



Census 2016 Evaluation Campaign Research Presentation

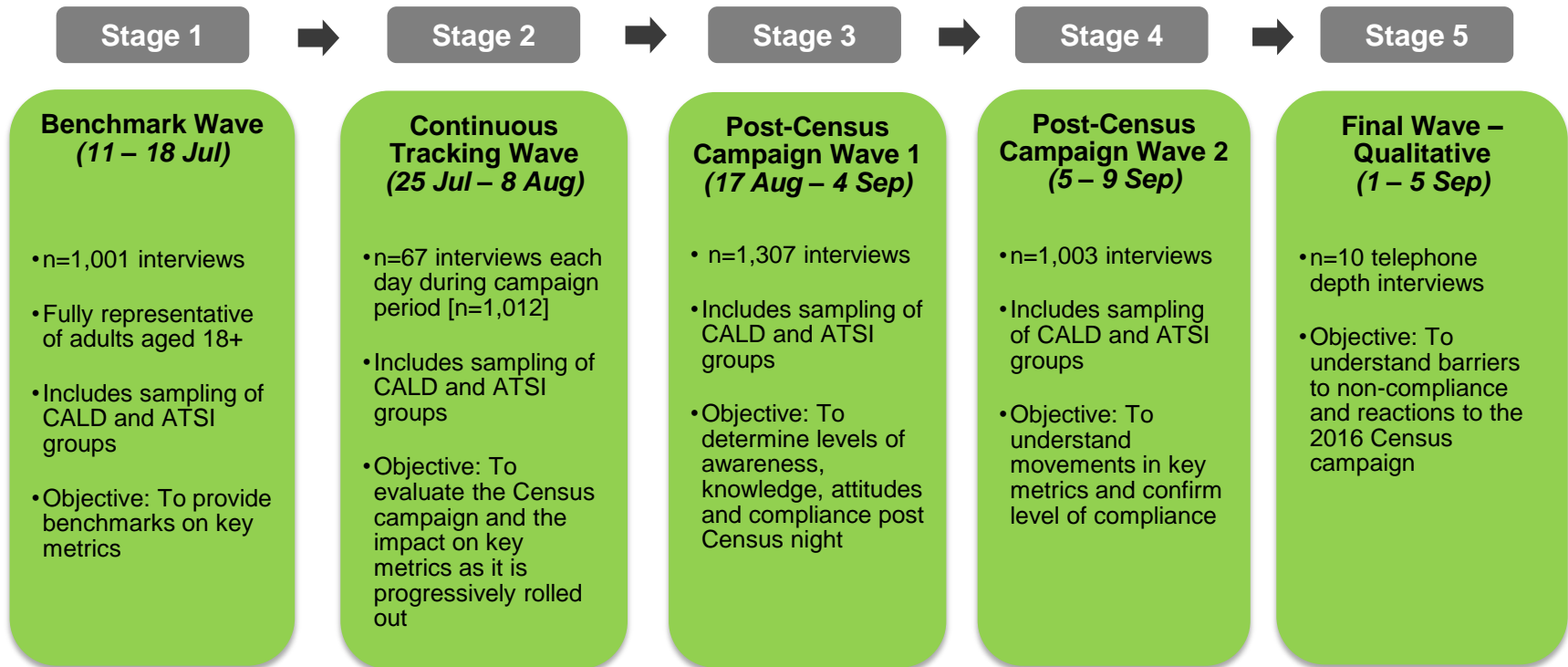
Prepared for: Census Communications & ABS

4th November 2016



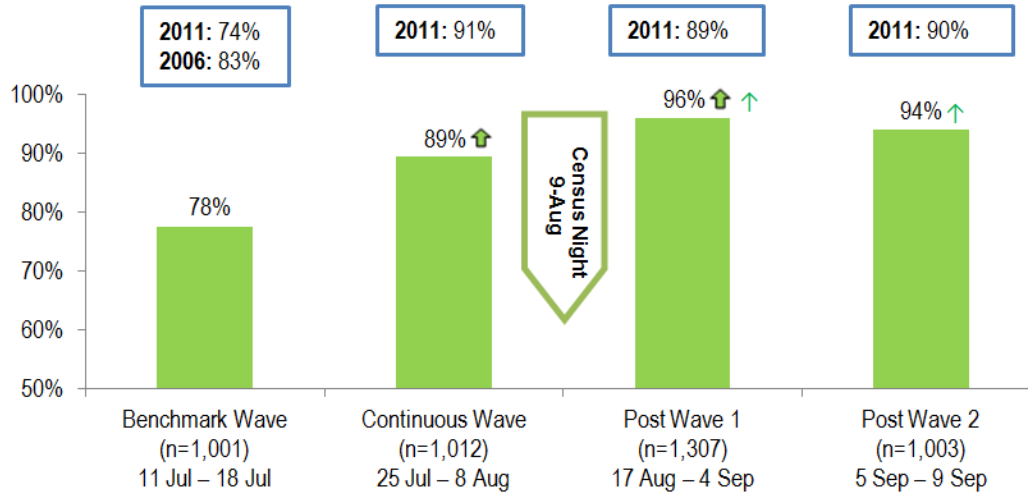
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SURVEY METHODOLOGY OVERVIEW

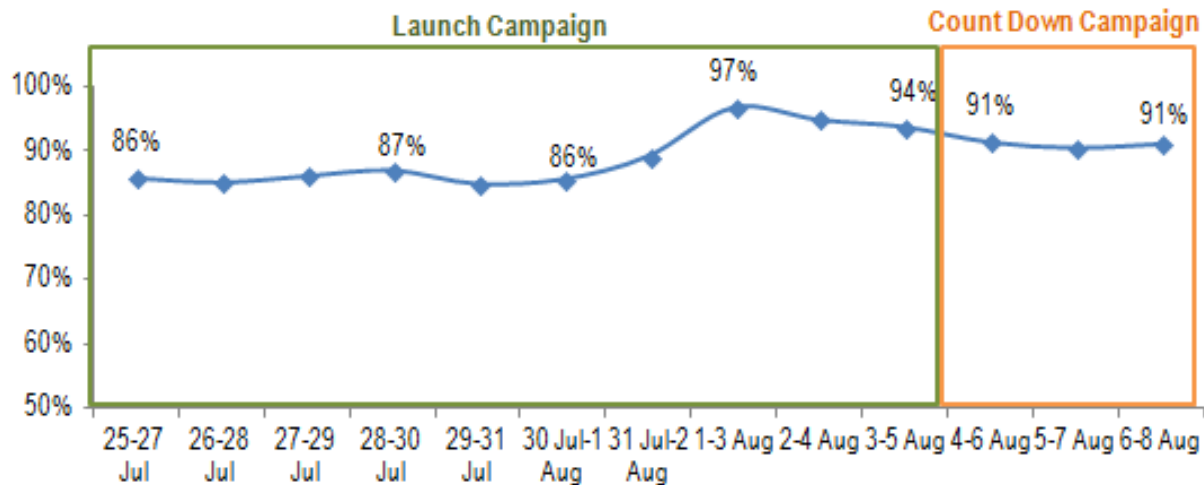


- Each wave was independently weighted to ensure sample was representative of the Australian adult (18+) population.
- Population targets set using the ABS 3101.0 release (Australian Demographic Statistics, Dec 2015, released 23 June 2016).
- Cellular weighting was applied using three weighting dimensions: state, age and gender.

