages and/or make audio or video calls in the last month? (Multiple responses)
Base: Australian parents/guardians of children aged 14-17 (n=292); Australians 14-17 (n=342), October-November 2024.

Parents and guardians were most concerned about the safety and security of their children when using online messaging services, with 83% citing protection against harmful content, predators, scams, and spam being extremely or very important. Parents also frequently rated the level of security to protect against malware and hackers (81%), the level of privacy of their child's conversations and data (79%), and the option for parental control over access and settings (75%) as being very or extremely important.

[14] This was not an option for parents/guardians to choose from.

Figure 35: Importance of factors when selected an online messaging service for your children



B5. How important are each of the following to you when choosing an online messaging service for your child/children to use?
Base: Australian parents/guardians of children aged 0-17 years old who monitor their children's online messaging apps (n=631), October-November 2024.

Section 05

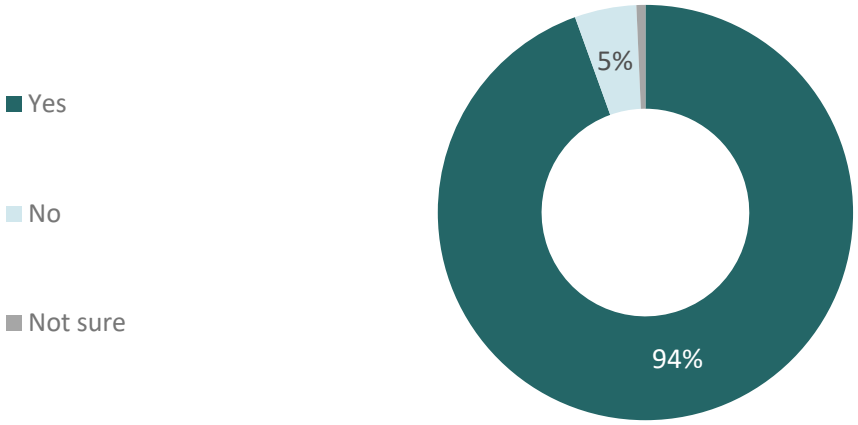
Smartphones

5. Smartphones

5.1. Current and previous smartphone use

Nearly all Australians aged 14 and older (94%) have a smartphone for personal use.

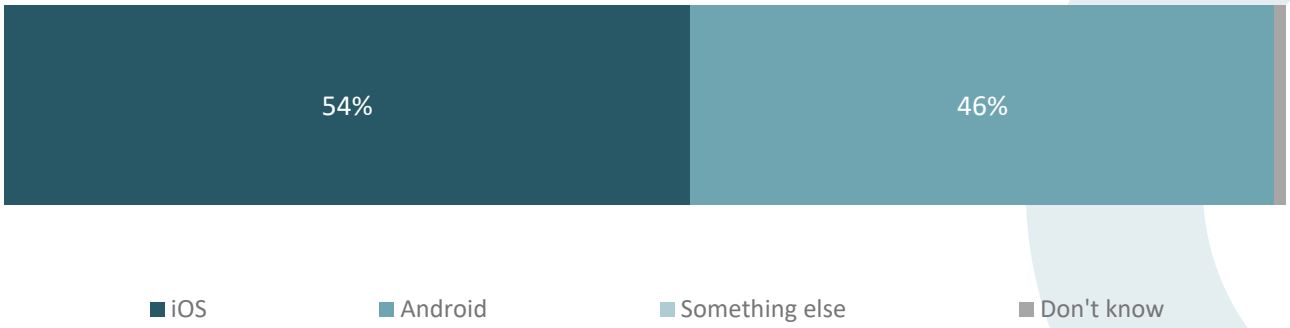
Figure 36: Have a smartphone for personal use



D1. Do you have a smartphone for personal use?
Base: Australians 14+ (n=3,075), October-November 2024.

More than half (54%) of those who had a smartphone currently used iOS, while 46% used Android phones. Australians aged 14-29 were statistically significantly more likely than other age groups to be currently using iOS phones (14-17 years 72%, 18-29 68%; overall average 54%), while Australians aged 60 and above were statistically significantly more likely than other age groups to be using Android (60-74 years 56%, 75+ years 58%; overall average 46%).

Figure 37: Operating system of current smartphone

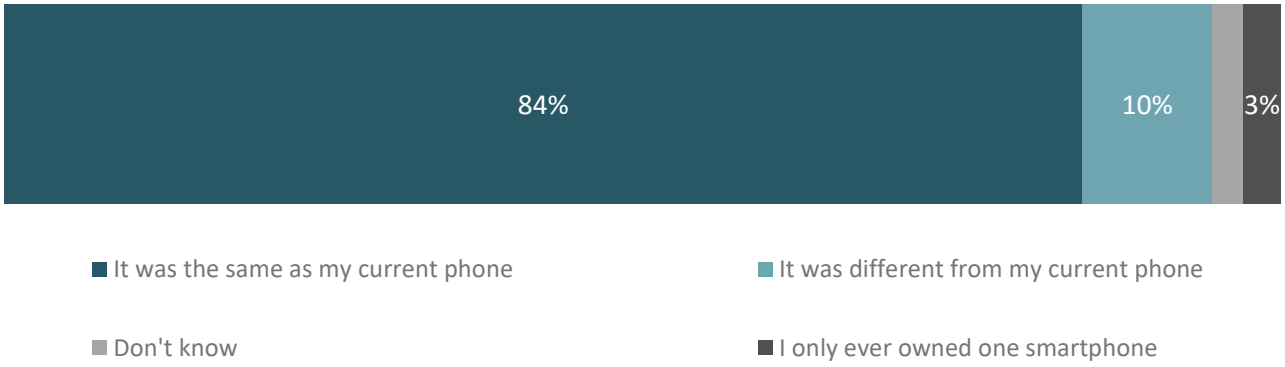


D3. What operating system does your current phone use?
Base: Australians 14+ who have a smartphone for personal use (n=2,895), October-November 2024.

More than four in five (84%) Australian smartphone owners did not switch phone operating system between their current and previous phone. Children aged 14-17 and older Australians aged 75+ were statistically significantly less likely than other age groups to have used the same operating system (14-17 years 73%; 75+ 80%; overall average 84%), however they were also more likely to have only ever owned one smartphone, meaning they have not had the opportunity to switch phone operating system (14-17 years 12%, 75+ years 6%; overall average 3%).

Australians with low confidence using technology were less likely than those with moderate or high confidence with technology to have used the same operating system in both their current and previous phones (Low 69%; cf. Moderate 84%, High 87%). However, there was also a statistically significant portion (11%) of this group who did not know whether they had changed or stayed on the same operating system (cf. Moderate 2%, High 1%).

Figure 38: Operating system of previous smartphone



D4. What operating system did your previous phone use?
Base: Australians 14+ who have a smartphone for personal use (n=2,895), October-November 2024.

5.2. Considerations and preferences for choosing a smartphone

When choosing a smartphone to use, the majority of Australians who owned a smartphone for personal use considered:

- security and privacy (83%)
- features of the phone itself (76%), and
- price (75%)

to be extremely or very important.

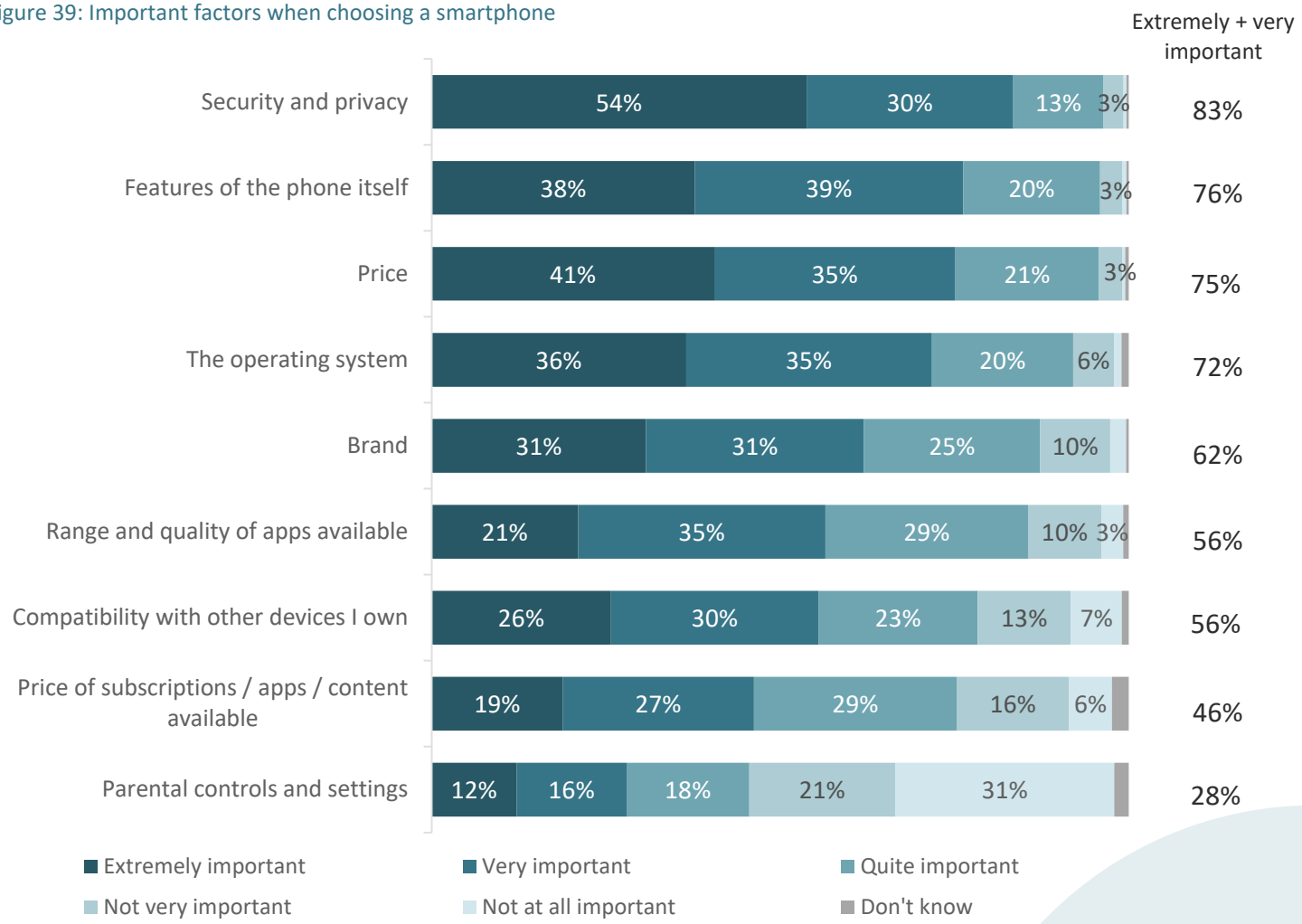
Security and privacy were considered statistically significantly more important by Australians aged 60-74 compared to other age groups (92% extremely or very important; overall average 83%), while compatibility with other devices was statistically significantly more important to those aged 18-44 (18-29 years 64%, 30-44 years 65%; overall average 56%).

Current Android users were statistically significantly more likely than current iOS users to feel that price was either very or extremely important when choosing a smartphone to use (Android users 80%; cf. iOS users 72%). On the other hand, iOS users were statistically significantly more likely than Android users to think:

- features of the phone (iOS users 78%; cf. Android users 74%),
- brand (iOS users 70%; cf. Android users 53%),
- compatibility with other devices owned (iOS users 64%; cf. Android users 47%),
- range and quality of apps available (iOS users 61%; cf. Android users 52%),
- price of subscriptions/apps/content available (iOS users 49%; cf. Android users 43%), and
- parental controls and settings (iOS users 31%; cf. Android users 24%)

were either very or extremely important when choosing a smartphone to use.

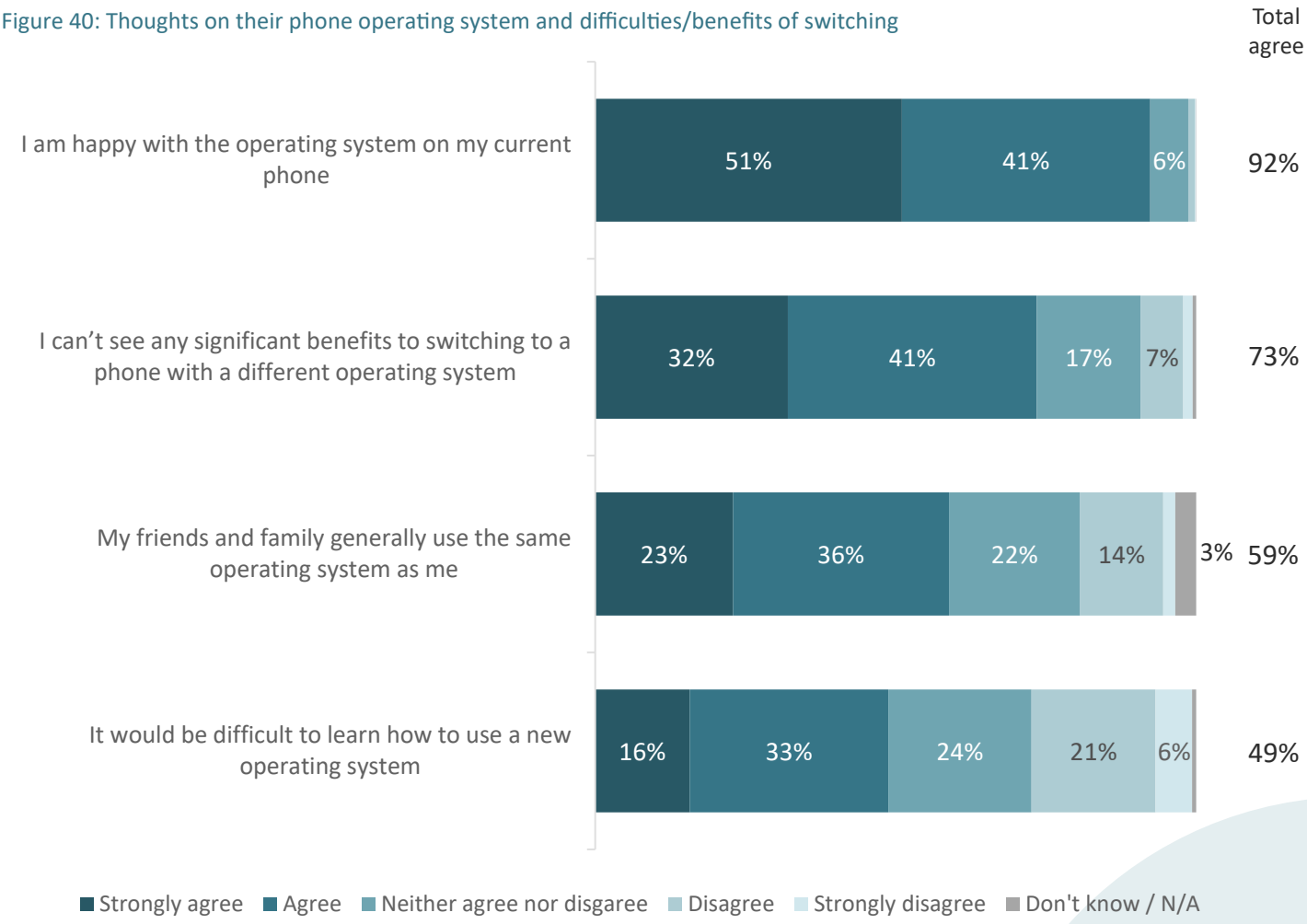
Figure 39: Important factors when choosing a smartphone



D2. How important are each of the following to you when choosing a smartphone to use?
Base: Australians 14+ who have a smartphone for personal use (n=2,895), October-November 2024.

Thinking about Australians potentially switching operating systems, almost all (92%) smartphone owners agreed or strongly agreed they were content with the operating system of their current phone. Almost three-quarters (73%) saw no significant benefit in switching, and about half believed it would be difficult to learn a new operating system (49%).

Figure 40: Thoughts on their phone operating system and difficulties/benefits of switching



D8. To what extent do you agree or disagree with each of the following statements?
Base: Australians 14+ who have a smartphone for personal use (n=2,895), October-November 2024.

Australians with low to moderate confidence using technology were more likely to agree that learning a new operating system would be difficult (agree or strongly agree: Low 61%, Moderate 54%, High 41%).

Australians aged 60+ were statistically significantly more likely than other age groups to strongly agree that they can't see any significant benefits to switching to a phone with a different operating system (60-74 years 38%, 75+ years 40%; overall average 32%), while those aged 18-29 were statistically significantly more likely to be indifferent or disagree (Neither agree nor disagree 18-29 years 22%; Neither agree nor disagree overall average 17%, Disagree 18-29 years 11%; Disagree overall average 7%).

Australians with high confidence with technology were statistically significantly more likely than those with low or moderate confidence to strongly agree that they couldn't see any significant benefits to switching to a different operating system (High 38%; cf. Moderate 27%, Low 29%).

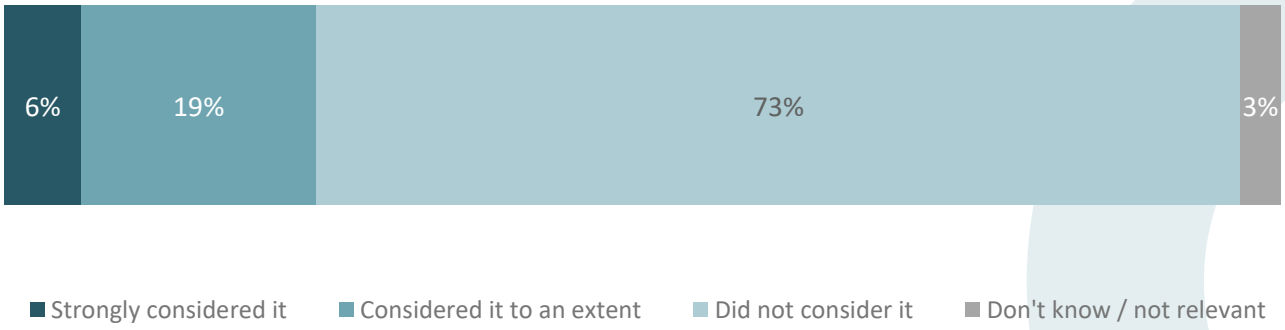
Figure 41: Can't see any significant benefits to switching to a phone with a different operating system

	Age						Confidence with technology		
	14-17	18-29	30-44	45-59	60-74	75+	Low (1-5)	Moderate (6-8)	High (9-10)
Strongly agree	26%	32%	28%	30%	**38%***	**40%***	29%	27%	**38%***
Agree	43%	33%	42%	44%	43%	47%	45%	**46%***	36%
Neither agree nor disagree	17%	**22%***	19%	18%	14%	8%	20%	19%	15%
Disagree	9%	**11%***	9%	6%	4%	3%	6%	6%	8%
Strongly disagree	2%	2%	2%	2%	1%	<1%	0%	1%	**2%***
Don't know / N/A	**2%***	<1%	<1	1%	1%	1%	1%	1%	1%

D8_4. To what extent do you agree or disagree with each of the following statements? – I can't see any significant benefits to switching to a phone with a different operating system A2. How old are you? Z12. On a scale of 1 to 10, where 1 is not confident at all and 10 is extremely confident, how would you rate your confidence using and navigating devices and the internet?
Base: Australians 14+ who have a smartphone for personal use (n=2,895), October-November 2024.
*Bolded text indicates the cohort is statistically significantly more likely to think this way.

For Australians who did not switch operating systems from their previous to current smartphone, around three-quarters (73%) did not even consider changing operating systems. There was no statistically significant difference between current iOS and Android users in whether they had considered (strongly or to an extent) changing operating systems (iOS 25%; cf. Android 24%).

Figure 42: Extent of considering switching operating system

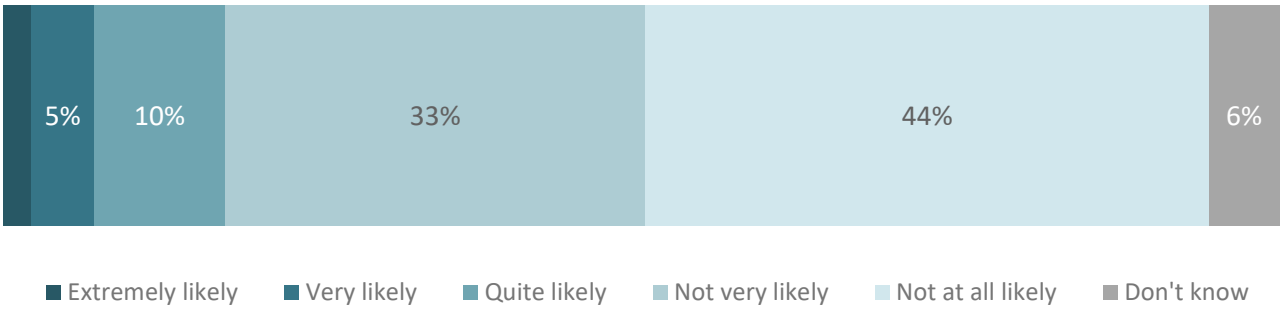


D6. To what extent did you consider switching to a smartphone with a different operating system this time around?
Base: Australians 14+ who have a smartphone for personal use and did not switch operating system between their most previous and current smartphones (n=2,414), October-November 2024.

5.3. Future intentions and concerns about switching operating systems

Thinking about their next smartphone, 77% of Australians were not very likely or not at all likely to choose a phone with a different operating system. Australians aged 60+ (86%) and those with high confidence in their digital literacy (80%) were statistically significantly more likely than other age groups or levels of confidence in digital literacy, respectively, to have indicated that they were not very or not at all likely to change operating systems.

Figure 43: Likelihood of choosing a phone with a different operating system

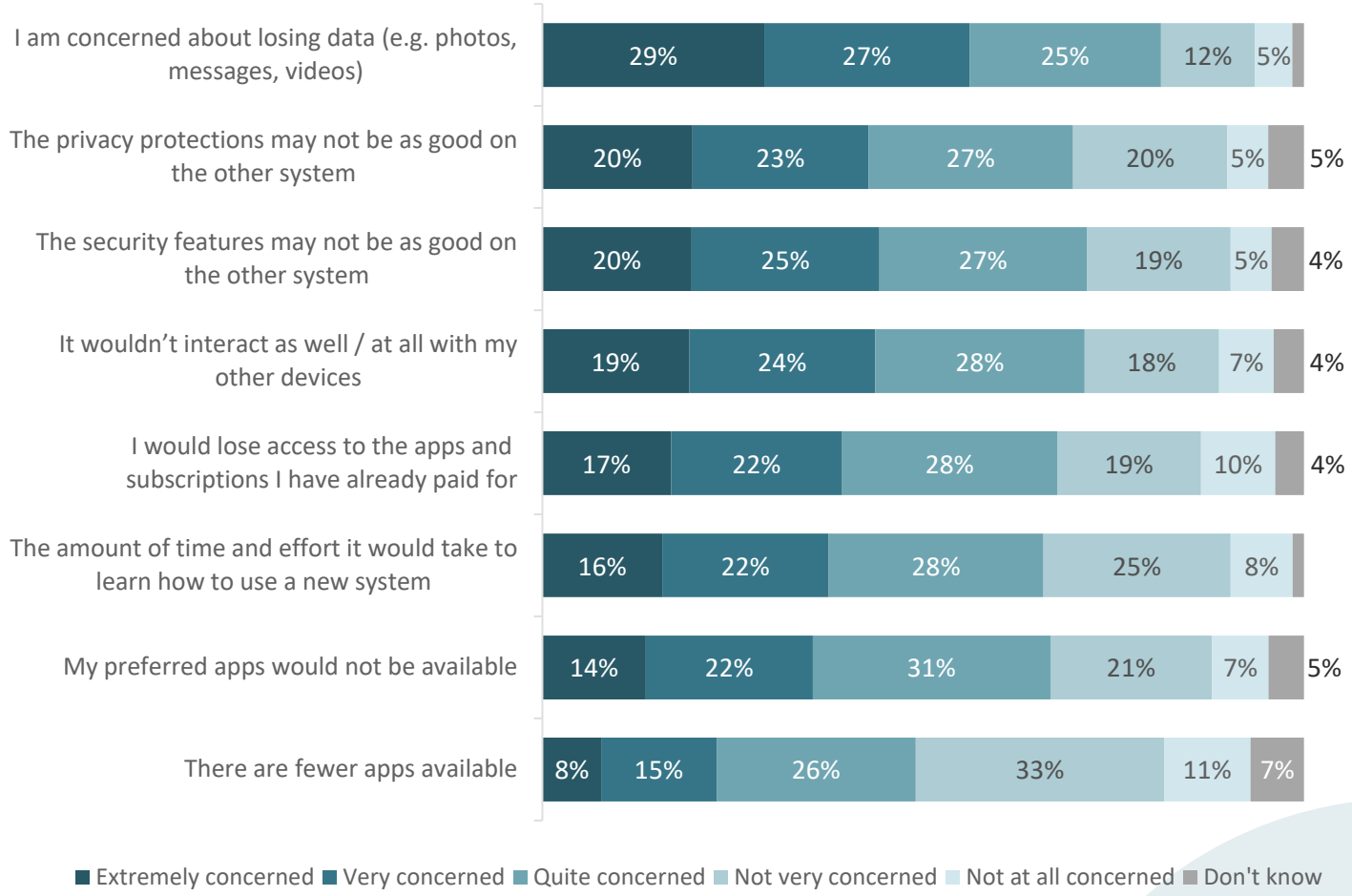


D9. How likely are you to choose a phone with a different operating system the next time you get a new smartphone?
Base: Australians 14+ who have a smartphone for personal use (n=2,895), October-November 2024.

More than half (56%) of Australians with a smartphone for personal use were extremely or very concerned about the potential for losing data when switching to a phone with a different operating system. Security (44%), lack of interaction with other devices (44%), and privacy (43%) were also top concerns for Australians.

38% of smartphone owners were extremely or very concerned about the learning curve of having a phone with a different operating system. This concern was statistically significantly more common among Australians 75+ (45%) and those with low confidence using technology (47%).

Figure 44: Concerns about switching phone operating systems

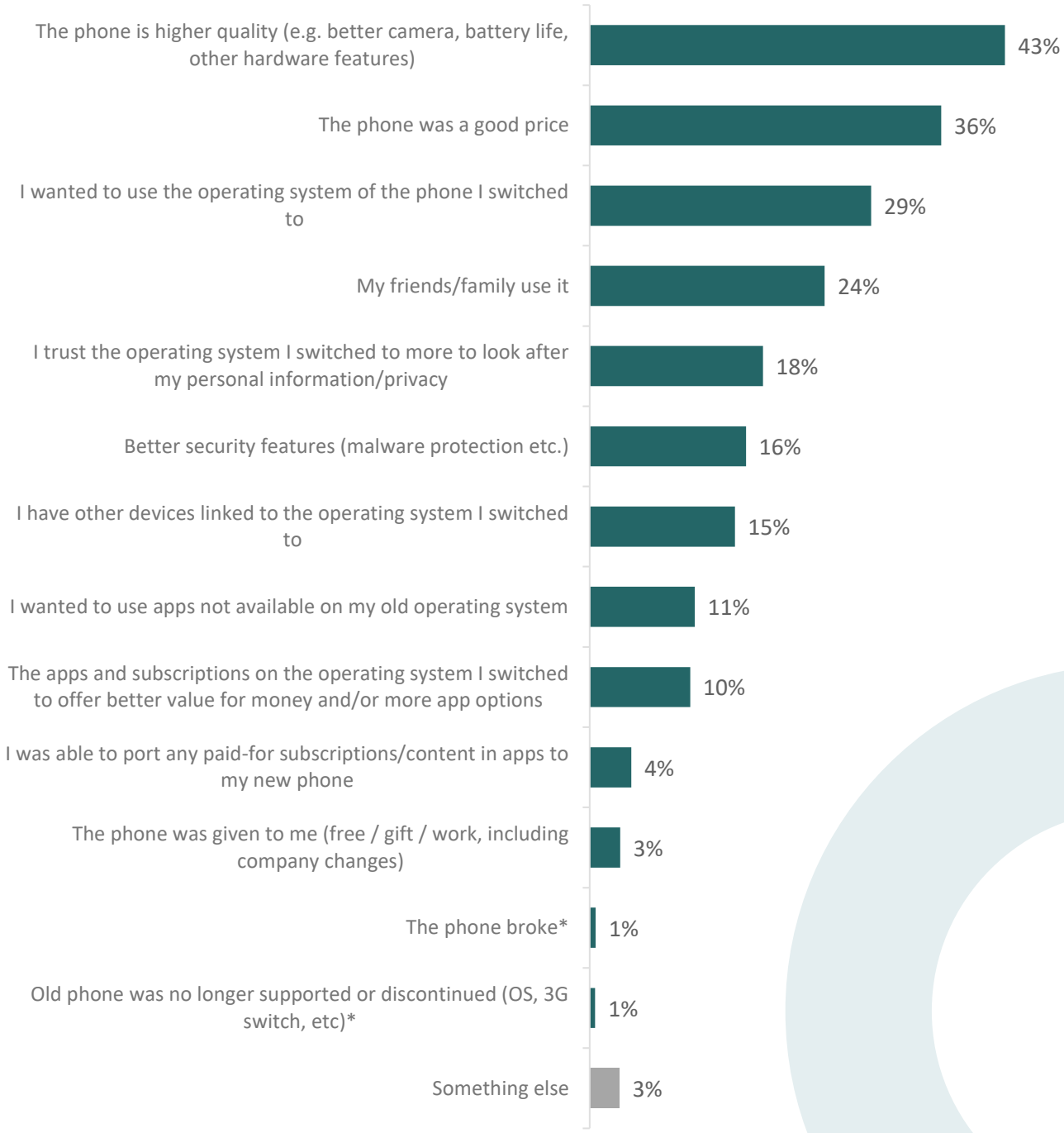


D10. Regardless of how likely you are to switch to a phone with a different operating system, how concerned are you about each of the following?
Base: Australians 14+ who have a smartphone for personal use (n=2,895), October-November 2024.