AWARENESS OF THE CENSUS

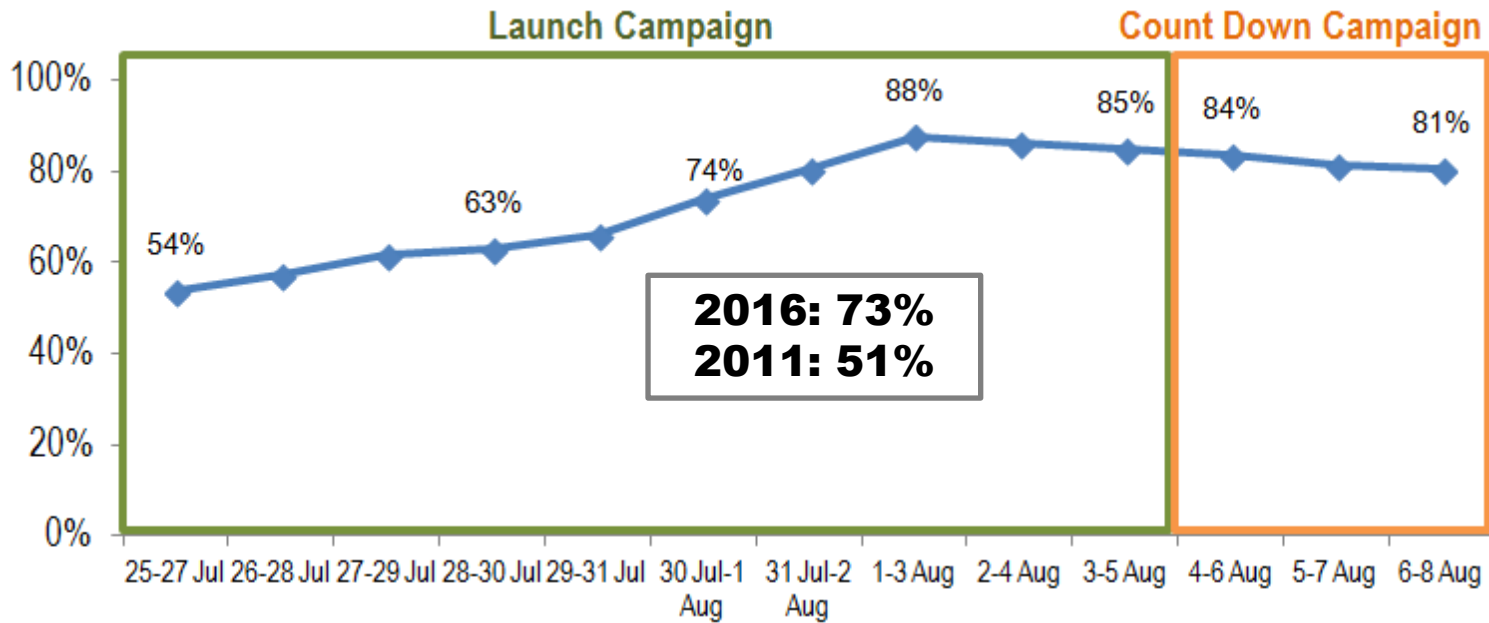


- 18-34 year olds less aware of Census, as were:
 - Singles
 - Living in shared accommodation
 - Using PO Box for household mail
 - Culturally & Linguistically Diverse (CALD)



Base: All respondents
 B1: Before today, had you heard of the Census, also known as the Census of Population and Housing?

AWARENESS OF CENSUS ONLINE FORM



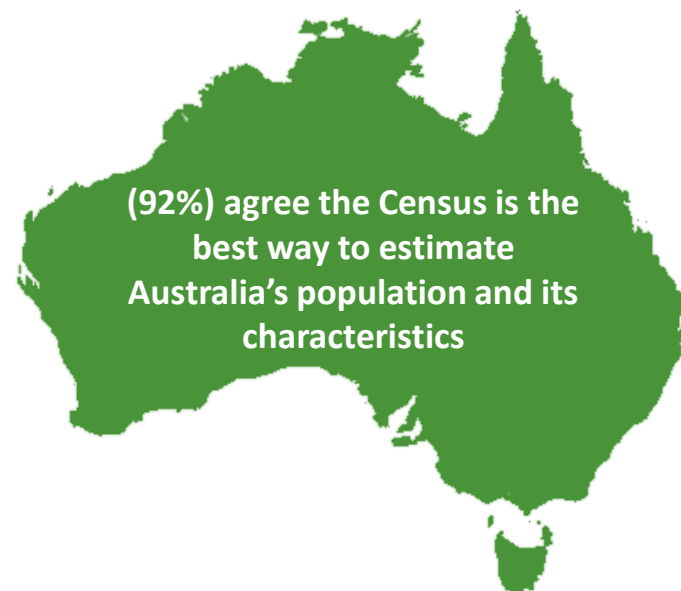
- CALD respondents and those aged 18-34 years old were less aware of the online Census form



Base: All respondents who were not aware of the Census (n=1,012)
D7: Before today, were you aware that you can complete the Census form online?

WHAT IS CENSUS INFORMATION USED FOR?