5.4. Experiences with switching operating systems

For Australians who had switched phone operating systems in the past, the most common reasons for switching were because the new phone was higher quality (43%) or was a good price (36%). Less than a third (29%) switched because they wanted to use the different operating system.

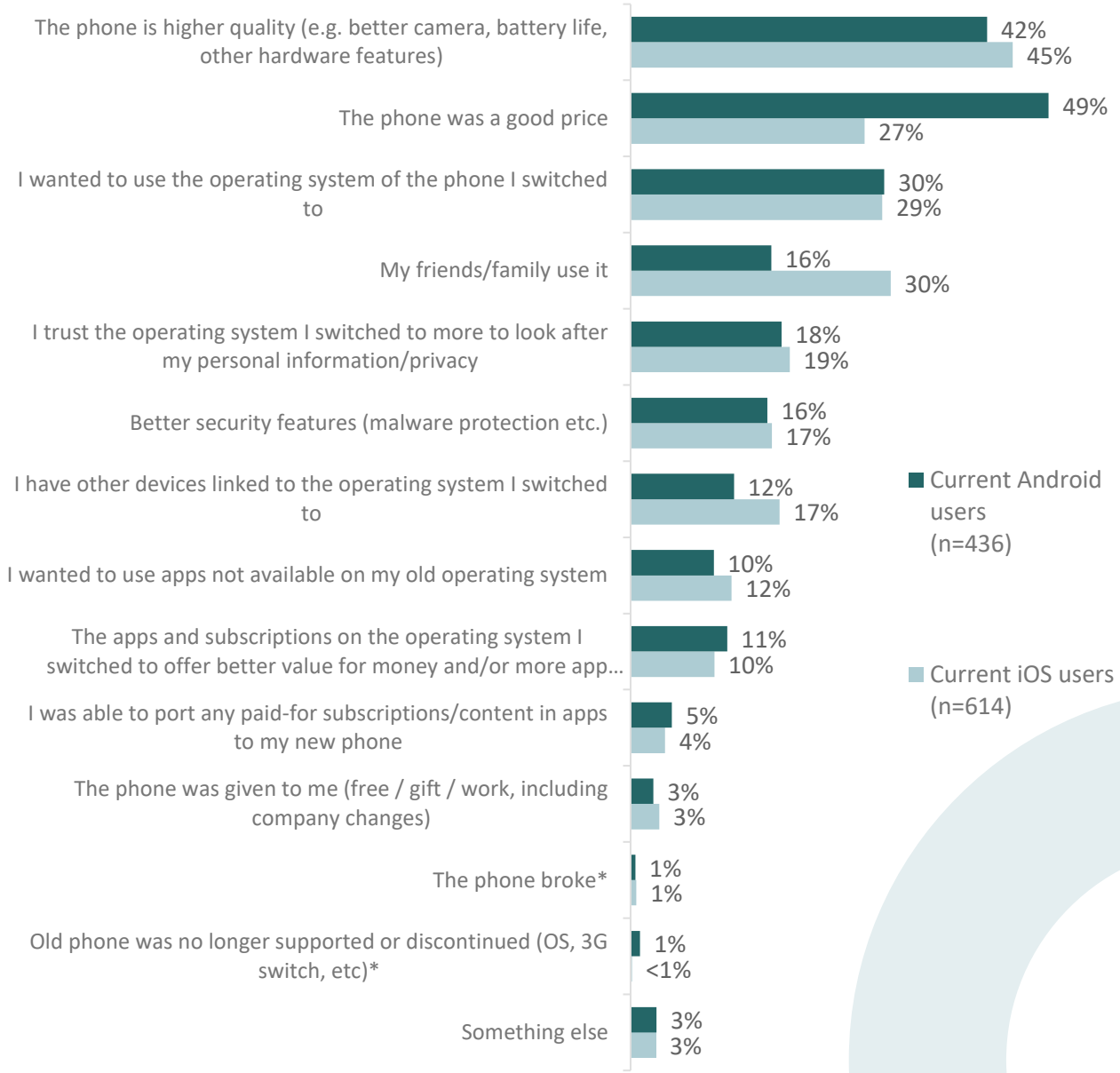
Figure 45: Reasons for switching phone operating systems



D11. Thinking back to when you last decided to switch operating systems, why did you switch? (Multiple responses)
Base: Australians 14+ who have a smartphone for personal use and have ever switched operating systems (n=1,065), October-November 2024.
** 'Something else' open-ended responses categorised into new options not included in original survey*

Looking at the differing reasons between current iOS and Android users for switching phone operating systems, current Android users were statistically significantly more likely than iOS users to have switched due to price (Android users 49%; cf. iOS users 27%). On the other hand, current iOS users were statistically significantly more likely than Android users to have switched because their friends or family use it (iOS users 30%; cf. Android users 16%).

Figure 46: Reasons for switching phone operating systems by current phone operating system



D11. Thinking back to when you last decided to switch operating systems, why did you switch? (Multiple responses) D3. What operating system does your current phone use?
Base: Australians 14+ who have a smartphone for personal use and have ever switched operating systems; Currently using iOS (n=614); Currently using Android (n=436), October-November 2024.
** 'Something else' open-ended responses categorised into new options not included in original survey*

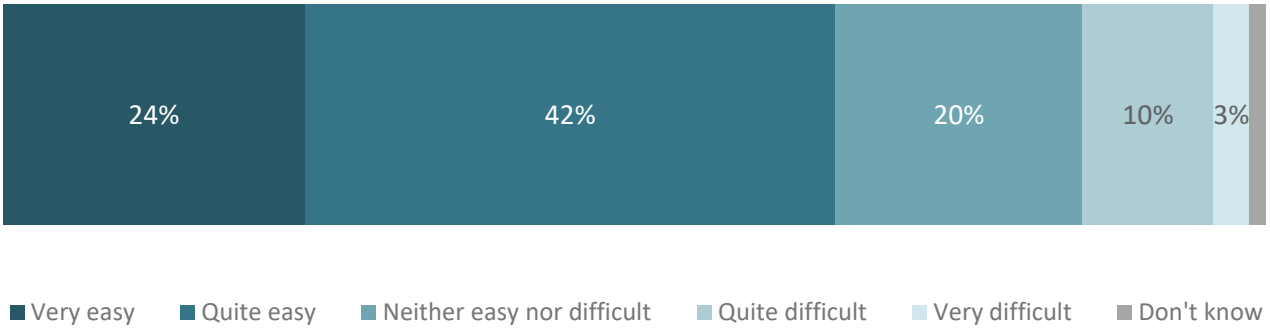
"I think the ease of use and the simplicity and having all devices under one ecosystem was a big move for me. And also I guess in terms of the trustworthiness or with Apple devices, they last longer as well and there's more support … if there's anything wrong, you can just go to the Apple store. Whereas the Pixel I had, there's not as many Google stores out there to get that support. But yeah, I think it was just more so having all my devices under one ecosystem. And it does also help in terms of tracking-wise as well. I like Find My iPhone as well as I think with passwords and everything, it's all saved and secure, which just makes it much easier. …

I did have a Pixel before, but I was just waiting … 'til the iPhone was good enough or there [were] new features that incentivised me [to] buy it." – In-depth interviews: Young adult

The majority (66%) of Australians who have switched phone operating system found it quite easy or very easy. There was no statistically significant difference in difficulty between current iOS and Android users (66% of iOS and 67% of Android users found it 'quite easy' or 'very easy' to switch to their current operating system).

Australians aged 75+ were statistically significantly less likely than other age groups to find switching operating systems quite or very easy (48%; overall average 66%), with ease increasing with reported confidence with using technology as well (Low 39%, Moderate 59%, High 76%).

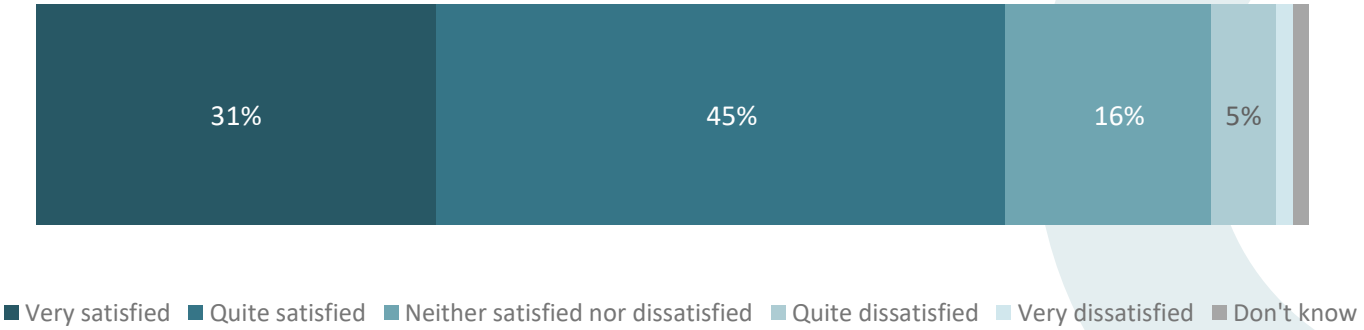
Figure 47 Difficulty of switching phone operating system



D12. How easy or difficult did you find it to switch operating systems?
Base: Australians 14+ who have a smartphone for personal use and have ever switched operating systems (n=1,067), October-November 2024.

Overall, more than three-quarters (76%) of Australians who had ever switched phone operating systems were satisfied with their experience. Satisfaction increased with confidence using technology (Low 61%, Moderate 71%, High 83%).

Figure 48: Satisfaction with switching phone operating systems



D13. Overall, how satisfied or dissatisfied were you with your experience of switching operating systems?
Base: Australians 14+ who have a smartphone for personal use and have ever switched operating systems (n=1,067), October-November 2024.

5.5. Smartphones and operating systems within families

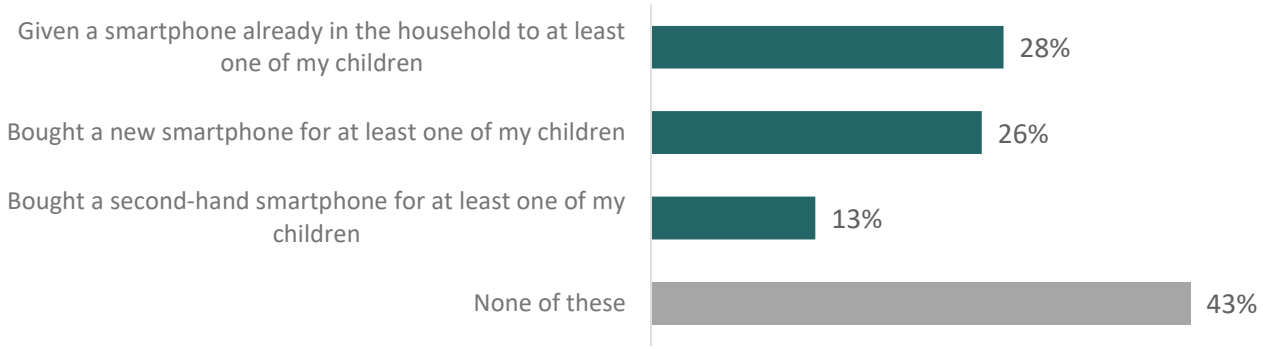
It is common for parents/guardians in Australia to purchase or provide their child's smartphone (whether that be new or second-hand). On the flip side, there are also individuals who purchase or give smartphones to

adults (i.e. their parents, grandparents, or other adults who may not be as proficient with technology). In both situations, the purchaser/provider of the phone may have a strong influence on what smartphone (and operating system) the recipient of the phone uses.

5.5.1. Parents providing children smartphones

The majority (57%) of Australians with children aged 0-17 had bought a new or second-hand smartphone for their child or given them a hand-me-down phone. Parents/guardians were statistically significantly less likely to have bought a new smartphone for their children if at least one of their children was under the age of 12 (19%), with over half (53%) not giving them any phone.

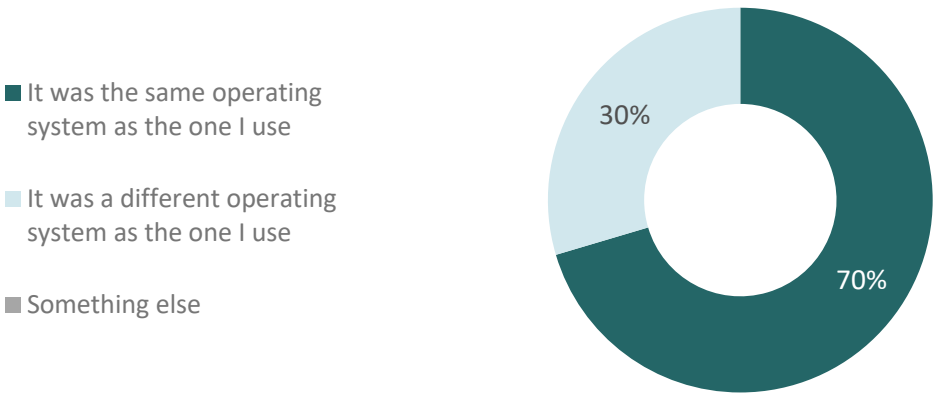
Figure 49: Purchased or given a smartphone for your child



E1. Which of the following have you done in the past 2 years for at least one of your children? (Multiple responses)
Base: Australian parents/guardians of children aged 0-17 (n=777), October-November 2024.

70% of parents/guardians who purchased a phone for their child, purchased a phone of the same operating system that they use. This increased with the age of the parent (18-29 years 56%, 30-44 years 68%, 45-59 years 77%).

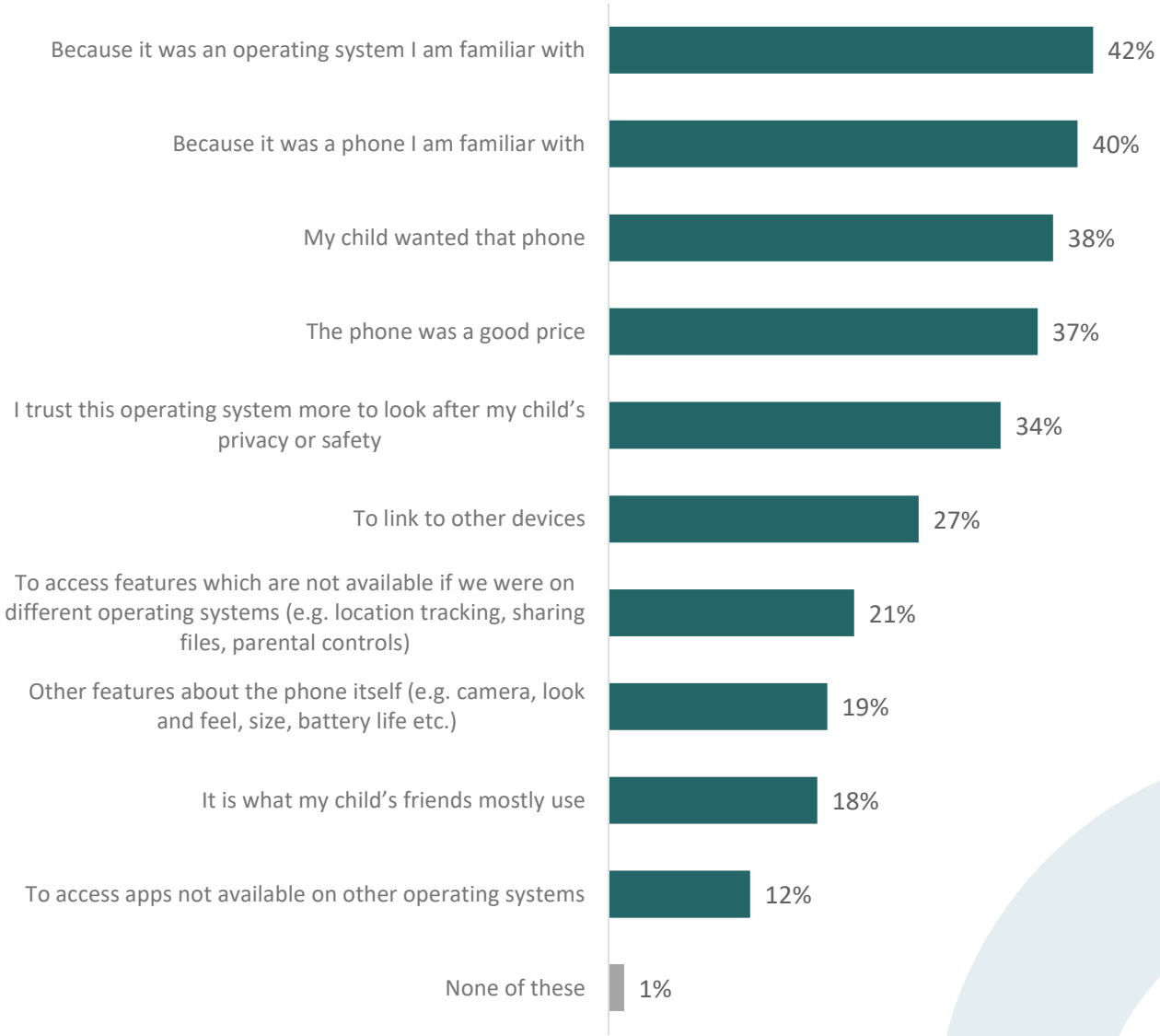
Figure 50: Operating system of smartphone purchased for child



E2. Which of the following applied the last time you bought a new or second-hand smartphone for one of your children?
Base: Australian parents/guardians of children aged 0-17 who purchased a smartphone for their child (n=298), October-November 2024.

Parents/guardians most commonly purchased phones for their children that shared the same operating system as their own because it was an operating system they were familiar with (42%) and because they were familiar with the phone itself (40%). The child's wants and the price of the phone were also key reasons (38% and 37% respectively).

Figure 51: Reason for purchasing phone for child with the same operating system



E3. Why did you choose a phone for your child with the same operating system as yours? (Multiple responses)
Base: Australian parents/guardians of children aged 0-17 who bought a smartphone for their child with the same operating system as their phone (n=211), October-November 2024.

During the IDIs, parents often mentioned choosing a phone with the same operating system for their child because both the phone and operating system were familiar to them, and it would be easier for them to help their child if they were to run into any issues.

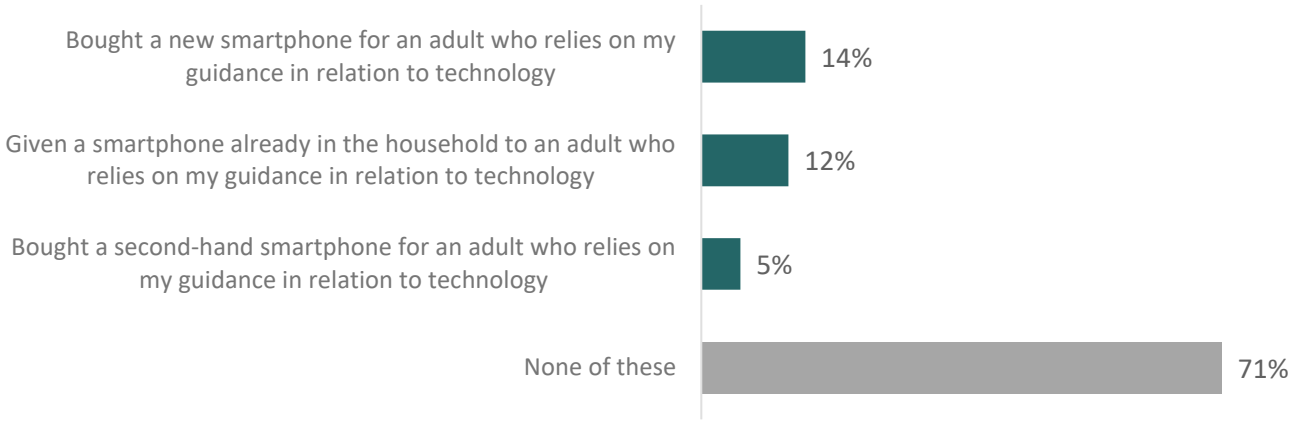
"I just wanted him to get an Android because being a kid you need your parent to help with so many things. And the last thing I want is [for] him to say, 'Can you help me with my Apple?' And then I won't have any idea either. We got it mainly just for our sake, mine and my wife's sake, we weren't big on Apple phones." – In-depth interviews: Parent of young children

5.5.2. Providing smartphones for dependent adults

Compared to the 57% of parents/guardians who had provided phones for their children, only 29% of Australians 14+ had purchased or given a phone to an adult who relied on their guidance to use technology

(such as a parent). Those aged 18-29 were most likely to have done this (42%; cf. 14-17 years 23%, 30-44 years 37%, 45-59 years 30%, 60-74 years 14%, 75+ years 9%).

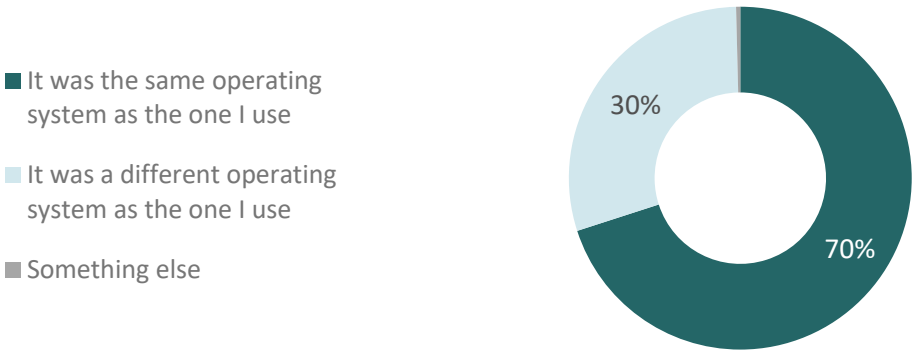
Figure 52: Purchased or given a smartphone for an adult



E4. Which of the following have you done in the past 2 years for an adult who relies on your guidance in relation to technology (e.g. a parent) who is not your child? (Multiple responses)
Base: Australians 14+ (n=3,075), October-November 2024.

70% of Australians who purchased a smartphone for such an adult bought one with the same operating system as their phone. 18-29-year-olds were statistically significantly less likely than other age groups to have purchased a phone with the same operating system as their own (59%; overall average 70%), while 45-59-year-olds were statistically significantly more likely to have purchased one with the same operating system as their own (85%). 53% of Australians with low confidence with technology who had purchased a smartphone for such an adult bought one with the same operating system (cf. Moderate 70%, High 73%) as their own, and 47% purchased one with a different operating system (cf. Moderate 29%, High 27%).

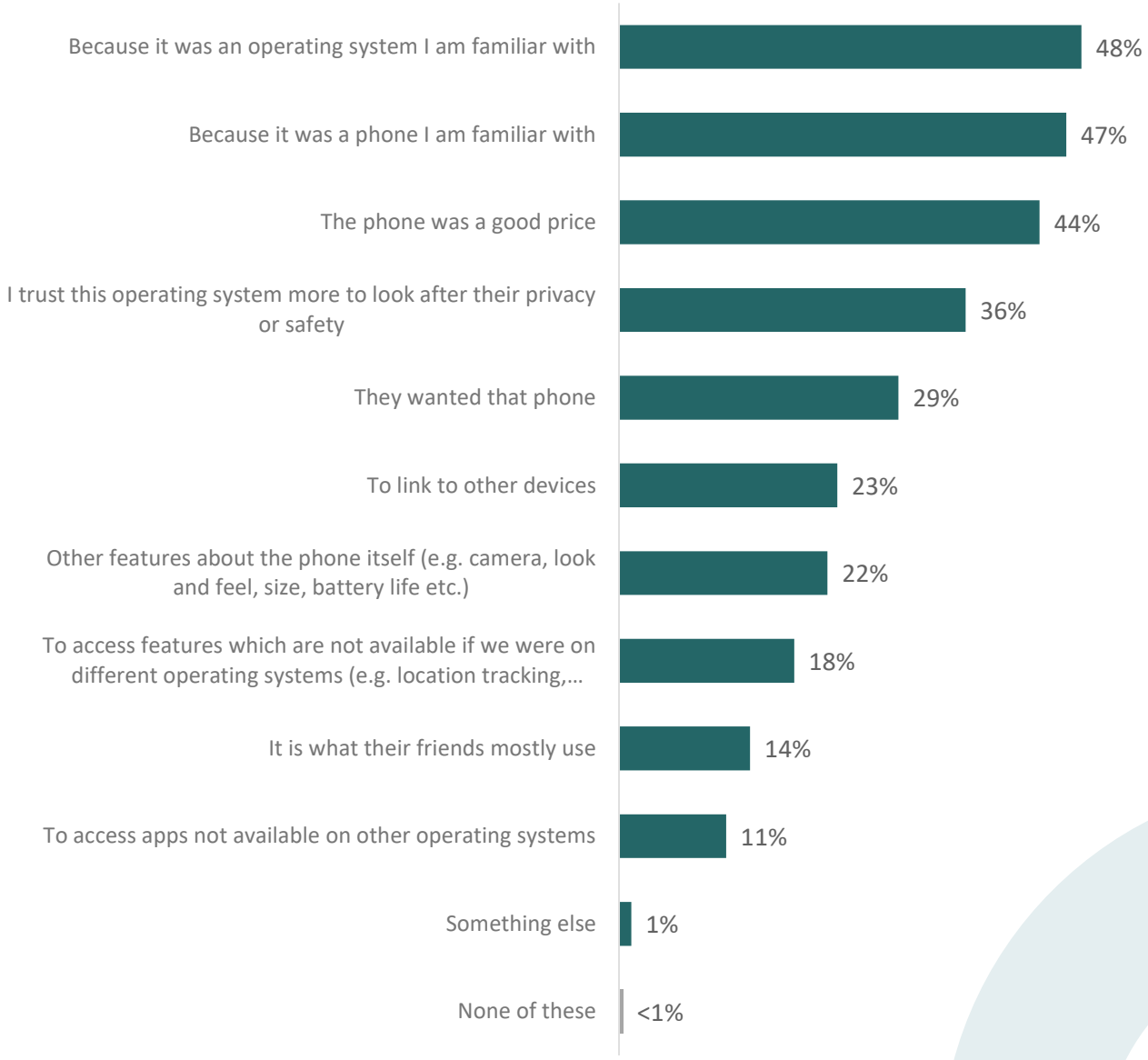
Figure 53: Operating system of smartphone purchased for an adult



E5. Which of the following applied the last time you bought a new or second-hand smartphone for an adult who relies on your guidance in relation to technology (e.g. a parent)?
Base: Australians 14+ who purchased a smartphone for an adult (n=527), October-November 2024.

The top 2 reasons for Australians 14+ purchasing a smartphone with the same operating system for an adult who relies on their technology guidance were the same as for parents/guardians purchasing a smartphone for their child. However, price was a higher concern (44%; cf. 37% Purchasing for child).

Figure 54: Reason for purchasing phone for adult with the same operating system



E6. Why did you choose a phone with the same operating system as yours? (Multiple responses)
Base: Australians 14+ who bought a smartphone for an adult with the same operating system as their phone (n=373), October-November 2024.

Section 06

Online and mobile gaming

6. Online and mobile gaming

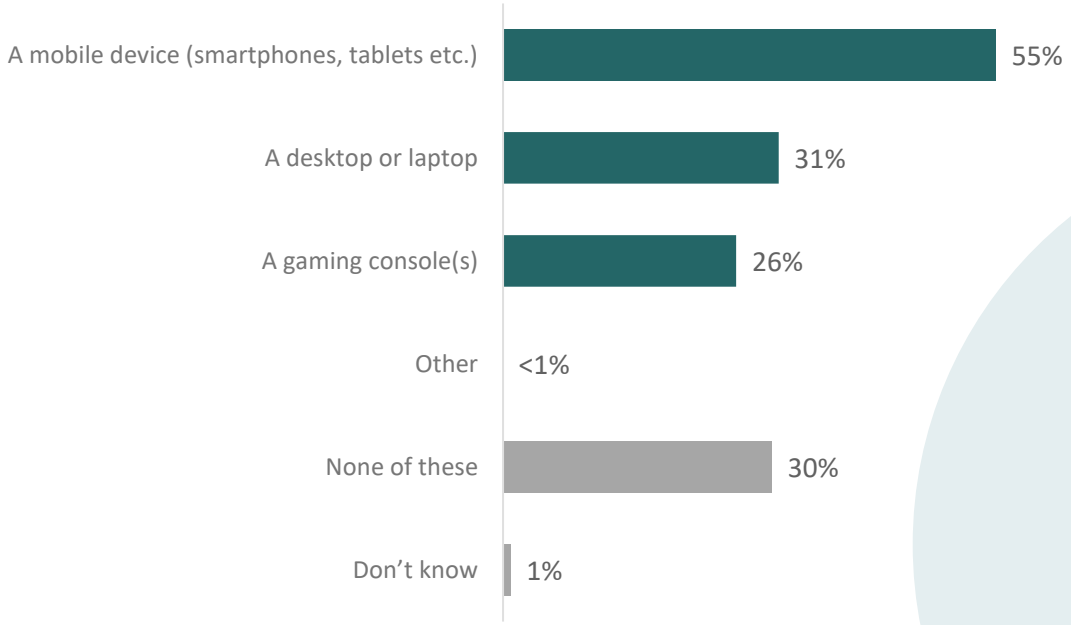
6.1. Usage of online and mobile gaming systems

69% of Australians aged 14 and over had played online or mobile games in the previous 6 months. Mobile devices, including smartphones and tablets, were the most popular type of device used to play games in the past 6 months (55%), followed by desktop or laptop devices (31%) and gaming consoles (26%).