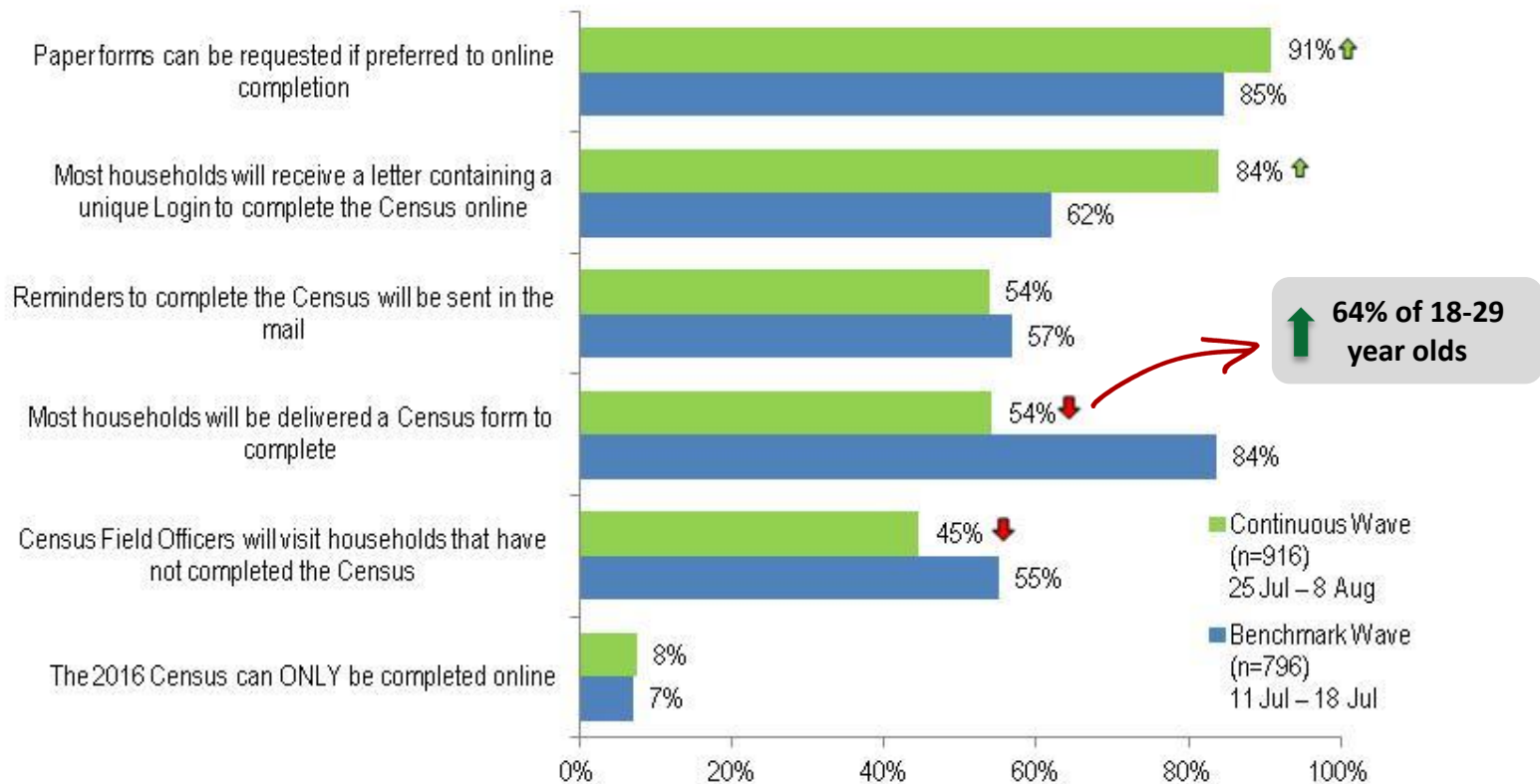
	2016 Benchmark Wave (n=796) 11 Jul – 18 Jul	2016 Post Wave 1 (n=1,258) 17 Aug – 4 Sep
NETT: Planning	62%	64%
Government planning	38% ↑	40%
To help plan for services such as schools and roads	24% ↑	30% ↑
To get a profile of what people do for a living	8%	5%
Allocation of money to States/ Funding	6%	8%
NETT: Counting	54%	48% ↓ ↓
To estimate the population of where people live	31%	20% ↓
To see how many people there are/count people	25%	16% ↓
Compiling statistics	29%	20%
To get a profile of society	17%	18%
NETT: Other	17% ↑	18% ↑



Base: Respondents aware of Census
B3: As far as you are aware, what is Census information used for?

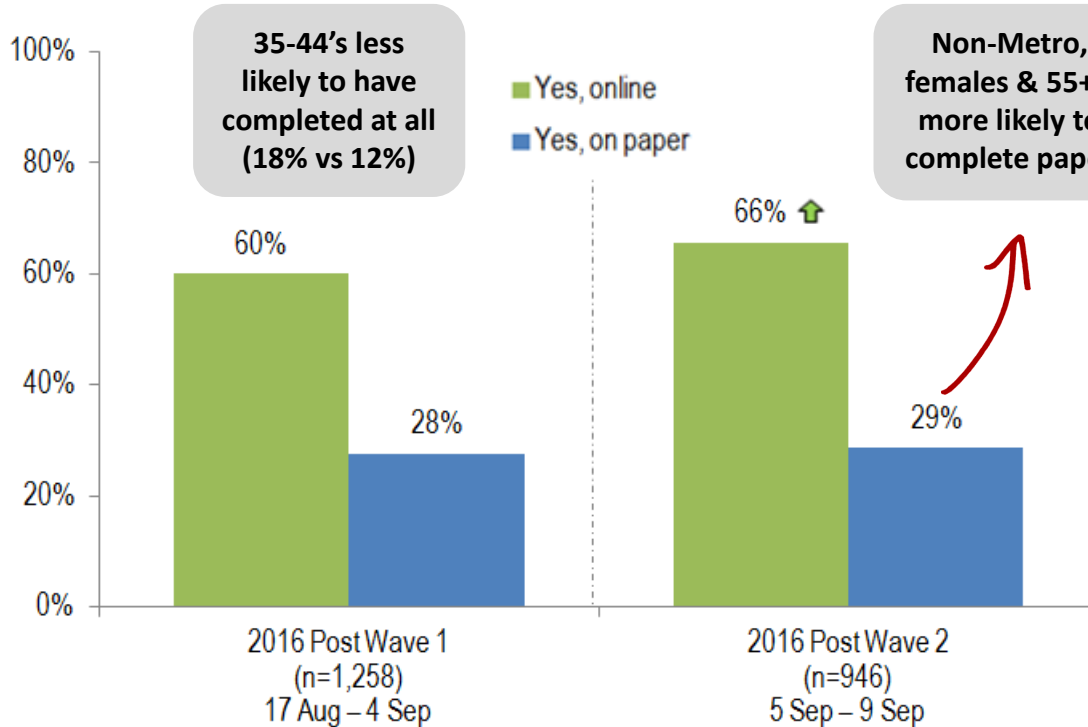
KNOWLEDGE OF CENSUS OPERATIONS

- Knowledge of Census operations mostly increased as the campaign progressed



Base: Respondents aware of the Census
 B2: I am now going to read out a few statements about the Census. For each one, please tell me whether you think it is true or false.

CENSUS PARTICIPATION LEVELS



- Almost all (97%) intended to complete the Census (2011: 97%)
- 64% agree that an Online Census is better than using paper
- Over half (56%) aware of Census advertising agree the adverts made them more likely to complete the Census online (than paper)



Base: All respondents
B2a. Has a Census form been completed for your household either online or on paper?