Collectively, mobile devices, desktop or laptop computers and gaming consoles used to play online or mobile games are referred to in chapter 6 of this report as 'devices'. The term 'online or mobile game' is also used interchangeably with 'digital game'. 30% of Australians 14+ did not use any devices to play games in the past 6 months.

Australians aged 14+ who had used desktop or laptop devices and those who used gaming consoles were more likely than mobile device users to have indicated using more than one type of device for gaming in the previous 6 months, having chosen 2.1 or 2.2 types of devices on average, respectively. By contrast, those who had used a mobile device for gaming in the past 6 months used 1.7 types of devices on average, being less likely to use other types of devices for gaming within this timeframe.

Figure 55: Types of online and mobile devices used for gaming in the past 6 months



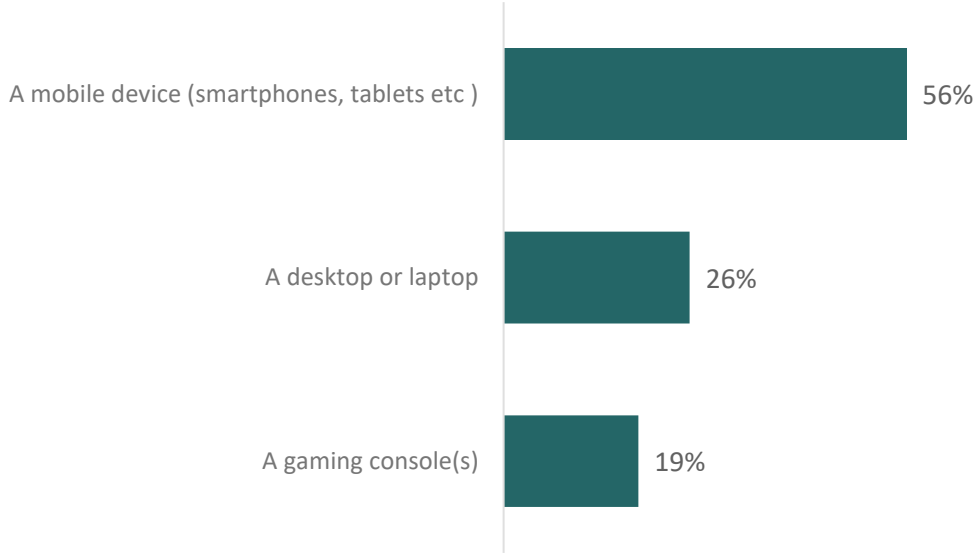
F1. Which of the following devices have you used to play games on in the past 6 months? (Multiple responses)
Base: Australians 14+ (n=3,075), October-November 2024.

The proportion of Australians who had used at least one type of device to play games in the past 6 months varied significantly with age. 96% of Australians aged 14-17 years old and 86% of those aged 18 to 29 had used one or more types of devices for online or mobile gaming in the previous 6 months, compared to 52% of 60-74-year-olds and 42% of Australians aged 75 and over.

Self-reported confidence with technology was also associated with online or mobile gaming. Of those who had rated their confidence with technology highly, 75% had used a device for online or mobile gaming in the past 6 months, compared to 67% of those with a moderate confidence score of between 6 and 8 out of 10, and 53% of those who rated their confidence low, between 1 and 5.

Amongst Australians 14+ who had used more than one type of device for gaming in the previous 6 months, mobile devices were the most likely to be used most frequently (56%), followed by a desktop or laptop (26%) and gaming consoles (19%).

Figure 56: Gaming device used most often amongst those who used more than one type of device



F2. Which of these do you use most often?
Base: Australians 14+ who have used more than one type of device to play games in the last 6 months (n=1,014), October-November 2024.

Mobile devices were the most common type of device used for gaming across all age groups. For desktop/laptop computers and gaming consoles, these results were consistent across all age groups except for Australians aged 30-44 years, who were more likely to have used gaming consoles most often (25%) than a desktop or laptop computer (20%) in the past 6 months.

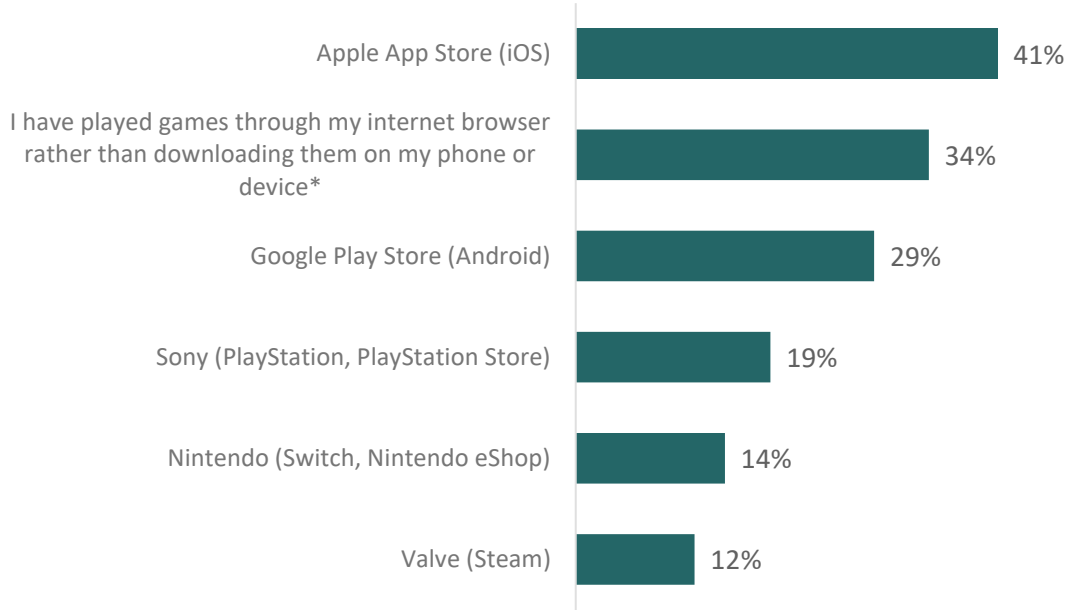
Female Australians aged 14 and over were statistically significantly more likely than males to have used mobile devices most often for gaming in the previous 6 months (71%; cf. Males 44%). Those who reported their confidence with technology to be high were statistically significantly more likely to have used a gaming console most often (22%) compared to those with a moderate (15%) or low technology confidence score (12%).

6.1.1. Accessing online and mobile games

Amongst Australians aged 14 and over who accessed online or mobile games within the previous 6 months, the most common ways games were accessed were through:

- the Apple App Store (iOS) (41%),
- Internet browsers on desktop or mobile devices (34%),
- the Google Play Store (29%),
- Sony (PlayStation, PlayStation Store) (19%),
- Nintendo (Switch, Nintendo eShop) (14%), and
- Valve (Steam) 12%.

Figure 57: Most common means of accessing digital games across all platforms



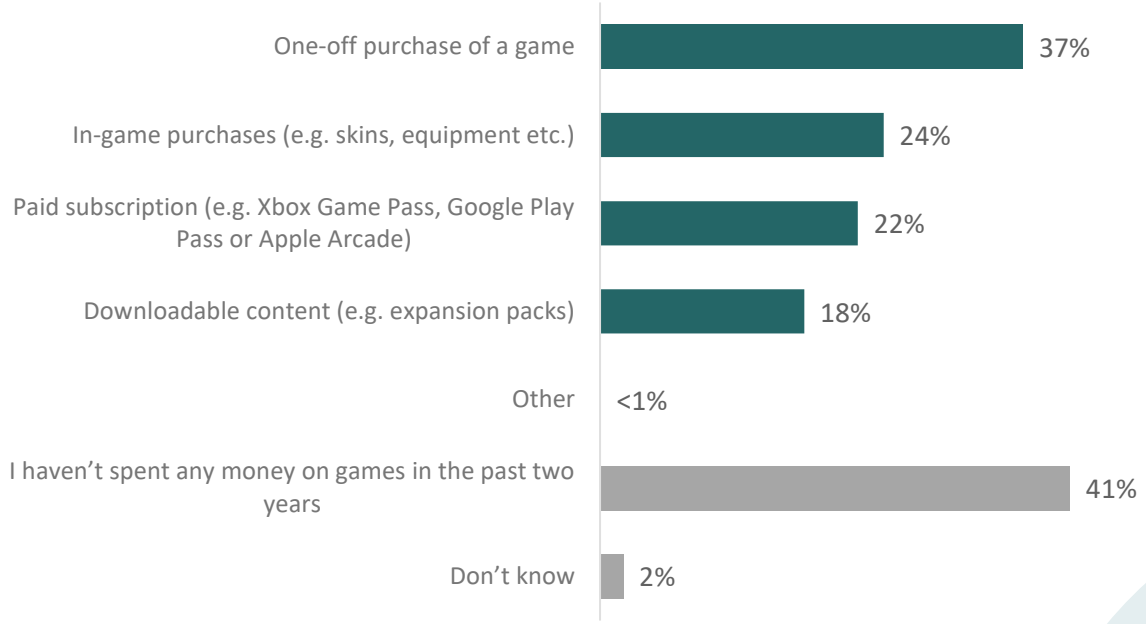
F3. Thinking of the devices you used to play games, which of the following have you used to access games in the past 6 months? (Multiple responses)
Base: Australians 14+ who have used any platform to play online games in the last 6 months (n=2,069), October-November 2024.
** This is the combined total of respondents who answered with 'I have played games through my phone's internet browser rather than downloading them on my phone' and 'I have played games through my device's internet browser rather than installing them on my computer.'*

6.2. Spending money on online and mobile gaming

6.2.1. Types of online gaming-related purchases

Of Australians aged 14 and over who had accessed online or mobile games in the past 6 months, over half (57%) had spent money on online games in the past two years. The most common type of online gaming-related purchase was one-off purchases of a game (37%), followed by in-game purchases (24%) and paid subscriptions (22%). 41% of Australians aged 14 and over who accessed online games in the past 6 months had not spent any money on online games within the past two years.

Figure 58: Types of online gaming-related purchases within the past two years



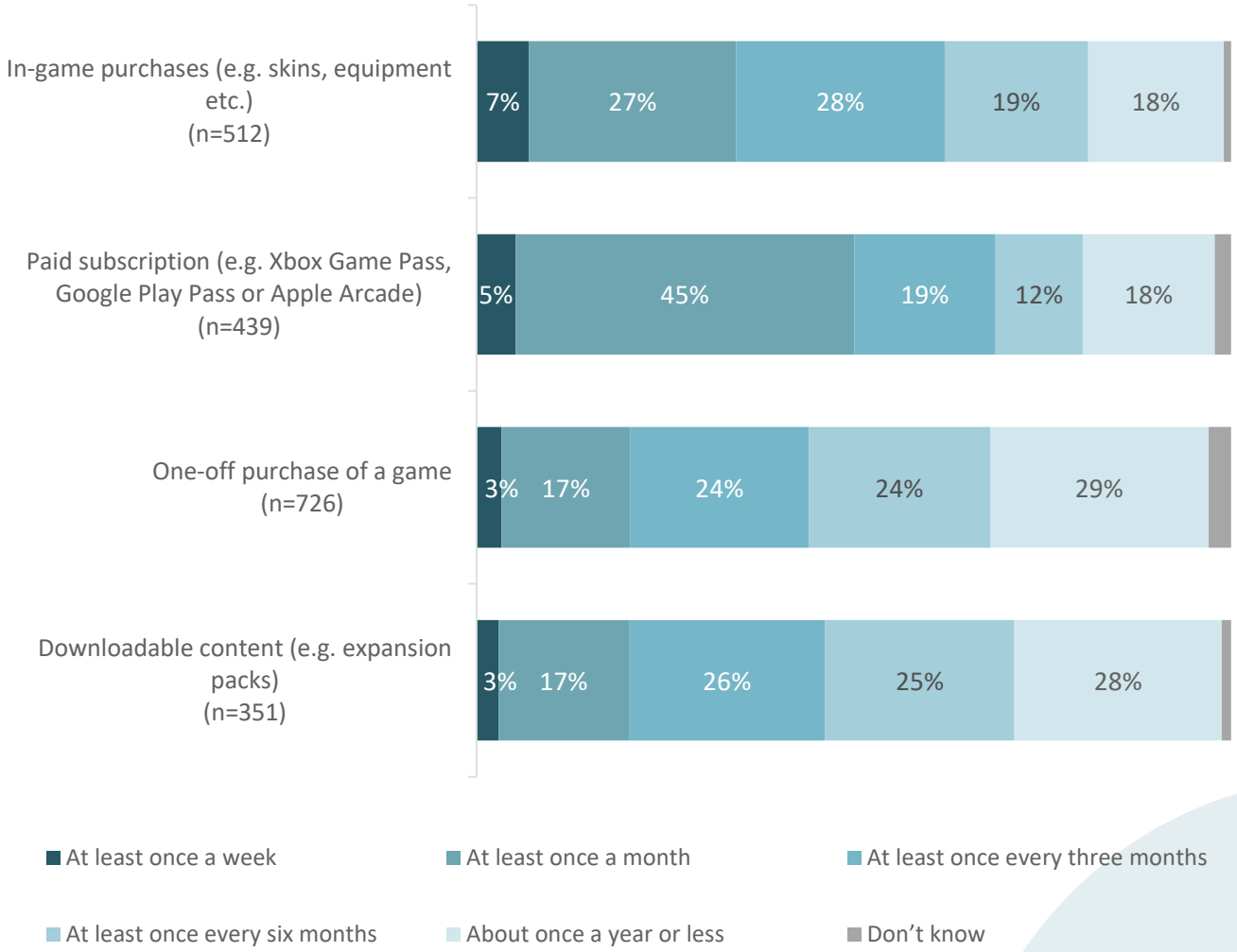
F9. Over the past two years, have you spent money on online games in any of the following ways? (Multiple responses)
Base: Australians 14+ who have used any platform to play online games in the last 6 months (n=2,076), October-November 2024.

Gamers aged between 14 and 44 were statistically significantly more likely than older gamers to have spent money on online games in any of the above ways within the last two years (73%; cf. 33% of gamers aged 45+), with this likelihood peaking in 18-29-year-olds (79%; overall average 57%). Male gamers were also statistically significantly more likely to have spent money on online games within the past two years than female gamers (Males 66%; cf. Females 48%). Further, gamers who were also parents/guardians of children aged under 18 years were statistically significantly more likely to have spent money on games within the past two years (70%), compared to adult gamers with no children aged under 18 (48%).

6.2.2. Frequency of online gaming-related purchases

Within the past two years, Australians aged 14 and over typically did not spend money on online games more frequently than once every three months. Of those who had made a one-off purchase of a game within the past two years, only 20% did so at least once a month or more. A third (34%) of those who had made in-game purchases within the past two years did so at least once a month, while 20% of those who bought downloadable content did so at least this frequently. On the other hand, 50% of those who bought a paid online gaming subscription within the past two years paid for subscription fees at least once a month.

Figure 59: Frequency of online gaming-related purchases by type of purchase

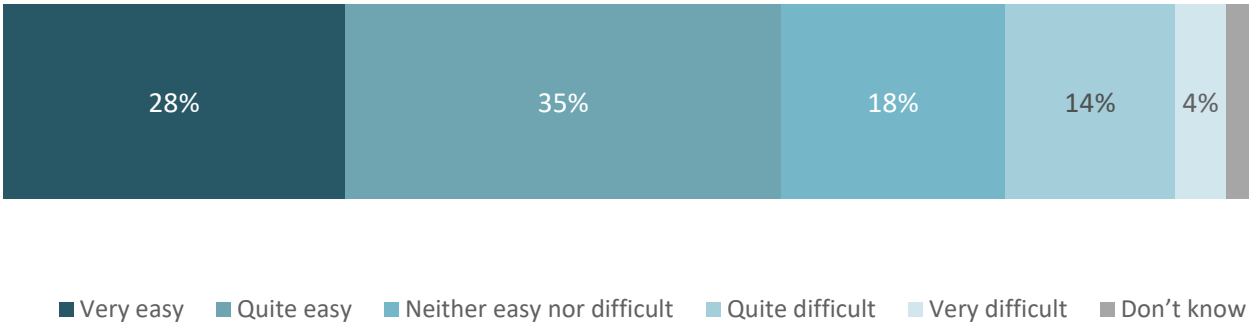


F10. Over the past two years, how often have you spent money on online games in the following way?
Base: Australians 14+ who have spent money on online games within the past two years (n=351-726), October-November 2024.

6.2.3. Keeping track of money spent on online gaming

For Australians aged 14 and over who had spent money on games within the past two years, a majority (62%) felt it was either quite easy or very easy for them to keep track of how much real-world money they had spent on online games. Only 18% felt it was either quite difficult or very difficult to keep track of the real-world money they had spent on online games.

Figure 60: Ease of tracking money spent on online games



F11. How easy or difficult is it for you to keep track of how much real-world money you spend on online games?
Base: Australians 14+ who have spent money on online games in the past two years (n=1,133), October-November 2024.

Australians aged 14-17 were more likely than other age groups to find it difficult to keep track of how much real-world money they have spent on online games (26% quite or very difficult; overall average 18%).

Self-reported confidence with technology was somewhat associated with ease of tracking real-world money spent on online games. Those who had high confidence with technology were statistically significantly more likely to find it quite or very easy to keep track of these kinds of purchases (70%), compared to those who rated their confidence as low (36%).

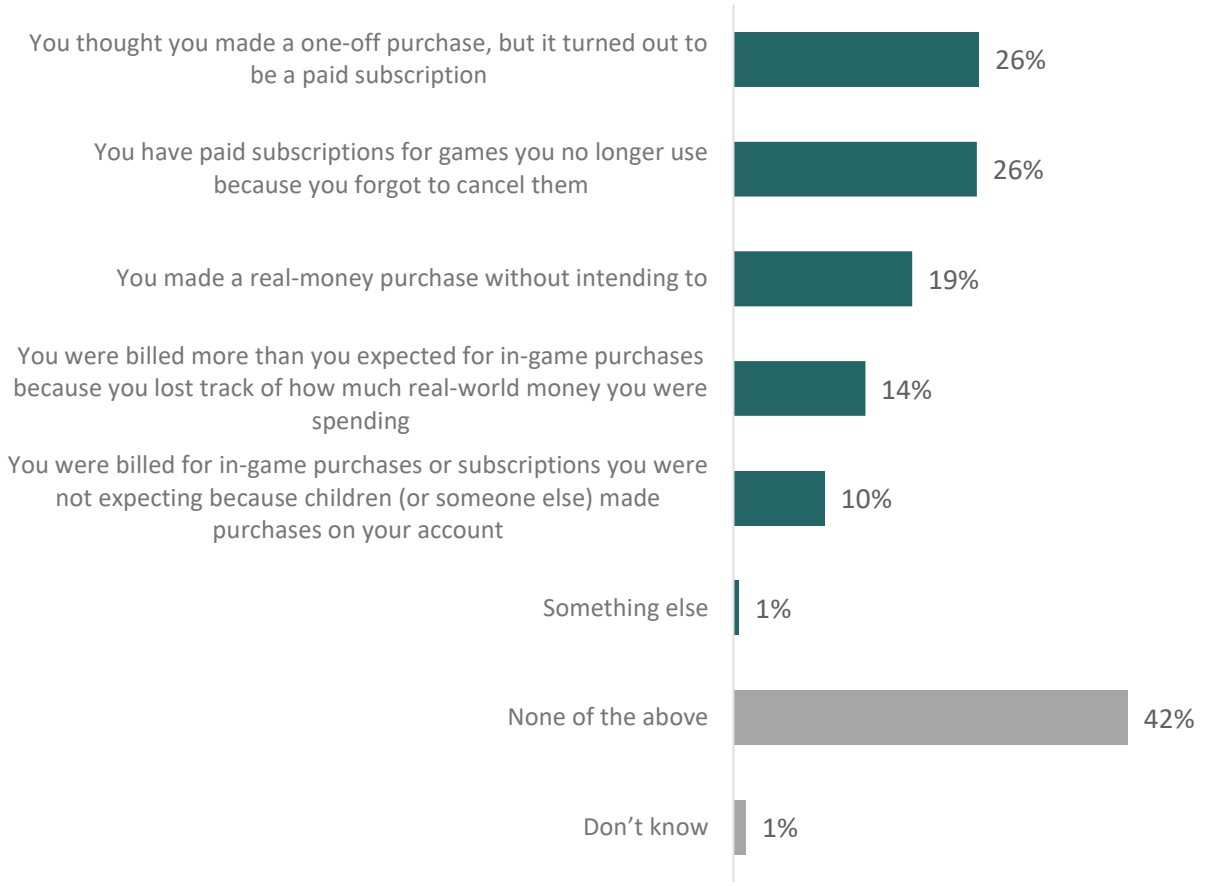
Having children under the age of 18 was also associated with ease of keeping track of gaming-related purchases. Adults with no children under the age of 18 were statistically significantly more likely to find it quite or very easy (68%) to track how much real-world money they had spent on online games, compared to adults with children aged under 18 years (58%).

Ease of tracking how much real-world money is being spent differed by type of game-related purchases. Those who had made a one-off purchase of a game within the past two years were statistically significantly more likely than those who had made other kinds of game-related purchases in the past two years to feel it was very easy to keep track of how much real-world money they had spent (31%; overall average 28%), while those who made in-game purchases were statistically significantly more likely to find it quite or very difficult to keep track of their gaming-related purchases (23%; overall average 18%).

While 62% of Australians who had spent money on online games within the past two years felt it was either quite easy or very easy for them to keep track of how much real-world money they spent, 57% had experienced some kind of issue with keeping track of the real-world money spent on these purchases. The most common issues experienced were purchasing a paid subscription that was thought to be a one-off purchase (26%) and paying for subscriptions that were no longer used because they forgot to cancel them (26%).

19% made a real-world money purchase without intending to, 14% were billed more than they expected because they had lost track of how much money they were spending, and 10% were billed more than expected because someone else (including children) had made purchases on their account.

Figure 61: Issues with keeping track of gaming-related purchases



F12. Which of the following have ever happened to you? (Multiple responses)
Base: Australians 14+ who have spent money on online games in the past two years (n=1,133), October-November 2024.

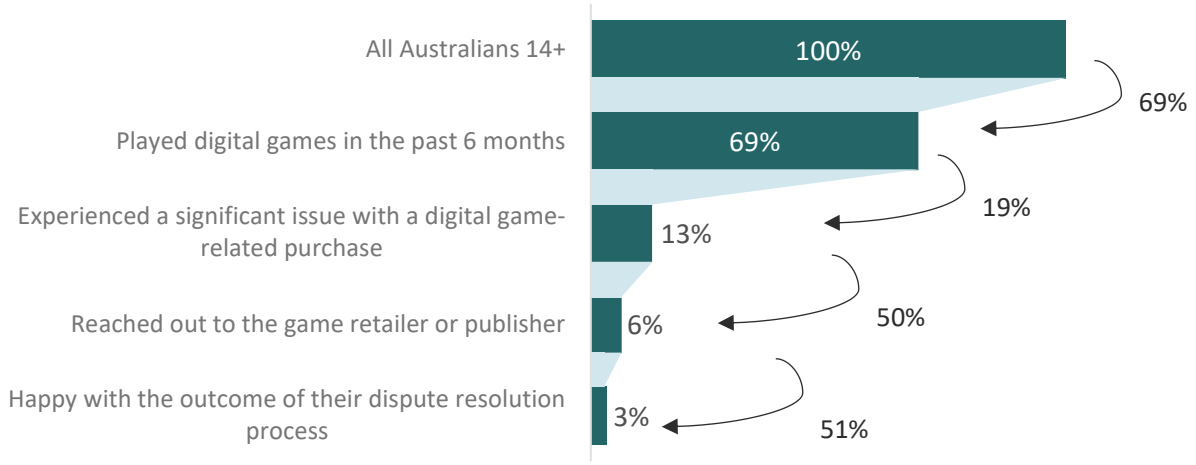
Australians aged 18 to 29 years old were statistically significantly more likely than other age groups to have experienced any of the above issues (67%; overall average 57%) and to have purchased a paid subscription thinking it was a one-off purchase (32%; overall average 26%).

Parents/guardians of children under the age of 18 were statistically significantly more likely than adults with no children under the age of 18 to have experienced at least one of the above issues with keeping track of gaming-related purchases (63%; Adults with no children under 18 years 52%). In particular, they were statistically significantly more likely than adults with no children under 18 to have paid for game subscriptions they no longer use because they had forgotten to cancel them (32%; cf. Adults with no children under 18 21%), been billed more than they expected for in-game purchases because they lost track of how much real-world money they were spending (18%; cf. Adults with no children under 18 10%), and been billed for in-game purchases or subscriptions they were not expecting because children (or someone else) made purchases on their account (15%; cf. Adults with no children under 18 6%).

6.3. Issues with gaming-related purchases

19% of Australians aged 14 and over who had played digital games in the past 6 months had experienced a significant issue with a digital game they have spent money on. Of this group, 50% decided to reach out to the game retailer or publisher to seek recourse, and 51% of these consumers received an outcome they were happy with. Of the consumers who had an issue with a digital game-related purchase and did not reach out to the game retailer or publisher (6% of all Australians 14+), 44% said this was because they felt it would take too long to achieve a solution.

Figure 62: Funnel of Australians 14+ who have undergone dispute resolution regarding an issue with a digital game-related purchase

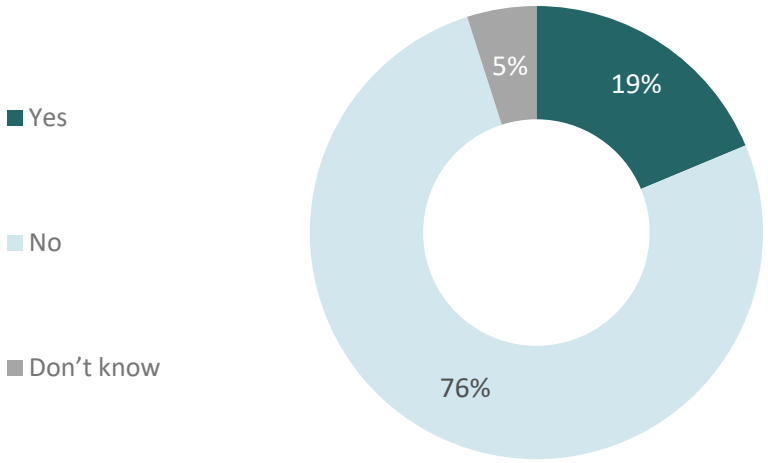


F1. Which of the following devices have you used to play games on in the past 6 months? (Multiple responses) F13. Have you ever experienced a significant issue with a digital game that you spent money on (not a free game which you have no made purchases for)? F14. Did you contact the retailer or publisher you bought the game from, whether online (e.g. Steam, App Store) or in-store (e.g. EB Games), to seek a refund or other solution to the issue? F15. How was the situation resolved?
Base: Australians 14+ (n=3,075), Australians 14+ who played online games in the past 6 months (n=2,076), Australians 14+ who experienced a significant issue with a digital game-related purchase (n=370), Australians 14+ who had contacted a retailer/ publisher to seek a refund or other solution to their digital game-related issue (n=180), October-November 2024.

6.3.1. Prevalence of experiencing digital game-related issues

A majority of Australians aged 14 and over who played online games in the past 6 months had not experienced any significant issues with a digital game they had spent money on (76%).

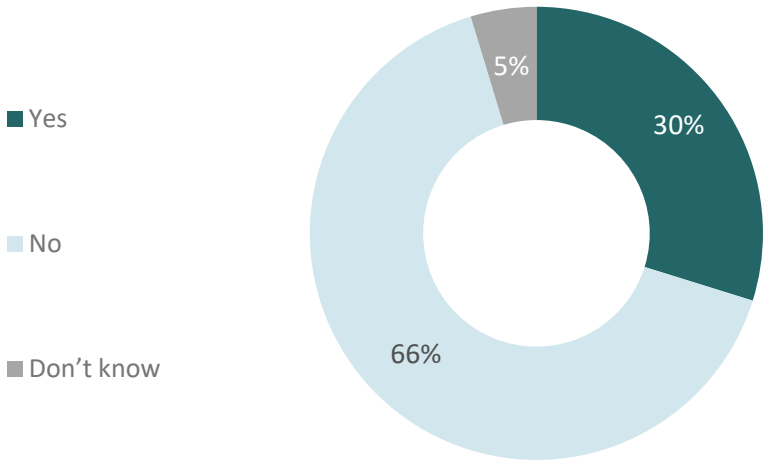
Figure 63: Experienced a significant issue with a digital game money was spent on



F13. Have you ever experienced a significant issue with a digital game that you spent money on (not a free game which you have not made purchases for)?
Base: Australians 14+ who have used any platform to play online games in the last 6 months (n=2,076), October-November 2024.

While 19% of Australians aged 14+ who played online games experienced significant issues with a digital game they had spent money on, this figure increased to 30% when only considering those who had spent money on online games within the past two years.

Figure 64: Experienced a significant issue with a digital game money was spent on - Those who have spent money on online games



F13. Have you ever experienced a significant issue with a digital game that you spent money on (not a free game which you have not made purchases for)? F9. Over the past two years, have you spent money on online games in any of the following ways? – All except N/A and Don't know (Multiple responses)
Base: Australians 14+ who have spent money on online games in the past two years (n=1,133), October-November 2024.

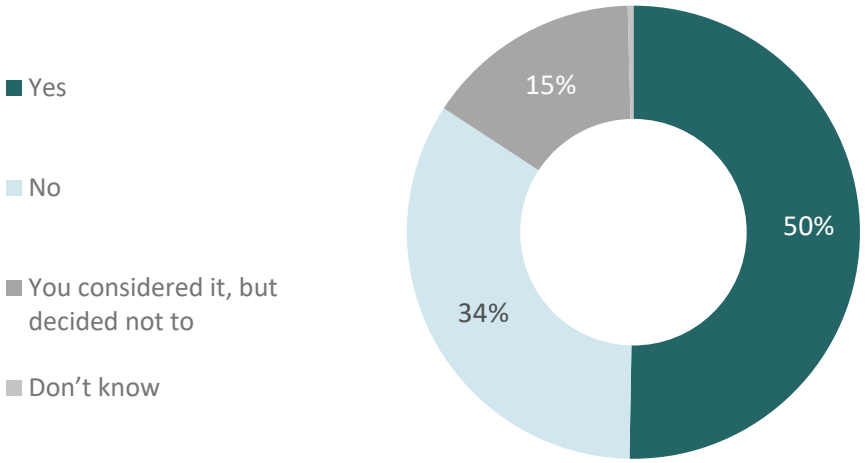
Males were statistically significantly more likely than females to have experienced a significant issue with a digital game they had spent money on (22%; cf. Females 15%). 18-to-29-year olds were also statistically significantly more likely than other age groups to have experienced such an issue (18-29 years 29%; overall average 19%).

Parents/guardians of children aged 17 or under were also statistically significantly more likely to have experienced a significant issue with a digital game they themselves had spent money on (23%; cf. Adults with no children aged under 18 16%). One in four (25%) parents/guardians who had children aged 0 to 11 years old and who had played online games in the past 6 months encountered such an issue.

6.3.2. Dispute resolution experience

50% of Australians aged 14 and over who had experienced a significant issue with a digital game they had spent money on decided to contact the retailer or publisher they had bought the game from. This increased to 53% of those who had spent money on online games within the past two years.

Figure 65: Contacted a retailer or publisher after experiencing an issue with a digital game-related purchase

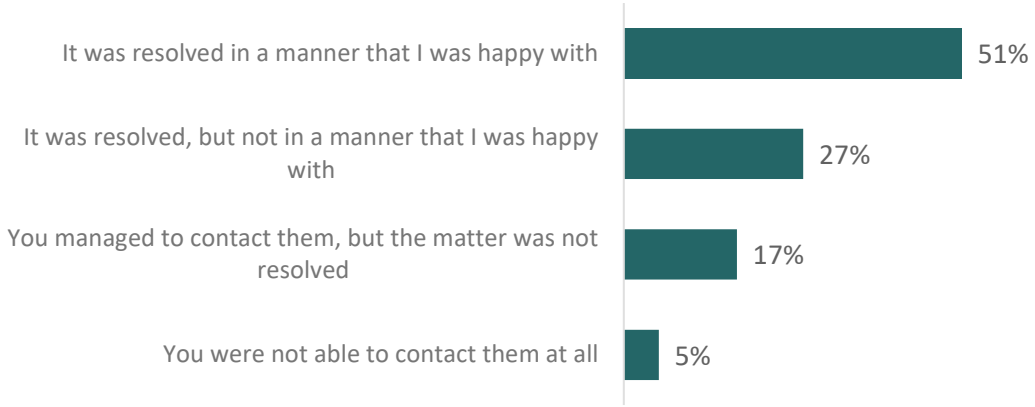


F14. Did you contact the retailer or publisher you bought the game from, whether online (e.g. Steam, App Store) or in-store (e.g. EB Games), to seek a refund or other solution to the issue?
Base: Australians 14+ who have had a significant issue with a digital game (n=370), October-November 2024.

62% of those aged 45-59 years who had experienced a significant issue with a digital game they had spent money on had contacted the gaming retailer or publisher, making them the most likely age group to have done so (cf. 30-44 years 55%, 18-29 years 42%, 14-17 years 39%).

Out of those who had chosen to contact the retailer or publisher after having a significant issue with a digital game-related purchase, 51% were able to have their issue resolved in a manner they were happy with. 27% were able to contact the publisher or retailer but did not have their situation resolved satisfactorily, whilst 17% had made contact with the publisher or retailer but their matter was not resolved. 5% were not able to contact the publisher or retailer of the game they had a significant issue with.

Figure 66: Outcome of contact with digital game publisher or retailer

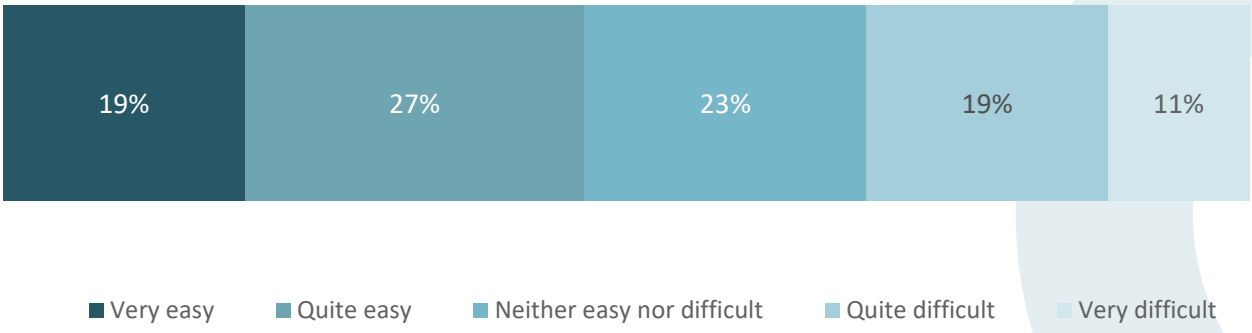


F15. How was the situation resolved?
Base: Australians 14+ who contacted a retailer/publisher to seek a refund or other solution to their digital game-related issue (n=180), October-November 2024.

People with high self-reported confidence with technology were more likely than those with low to moderate confidence to have had their situation resolved in a manner they were happy with (60%; cf. Low to Moderate 40%). On the other hand, those with low to moderate confidence were more likely to have had their issue resolved in a manner they were not happy with (32%; cf. High 23%) and to have contacted the retailer or publisher but not had their matter resolved (22%; cf. High 13%).

Nearly half (47%) of those who had chosen to contact a retailer or publisher after having a significant issue with a digital game they had spent money on had found it easy (quite or very easy) to seek their sought-after solution, with 19% having found it very easy. Conversely, 31% found it was either quite or very difficult to seek a solution to their issue.

Figure 67: Ease of seeking a solution to their digital game-related issue



F16. How easy or difficult did you find it to seek this refund or other solution?
Base: Australians 14+ who had contacted a retailer/ publisher to seek a refund or other solution to their digital game-related issue (n=180), October-November 2024.

Consumers with high confidence using technology were more likely than those with low to moderate confidence to have found it either quite or very easy to seek a solution (High 52%; cf. Low to Moderate 40%). On the other hand, those with low to moderate confidence were more likely to have found it quite or very difficult to seek a solution to their issue (35%; cf. High 27%).

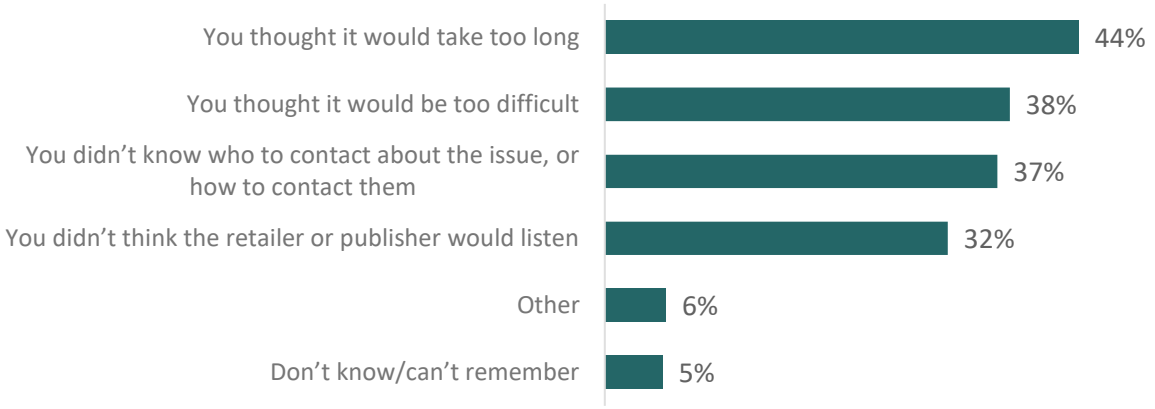
Compared to adults without any children under the age of 18, parents/guardians of children aged 17 and below were both less likely to have found it very or quite easy to seek a solution to their digital game-related

issue (39%; cf. Adults with no children under 18 56%) and more likely to have found it quite or very difficult to seek a solution (38%; cf. Adults with no children under 18 22%).

6.3.3. Reasons for not seeking a solution

The most common reason for consumers not seeking a refund or other solution after having an issue with a digital game-related purchase was thinking that resolving the issue would take too long (44%). This was closely followed by thinking the process of achieving a solution would be too difficult (38%) and either not knowing who to contact about the issue or how to make contact (37%). Nearly a third (32%) did not think the retailer or publisher would listen to their issue.

Figure 68: Reasons for not seeking a solution following an issue with a digital game-related purchase



F17. Why did you choose not to seek a refund or other solution to the issue you experienced? (Multiple responses)
Base: Australians 14+ who did not contact a game retailer or publisher following an issue (n=188), October-November 2024.

Females were more likely than males to have chosen not to seek a refund or other solution because they thought it would be too difficult (42%; cf. Males 35%) or because they either did not know who to contact or how to contact them (41%; cf. Males 33%).

Australians aged 14+ living in metropolitan areas were more likely than those living in regional areas to have decided not to seek a refund or other solution to the issue they had experienced because they thought seeking a solution would take too long (48%; cf. Regional 35%), seeking a solution would have been too difficult (43%; cf. Regional 27%) or because they had thought the retailer or publisher wouldn't listen to their complaint (37%; cf. Regional 22%).

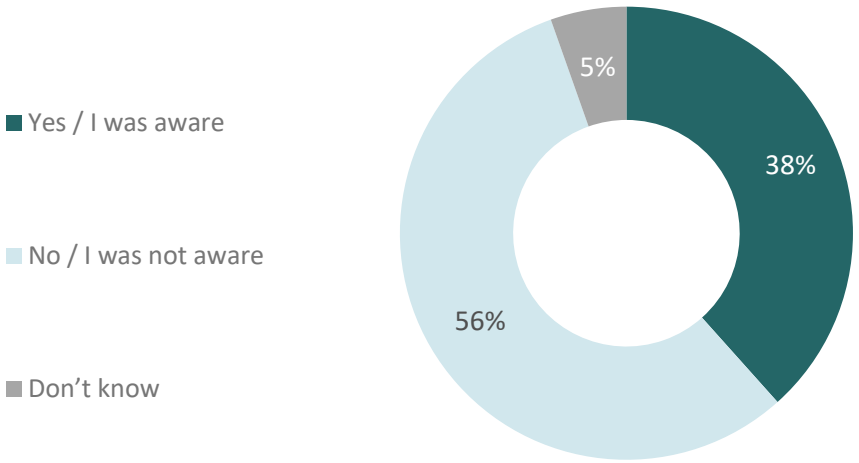
Compared to those with high confidence using technology, consumers with low to moderate confidence were more likely to have not sought a solution because they thought it would have taken too long (50%; cf. High 38%) or they were unsure of who to contact or how to contact them (40%; cf. High 33%).

6.4. ‘Licence to play’ terms and conditions

6.4.1. Awareness of ‘licence to play’ terms and conditions

Respondents were shown a short segment summarising that some digital game stores provide a licence to play or access a game, rather than ownership of it, and the possible implications of this (**Appendix A, question F5**). A majority (56%) of Australians aged 14 and over who had played online games in the past 6 months were not previously aware of this, with only 38% indicating that they were.

Figure 69: Awareness of 'licence to play' conditions



F5. Before today, were you aware of this?
Base: Australians 14+ who have used any platform to play online games in the last 6 months (n=2,076), October-November 2024.

Males (45%), 18-29-year-olds (46%), 30-44-year-olds (43%), those with high self-reported confidence with technology (46%) and parents/guardians of children below 18 years of age (44%) were all statistically significantly more likely to have been aware of these terms previously.

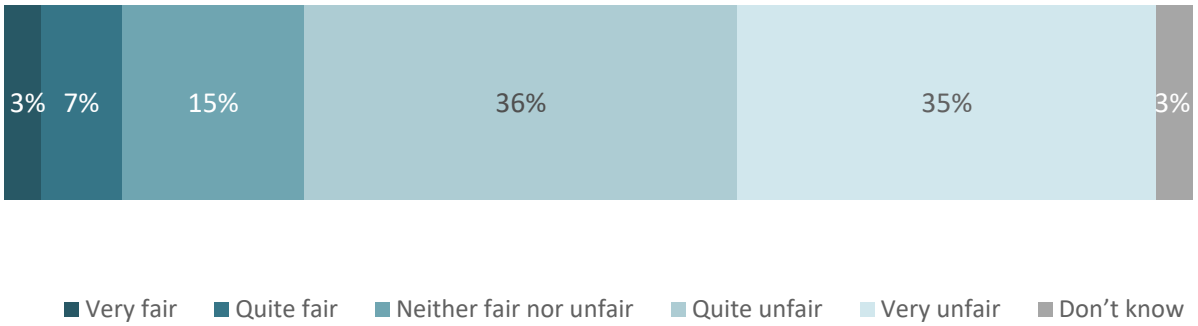
On the other hand, females (31%), 14-17 (26%), 60-74 (31%) and 75+-year-olds (24%), and those with low to moderate self-reported confidence with technology literacy (32%) were all statistically significantly less likely to have been aware of these terms prior to taking the survey.

6.4.2. Perceived fairness of ‘licence to play’ terms

When asked how fair it was that they may lose access to a paid game if the store were to stop hosting it, 72% of Australians 14 and over who had played digital games in the last 6 months perceived this to be either quite or very unfair. Only 10% thought this to be either quite or very fair, while 15% thought it neither fair nor unfair.

“I think it does affect [how trustworthy I see online game stores], but would I stop buying games? No. Would I stop playing games? No. I think it's a very rare occurrence … but it's kind of sad that you're wasting so much money and then it just goes away.” – In-depth interview; Young adult, Student

Figure 70: Fairness of 'licence to play' terms



F6. In your opinion, how fair is it that you may no longer be able to play a game you have paid for if the game store stops hosting it?
Base: Australians 14+ who have used any platform to play online games in the last 6 months (n=2,076), October-November 2024.

14-17-year-olds (84%) were statistically significantly more likely than other age groups (18+ 71%) to have found this policy either quite or very unfair, while 18–29-year-olds (17%) were statistically significantly more likely (14-17 and 30+ 8%) to have found this either quite or very fair.

Those with high self-reported confidence using technology were statistically significantly more likely than those with low to moderate self-reported confidence to think it is either quite or very unfair they may lose access to a game they have paid for if the game store were to stop hosting it (High 76%; cf. Low to Moderate 68%). Those with low confidence were statistically significantly more likely to be unsure of whether this is fair or not (9%; cf. Moderate 3%, High 2%).

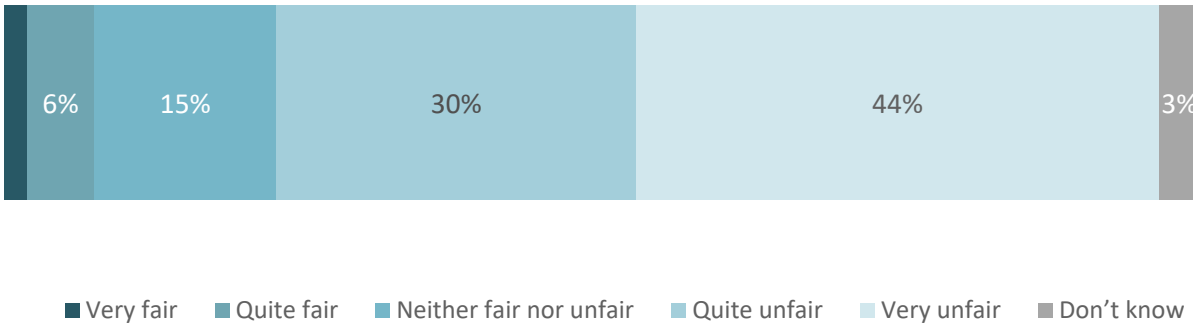
Further, those who thought this policy to be quite or very unfair were statistically significantly more likely to support a specialised, independent, external dispute resolution body for digital platform services than those who thought this policy to be quite or very fair (Unfair 87%; cf. Fair 70%). On the other hand, those who thought it quite or very fair they may lose access to a game they have paid for if the game store were to stop hosting it were statistically significantly more likely to say a specialised dispute resolution body is not required, compared to those who thought it quite or very unfair (Fair 22%; cf. Unfair 6%).

6.4.3. Access to in-game purchases

In addition to losing access to a game if the game store were to stop hosting it, in some cases consumers may not receive refunds for money spent on in-game purchases, even if they can no longer use them. Respondents were given a short excerpt explaining this and were then asked how fair they thought this to be (**Appendix A, question F7**).

Most Australians aged 14 and over who had played a digital game in the past 6 months thought this to be either quite or very unfair (74%), with over two in five (44%) perceiving this to be very unfair. Only 8% thought this to be either quite or very fair, while 15% thought it neither fair nor unfair.

Figure 71: Perceived fairness of 'licence to play' on in-game purchases



F7. In your opinion, how fair is this?
Base: Australians 14+ who have used any platform to play online games in the last 6 months (n=2,076), October-November 2024.

Males were statistically significantly more likely than females to have thought not receiving refunds for in-game purchases if a game store were to stop hosting a digital game was either quite or very fair (10%; cf. Females 6%), as were 18-29-year-olds compared to other age groups (11%; overall average 8%). On the other hand, 14-17-year-olds were statistically significantly more likely than other age groups to find this to be quite or very unfair (85%; overall average 74%).

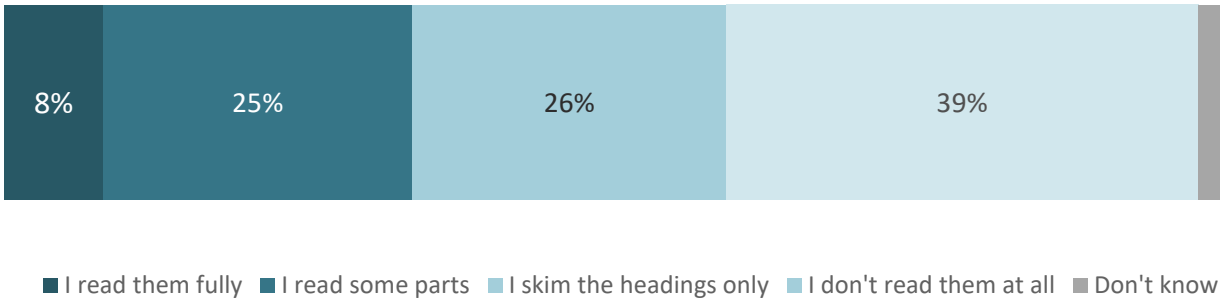
Those who thought that it was either quite or very unfair they may not receive a refund for in-game purchases if a game store were to stop hosting the game were statistically significantly more likely to support a specialised, independent, external dispute resolution body for digital platform services than those who thought it quite or very fair (Unfair 87%; cf. Fair 69%). Conversely, those who thought this policy to be quite or very fair were statistically significantly more likely to believe a specialised dispute resolution body was not required compared to those who thought it quite or very unfair (Fair 20%: cf. Unfair 6%).

Of Australians aged 14 and over who had played a digital game in the last 6 months, those who had made a one-off purchase of a game within the past two years were statistically significantly more likely than those who had not made such a purchase to feel a lack of refund in this situation was quite or very unfair (81%; overall average 74%), whilst those who had purchased a paid subscription were statistically significantly more likely to feel this was quite or very fair (12%; overall average 8%). Those who had made an in-game purchase within the last two years were no more or less likely to feel that not receiving a refund if a game store were to stop hosting a game was quite or very unfair (73%; overall average 74%).

6.5. Tendency to read terms of use

Nearly two in five (39%) Australians aged 14 and over who have recently accessed digital games do not read the terms of use for the digital stores where they access games at all. About a quarter (26%) skim the headings, while another 25% read some parts of the terms of use. Only 8% fully read the terms of use for digital stores where they access games.

Figure 72: Tendency to read digital game store terms of use



F4. How closely do you read the terms of use for the digital stores where you access games (e.g. App Store, Google Play Store, Steam, PlayStation Store, etc.)?
Base: Australians 14+ who have used any platform to play online games in the last 6 months (n=2,076), October-November 2024.

14-17-year-olds were statistically significantly less likely than other age groups to have read the terms of use of digital game stores they had used fully (2%; overall average 8%) or to have read some parts (15%; overall average 25%) and were statistically significantly more likely to not read the terms of use at all (57%; overall average 39%).

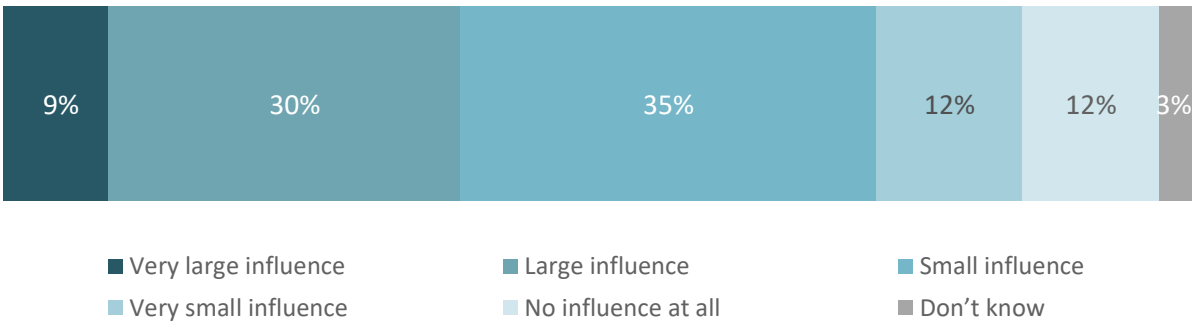
Australians high confidence using technology were statistically significantly more likely than those with low to moderate confidence to not read the terms of use at all (44%; cf. Low 28%, Moderate 36%). Further, those who were retired were less likely to have not read the terms of use at all (Retired 28%; overall average 39%).

Those who had bought a paid subscription for a digital game within the past two years were statistically significantly more likely than those who had not made such a purchase to have read the terms of use fully for digital game stores they have accessed games through (13%; overall average 8%), while those who had made an in-game purchase within the past two years were more likely to not read the terms of use of digital game stores at all (43%; overall average 39%).

6.6. Influence of user ratings on purchase decisions

When thinking about the user ratings or reviews present on digital game stores, over a third (38%) of Australians aged 14 and over who had played digital games in the past 6 months felt these ratings had either a large or very large influence on their decision to download or purchase a game. Over a third (35%) felt user ratings and reviews on digital games stores had a small influence, while 12% felt this had a very small influence on their downloading or purchasing decisions and another 12% felt this had no influence at all.

Figure 73: Influence of user ratings and reviews on purchasing decisions



F8. How much influence do user ratings have on your decision to download or purchase a game?
Base: Australians 14+ who have used any platform to play online games in the last 6 months (n=2,076), October-November 2024.

User ratings and reviews had a stronger influence on the purchasing decisions of 18-29-year-olds, who were statistically significantly more likely than other age groups to have indicated user ratings had a large or very large influence on whether they downloaded or purchased a game (18-29 years 47%; overall average 38%). On the other hand, older Australians were statistically significantly more likely than younger Australians to have felt that user reviews and ratings had no influence at all on their decision to download or purchase a game (75+ years 39%, 60-74 years 25%; cf. 45-59 years 15%, 30-44 years 6%, 18-29 years 4%, 14-17 years 6%).

Self-reported confidence with technology was also associated with a stronger reliance on user ratings and reviews in deciding whether to download or purchase a game. Those with high confidence were statistically significantly more likely than those with low or moderate confidence to indicate that reviews and ratings had a large or very large influence (46%; cf. Low 26%, Moderate 33%) whilst those with low to moderate confidence were statistically significantly more likely than those with high confidence to have felt these user ratings and reviews had either a very small influence or no influence at all on their decision to download or purchase a game (Low 34%, Moderate 26%; cf. High 20%).

Section 07

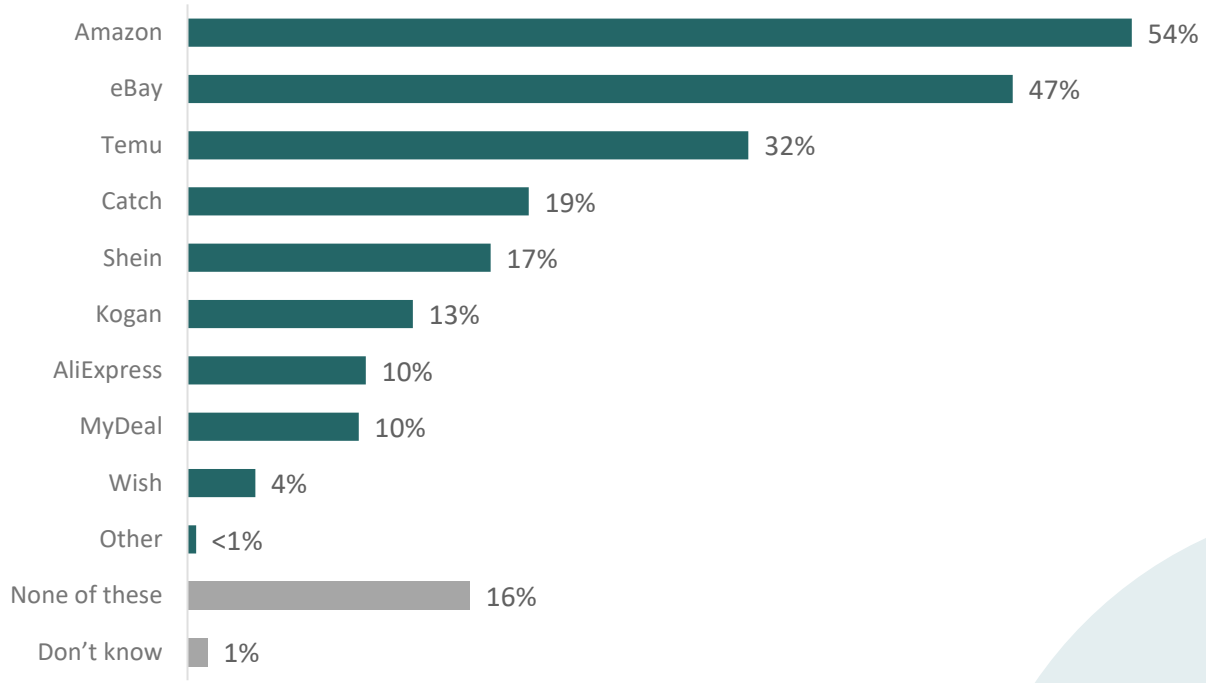
General online retail marketplaces

7. General online retail marketplaces

7.1. Usage of general online retail marketplaces

83% of Australians have bought from a general online retail marketplace (referred to as a 'marketplace' in section 7 of this report) in the last 12 months. The most commonly used marketplace was Amazon (54%), followed by eBay (47%), and Temu (32%).

Figure 74: General online retail marketplaces Australians have purchased from in the last 12 months



G1. From which of the following general online retail marketplaces have you made a purchase within the last 12 months? (Multiple responses)
Base: Australians 14+ (n=3,075), October-November 2024.