REASONS FOR NOT COMPLETING THE CENSUS

	2016 Post Wave 1 (n=138) 17 Aug – 4 Sep	2016 Post Wave 2 (n=38) 5 Sep – 9 Sep
NETT: Time/Availability Constraints	33% ↓	35%
Haven't got round to doing it	18% ↓	19%
Was busy / not at home on Census night	10%	9%
Started it but haven't finished it	6%	11%
Overseas at the time	3%	16% ↑
Intend to complete the form online	-	-
NETT: Issues with Census Form	61% ↑	53%
Census website was not working	46%	38%
Did not receive the paper form	11%	15%
Did not receive the letter / Census online log in details	6% ↓	9%
Misplaced / lost the letter / Census online log in details	5%	0%
NETT: Privacy/Confidentiality	7%	12%
Concerned about security of Census website/ data security	3%	10%
Privacy reasons (general)	3%	2%
Confidentiality reasons (general)	2%	6%
Census data will be linked with other government data	1%	0%
Do not trust government	-	-
NETT: Census is unnecessary	2%	9%

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“What are the main reasons your household has not completed the Census?”

- In Post Wave 1, almost half of non completers (12% overall) experienced issues with the online Census form
- Other top reasons include:
 - Not getting around to it
 - Haven't received the paper form
 - Too busy / not at home
- Privacy & confidentiality concerns mentioned by less than 1 in 10 in Post Wave 1 (identical to 2011 levels)




Base: Respondents that have not completed the Census
B2b. What are the main reasons your household has not completed the Census?

REASONS FOR NOT COMPLETING ONLINE CENSUS FORM

	2016 Post Wave 1 (n=412) 17 Aug – 4 Sep	2016 Post Wave 2 (n=325) 5 Sep – 9 Sep
NETT: Computer Issues	36%	25% ↓ ↓
Computer/ internet not reliable / might drop out	17% ↑	8% ↑
Do not have a computer	8% ↓	4% ↓ ↓
Do not have Internet access	6% ↓	4%
Don't know how to use the computer / internet	4%	6%
Do not use / seldom use a computer / don't like using computer	4% ↓	5%
NETT: Prefer Paper	42%	41%
Was sent the paper Census form	18%	15%
Prefer to do on paper / am old fashioned	13% ↓	11%
Easier to complete the printed/ paper Census form than completing it online	11% ↓	16% ↑
Have already completed paper Census form	2% ↓	2% ↓
NETT: Issues with Census website	12%	28% ↑
Still cannot access the online Census form	10%	14%
I knew the Census website might or would crash	1%	14% ↑
NETT: Mistrust of data use/security of data	18%	15%
Census online form not reliable / secure	10%	7%
Privacy concerns	4%	6%
NETT: Other	8%	8%

- Main single reason for not completing the online form was due to already receiving a paper form (18%)
 - 18-29 year olds (36%)
- Concerns about computer and / or internet reliability was a concern (17%)
 - 30-39 year olds (33%)
- Computer / internet access issues represented a significant barrier
- Paper forms preferred over online due to habit and perceived ease of completion

 Older people, aged 55+ less likely to complete online Census form (many prefer paper, don't use computers)

Base: Respondents that have not completed the Census online and do not intend to complete it online (includes respondents who have completed the paper version).
 D9. What are the main reasons for not completing the Census online? (2016) &
 D8. What are the main reasons that you would not complete the Census online? (2011)

PRIVACY, SECURITY & CONFIDENTIALITY

Agreement (Nett Strongly agree and Agree)				
	Benchmark Wave (n=796) 11 Jul – 18 Jul	Continuous Wave (n=916) 25 Jul – 8 Aug	Post Wave 1 (n=1258) 17 Aug – 4 Sep	Post Wave 2 (n=946) 5 Sep – 9 Sep
The Census is an invasion of privacy	8%	14% ↑	19% ↑	14% ↓
The Australian Government can be trusted to manage the Census	Question not asked		60%	64%



Main reasons why Census is an invasion of privacy (PW1)
 Questions are too personal or invasive (55%);
 Concerns about retention of personal information (23%);
 or that Census data is no longer anonymous (15%).



“Just that it's not really anyone's need to know whether I use the internet daily, all that sort of stuff. I mean the government already knows how many children I've had and all that. It shouldn't have to be noted on a form. It's whether I have a friend coming for dinner or, it's no one's business.”

Female 40-44, Metro WA



“Because nothing is [private] these days. Well I mean, you know I mean, you look at terms and conditions, your information is sold regardless, whether it's a competition or something online. Your information is sold. Next minute you're getting emails or phone calls from Joe Blow trying to sell you things.”

Female 40-44, Metro WA



Base: Respondents aware of the Census

C1a-m: I would now like to read you some statements people have made about the Census. For each statement, please tell me whether you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree

ATTITUDES TOWARDS THE CENSUS

Agreement (Nett Strongly agree and Agree)				
	Benchmark Wave (n=796) 11 Jul – 18 Jul	Continuous Wave (n=916) 25 Jul – 8 Aug	Post Wave 1 (n=1258) 17 Aug – 4 Sep	Post Wave 2 (n=946) 5 Sep – 9 Sep
The Census is a waste of taxpayer's money	5%	7%	13% ↑	11%
The Census is an invasion of privacy	8%	14% ↑	19% ↑	14% ↓
Data collected from this year's Census is unreliable	Question not asked		37%	33%
This year's Census has been a failure	Question not asked		47%	42% ↓
The information collected by the Census is not available from other sources	63%	64%	53% ↓	52%
Other government departments cannot get access to individual Census records	62%	61%	54% ↓	56%
Conducting the Census online is better than the paper format	65%	64%	55% ↓	58%
The Australian Government can be trusted to manage the Census	Question not asked		60%	64%
The ABS can be trusted to manage the Census	Question not asked		67%	71%
The Census is the best way to estimate Australia's population and its characteristics	94%	92%	86% ↓	87%
Census information is necessary for government planning	97%	93% ↓	90% ↓	91%
It's our duty as members of Australian society to participate in the Census	93%	92%	91%	92%
The information provided on the Census should be as accurate as possible	98%	99%	98%	98%

↑ 27% of SA/NT residents (PW1)

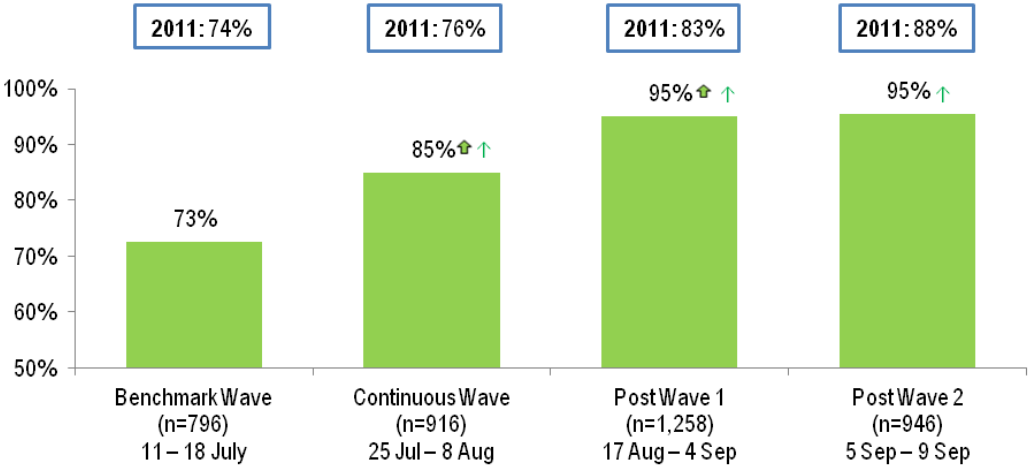
↑ 55% of 35-44 year olds (PW1)

↓ 63% of 35-44 year olds (PW1)

Base: Respondents aware of the Census
C1a-m: I would now like to read you some statements people have made about the Census. For each statement, please tell me whether you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree

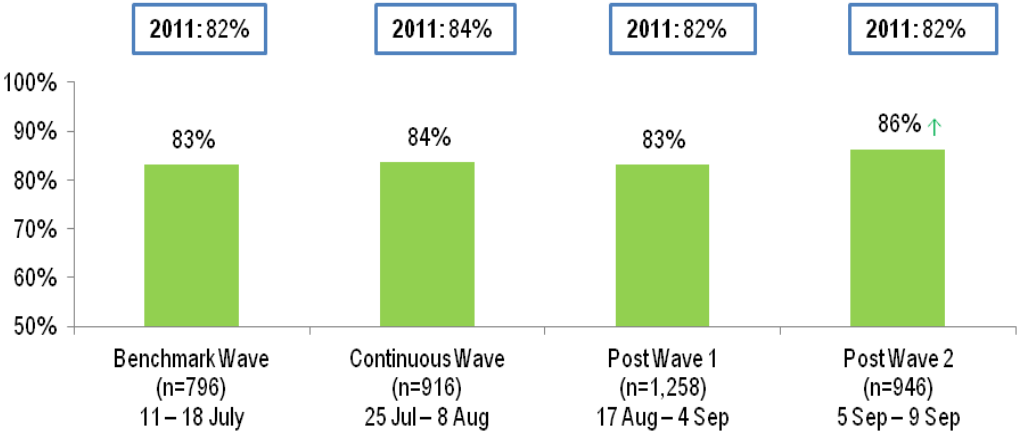
COMPULSORY NATURE OF THE CENSUS

Is the Census Compulsory? (Yes, Compulsory)



- Almost universal awareness that the Census is compulsory (higher than in 2011)
- 18-29 year olds least likely to know the Census is compulsory (90% in PW1)

Should the Census be compulsory? (Agree)



- 18-29 year olds least likely to agree that the Census should be compulsory (75% in PW1)
- Qualitative research found high levels of awareness of fines for non completion. Respondents unopposed to fines, since they can encourage completion



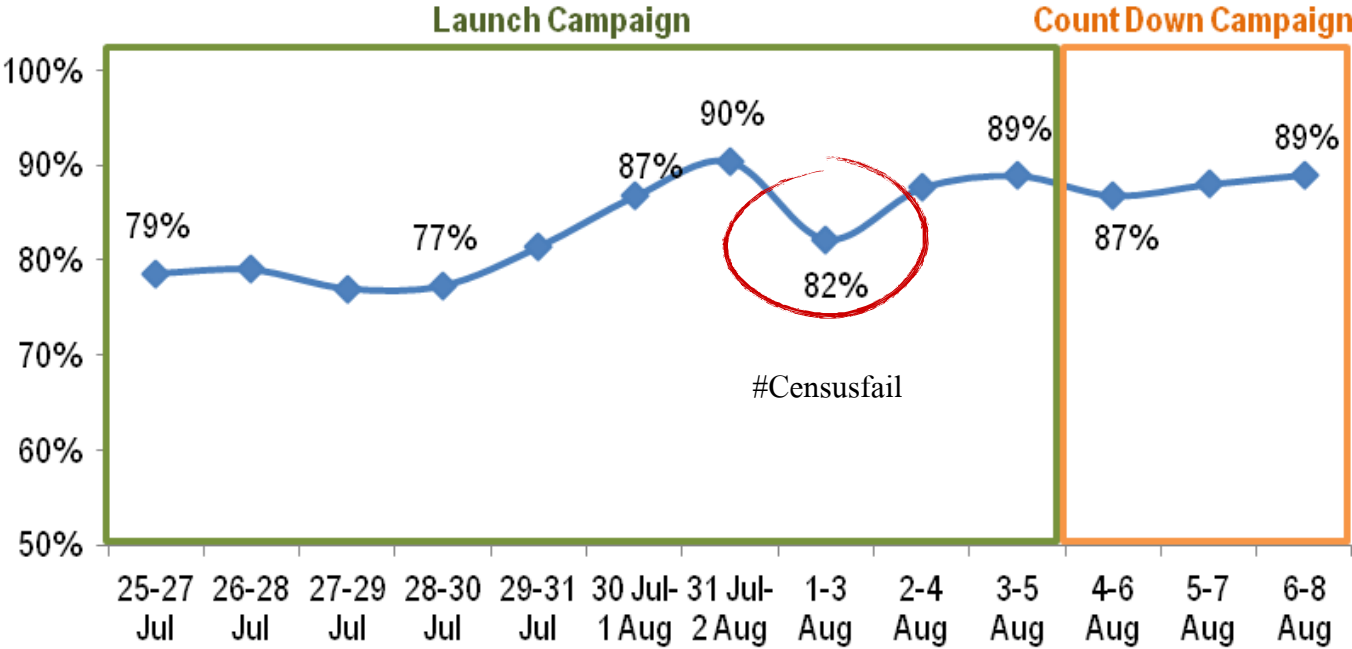
Base: Respondents aware of the Census
 B5: As far as you know, is it compulsory to complete the Census?
 B6: And do you think it should be compulsory?

COMPULSORY NATURE OF THE CENSUS

- Between 1-3 August, understanding slipped to 82% during the time various politicians' privacy concerns were reported, and the social media #censusfail movement gathered pace

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Is the Census Compulsory? (Yes, Compulsory)