Australians aged 14 and over living in metropolitan parts of the country were statistically significantly more likely than those living in regional areas of Australia to have used Amazon (58%; cf. Regional 47%) or AliExpress (11%; cf. Regional 8%) within the past 12 months. Meanwhile, regional Australians were statistically significantly more likely to have used eBay in the previous 12 months (50%; cf. Metropolitan 45%).

Of the most popular marketplaces, 18-44-year-olds were statistically significantly more likely than other age groups to have purchased from Amazon (18-29 years 63%, 30-44 years 63%; overall average 54%), while a slightly older crowd, aged 30-74, were statistically significantly more likely to have used eBay (30-44 years 52%, 45-59 years 53%, 60-74 years 52%; overall average 47%). Females were statistically significantly more likely than males to have made purchases on Temu (37%; cf. Males 27%), Catch (22%; cf. Males 17%), and Shein (26%; cf. Males 8%). Further, 14-29-year-olds were statistically significantly more likely than other age groups to have purchased from Shein (14-17 years 31%, 18-29 years 27%; overall average 17%).

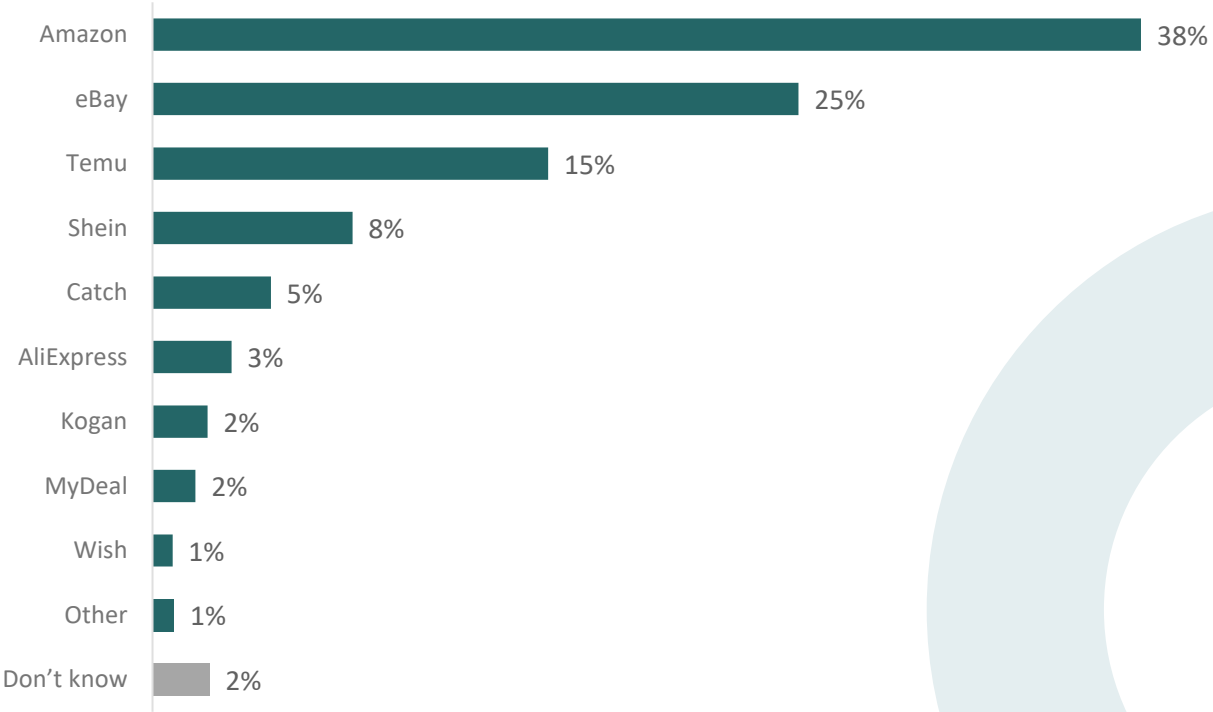
Figure 75: General online retail marketplaces Australians have most commonly purchased from, by gender and age

	Gender		Age					
	Male	Female	14 - 17	18 - 29	30 - 44	45 - 59	60 - 74	75+
Amazon	55%	53%	47%	**63%***	**63%***	55%	43%	34%
eBay	**52%***	42%	27%	40%	**52%***	**53%***	**52%***	37%
Temu	27%	**37%***	**38%***	30%	32%	31%	35%	32%
Catch	17%	**22%***	7%	17%	**27%***	22%	18%	11%
Shein	8%	**26%***	**31%***	**27%***	20%	14%	10%	5%

G1. From which of the following general online retail marketplaces have you made a purchase within the last 12 months? (Multiple responses) A3. What is your gender? A2. How old are you?
Base: Australians 14+ (n=3,075), October-November 2024.
*Bolded text indicates the cohort is statistically significantly more likely to purchase from that marketplace.

For Australians aged 14 and over who had purchased from multiple marketplaces, Amazon (38%), eBay (25%), and Temu (15%) maintained their top spots as most used.

Figure 76: Most used online retail marketplaces Australians have purchased from in the last 12 months



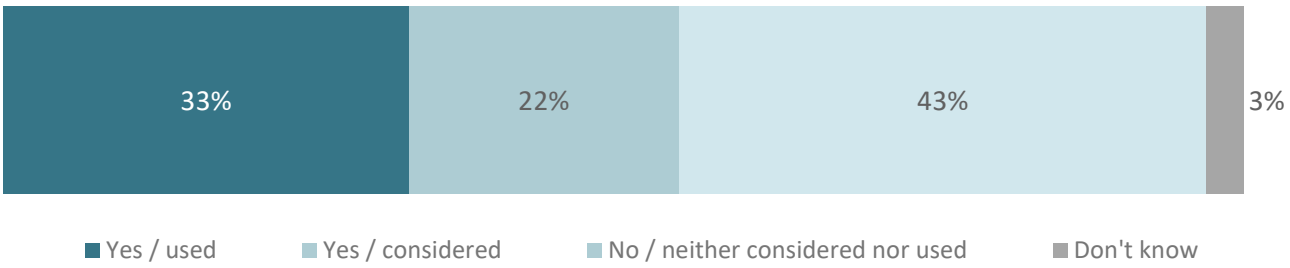
G2. And which of those marketplaces did you use the most?
Base: Australians 14+ who purchased from at least two different marketplaces in the last 12 months (n=1,733), October-November 2024.

Of Australians aged 14 and over who had purchased from a marketplace in the last 12 months, 55% had considered or used optional paid subscriptions linked to a marketplace for benefits such as free delivery.

Australians aged 18-44 were statistically significantly more likely than other age groups to have used an optional paid subscription (18-29 years 39%, 30-44 years 39%; overall average 33%). Metropolitan Australians were statistically significantly more likely than those living in regional Australia to have used an optional paid subscription (36%; cf. Regional 28%), while regional Australians were statistically significantly more likely to

have neither considered nor used an optional paid subscription linked to a marketplace (49%; cf. Metropolitan 39%).

Figure 77: Use of optional paid subscriptions linked to general online marketplaces



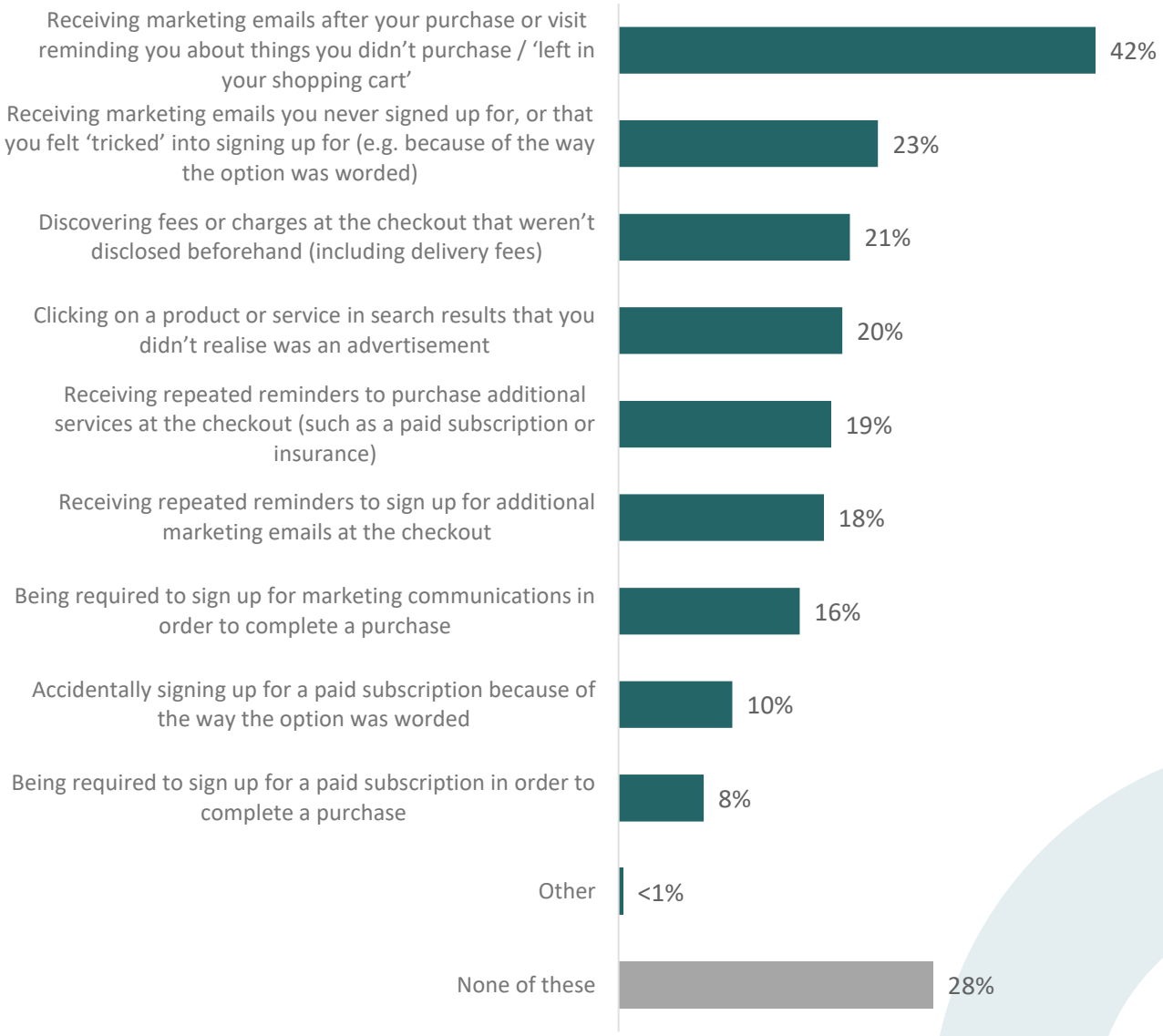
G12. Have you ever used or considered using any optional paid subscriptions linked to general online marketplaces (such as Amazon Prime for faster / cheaper / free delivery)?
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months (n=2,474), October-November 2024.

7.2. Experiences with general online retail marketplaces

28% of Australians aged 14 and over who shopped at marketplaces had not experienced any issues, while two in five (42%) had received marketing emails after their purchase or visit, reminding them about items left in their cart. 23% had received marketing emails they never signed up for or felt that they were tricked into signing up for, and undisclosed fees (including delivery fees) were experienced by around one-fifth (21%) of Australian online consumers.

Consumers who purchased from more than 3 marketplaces in the previous 12 months were statistically significantly more likely to have experienced issues (86%; overall average 72%). Shein, Kogan, and Catch customers were statistically significantly more likely than other shoppers to have received marketing emails they had never signed up for or felt “tricked” into signing up for (Shein 31%, Kogan 29%, Catch 28%; overall average 23%).

Figure 78: Issues consumers experienced with general online marketplaces in the past 12 months



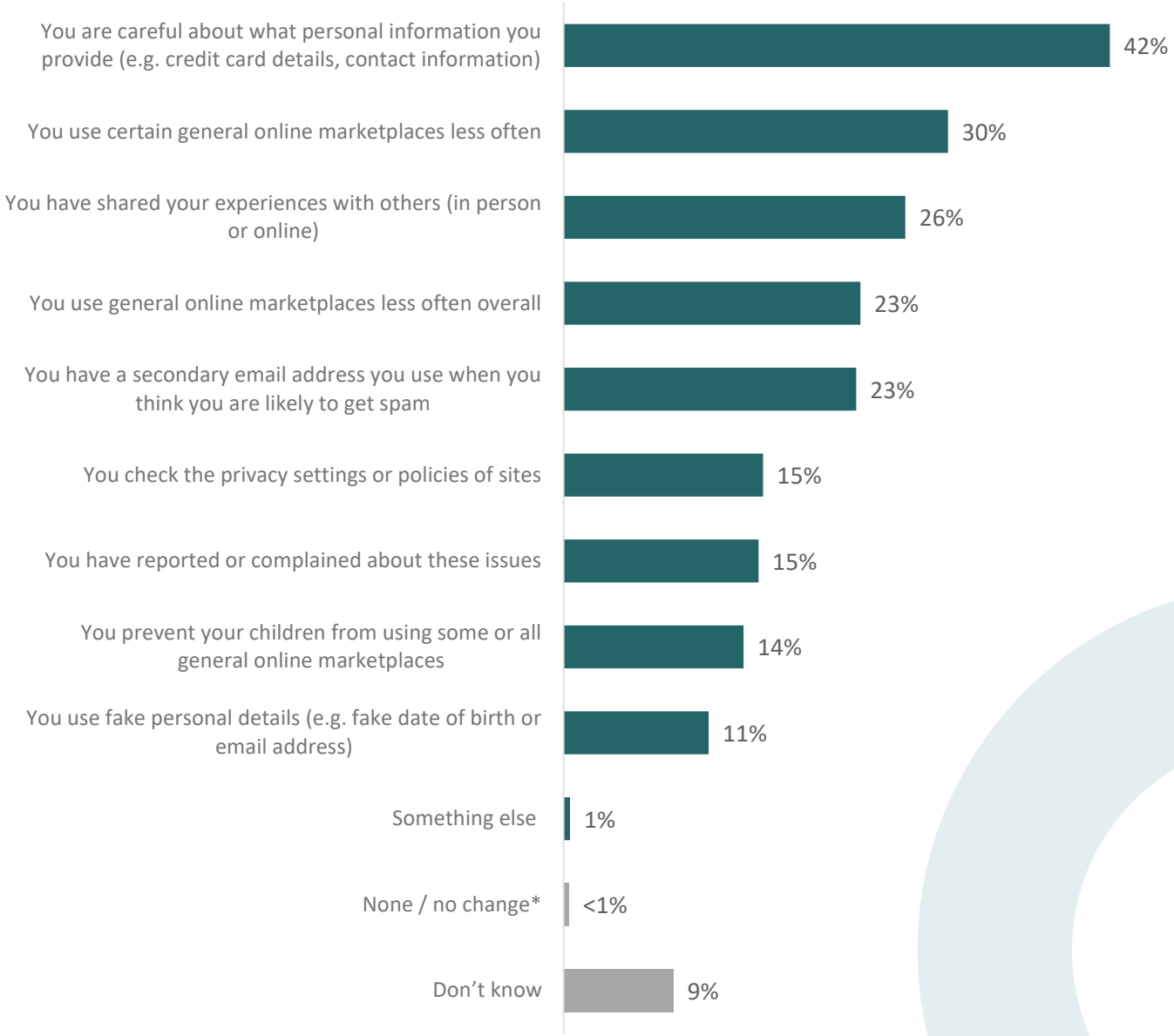
G10. Which of the following experienced, if any, have you had when using a general online retail marketplace in the last 12 months? (Multiple responses)
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months (n=2,474), October-November 2024.

Due to these experiences, 42% of affected Australians were careful about what personal information they provide to marketplaces, and many used certain marketplaces less often (30%).

Females were statistically significantly more likely to be careful about providing personal information (47%; cf. Males 37%) as a result of their experiences with marketplaces. Meanwhile, males were statistically significantly more likely to reduce their use of marketplaces in general (28%; cf. Females 18%). Males were also statistically significantly more likely to have reported or complained about these issues (19%; cf. Females 11%) or prevent their children from using some or all general online retail marketplaces (17%; cf. Females 11%).

Australians aged 14-17 were statistically significantly more likely than other age groups to have a secondary email address they use when they think they are likely to get spam (31%; overall average 23%) or use fake personal details (22%; overall average 11%) after experiencing an issue with a marketplace.

Figure 79: Changes in how general online marketplaces are used as a result of previous experiences

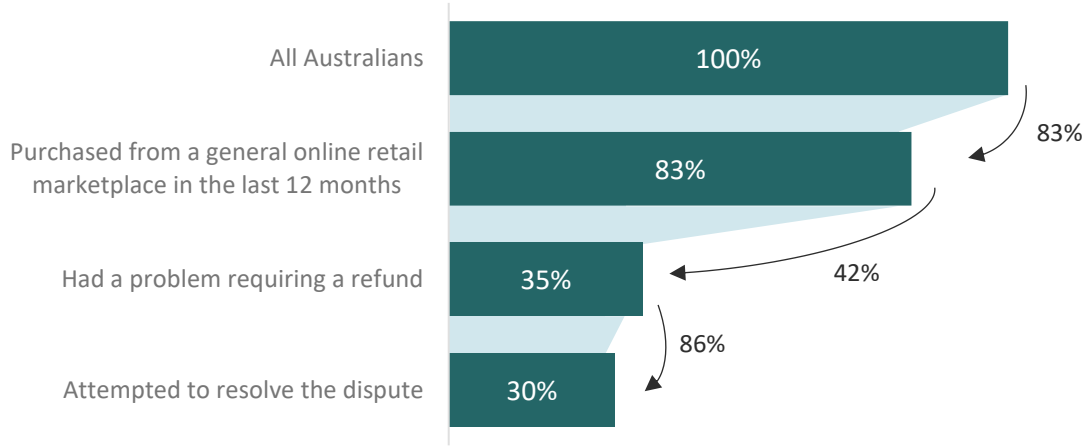


G11. In what ways, if any, have these issues changed how you use general online marketplaces? (Multiple responses)
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months and experienced issues (n=1,504), October-November 2024.
** 'Something else' open-ended responses categorised into new options not included in original survey*

7.3. Dispute resolution

Of all Australians aged 14 and above, 35% had a problem with a marketplace where they felt they were entitled to a refund. Of all Australians surveyed, 30% attempted to resolve a dispute with a marketplace.

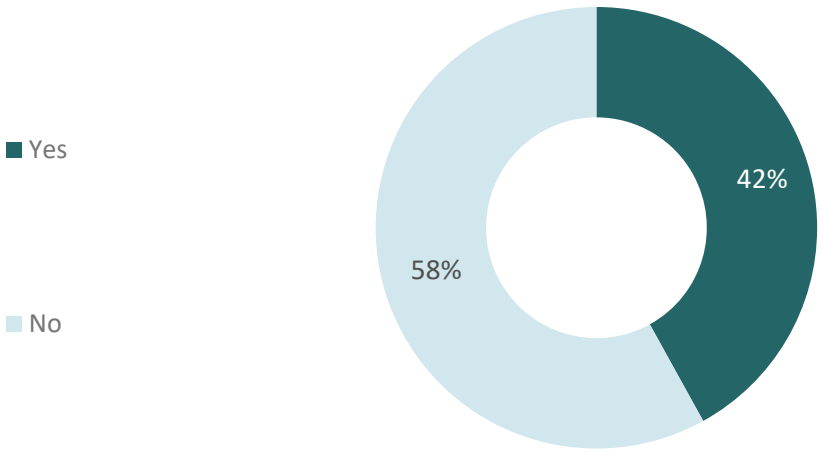
Figure 80: Funnel of Australians who experienced and attempted to resolve a dispute



G1. From which of the following general online retail marketplaces have you made a purchase within the last 12 months? (Multiple responses) G3. Have you ever had a problem with a general online retail marketplace, where you felt entitled to a refund? G4. Have you ever attempted to resolve a dispute with a general online retail marketplace?
Base: Australians 14+ (n=3,075), Australians 14+ who purchased from a general online marketplace in the last 12 months (n=2,474), Australians 14+ who purchased from a general online marketplace in the last 12 months and had a problem where they felt entitled to a refund (n=1,004), Australians 14+ who purchased from a general online marketplace in the last 12 months and attempted to resolve a dispute with a general online marketplace (n=861), October-November 2024.

About 2 in 5 online marketplace users (42%) had encountered a problem with an online marketplace where they felt entitled to a refund. Australian parents/guardians of children under 18 (46%) were statistically significantly more likely to experience this than adults with no children under 18 years of age (40%).

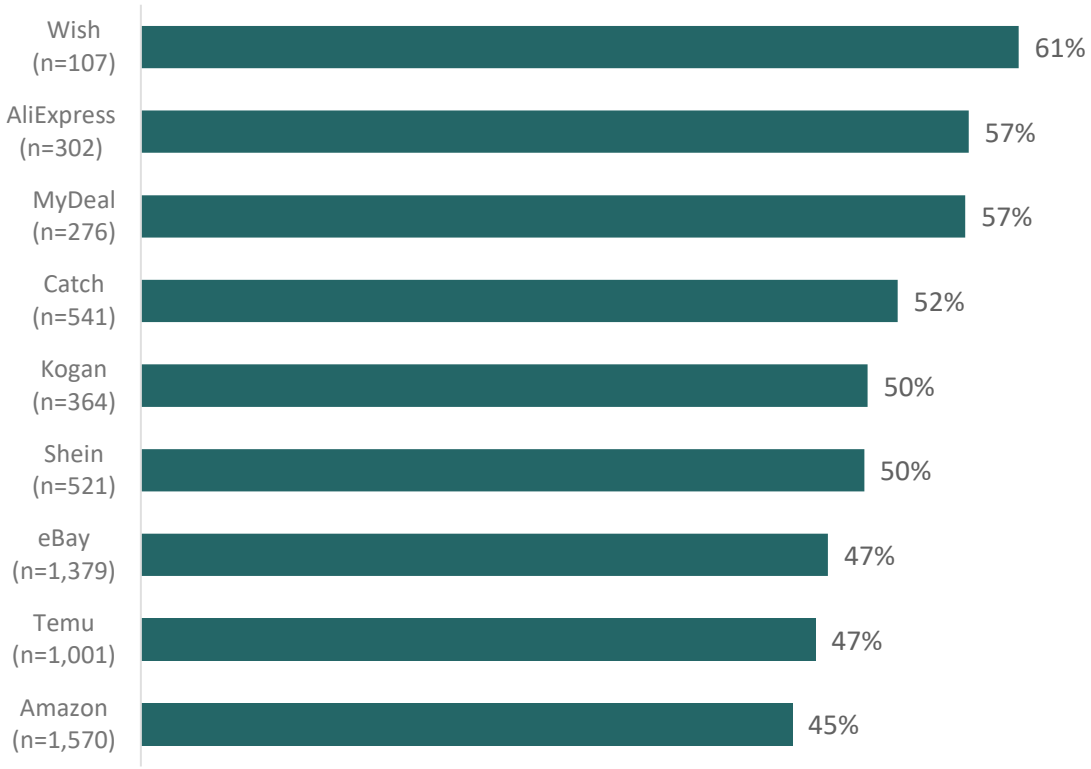
Figure 81: Had a problem with a general online retail marketplace, requiring a refund



G3. Have you ever had a problem with a general online retail marketplace, where you felt entitled to a refund?
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months (n=2,474), October-November 2024.

Users of Wish (61%), AliExpress (57%), and MyDeal (57%) were most likely to have experienced problems where they felt entitled to a refund.

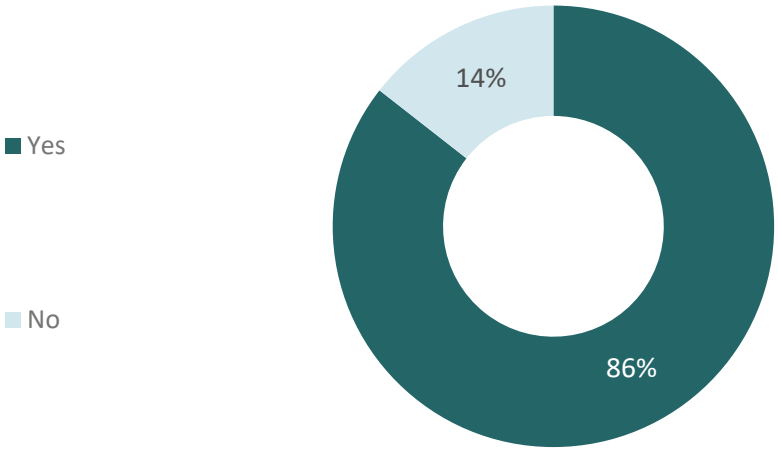
Figure 82: Had a problem with an online marketplace, requiring a refund, by commonly used marketplaces



G3. Have you ever had a problem with a general online retail marketplace, where you felt entitled to a refund? G1. From which of the following general online retail marketplaces have you made a purchase within the last 12 months? (Multiple responses) Base: Australians 14+ who purchased from a general online marketplace in the last 12 months (n=107-1,570), October-November 2024.

Of Australian shoppers who felt they were entitled to a refund, the majority (86%) attempted to resolve the dispute with the marketplace. There was no specific demographic cohort that was statistically significantly more likely to attempt to resolve the dispute with the marketplace.

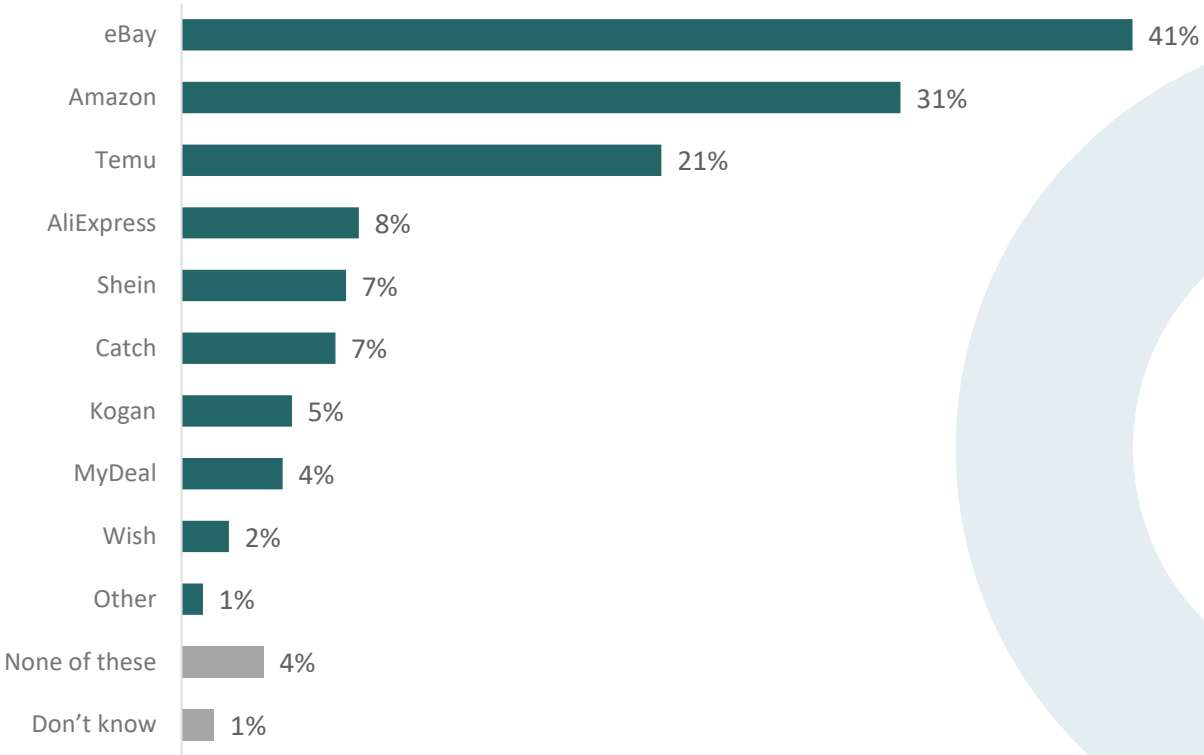
Figure 83: Attempted to resolve a dispute with a general online retail marketplace



G4. Have you ever attempted to resolve a dispute with a general online retail marketplace?
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months and had a problem where they felt entitled to a refund (n=1,004), October-November 2024.

Of those that contacted a marketplace to resolve a dispute, eBay (41%), Amazon (31%), and Temu (21%) were the marketplaces they most commonly attempted this with. In comparison to Figure 82, consumers using these marketplaces were the least likely to experience problems in the first place.