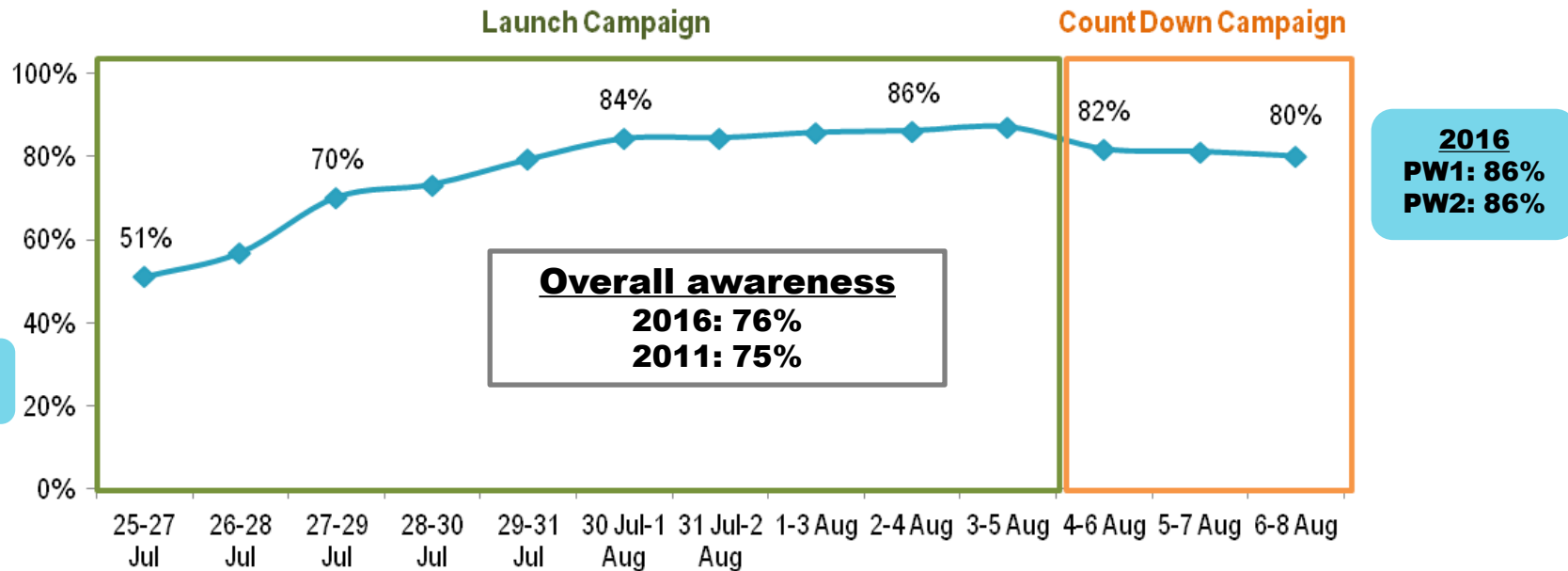


Base: Respondents aware of the Census
B5: As far as you know, is it compulsory to complete the Census?

CENSUS COMMUNICATION CAMPAIGN MEASURES



CENSUS RELATED COMMUNICATIONS AWARENESS



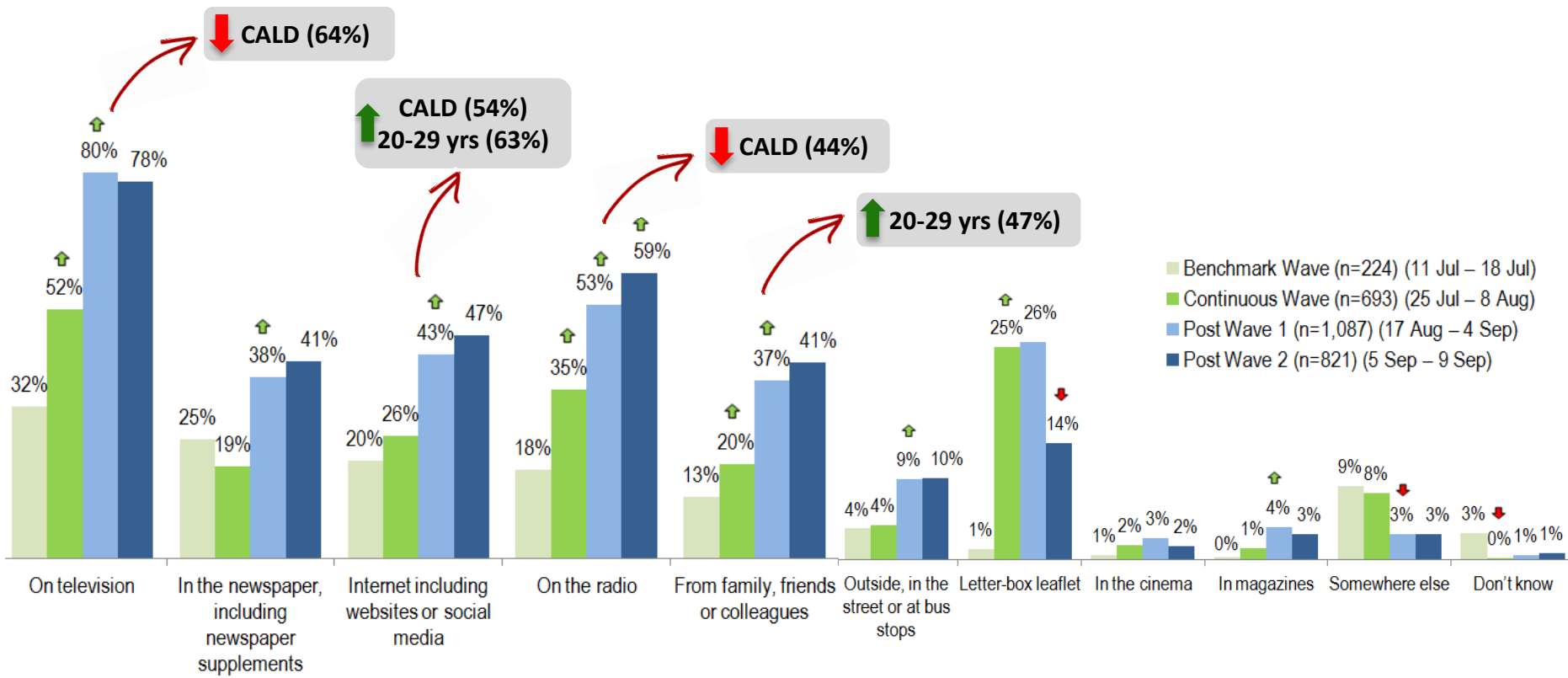
- Overall Census communications awareness increased throughout the campaign, following a very similar trend to that seen for the 2011 Census campaign.
 - Those aged 18-29 years old and CALD respondents were least aware of Census communications
- Communication awareness peaked at 86% between 2-4 August (when privacy concerns were being heavily reported, and the #censusfail movement was gathering pace).