Figure 84: Marketplaces that Australian consumers attempted to resolve a dispute with

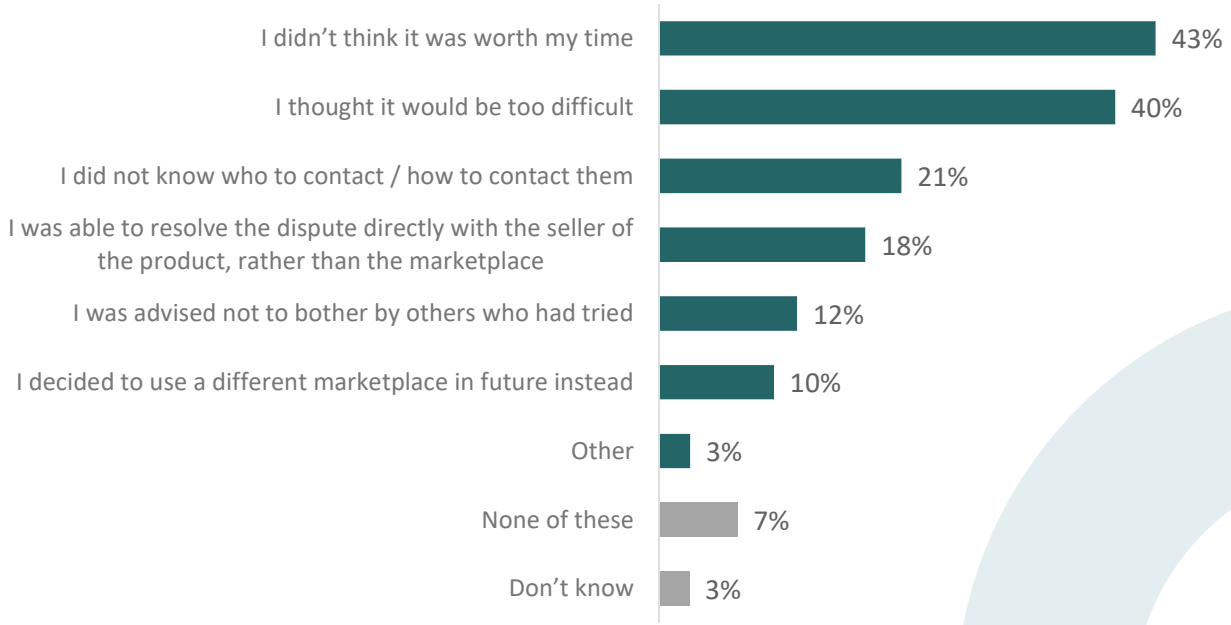


G5. With which marketplaces did you attempt to resolve a dispute? (Multiple responses)
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months and attempted to resolve a dispute with a general online marketplace (n=861), October-November 2024.

Of Australians who faced issues with a marketplace where they felt they should receive a refund but did not attempt to resolve the dispute, 43% did so because they did not think it was worth their time, while 40% did not attempt to resolve the dispute because they thought it would be too difficult. 18-29-year-olds were statistically significantly more likely than other age groups to have not attempted to resolve a dispute because they did not know who to contact (42%; overall average 21%). Males were also more likely than females to avoid attempting to resolving the dispute because they did not know who to contact or how to contact the marketplace (28%; cf. Females 15%).

Australians who reported high confidence with technology were more likely than those with low to moderate confidence to not attempt to resolve the dispute because they didn't think it was worth their time (53%; cf. Low to Moderate 38%), while those with low to moderate confidence with technology were more likely not to because they thought it would be too difficult (42%; cf. High 37%). Regional Australians who experienced an issue with a marketplace where they felt entitled to a refund but did not attempt to resolve the dispute were more likely to not do so because they didn't think it was worth their time (47%; cf. Metropolitan 42%).

Figure 85: Reasons for not attempting to resolve a dispute with an online marketplace

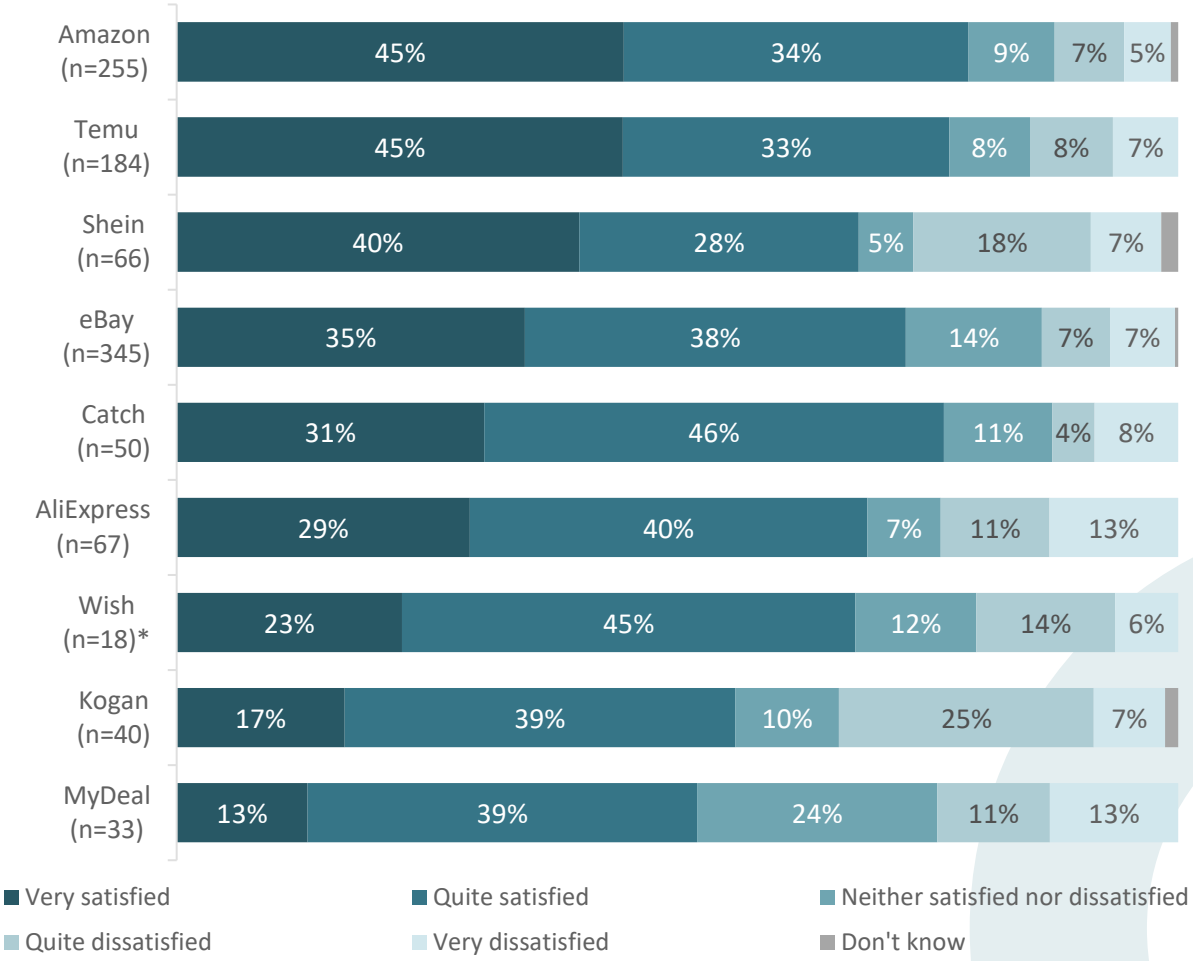


G9. Why didn't you attempt to resolve a dispute with the online platform? (Multiple responses)
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months and did not attempt to resolve a dispute with a general online marketplace (n=142), October-November 2024.

7.4. Satisfaction and impact of dispute resolution outcomes on future use of online retail marketplaces

Australian consumers had different levels of satisfaction depending on the marketplace they used. 79% of Amazon users who attempted to resolve a dispute with Amazon were very or quite satisfied with the outcome, and 45% were very satisfied. 40% of Shein customers were very satisfied after their dispute resolution experience, however their overall satisfaction rate (68% very or quite satisfied) was lower than some other marketplaces in comparison.

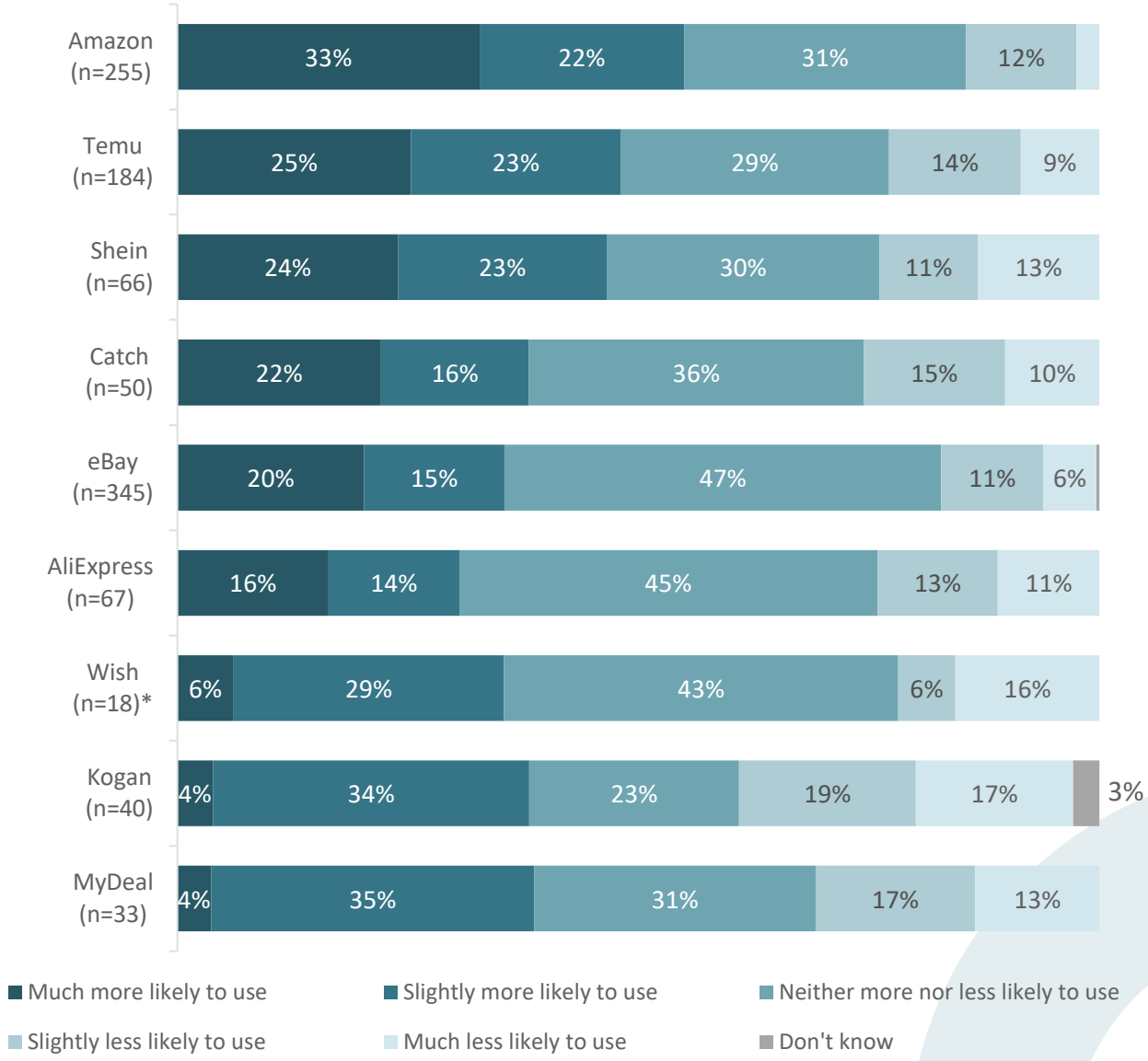
Figure 86: Satisfaction of experience attempting to resolve dispute with online marketplace



G6. How satisfied were you with your experience attempting to resolve a dispute with…?
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months and attempted to resolve a dispute with a marketplace (n=18-345), October-November 2024.
** Indicative results only as n<30.*

Amazon (33%), Temu (25%), and Shein (24%) users were much more likely to use these marketplaces' services again after attempting to resolve a dispute with them. This is consistent with their high 'very satisfied' and 'quite satisfied' scores.

Figure 87: Likelihood of using that specific marketplace again after attempting to resolve a dispute with them

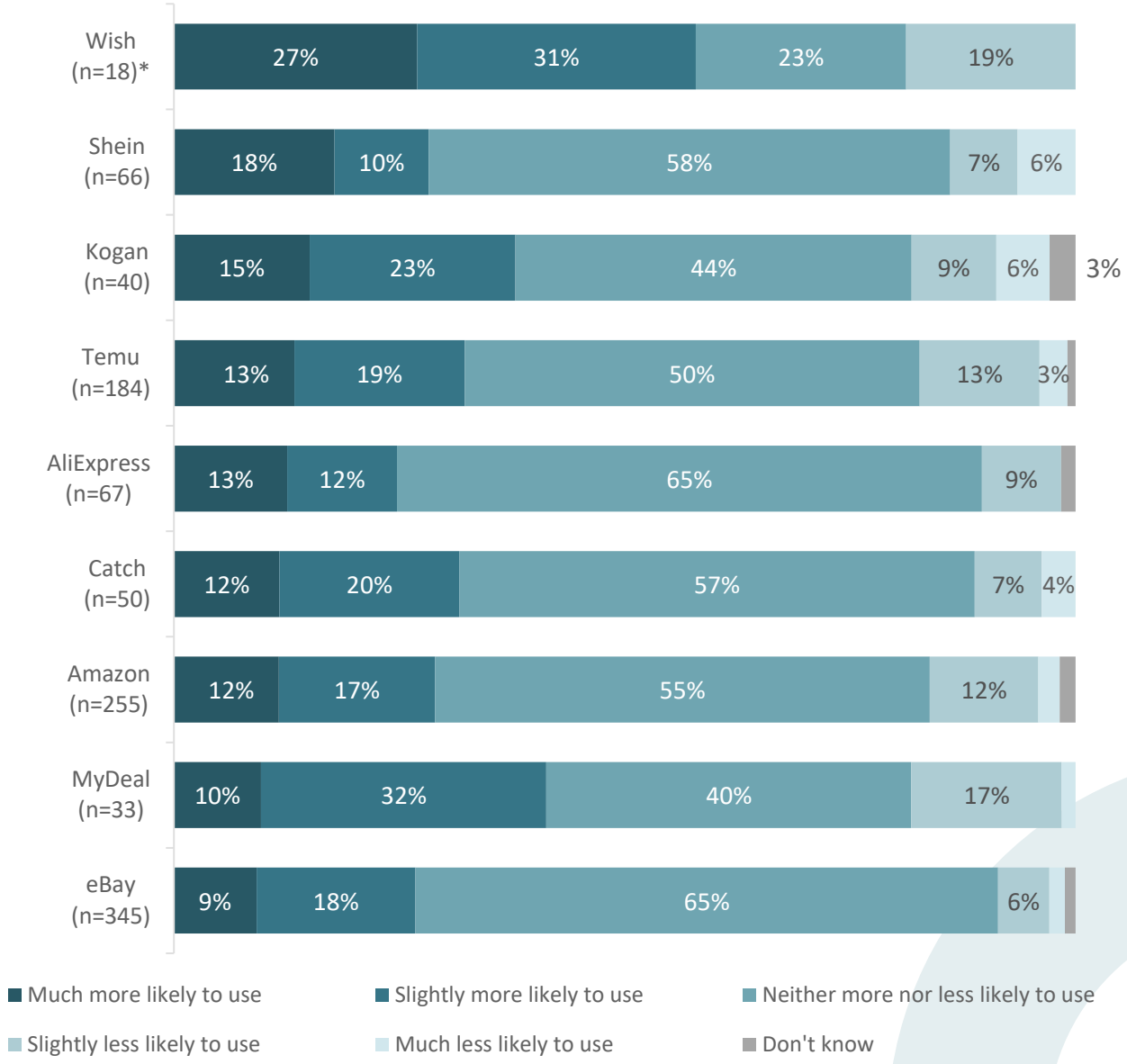


G7. What impact did this dispute have on your likelihood to use this specific marketplace in the future?
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months and attempted to resolve a dispute with a marketplace (n=18-345), October-November 2024.
** Indicative results only as n<30.*

Looking specifically at consumers who had attempted to resolve a dispute with Amazon, those with high confidence with technology were statistically significantly more likely than those with low or medium confidence to use Amazon again (slightly or much more likely to use: 68%; cf. Low to medium confidence 41%). Females were statistically significantly more likely than males to be neither more nor less likely to use Amazon again (43%; cf. Males 20%).

Consumers who sought to resolve a dispute with Wish (27% - although this is indicative due to small sample size), Shein (18%) or Kogan (15%) were most likely to have indicated they were 'much more likely to use other marketplaces' after the attempted dispute resolution (overall average 14%). While Shein had a higher 'much more likely to use other marketplaces' rate (18%), their overall likelihood (much more or slightly more likely to use 28%) was lower than other marketplaces.

Figure 88: Likelihood of using other online marketplaces after attempting to resolve a dispute



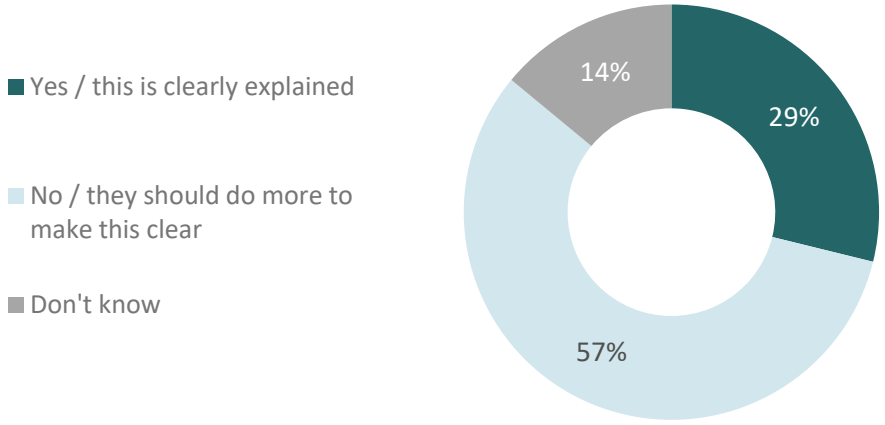
G8. What impact did this dispute have on your likelihood to use other online marketplaces in the future?
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months and attempted to resolve a dispute with a marketplace (n=18-345), October-November 2024.
** Indicative results only as n<30.*

7.5. Transparency in general online retail marketplaces

29% of online marketplace users believed the order of products displayed in response to a product search was explained clearly, while more than half (57%) thought marketplaces should make it clearer.

Australians who shopped at Wish in the last 12 months were statistically significantly more likely than other online marketplace shoppers to believe the order of search results are clearly explained (44%; overall average 29%).

Figure 89: Opinions on clear explanation of product search results order



G14. Do you think online marketplaces clearly explain how product search results are sorted and displayed by default?
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months (n=2,474), October-November 2024.

Marketplace consumers aged 60+ (60-74 years 19%, 75+ years 14%) and those with low confidence using technology (20%) were statistically significantly less likely than other age groups or moderate to high confidence, respectively, to think the default product search results order was clearly explained (overall average 29%) and were also statistically significantly more likely to not know or have an opinion compared to others (60-74 years 21%, 75+ years 28%, Low confidence 25%; overall average 14%). Meanwhile, parents of children under 18 years old were statistically significantly more likely to think the order of search results on marketplaces was clearly explained (33%; Adults with no children under 18 27%).

Figure 90: Opinions on clear explanation of product search results default order by demographics

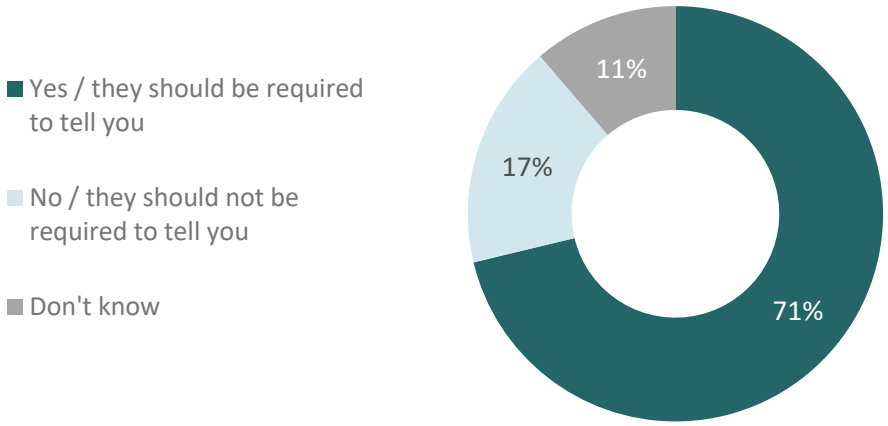
	Aged 60-74	Aged 75+	Low confidence with technology (1-5)	Parents of children <18
Yes	19%	14%	20%	**33%***
No	60%	57%	55%	58%
Don't know	**21%***	**28%***	**25%***	9%

G14. Do you think online marketplaces clearly explain how product search results are sorted and displayed by default? A2. How old are you? Z12. On a scale of 1 to 10, where 1 is not confident at all and 10 is extremely confident, how would you rate your confidence using and navigating devices and the internet? A5. In which of the following age groups are the children under your care? (Multiple responses)
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months (n=2,474), October-November 2024.
*Bolded text indicates the cohort is statistically significantly more likely to think this way.

Almost three-quarters (71%) of marketplace shoppers believed marketplaces should be required to disclose how search results have been ordered. Children aged 14-17 (64%) and those with low confidence using

technology (59%) were statistically significantly less likely than those in other age groups or levels of confidence with technology, respectively, to think online marketplaces should be required to explain this to consumers.

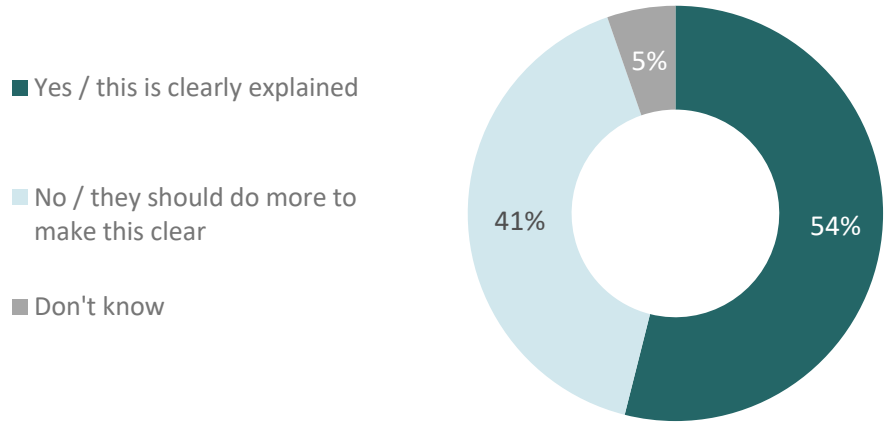
Figure 91: Opinions on online marketplace disclosure requirements about search result display order



G15. Do you think that general online marketplaces should be required to tell you how search results have been ordered? Base: Australians 14+ who purchased from a general online marketplace in the last 12 months (n=2,474), October-November 2024.

In relation to optional paid subscriptions (to gain benefits such as faster or free shipping), more than half (54%) of those who used or considered using these subscriptions believed the specifications of the costs and benefits of the subscriptions are clearly explained, while 41% believed this needs to be clearer.

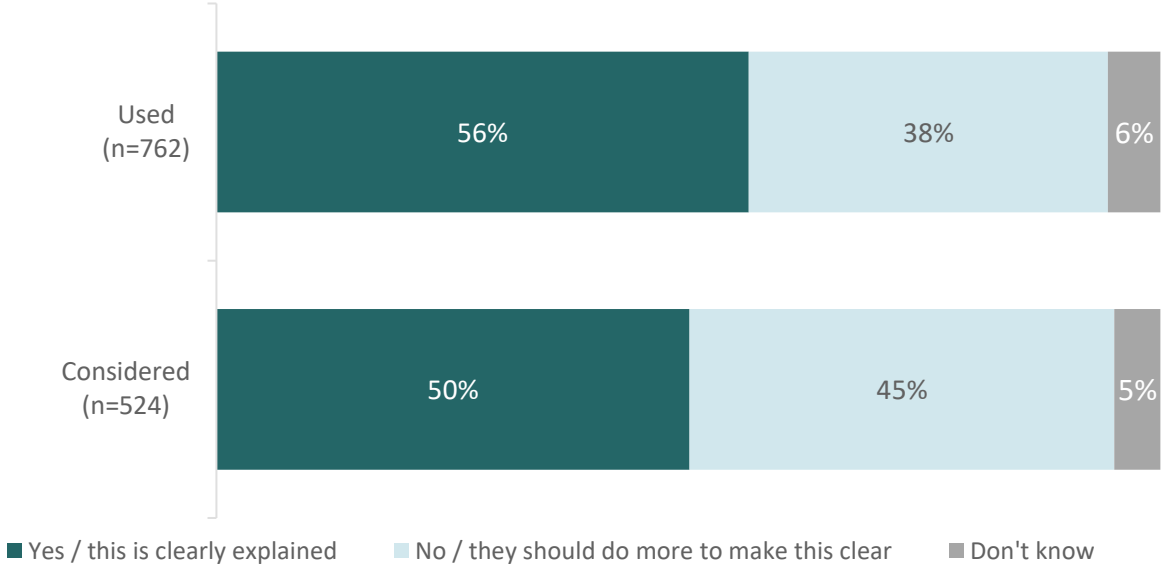
Figure 92: Opinions on clear explanation of optional paid subscriptions



G13. Do you think online marketplaces do enough to clearly explain the costs and benefits of any optional paid subscriptions? Base: Australians 14+ who purchased from a general online marketplace in the last 12 months and have considered or used subscriptions linked to general online marketplaces (n=1,286), October-November 2024.

Australians who made a purchase from a marketplace and also purchased an optional paid subscription from that marketplace were more likely to believe the costs and benefits are clearly explained (56%; cf. Only considered using optional paid subscriptions 50%). In comparison, those who had only considered buying the subscription were statistically significantly more likely to believe marketplaces should explain the costs and benefits of optional paid subscriptions more clearly (45%; cf. Used optional paid subscriptions 38%).

Figure 93: Opinions on clear explanation of optional paid subscriptions by whether consumers had purchased an optional paid subscription linked to a marketplace

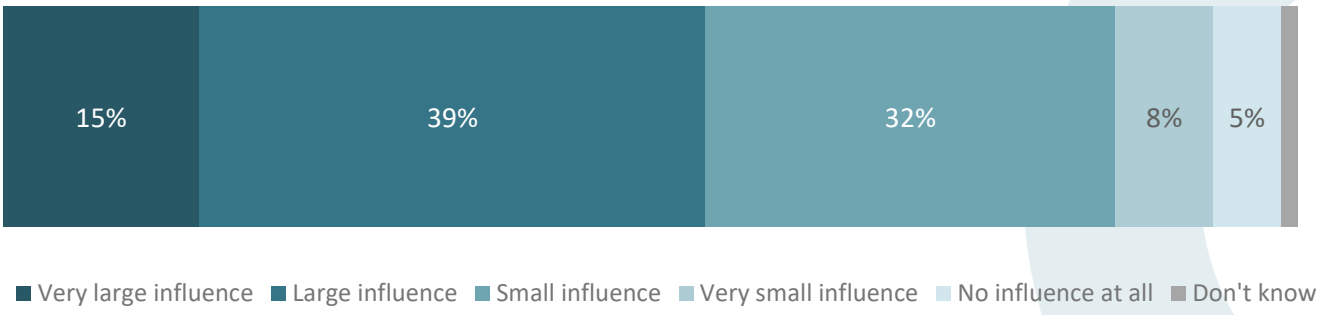


G12. Have you ever used or considered using any optional paid subscriptions linked to general online marketplaces? G13. Do you think online marketplaces do enough to clearly explain the costs and benefits of any optional paid subscriptions?
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months and have considered or used subscriptions linked to general online marketplaces (n=524-762), October-November 2024.

7.6. Product reviews and trustworthiness

More than half (54%) of Australian marketplace shoppers, customer reviews had a large or very large influence on their decision to purchase a product, including 15% of shoppers who said reviews had a very large influence.

Figure 94: Influence of reviews on purchase decisions on general online retail marketplaces



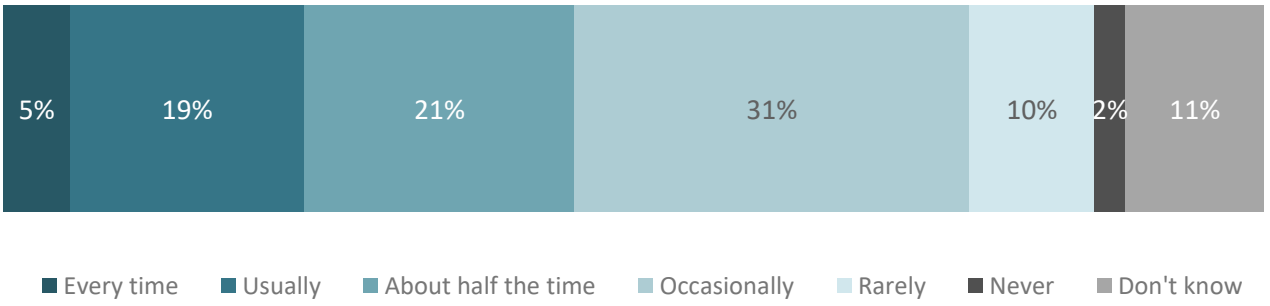
G16. How much influence do product reviews published and visible on general marketplaces have on your decision to purchase a product?
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months (n=2,474), October-November 2024.