SOURCES OF CENSUS COMMUNICATION AWARENESS

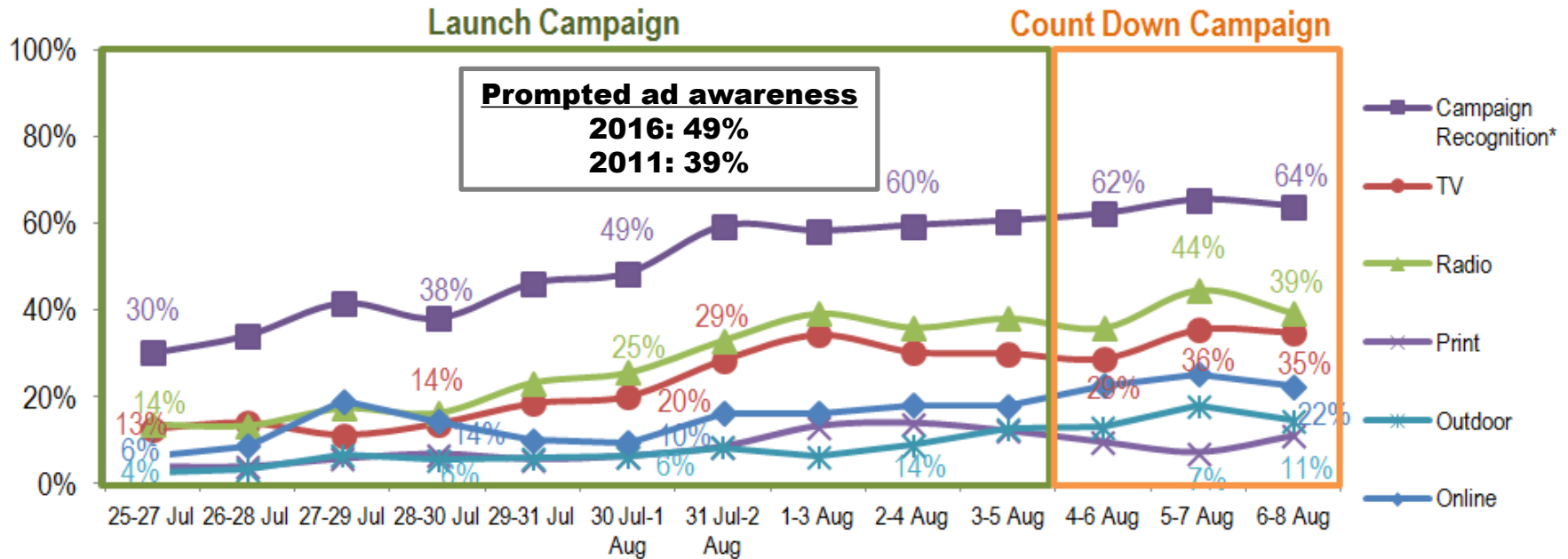


Communication awareness increased across most media channels, with TV, Radio and Internet (incl. Social media) contributing most. Letter box leaflets were also effective in the lead up to Census night.



Base: Respondents that are aware of Census communications
 C5: Where did you see or hear something about the 2016 Census?

PROMPTED CENSUS ADVERTISING RECALL

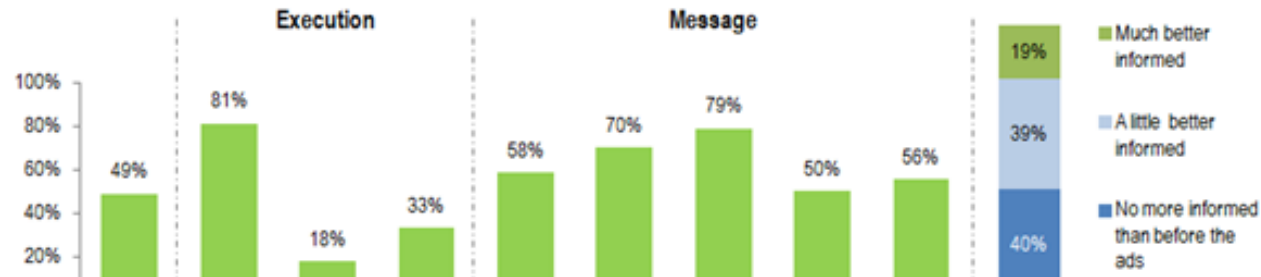


- Prompted recognition highest for Radio (28%), followed by TV (24%) and Online (15%)
- Post Wave 1 overall prompted advertising recall was 73% (2011: 42%)
- CALD respondents less likely to recall Radio throughout the campaign

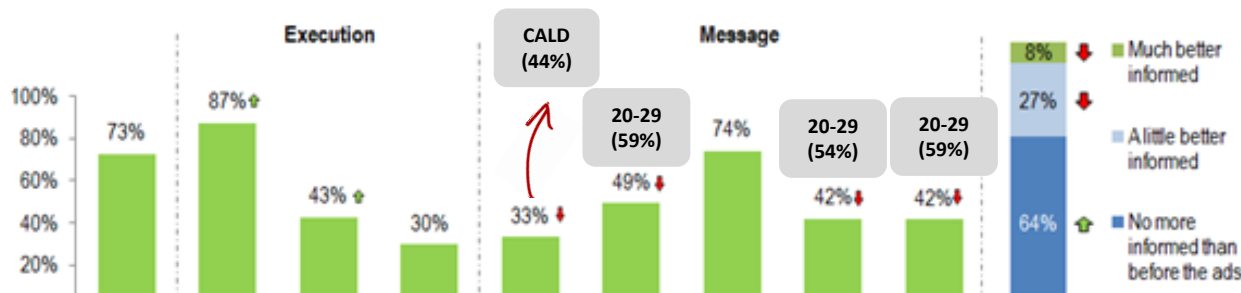


AD RECOGNITION & DIAGNOSTICS

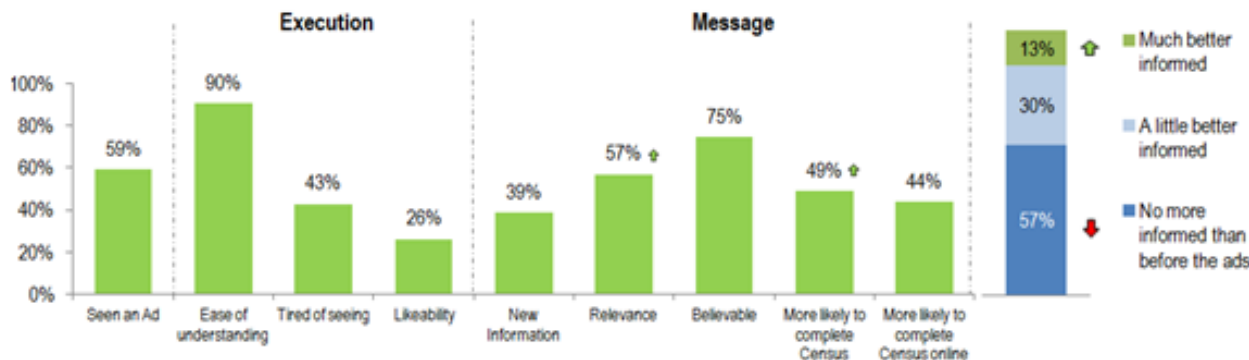
Continuous Wave - Ad recognition and diagnostics (n=509)



Post Wave 1 - Ad recognition and diagnostics (n=915)



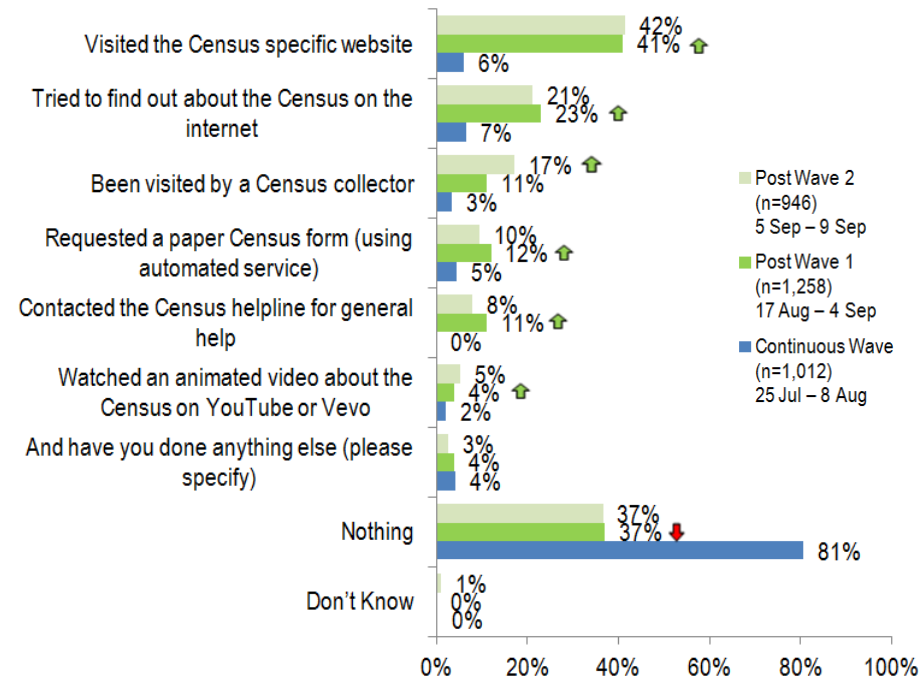
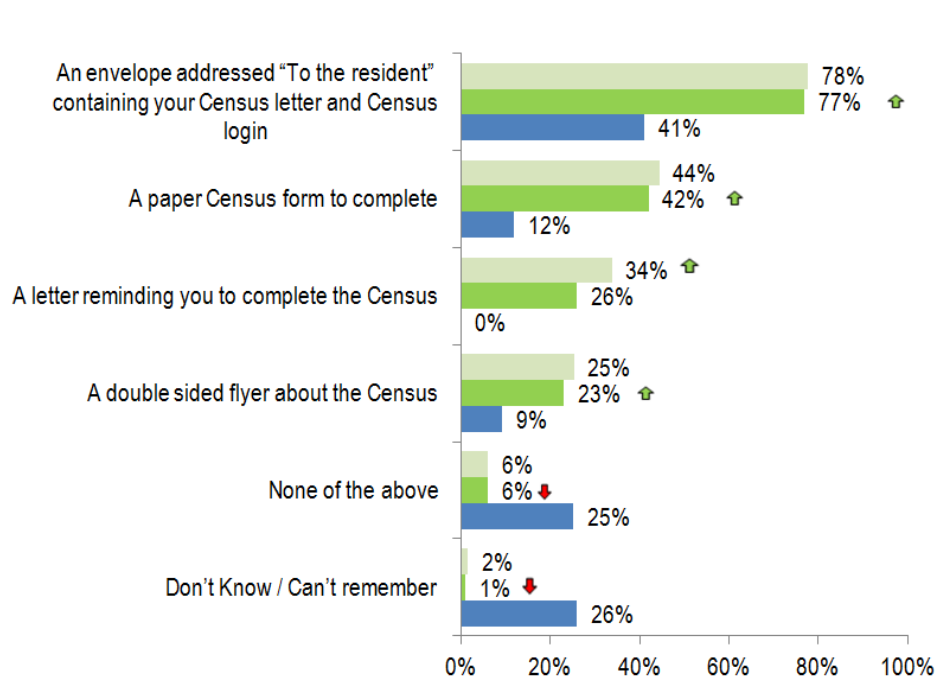
Post Wave 2 - Ad recognition and diagnostics (n=594)



- Most thought the ads were easy to understand, believable & relevant
- Ad wear out more evident in Post Wave 1, whilst agreement declined that Census ads offered relevant or new information
- Post Wave 2 saw increased agreement that Census ads were more likely to provoke Census completion (relevance of the ads also increased)

Base: All respondents
 Note: Percentages for "Seen an ad" correspond to total agreement. Percentages shown for "Execution" and "Message" and "informed" correspond to agreement amongst respondents who have seen an advertisement during that survey.
 H7: Thinking about these ads, for each statement please tell me whether...
 H8: After seeing or hearing the ads, how much better informed do you feel about the Census?

RECEIVED CENSUS RELATED MATERIALS



- Those aged 18-34 (surveyed in Post Wave 2) were more likely to have received a letter reminding them to complete the Census (42%); and
- more likely to visit the Census website (49%), or watched an animated video (8%) on YouTube or Vevo



Base: All respondents

1. Has your household received any of the following Census related information?
2. Which, if any, of the following have you done recently in relation to the Census?

HEARD/SAW NEGATIVE PUBLICITY RELATING TO THE CENSUS



- 88% heard/saw negative Census publicity in Post Wave 1 (PW2: 74%)
- NSW/ACT residents most likely to have been exposed to negativity coverage
- Younger people (18-34 years old) and CALD respondents less likely

?	Post Wave 1 (n=1,123) 17 Aug – 4 Sep	Post Wave 2 (n=699) 5 Sep – 9 Sep
Did you do anything different as a result?		
No / nothing	83%	89% ↑
Delayed completing the online Census	6%	4%
Will / Have completed a paper form (instead of online Census)	4%	3%
Did not provide name(s) and/or address details	1%	0%
Did not fill the Census in accurately / completely	1%	0%
Did not provide accurate name(s) and/ or address details	0%	0%
Will not complete the Census at all	0%	0%
Other	5%	3% ↓
Don't Know	1%	1%
Refused	0%	0%

↑ 12% of 35-44 year olds (PW1)



Base: Respondents who are aware of the Census

C12. Have you seen, heard or read any negative publicity or stories about this year's Census in the past few weeks?

Base: Respondents who saw, heard or read negative publicity or stories about the Census over the past few weeks

C13. As a result of the negative publicity, what, if anything, have you done differently in relation to the Census?

CENSUS HELPLINE ASSISTANCE



- Less than 1 in 10 (8%) contacted the Census helpline for help



- 69% got through to a Census helpline operator



- Two calls required to get through to a human



- 85% got everything they needed



Base: All respondents who either requested a paper Census form using the automated service or contacted the Census helpline for general help.

13. You said you contacted the Census helpline. How many times did you call before you got through? &

Base: All respondents who got through to the Census helpline when they called.

14. And when you got through to the helpline, did you get everything you needed?



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