Females were statistically significantly more likely than males to be largely or very largely influenced by product reviews when shopping on marketplaces (58%; cf. Males 51%). Australians aged 14-44 were also statistically significantly more likely than those in other age groups to be largely or very largely influenced by marketplace reviews (14-17 years 70%, 18-29 years 62%, 30-44 years 63%; cf. 45-59 years 51%, 60-74 years 41%, 75+ years 28%). Australians with high self-reported confidence with technology were also statistically

significantly more likely to be largely or very largely influenced (61%; cf. Low 42%, Moderate 50%), as were parents with children under 18 years old (61%; cf. Adults with no children under 18 49%).
About a quarter (24%) of Australian marketplace shoppers said they had encountered reviews that they knew or suspected were fake usually or every time when using a marketplace.

Users of AliExpress were most likely to have seen fake reviews every time they had used an online marketplace (9%; overall average 5%), compared to users of other marketplaces. Australians with high confidence using technology were statistically significantly more likely than those with low to moderate confidence to encounter fake or suspected fake reviews every visit (8%; cf. Low to moderate confidence 3%).

Figure 95: Rate of encountering fake reviews on general online marketplaces

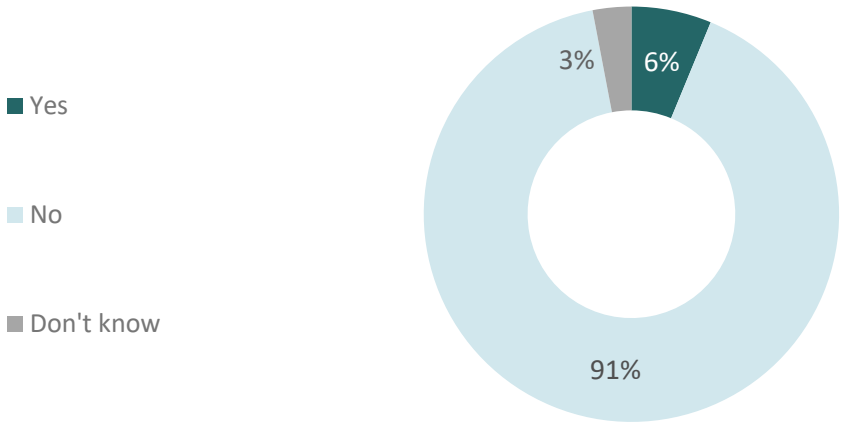


G17. How often do you encounter reviews which you know, or strongly suspect are fake reviews when using general online marketplaces?
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months (n=2,474), October-November 2024.

While 87% of Australians aged 14 and over who had made a purchase from an online marketplace in the past 12 months had seen reviews they believed were fake on marketplaces, a very small portion of Australians had reported this to a marketplace (6%). Even among those who spotted fake reviews every time they used a general online marketplace, only one out of five (21%) had ever complained to a marketplace about a potentially fake review.

People aged 18-29 were statistically significantly more likely than other age groups to have complained to a marketplace about a review they thought was fake (11%; overall average 6%). Parents of children under 18 were also statistically significantly more likely to have complained about fake reviews to a marketplace (9%; cf. Adults with no children under 18 years 5%).

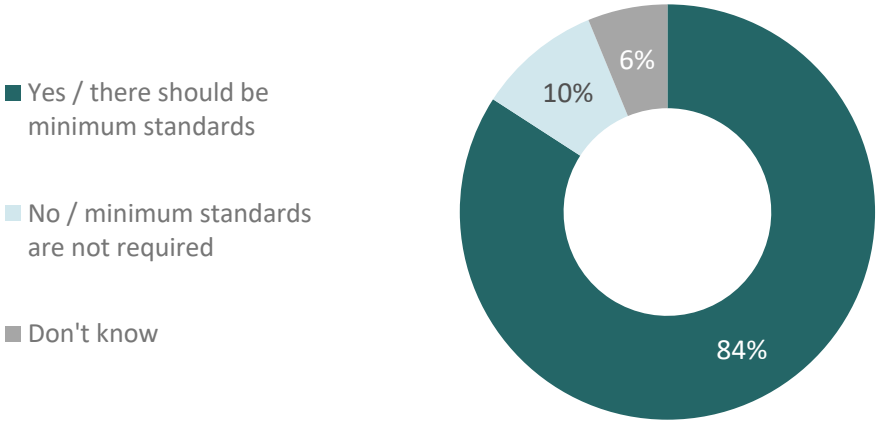
Figure 96: Reporting fake reviews to a general online marketplace



G18. Have you ever complained to a general online marketplace about a review you thought was fake?
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months (n=2,474), October-November 2024.

Overall, a significant majority (84%) of Australian marketplace users believed there should be minimum standards to prevent fake reviews. Australians aged 45+ were statistically significantly more likely than other age groups to support this (45-59 years 89%, 60-74 years 89%, 75+ years 93%,; overall average 84%), as were those with high confidence using technology (89%).

Figure 97: Opinion on minimum standards for reviews on general online marketplaces



G19. In your opinion, should there be minimum obligations on general online marketplaces that use customer reviews to prevent fake reviews?
Base: Australians 14+ who purchased from a general online marketplace in the last 12 months (n=2,474), October-November 2024.

Marketplace users aged 18-29 (62%) and those with children under the age of 18 (61%) were some of the cohorts that were statistically significantly more likely than other age groups or adults with no children under 18 to be largely or very largely influenced by marketplace product reviews (overall average 54%). Despite this, the same cohorts were statistically significantly less likely to support minimum standards of marketplace reviews (18-29 years 77%, Parents with children <18 81%; overall average 84%).

Those who believed there should be minimum standards were statistically significantly more likely to support an independent, specialised dispute resolution body for digital platform services (89%; cf. Minimum standards not required 50%).

Section 8

Appendix A – Online Consumer Survey

8. Questionnaire

3554 ACCC DPSI Final Report Consumer Survey

Research Outline

Element	Specification
Methodology	Online
Questionnaire length	TBC
Sample size	TBC
Sample profile	Australians 14+

Notes

Writing in ***black, italic*** (**bold** or unbold) is instructional text for the survey respondent

Writing in **teal**, (**bold** or unbold) is instructional text for the programmer and/or data analyst and will not be visible to survey respondent

Writing in **purple**, (**bold** or unbold) is instructional text for telephone interviewers / recruiters and will not be visible to survey respondent

Writing in **grey** is identifying text for analysis and will not be visible to survey respondent

Sections

Section	Randomised?
Section A: Screening and quota control	
Section B: Online Private Messaging	X
Section C: Generative AI	X
Section D: App stores and mobile operating systems Section E: Kids and Dependent Adults' smartphones	X Section E always shown after Section D
Section F: Online Gaming	X
Section G: Online Retail Marketplaces	X
Section H: Regulatory Body	
Section Z: Demographics	

Introduction Text for Survey Respondents

INSTRUCTIONS
Thank you for agreeing to participate in this survey. Please answer the following questions to see if you fall into the category of respondent we need to interview. You will need to provide a response for **EVERY** question to proceed with the interview. *Please be assured of complete confidentiality. Lonergan Research is bound by the Research Society Code of Professional Behaviour and the Privacy Act.* *During the survey, please do not use your browser's **FORWARD** and **BACK** buttons. Instead, please always use the "Next" button below to move forward through the survey.*

Section A: Screening and quota control

ASK ALL				
A1	Where do you live in Australia?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		NSW – Sydney	01	
		NSW – Other	02	
		ACT	03	
		Victoria - Melbourne	04	
		Victoria - Other	05	
		Tasmania	06	
		Queensland - Brisbane	07	
		Queensland - Other	08	
		South Australia - Adelaide	09	
		South Australia - Other	10	
		Western Australia - Perth	11	
		Western Australia - Other	12	
		Northern Territory	13	
		Other Australian territories (including Norfolk Island, Christmas Island, the Cocos (Keeling) Islands or the Jervis Bay Territory)	14	
		Somewhere else	96	**TERMINATE**

ASK ALL				
A2	How old are you?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	13 years or less		01	**TERMINATE**
	14-15 years		02	
	16-17 years		03	
	18 - 19 years		05	
	20 - 24 years		06	
	25 - 29 years		07	
	30 - 34 years		08	
	35 - 39 years		09	
	40 - 44 years		10	
	45 - 49 years		11	
	50 - 54 years		12	
	55 - 59 years		13	
	60 - 64 years		14	
	65 - 69 years		15	
	70 - 74 years		16	
	75+ years		17	

ASK ALL				
A3	What is your gender?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	Male		01	
	Female		02	
	Non-binary		03	
	Other		04	

CONTINUE IF RESIDE IN AUSTRALIA AND AGED OVER 14 YEARS (CODES 01-13 IN A1 AND CODES 02-17 IN A2)

ASK ALL				
A4.	Are you the parent or guardian of any child/children **aged 17 years or under**?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	No, none		01	**SKIP TO NEXT SECTION**
	Yes – one child		02	
	Yes – two children		03	
	Yes – three children		04	
	Yes – four or more children		05	

ASK IF PARENT OR GUARDIAN (IE CODES 02-05 IN A4)				
A5.	In which of the following age groups are the children under your care?			
	Please select all that apply	**DO NOT RANDOMISE**	**MR**	
	0 - 4 years		01	*Parent / Guardian (child <18)*
	5 - 8 years		02	*Parent / Guardian (child <18)*
	9 - 11 years		03	*Parent / Guardian (child <18)*
	12 - 13 years		04	*Parent / Guardian (child <18)*
	14 - 15 years		05	*Parent / Guardian (child <18)*
	16 - 17 years		06	*Parent / Guardian (child <18)*
	18+ years		08	

ASK IF PANEL=OCTOPUS & PARENT OF CHILD 14-17 YRS (A2 CODE 05-17, A4 02-05, A5 05-06)				
A6.	Thank you for agreeing to participate in this survey. In this instance we are only looking to survey teenagers **aged 14-17** years old. If you are happy for your child aged 14-17 years of age to participate, please pass on your device to them so they may take part. This survey is about your child's experiences with using social media, online messaging or video apps, online gaming and general online marketplaces (e.g. Amazon, eBay and AliExpress). The survey is about the services and platforms they use, not the specific content they access. Is your child **aged 14-17** years completing the remainder of this survey?			
	Please select all that apply	**DO NOT RANDOMISE**	**MR**	
	Yes, my child is available to continue now		01	**ASK A2 AND A3**
	Yes, my child is able to continue at a later point		02	**ASK A2 AND A3**
	No, my child is not available or willing to participate		03	**TERMINATE**

Section B: Online Private Messaging

ASK ALL				
B1	We would now like to ask you about using online messaging services and audio or video calling services. Which of the following have you used to either **send messages and/or make audio or video calls in the last month?**			
	Please select all that apply	**DO NOT RANDOMISE**	**MR**	
	Commonly pre-installed apps			
	Apple FaceTime		01	
	Apple iMessage		02	
	Google Messages		03	
	Google Meet		04	
	Samsung Messages		05	
	Social media services with messaging / calling features			
	Facebook Messenger		06	
	Snapchat		07	
	Instagram Direct		08	
	TikTok Messages		09	
	WeChat		10	
	Online messaging / calling services			
	WhatsApp		11	
	Discord		12	
	Signal		13	
	Telegram		14	
	LINE		15	
	Microsoft Teams		16	
	Slack		17	
	Skype		18	
	Viber		19	
	Zoom		20	
	Google Chat		21	
	Other (please specify)		96	
	None of the above		98	**SKIP TO B3**

ASK IF SELECTED MORE THAN ONE PLATFORM IN B1				
B2	Which of the following have you used **most often for <u>personal use</u>** to either **send messages and/or make audio or video calls in the last month?**			
	Please select one response only	**PIPE RESPONSES FROM B1**	**SR**	
			01	
		I haven't used any of these services for personal use.	98	

ASK IF PARENT OR GUARDIAN OF A CHILD 17 OR UNDER IE CODES 01-06 IN A5. OTHERS SKIP TO NEXT SECTION				
B3	To the best of your knowledge, which **online messaging services** are used by any children in your household once a month or more?			
	Please select all that apply	**DO NOT RANDOMISE**	**MR**	
		Apple Messages (iMessage/iOS text messaging app)	01	
		Discord	02	
		Facebook Messenger	03	
		Facebook Messenger Kids	04	
		Google Messages (Android text messaging app)	05	
		Instagram Direct	06	
		Snapchat	07	
		TikTok Messages	09	
		WhatsApp	10	
		Other (please specify)	11	
		There are likely others that I don't know about	12	
		None are used	13	
		Don't know / do not monitor this	14	

ASK IF PARENT OR GUARDIAN OF A CHILD 17 OR UNDER IE CODES 01-05 IN A5. OTHERS SKIP TO NEXT SECTION				
B4	To what extent do you monitor **which online messaging apps** your children have? Please note, we are interested in whether you monitor the **apps your children have**, not whether you monitor the messages themselves.			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		I monitor the apps my children have closely	01	**SKIP TO B5**
		I monitor the apps my children have to some extent	02	**SKIP TO B5**
		I don't monitor the apps my children have	03	**GO TO B4b**

ASK IF THEY DON'T MONITOR THE APPS – CODE 03 ABOVE IN B4a

B4b	To the best of your knowledge, does another adult monitor the apps your children have (e.g. could be another parent, other family member, or friend)?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	Yes, another adult monitors the apps my children have		01	**SKIP TO NEXT SECTION**
	No, another adult does not monitor the apps my children have		02	**SKIP TO NEXT SECTION**
	I don't know		03	**SKIP TO NEXT SECTION**

ASK IF PARENT WHO MONITORS CHILDREN'S APP USAGE I.E. B4 CODES 01-02

B5. How important are each of the following to you when choosing an online messaging service **for your child / children** to use?

	Please select one response per statement	**RANDOMISE STATEMENTS**					**RSR**
		Extremely important	Very Important	Quite important	Not very important	Not at all important	Don't know
_1	The preference of my child / children	01	02	03	04	05	97
_2	Whether my child's friends are using the service	01	02	03	04	05	97
_3	Whether our family members are using the service	01	02	03	04	05	97
_4	The level of privacy of my child's conversations and data	01	02	03	04	05	97
_5	The level of security to protect against malware and hackers	01	02	03	04	05	97
_6	The level of protection against harmful content, predators, scams and spam	01	02	03	04	05	97
_7	The ability to access the service across many devices	01	02	03	04	05	97
_8	It's the default service on my child's device	01	02	03	04	05	97
_9	Option for parental controls over settings and access	01	02	03	04	05	97
_10	Any other social networking features on the service (e.g. sharing stories or posts, following businesses & creators etc.)	01	02	03	04	05	97

ASK IF PARENT WHO MONITORS CHILDREN'S APP USAGE I.E. B4 CODES 01-02

B6.	Do you take any other considerations into account when choosing an online messaging service **for your child / children** to use?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	

		Yes (please specify)	01	
		No	02	
		Don't know	97	

ASK IF AGED 14-17 (A2 CODES 02-03)													
B7	To what extent do your parents or another adult monitor **your online activity (e.g. social media or websites you use, online messaging, online games you play, etc.)**?												
	Please select one response only						DO NOT RANDOMISE					RSR	
		1 (Not monitor at all)	2	3	4	5	6	7	8	9	10 (Monitor very closely)		
		00	01	02	03	04	05	06	07	08	09		
Notes:													

ASK IF AGED 14-17 (A2 CODES 02-03)				
B8.	If you have any siblings, how old are they?			
	Please select all that apply	DO NOT RANDOMISE	MR	
		0 - 4 years	01	
		5 - 8 years	02	
		9 - 11 years	03	
		12 - 13 years	04	
		14 - 15 years	05	
		16 - 17 years	06	
		18+ years	08	
		I don't have any siblings	98	

Section C: Generative AI

ASK ALL				
C1	How much do you know about the phrase **generative artificial intelligence (AI)**?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	I have never heard this phrase before today		01	
	I have heard of it, but don't really know what it means		02	
	I have heard of it, and think I know what it means		03	
	I am confident I know what this term means		04	**SKIP TO C3**

ASK IF UNSURE OF TERM IE CODES 01-03 IN C1				
C2	**Generative artificial intelligence (AI)** services can create content such as text, images, audio or video in response to a user's request (for example, a user might describe a picture and the generative AI tool will produce the picture for them). Examples include chatbots such as ChatGPT, productivity tools such as Microsoft Copilot, and image generators such as Stable Diffusion. Before now, were you aware that these types of tools existed?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	Yes, I was aware of these types of tools		01	**AUTOCODE THIS FOR C1_4**
	No, I was not aware of these types of tools		02	
	Not sure		03	**INTERPRET AS NOT AWARE**

ASK ALL				
C3.	Which of these generative AI tools, if any, were you **aware of** before today?			
	Please select all that apply	**RANDOMISE**	**MR**	
		Character.AI	01	
		ChatGPT	02	
		Claude AI	03	
		DALL-E	05	
		Grammarly	06	
		Google Gemini	08	
		Jasper	09	
		Meta AI (website version)	10	
		Meta AI (within Instagram, Messenger or WhatsApp)	11	
		Microsoft Copilot	12	
		Midjourney	13	
		Perplexity AI	14	
		Runway	15	
		Stable Diffusion	16	
		Suno	17	
		Synthesia	18	
		Other (please specify)	97	
		None of these	98	

ASK IF AWARE OF ANY TOOLS IE CODES 01-97 IN C3				
C4.	Which of these AI tools, if any, have you **used** in the **past 6 months**?			
	Please select all that apply	**RANDOMISE** **PIPE RESPONSES FROM C3**	**MR**	
			01	
		None of these	98	

ASK IF USES CHARACTER AI, CHATGPT, CLAUDE AI, GOOGLE GEMINI OR MICROSOFT COPILOT					
C4B.	Of these AI tools, do you use the free or paid version?				
	Please select one response per row	**RANDOMISE STATEMENTS** **PIPE APPLICABLE RESPONSES FROM C4**			**RSR**
		Free	Paid	Don't know	
_1		01	02	97	

ASK IF USES ANY GENERATIVE AI TOOLS IE CODES 01-97 IN C4								
C5.	How often do you use these generative AI tools?							
	Please select one response per row	**RANDOMISE STATEMENTS PIPE RESPONSES FROM C4**						**RSR**
		Every day or most days	Once a week or more	Once every 2-3 weeks	Once a month	Every 2-3 months	Less often	Unsure / have only just started using it
_1		01	02	03	04	05	06	97

ASK IF USED ANY AI TOOLS IE CODES 01-97 IN C4. SHOW C6 AND C7 ON SAME SCREEN				
C6	For which of the following purposes have you used generative AI tools?			
	Please select all that apply	**RANDOMISE**	**MR**	
		For fun / general entertainment	01	
		To try it out	02	
		For work or business purposes	03	
		For school or study purposes	04	
		To help me with a personal task	05	
		Something else (specify)	97	
		Don't know	98	

ASK IF USED ANY AI TOOLS IE CODES 01-97 IN C4. C6 AND C7 ON SAME SCREEN				
C7	For what specific tasks have you used generative AI?			
	Please select all that apply	**RANDOMISE**	**MR**	
		To search for information on a specific topic (as a browsing tool)	01	
		To summarise information or advice on a specific topic	02	
		To get personalised advice or recommendations	03	
		To access news	04	
		To create or get ideas for written content	05	
		To review and improve your written content (e.g. correcting grammar, reducing length)	06	
		To create or edit images	07	
		To create or edit audio	08	
		To create or edit video content	09	
		To create or edit computer code	10	
		To translate content into a different language	11	
		To create social media or website content	12	
		Something else (specify)	97	
		Don't know	98	

ASK ALL				
C8	Some social media platforms, including Facebook, Instagram and LinkedIn, have said they may use posts (both text and images) from users to help train their AI models. This means posts you make could be used to help these models generate responses when other people ask them questions. In your opinion, should companies that train AI models using your data gain your consent before they use your data in this way?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	Yes, they should seek consent		01	
	No, they do not need to seek consent		02	
	Not sure		03	

ASK ALL				
C9	Meta is the company that owns Facebook and Instagram. Meta has said that it uses public posts on Facebook and Instagram to train its AI models. In Europe, Meta allows its users to opt-out of having their public posts being used to train its AI models. Meta has said that users in Australia will **not** be able to opt-out. Do you think Meta should give Australians the ability to opt out?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	Yes, they should provide an opt-out option		01	
	No, they do not need to provide an opt-out option		02	
	Not sure		03	

ASK ALL				
C10	What concerns, if any, do you have about generative AI?			
	Please select all that apply	**RANDOMISE**	**MR**	
	The privacy of my information		01	
	The accuracy of the responses provided by the AI		02	
	Any bias or unfairness in what information it chooses to show you		03	
	People starting to depend on AI judgement instead of human judgement		04	
	A lack of transparency as to how it arrived at the results		05	
	It can be misused by scammers		06	
	It can create harmful content (e.g. fake audio / video content, or misinformation)		07	
	Being forced to talk to an AI when I interact with a business		08	
	Something else (specify)		97	
	I have no significant concerns		98	

Section D: App stores and mobile operating systems

ASK ALL				
D1	Do you have a smartphone for personal use? A smartphone is a mobile phone on which you can send and receive emails, use apps, view websites and generally go online. Popular brands include Apple iPhone and Samsung Galaxy.			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	Yes		01	
	No		02	**SKIP TO NEXT SECTION**
	Not sure		03	**SKIP TO NEXT SECTION**

ASK IF HAVE A SMARTPHONE IE CODE 01 IN D1

D2. How important are each of the following to you when choosing a smartphone to use?

Please answer this question about the **phone itself**, and not your mobile network provider.

	Please select one response per statement	**RANDOMISE STATEMENTS**					**RSR**
		Extremely important	Very Important	Quite important	Not very important	Not at all important	Don't know
_1	Price	01	02	03	04	05	97
_2	Brand (e.g. Apple, Google, Samsung etc.)	01	02	03	04	05	97
_3	The operating system (iOS or Android, which is pre-installed on your device)	01	02	03	04	05	97
_4	Features of the phone itself (e.g. camera, look and feel, screen size and quality, battery life)	01	02	03	04	05	97
_5	Security and privacy	01	02	03	04	05	97
_6	Compatibility with other devices I own (e.g. smart watches, headphones etc.)	01	02	03	04	05	97
_7	Range and quality of apps available	01	02	03	04	05	97
_8	Price of subscriptions / apps / content available	01	02	03	04	05	97
_9	Parental controls and settings	01	02	03	04	05	97

ASK IF HAVE A SMARTPHONE IE CODE 01 IN D1				
D3.	What operating system does your **current** phone use?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		iOS (used by Apple products including iPhones)	01	
		Android (used by almost all other smartphones, including Samsung, Google, Oppo, Motorola, Xiaomi, Vivo and Nokia)	02	
		Something else (specify)	03	
		Don't know	97	

ASK IF HAVE A SMARTPHONE IE CODE 01 IN D1				
D4N	Thinking about the most recent phone you had before your current phone. What operating system did your **previous** phone use?			
	Please select one response only	**RANDOMISE**	**SR**	
		It was the same operating system as my current phone (i.e. both Android, or both iOS)	01	**NON-SWITCHER**
		It was a different operating system from my current phone (i.e. one was Android, the other iOS)	02	
		Don't know	97	
		I only ever owned one smartphone	98	

ASK IF NON-SWITCHER CODE 01 IN D4N				
D6.	To what extent did you consider switching to a smartphone with a different operating system this time around?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Strongly considered it	01	
		Considered it to an extent	02	
		Did not consider it	03	
		Don't know / not relevant (e.g. phone was a gift)	97	

ASK IF NON-SWITCHER CODE 01 IN D4N				
D7.	Have you **ever** owned a smartphone with a different operating system than the one you currently use?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Yes	01	
		No	02	
		Don't know	97	

ASK IF HAVE OWNED OTHER OS IE CODE 01 IN D7 SHOW ON SAME PAGE AS D7

D7b.	Which operating systems were these?			
	Please select all that apply	**RANDOMISE**	**MR**	
	iOS (used by Apple products including iPhones)		01	**SHOW IF NOT iOS IN D3**
	Android (used by almost all other smartphones, including Samsung, Google, Oppo, Motorola, Xiaomi, Vivo and Nokia)		02	**SHOW IF NOT ANDROID IN D3**
	HarmonyOS (Huawei)		03	
	BlackBerry OS / BlackBerry 10		04	
	Something else (specify)		97	
	Don't know		98	

ASK IF HAVE A SMARTPHONE IE CODE 01 IN D1

D8. Please answer the following questions regardless of whether you have ever switched between operating systems in the past.

To what extent do you agree or disagree with each of the following statements?

	Please select one response per statement	**RANDOMISE STATEMENTS**					**RSR**
		Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Don't know / N/A
_1	I am happy with the operating system on my current phone	01	02	03	04	05	97
_2	It would be difficult to learn how to use a new operating system	01	02	03	04	05	97
_3	My friends and family generally use the same operating system as me	01	02	03	04	05	97
_4	I can't see any significant benefits to switching to a phone with a different operating system	01	02	03	04	05	97

Notes:

ASK IF HAVE A SMARTPHONE IE CODE 01 IN D1				
D9.	How likely are you to choose a phone with a different operating system the next time you get a new smartphone?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Extremely likely	01	
		Very likely	02	
		Quite likely	03	
		Not very likely	04	
		Not at all likely	05	
		Don't know	97	
Notes:				

ASK IF HAVE A SMARTPHONE IE CODE 01 IN D1							
D10.	Regardless of how likely you are to switch to a phone with a different operating system, how concerned are you about each of the following?						
	Please select one response per statement	**RANDOMISE STATEMENTS**					**RSR**
		Extremely concerned	Very Concerned	Quite concerned	Not very concerned	Not at all concerned	Don't know
_1	The security features may not be as good on the other system	01	02	03	04	05	97
_2	The privacy protections may not be as good on the other system	01	02	03	04	05	97
_3	I am concerned about losing data (e.g. photos, messages, videos)	01	02	03	04	05	97
_4	The amount of time and effort it would take to learn how to use a new system	01	02	03	04	05	97
_5	It wouldn't interact as well / at all with my other devices	01	02	03	04	05	97
_6	My preferred apps would not be available	01	02	03	04	05	97
_7	There are fewer apps available	01	02	03	04	05	97
_8	I would lose access to the apps and subscriptions I have already paid for	01	02	03	04	05	97
Notes:							

ASK IF EVER SWITCHED OS IE CODES 02 or 97 IN D4N OR CODE 1 IN D7	
D11	Thinking back to when you last decided to switch operating systems, why did you switch?

	Please select all that apply	RANDOMISE	MR	
		The phone was a good price	01	
		The phone is higher quality (e.g. better camera, battery life, other hardware features)	02	
		I wanted to use the operating system of the phone I switched to	03	
		The apps and subscriptions on the operating system I switched to offer better value for money and/or more app options	04	
		My friends/family use it	05	
		I wanted to use apps not available on my old operating system	06	
		I have other devices linked to the operating system I switched to	07	
		I was able to port any paid-for subscriptions/content in apps to my new phone	08	
		Better security features (malware protection etc.)	09	
		I trust the operating system I switched to more to look after my personal information/privacy	10	
		Something else (please specify)	97	

ASK IF EVER SWITCHED OS IE CODES 02-97 IN D4N OR CODE 1 IN D7					
D12.	How easy or difficult did you find it to switch operating systems?				
	Please select one response only		DO NOT RANDOMISE	SR	
		Very easy		01	
		Quite easy		02	
		Neither easy nor difficult		03	
		Quite difficult		04	
		Very difficult		05	
		Don't know		97	
Notes:					

ASK IF EVER SWITCHED OS IE CODES 02-97 IN D54N OR CODE 1 IN D7				
D13.	Overall, how satisfied or dissatisfied were you with your experience of switching operating systems?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Very satisfied	01	
		Quite satisfied	02	
		Neither satisfied nor dissatisfied	03	
		Quite dissatisfied	04	
		Very dissatisfied	05	
		Don't know	97	
Notes:				

Section E: Kids and Dependent Adults' smartphones

ASK PARENTS WITH CHILDREN <18				
E1	Which of the following have you done in the past 2 years for **at least one of your children**?			
	Please select all that apply	**RANDOMISE**	**MR**	
		Bought a new smartphone for at least one of my children	01	
		Bought a second-hand smartphone for at least one of my children	02	
		Given a smartphone already in the household to at least one of my children	03	
		None of these	98	

ASK IF BOUGHT A SMARTPHONE FOR CHILD IE CODES 01-02 IN E1				
E2	Which of the following applied the last time you **bought** a new or second-hand smartphone for one of your children?			
	Please select one response only	**RANDOMISE**	**SR**	
		It was the same operating system as the one I use (i.e. both Android, or both iOS)	01	
		It was a different operating system as the one I use (i.e. one was Android, the other iOS)	02	
		Something else (please explain)	03	

ASK IF BOUGHT A SMARTPHONE FOR ADULT IE CODES 01-02 IN E4					
E5	Which of the following applied the last time you **bought** a new or second-hand smartphone for an adult who relies on your guidance in relation to technology (e.g. a parent)?				
	Please select one response only		**RANDOMISE**	**SR**	
		It was the same operating system as the one I use (i.e. both Android, or both iOS)		01	
		It was a different operating system as the one I use (i.e. one was Android, the other iOS)		02	
		Something else (please explain)		03	

ASK IF BOUGHT CHILD A PHONE WITH THE SAME OPERATING SYSTEM IE CODE 01 IN E2					
E3	Why did you choose a phone for your child with the same operating system as yours?				
	Please select all that apply		**RANDOMISE**	**MR**	
		Because it was a phone I am familiar with		01	
		Because it was an operating system I am familiar with		02	
		My child wanted that phone		03	
		The phone was a good price		04	
		Other features about the phone itself (e.g. camera, look and feel, size, battery life etc.)		05	
		To access apps not available on other operating systems		06	
		To access features which are not available if we were on different operating systems (e.g. location tracking, sharing files, parental controls)		07	
		It is what my child's friends mostly use		08	
		To link to other devices		09	
		I trust this operating system more to look after my child's privacy or safety		10	
		Something else (specify)		97	
		None of these		98	

ASK ALL					
E4	Which of the following have you done in the past 2 years for **an adult who relies on your guidance in relation to technology (e.g. a parent) who is not your child**?				
	Please select all that apply		**RANDOMISE**	**MR**	
		Bought a new smartphone for an adult who relies on my guidance in relation to technology (e.g. a parent)		01	
		Bought a second-hand smartphone for an adult who relies on my guidance in relation to technology (e.g. a parent)		02	
		Given a smartphone already in the household to an adult who relies on my guidance in relation to technology (e.g. a parent)		03	
		None of these		98	

ASK IF BOUGHT ADULT A PHONE WITH THE SAME OPERATING SYSTEM IE CODE 01 IN E5				
E6	Why did you choose a phone with the same operating system as yours?			
	Please select all that apply	**RANDOMISE**	**MR**	
		Because it was a phone I am familiar with	01	
		Because it was an operating system I am familiar with	02	
		They wanted that phone	03	
		The phone was a good price	04	
		Other features about the phone itself (e.g. camera, look and feel, size, battery life etc.)	05	
		To access apps not available on other operating systems	06	
		To access features which are not available if we were on different operating systems (e.g. location tracking, sharing files)	07	
		It is what their friends mostly use	08	
		To link to other devices	09	
		I trust this operating system more to look after their privacy or safety	10	
		Something else (specify)	97	
		None of these	98	

Section F: Online Gaming

ASK ALL				
F1	For this section, we are interested in your use of **online and mobile gaming.** This includes digital board or puzzle games (Candy Crush, Chess, Words with Friends, Wordle etc.), interactive games, design games (décor design, fashion design, café games), educational games, or other types of video games that you can play by yourself or with others online (e.g. Fortnite, Minecraft, EA Sports FC etc.), but **not** simulated gambling games or online casinos where you have to gamble with real money. Please include downloading free apps, single purchases and games that you pay a subscription to play. Which of the following devices have you used to play games on in the **past 6 months**?			
	Please select all that apply	**RANDOMISE**	**MR**	
	A mobile device (smartphones, tablets etc.)		01	
	A desktop or laptop		02	
	A gaming console(s)		03	
	Other (please specify)		96	
	None of these		98	**SKIP TO NEXT SECTION**
	Don't know		99	**SKIP TO NEXT SECTION**

ASK IF MORE THAN ONE RESPONSE FROM F1				
F2	Which of these do you use most often?			
	Please select one response only	**PIPE RESPONSES FROM F1**	**SR**	
			01	

ASK IF USED ANY PLATFORM IN PAST 6 MONTHS IE CODES 01-96 IN F1. OTHERS TO NEXT SECTION				
F3	Thinking of the devices you used to play games, which of the following have you used to access games in the **past 6 months**?			
	Please select all that apply	**RANDOMISE**	**MR**	
	Mobile devices (smartphones, tablets etc.)			
	Apple App Store (iOS)		01	**SHOW IF F1 CODE 01**
	Google Play Store (Android)		02	**SHOW IF F1 CODE 01**
	Other app store on Android (please specify)		03	**SHOW IF F1 CODE 01**
	I have played games through my phone's internet browser (e.g. playing Wordle on the New York Times website through Safari/Chrome) rather than downloading them on my phone		04	**SHOW IF F1 CODE 01**
	I have directly installed a gaming app onto my Android device without using an app store		05	**SHOW IF F1 CODE 01**
	Other (please specify)		06	**SHOW IF F1 CODE 01**
	Desktops and laptops			
	CD Projekt (GOG)		07	**SHOW IF F1 CODE 02**
	Epic Games (Epic Games Store)		08	**SHOW IF F1 CODE 02**
	Valve (Steam)		09	**SHOW IF F1 CODE 02**
	I have played games through my device's internet browser rather than installing them on my computer.		10	**SHOW IF F1 CODE 02**
	Other desktop or laptop platform (please specify)		11	**SHOW IF F1 CODE 02**
	Consoles			
	Microsoft (Xbox, Microsoft Store)		12	**SHOW IF F1 CODE 03**
	Nintendo (Switch, Nintendo eShop)		13	**SHOW IF F1 CODE 03**
	Sony (PlayStation, PlayStation Store)		14	**SHOW IF F1 CODE 03**
	Other console platform (please specify)		15	**SHOW IF F1 CODE 03**

ASK IF USED ANY PLATFORM IN PAST 6 MONTHS IE CODES 01-96 IN F1. OTHERS TO NEXT SECTION				
F4	How closely do you read the **terms of use** for the digital stores where you access games (e.g. App Store, Google Play Store, Steam, PlayStation Store, etc.)?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	I read them fully		01	
	I read some parts		02	
	I skim the headings only		03	
	I don't read them at all		04	
	Don't know		99	

ASK IF USED ANY PLATFORM IN PAST 6 MONTHS IE CODES 01-96 IN F1. OTHERS TO NEXT SECTION SHOW F5 – F7 ON SAME SCREEN				
F5	Some digital game stores have terms of use which say that purchasing a game **does not** give you ownership of the game, but rather a licence to access and play it. This means that if a digital game store were to stop hosting the game or the developer were to cancel the licence, you may no longer be able to play it at all, even if you have paid for it. Before today, were you aware of this?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Yes / I was aware	01	
		No / I was not aware	02	
		Don't know	99	

ASK IF USED ANY PLATFORM IN PAST 6 MONTHS IE CODES 01-96 IN F1. OTHERS TO NEXT SECTION SHOW F5 – F7 ON SAME SCREEN				
F6	In your opinion, how fair is it that you may no longer be able to play a game you have paid for if the game store stops hosting it?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Very unfair	01	
		Quite unfair	02	
		Neither fair nor unfair	03	
		Quite fair	04	
		Very fair	05	
		Don't know	99	

ASK IF USED ANY PLATFORM IN PAST 6 MONTHS IE CODES 01-96 IN F1. OTHERS TO NEXT SECTION SHOW F5 – F7 ON SAME SCREEN				
F7	If a digital game store stops hosting a game, you **may not receive any refunds** for the money you spent on **in-game purchases**, even though you can no longer use them. This includes additional features like outfits/skins, equipment/weapons, loot boxes, battle passes, and/or in-game virtual currencies like coins, gold or Fortnite V-Bucks. In your opinion, how fair is this?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Very unfair	01	
		Quite unfair	02	
		Neither fair nor unfair	03	
		Quite fair	04	
		Very fair	05	
		Don't know	99	

ASK IF USED ANY PLATFORM IN PAST 6 MONTHS IE CODES 01-96 IN F1. OTHERS TO NEXT SECTION				
F8	Think about the **user ratings or reviews** which are visible on many digital game stores, often shown as "star ratings" or a score which are often shown when you go to download a game. These are generally based on feedback by other people using the same platform who have previously downloaded the game. How much influence do user ratings have on your decision to download or purchase a game?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Very large influence	01	
		Large influence	02	
		Small influence	03	
		Very small influence	04	
		No influence at all	05	
		Don't know	99	

ASK IF USED ANY PLATFORM IN PAST 6 MONTHS IE CODES 01-96 IN F1. OTHERS TO NEXT SECTION				
F9	Over the past **two years**, have you spent money on online games in any of the following ways? Please include any spending which was deliberate, accidental, made by someone else using your account, or which was later reimbursed.			
	Please select all that apply	**DO NOT RANDOMISE**	**MR**	
		One-off purchase of a game	01	**CONTINUE TO F10**
		Paid subscription (e.g. Xbox Game Pass, Google Play Pass or Apple Arcade)	02	**CONTINUE TO F10**
		In-game purchases (e.g. skins, equipment etc.)	03	**CONTINUE TO F10**
		Downloadable content (e.g. expansion packs)	04	**CONTINUE TO F10**
		Other (please specify)	05	**CONTINUE TO F10**
		I haven't spent any money on games in the past two years	97	**SKIP TO F13**
		Don't know	99	**SKIP TO F13**

ASK IF SPENT ANY MONEY ON GAMES IN PAST 2 YEARS IE CODES 01-05 IN F9. OTHERS TO NEXT SECTION. ASK FOR EACH RESPONSE IN F9.				
F10	Over the past **two years**, how often have you spent money on online games in the following way? **(Answer from F9)** Please include any spending which was deliberate, accidental, made by someone else using your account, or which was later reimbursed.			
	Please select one response only	**REPEAT FOR EACH RESPONSE FROM F9**	**SR**	
		At least once a week	01	
		At least once a month	02	
		At least once every three months	03	
		At least once every six months	04	
		About once a year or less	05	
		Don't know	99	

ASK IF SPENT ANY MONEY ON GAMES IN PAST 2 YEARS IE CODES 01 TO 05 IN F9. OTHERS SKIP TO F13				
F11	How easy or difficult is it for you to keep track of how much real-world money you spend on online games?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Very easy	01	
		Quite easy	02	
		Neither easy nor difficult	03	
		Quite difficult	04	
		Very difficult	05	
		Don't know	99	

ASK IF SPENT ANY MONEY ON GAMES IN PAST 2 YEARS IE CODES 01 TO 05 IN F9. OTHERS SKIP TO F13				
F12	Which of the following have ever happened to you?			
	Please select all that apply	**DO NOT RANDOMISE**	**MR**	
		You made a real-money purchase without intending to	01	
		You thought you made a one-off purchase, but it turned out to be a paid subscription	02	
		You have paid subscriptions for games you no longer use because you forgot to cancel them	03	
		You were billed more than you expected for in-game purchases because you lost track of how much real-world money you were spending	04	
		You were billed for in-game purchases or subscriptions you were not expecting because children (or someone else) made purchases on your account	05	
		Something else (specify)	06	
		None of the above	97	
		Don't know	99	

ASK IF USED ANY PLATFORM IN PAST 6 MONTHS IE CODES 01-96 IN F1. OTHERS TO NEXT SECTION				
F13	Have you **ever** experienced a significant issue with a digital game that **you spent money on** (not a free game which you have not made purchases for)? This includes the game not operating properly due to programming bugs, the game not being as advertised, or other significant game quality issues.			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	Yes		01	**CONTINUE TO F14**
	No		02	**SKIP TO NEXT SECTION**
	Don't know		98	**SKIP TO NEXT SECTION**
	Haven't spent money on games		99	**SKIP TO NEXT SECTION**

ASK IF EXPERIENCED SIGNIFICANT ISSUE IE CODE 01 IN F13. OTHERS TO NEXT SECTION				
F14	Did you contact the retailer or publisher you bought the game from, whether online (e.g. Steam, App Store) or in-store (e.g. EB Games), to seek a refund or other solution to the issue?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	Yes		01	**CONTINUE TO F15**
	No		02	**SKIP TO F17**
	You considered it, but decided not to		03	**SKIP TO F17**
	Don't know		99	**SKIP TO NEXT SECTION**

ASK IF CONTACTED RETAILER / PUBLISHER IE CODE 01 IN F14. OTHERS SKIP TO F17				
F15	How was the situation resolved?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	It was resolved in a manner that I was happy with		01	
	It was resolved, but not in a manner that I was happy with		02	
	You managed to contact them, but the matter was not resolved		03	
	You were not able to contact them at all		04	
	Don't know		99	

ASK IF CONTACTED RETAILER / PUBLISHER IE CODE 01 IN F14. OTHERS SKIP TO F17				
F16	How easy or difficult did you find it to seek this refund or other solution?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	Very easy		01	**SKIP TO NEXT SECTION**
	Quite easy		02	**SKIP TO NEXT SECTION**
	Neither easy nor difficult		03	**SKIP TO NEXT SECTION**
	Quite difficult		04	**SKIP TO NEXT SECTION**
	Very difficult		05	**SKIP TO NEXT SECTION**
	Don't know		97	**SKIP TO NEXT SECTION**

ASK IF DID NOT SEEK TO CONTACT RETAILER / PUBLISHER IE CODES 02-03 IN F14				
F17	Why did you choose not to seek a refund or other solution to the issue you experienced?			
	Please select all that apply	**DO NOT RANDOMISE**	**MR**	
	You thought it would be too difficult		01	
	You thought it would take too long		02	
	You didn't know who to contact about the issue, or how to contact them		03	
	You didn't think the retailer or publisher would listen		04	
	Other (please specify)		05	
	Don't know/can't remember		06	

Section G: Online Retail Marketplaces

ASK ALL					
G1	A **general online retail marketplace** is an online platform where you can buy goods from **a range of retailers**, rather than just the retailer operating the platform. It does not include second-hand marketplaces such as Facebook Marketplace. From which of the following general online retail marketplaces have you **made a purchase** within the last 12 months?				
	Please select all that apply		**RANDOMISE**	**MR**	
		Amazon		01	
		eBay		02	
		Catch		03	
		Kogan		04	
		MyDeal		05	
		AliExpress		06	
		Temu		07	
		Shein		08	
		Wish		09	
		Other (please specify)		97	
		None of these		98	**SKIP TO NEXT SECTION**
		Don't know		99	**SKIP TO NEXT SECTION**

ASK IF 2+ ANSWERS SELECTED IN G1. OTHERS TO G3					
G2	And which of those marketplaces did you use the most?				
	Please select one response only		**PIPE RESPONSES FROM G1**	**SR**	
				01	
		Don't know		99	

ASK IF USED ONLINE PLATFORM IN PAST 12 MONTHS IE CODES 01-97 IN G1. SHOW G3 AND G4 ON SAME SCREEN					
G3.	Have you **ever** had a problem with a general online retail marketplace, where you felt entitled to a refund? This includes a substandard product, broken product, a product of the wrong size or specifications, a product that wasn't as advertised or which wasn't delivered at all.				
	Please select one response only		**DO NOT RANDOMISE**	**SR**	
		Yes		01	
		No		02	**SKIP TO G10**

SHOW G3 AND G4 ON SAME SCREEN. G4 APPEARS IF CODE 01 SELECTED IN G3

G4.	Have you **ever** attempted to **resolve a dispute** with a general online retail marketplace? A dispute includes seeking a refund, complaining about a product that wasn't as advertised or which wasn't delivered.			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Yes	01	
		No	02	**SKIP TO G9**

ASK IF ATTEMPTED TO RESOLVE A DISPUTE IE CODE 01 IN G4				
G5	With which marketplaces did you attempt to resolve a dispute?			
	Please select all that apply	**RANDOMISE**	**MR**	
		Amazon	01	
		eBay	02	
		Catch	03	
		Kogan	04	
		MyDeal	05	
		AliExpress	06	
		Temu	07	
		Shein	08	
		Wish	09	
		Other (please specify)	97	
		None of these	98	
		Don't know	99	

ASK IF ATTEMPTED TO RESOLVE A DISPUTE IE CODE 01 IN G4				
G6a.	How satisfied were you with your experience attempting to resolve a dispute with **<<G5 RESPONSE>>**?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Very satisfied	01	
		Quite satisfied	02	
		Neither satisfied nor dissatisfied	03	
		Quite dissatisfied	04	
		Very dissatisfied	05	
		Don't know	97	
Notes:				

ASK IF ATTEMPTED TO RESOLVE A DISPUTE IE CODE 01 IN G4				
G7a.	What impact did this dispute have on your likelihood to use **<<G5 RESPONSE>>** in the future?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	

		Much more likely to use	01	
		Slightly more likely to use	02	
		Neither more nor less likely to use	03	
		Slightly less likely to use	04	
		Much less likely to use	05	
		Don't know	97	
Notes:				

ASK IF ATTEMPTED TO RESOLVE A DISPUTE IE CODE 01 IN G4				
G8a.	What impact did this dispute have on your likelihood to use **other online marketplaces** in the future?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Much more likely to use	01	
		Slightly more likely to use	02	
		Neither more nor less likely to use	03	
		Slightly less likely to use	04	
		Much less likely to use	05	
		Don't know	97	
Notes:				

REPEAT G6A-G8A FOR ALL MARKETPLACES SELECTED IN G5

ASK IF EVER HAD PROBLEM BUT NOT ATTEMPTED TO RESOLVE IE CODE 01 IN G3 AND CODE 02 IN G4. OTHERS TO G10				
G9	Why didn't you attempt to resolve a dispute with the online platform?			
	Please select all that apply	**RANDOMISE**	**MR**	
		I did not know who to contact / how to contact them	01	
		I was able to resolve the dispute directly with the seller of the product, rather than the marketplace	02	
		I thought it would be too difficult	03	
		I decided to use a different marketplace in future instead	04	
		I didn't think it was worth my time	05	
		I was advised not to bother by others who had tried	06	
		Other (specify)	97	
		None of these	98	
		Don't know	99	

ASK IF USED ONLINE PLATFORM IN PAST 12 MONTHS IE CODES 01-97 IN G1

G10	Which of the following experiences, if any, have you had when using a general online retail marketplace in the last 12 months?			
	Please select all that apply	**RANDOMISE**	**MR**	
		Clicking on a product or service in search results that you didn't realise was an advertisement	01	
		Receiving repeated reminders to sign up for additional marketing emails at the checkout	02	
		Receiving repeated reminders to purchase additional services at the checkout (such as a paid subscription or insurance)	03	
		Being required to sign up for marketing communications in order to complete a purchase	04	
		Being required to sign up for a paid subscription in order to complete a purchase	05	
		Accidentally signing up for a paid subscription because of the way the option was worded	06	
		Receiving marketing emails you never signed up for, or that you felt 'tricked' into signing up for (e.g. because of the way the option was worded)	07	
		Discovering fees or charges at the checkout that weren't disclosed beforehand (including delivery fees)	08	
		Receiving marketing emails after your purchase or visit reminding you about things you didn't purchase / 'left in your shopping cart'	09	
		Other (please specify)	97	
		None of these	99	

ASK IF EXPERIENCED ANY ISSUES IE CODES 01-97 IN G10				
G11	In what ways, if any, have these issues changed how you use general online marketplaces?			
	Please select all that apply	**DO NOT RANDOMISE**	**MR**	
		You use certain general online marketplaces less often	01	
		You use general online marketplaces less often overall	02	
		You prevent your children from using some or all general online marketplaces	03	
		You have shared your experiences with others (in person or online)	04	
		You have reported or complained about these issues	05	
		You use fake personal details (e.g. fake date of birth or email address)	06	
		You have a secondary email address you use when you think you are likely to get spam	07	
		You check the privacy settings or policies of sites	08	
		You are careful about what personal information you provide (e.g. credit card details, contact information)	09	
		Something else (please specify)	97	
		Don't know	99	

ASK IF USED ONLINE PLATFORM IN PAST 12 MONTHS IE CODES 01-97 IN G1				
G12	Have you ever used or considered using any optional paid subscriptions linked to general online marketplaces (such as Amazon Prime for faster / cheaper / free delivery)?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Yes / considered	01	**CONTINUE TO G13**
		Yes / used	02	**CONTINUE TO G13**
		No / neither considered nor used	03	**SKIP TO G14**
		Don't know	97	**SKIP TO G14**

ASK IF EVER CONSIDERED USING / USED SUBSCIRPTIONS IE CODE 01 OR 02 IN G12				
G13	Do you think online marketplaces do enough to **clearly explain** the costs and benefits of any optional paid subscriptions?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Yes / this is clearly explained	01	
		No / they should do more to make this clear	02	
		Don't know	97	

ASK IF USED ONLINE PLATFORM IN PAST 12 MONTHS IE CODES 01-97 IN G1					
G14	Thinking about the **default search results** in general online marketplaces. This is the order in which responses to your search are displayed if you have not selected to sort in any way. Do you think online marketplaces **clearly explain** how product search results are sorted and displayed by default?				
	Please select all that apply		**DO NOT RANDOMISE**	**SR**	
		Yes / this is clearly explained		01	
		No / they should do more to make this clear		02	
		Don't know		99	

ASK IF USED ONLINE PLATFORM IN PAST 12 MONTHS IE CODES 01-97 IN G1					
G15	In some general online marketplaces, sellers can pay to be at or near the top of the search results. The results can also be ordered to try and maximise the profit the online marketplace can earn. Do you think that general online marketplaces should be **required to tell you** how search results have been ordered?				
	Please select one response only		**DO NOT RANDOMISE**	**SR**	
		Yes / they should be required to tell you		01	
		No / they should not be required to tell you		02	
		Don't know		99	

ASK IF USED ONLINE PLATFORM IN PAST 12 MONTHS IE CODES 01-97 IN G1					
G16	Thinking about the **product reviews** which are published and visible on many general online marketplaces, often shown as "star ratings" or a score. These are generally based on feedback by other people who have bought the product. How much influence do product reviews published and visible on general online marketplaces have on your decision to purchase a product?				
	Please select one response only		**DO NOT RANDOMISE**	**SR**	
		Very large influence		01	
		Large influence		02	
		Small influence		03	
		Very small influence		04	
		No influence at all		05	
		Don't know		99	

ASK IF USED ONLINE PLATFORM IN PAST 12 MONTHS IE CODES 01-97 IN G1				
G17	Thinking about **fake reviews** published on general online marketplaces (e.g. to make a product seem more appealing than it is). How often do you encounter reviews which you know, or strongly suspect, are fake reviews when using general online marketplaces?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	Every time		01	
	Usually		02	
	About half the time		03	
	Occasionally		04	
	Rarely		05	
	Never		06	
	Don't know		97	

ASK IF USED ONLINE PLATFORM IN PAST 12 MONTHS IE CODES 01-97 IN G1				
G18	Have you ever complained to a general online marketplace about a review you thought was fake?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	Yes		01	
	No		02	
	Don't know		99	
Notes:				

ASK IF USED ONLINE PLATFORM IN PAST 12 MONTHS IE CODES 01-97 IN G1				
G19	In your opinion, should there be **minimum obligations** on general online marketplaces that use customer reviews to prevent fake reviews?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	Yes / there should be minimum standards		01	
	No / minimum standards are not required		02	
	Don't know		99	
Notes:				

Section H: Dispute Resolution Body

ASK ALL				
H1	In Australia, services such as telecommunications providers (e.g. Telstra and Optus) have a **specialised, independent external dispute resolution body to resolve disputes between consumers and these companies.** There is currently no equivalent body in Australia for digital services such as: • general online marketplaces (e.g. Amazon, Temu, eBay) • app stores (e.g. Apple App Store and Google Play Store) • mobile operating systems (e.g. Apple iOS and Google Android) • online messaging platforms (e.g. WhatsApp, Facebook Messenger) • search engines (e.g. Google and Bing) • social media services (e.g. Facebook, Instagram and LinkedIn) For example, if your account was suspended or terminated for one of these of services, or you had a dispute over a purchase you have made, there is no specialised body to resolve this issue. Do you think that you should be able to raise a complaint with an independent external dispute resolution body if you cannot resolve a dispute with these types of digital services?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
	Yes / there should be a specialised dispute resolution body		01	
	No / a specialised dispute resolution body is not required		02	
	Don't know		99	
Notes:				

ASK ALL							
H2.	How important do you think it is to have a specialised, independent external dispute resolution body to raise complaints to if you cannot resolve a dispute with the following types of digital services?						
	Please select one response per statement	**RANDOMISE STATEMENTS**					**RSR**
		Extremely important	Very important	Quite important	Not very important	Not at all important	Don't know
_1	General online marketplaces (e.g. Amazon, Temu, eBay)	01	02	03	04	05	97
_2	App stores (e.g. Apple App Store and Google Play Store)	01	02	03	04	05	97
_3	Mobile operating systems (e.g. Apple iOS and Google Android)	01	02	03	04	05	97
_4	Online messaging platforms (e.g WhatsApp, Facebook Messenger)	01	02	03	04	05	97
_5	Search engines (e.g Google and Bing)	01	02	03	04	05	97

_6	Social media services (e.g. Facebook, Instagram and LinkedIn)	01	02	03	04	05	97
Notes:							

ASK ALL				
H3	Are there any other digital services that you believe require an independent external dispute resolution body?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Yes (please specify)	01	
		No	02	
		Don't know	99	
Notes:				

Section Z: Demographics

ASK ALL				
Z1.	Which of the following categories best describes your total **household** income before tax?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Under $40,000	01	
		$40,000 - $69,999	02	
		$70,000 - $99,999	03	
		$100,000 - $139,999	04	
		$140,000 - $169,999	05	
		$170,000 - $199,999	06	
		More than $200,000	07	
		Prefer not to answer / Don't know	98	

ASK ALL				
Z2	Which of the following best describes the highest level of education you have completed?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Below Year 12	01	
		Completed Year 12	02	
		TAFE or technical	03	
		University	04	
		Post-grad	05	

ASK ALL				
Z3	Which of the following best describes your work status?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Employed full-time	01	
		Employed part-time	02	
		Self-employed	03	
		Long service leave	04	
		On a career break	05	
		Unemployed, looking for work	06	
		Retired	07	
		Studying full-time	08	
		Studying part-time	09	
		Homemaker	11	

ASK IF EMPLOYED FULL OR PART TIME OR SELF EMPLOYED (CODES 01-03 IN Z3)				
Z4	What is your level of responsibility in the main organisation you work in, in terms of managing the business or organisation?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		You own or part-own the business	01	
		You are wholly or partly responsible for managing the business on behalf of an owner / You are part of the decision-making team	02	
		You work in the business / You are not involved in the management of the business	03	

ASK IF EMPLOYED FULL OR PART TIME OR SELF EMPLOYED (CODES 01-03 IN Z3)				
Z5	How many employees does the main organisation you work in currently employ? If you don't know exactly, an estimate is OK. Please include yourself			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Yourself only, or yourself and other 'non-employed' business partners	01	
		2 - 4 employees	02	
		5 - 9	03	
		10 - 14	04	
		15 - 19	05	
		20-199	06	
		200 +	07	
		Don't know	08	

ASK ALL				
Z6	Which of the following best describes your household composition?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Single person living alone	01	
		Single person, living with one or more dependent children (aged < 18)	02	
		Couple, living without children	03	
		Couple, living with one or more dependent children (aged < 18)	04	
		Extended family, living without children	05	
		Extended family, living with one or more dependent children (aged < 18)	06	
		Group of unrelated adults	07	
		Single person living with adult children / children in law	08	
		Couple living with adult children / children in law	09	
		Single person living with parents / parents in law	10	
		Couple living with parents / parents in law	11	
		Other	95	

ASK ALL

Z7	Do you identify as Aboriginal or Torres Strait Islander?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Yes, Aboriginal	01	
		Yes, Torres Strait Islander	02	
		Yes, both Aboriginal and Torres Strait Islander	03	
		No	04	
		Prefer not to say	05	

ASK ALL				
Z8	Do you speak a language other than English at home?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		No, English only	01	**SKIP TO Z8**
		Yes, I speak another language at home	02	

ASK IF CALD (CODE 02 IN Z8)				
Z9	What language(s) do you speak at home?			
	Please select all that apply	**DO NOT RANDOMISE**	**MR**	
		Afrikaans	01	
		Arabic	02	
		Australian Indigenous language (please specify)	03	
		Cantonese	04	
		Dutch	05	
		English	06	
		Fijian	07	
		Filipino	08	
		French	09	
		German	10	
		Greek	11	
		Hindi	12	
		Indonesian	13	
		Italian	14	
		Japanese	15	
		Korean	16	
		Malay	17	
		Malayalam	18	
		Mandarin	19	
		Min Nan	20	
		Nepali	21	
		Norf'k-Pitcairn	22	
		Polish	23	
		Punjabi	24	
		Russian	25	
		Sinhalese	26	
		Spanish	27	

		Tagalog	28	
		Thai	29	
		Turkish	30	
		Urdu	31	
		Vietnamese	32	
		Other (please specify)	98	

ASK ALL

Z10	Do you identify as a person with disability?			
	Please select one response only	**DO NOT RANDOMISE**	**SR**	
		Yes	01	
		No	02	**SKIP TO Z12**
		Prefer not to say	99	**SKIP TO Z12**

ASK IF HAS A DISABILITY (CODE 01 IN Z10)

Z11	Which of the following best describes your disability?			
	Please select all that apply	**DO NOT RANDOMISE**	**MR**	
		Vision	01	
		Hearing	02	
		Speech or language	03	
		Physical or motor	04	
		Cognitive or learning	05	
		Mental health	06	
		Other (please specify)	97	
		Prefer not to say	99	**EXCLUSIVE**

ASK ALL

Z12. Thinking about how easily you can use and navigate smartphones, computers and the internet.

On a scale of 1 to 10, where 1 is not confident at all and 10 is extremely confident, how would you rate your confidence using and navigating devices and the internet?

	Please select one response only						**DO NOT RANDOMISE**					**RSR**	
		1 (Not at all)	2	3	4	5	6	7	8	9	10 (Extremely)	1.	
		00	01	02	03	04	05	06	07	08	09	2.	

Notes: