

2. Media use

Community attitudes to media policy issues are informed by the community's current media use behaviours and practices. This chapter provides an overview of media use activities by Australians in the converging media environment. It covers broadcast television and radio services, newspapers, catch-up television, online radio, video content and news services that are accessed from the internet. The devices used to access online media content are also examined.

This chapter draws from the ACMA's *Digital Australians* online survey findings of media use by adults aged 18 years and over. Additional research sources are used to provide a more complete picture of media use by Australians, including those who are not internet users. Additional online survey findings about the use of internet-capable mobile devices are also included to complement the ACMA study.

Media activities

Table 1 shows the media activities undertaken by online survey respondents. Viewing broadcast free-to-air television was the top media activity (reported by 65 per cent of respondents in the past month). Including subscription television, 69 per cent had watched broadcast television services.

The second most common media activity was accessing news online (reported by 59 per cent of respondents). This includes visiting news websites (52 per cent) and/or accessing news through social networking sites (22 per cent).

After broadcast television and online news, listening to broadcast radio (54 per cent of online respondents) and using social networking sites (49 per cent) were the next most commonly reported media activities.

Table 1 Media activities undertaken in the past month and past week, 2011

Media activity	Past month	Past week
	%	%
Watched free-to-air television (not online)	65	64
Listened to the radio (not online)	54	52
Visited a website of a news organisation	52	49
Undertook other social networking activities (e.g. browsing others' profiles, staying in touch with friends)	49	48
Watched video content that you downloaded from the internet from sites like YouTube	33	31
Played games on the internet (online games)	30	28
Watched pay TV (e.g. Foxtel, Austar) (not online)	26	25
Watched video content (video clips etc.) through a social media website such as Facebook	25	22
Accessed the news through a social media website (e.g. Facebook, Twitter, MySpace, Bebo – not YouTube)	22	20
Visited a TV broadcaster's or radio station's website (but not to watch catch-up TV over the internet)	20	17
Watched catch-up TV over the internet (e.g. iView, Plus7, FIXPlay, etc.)	17	15
Listened to an internet radio service	14	12
Watched video content that you downloaded from the internet from sites like BitTorrent or Pirate Bay or other peer-to-peer networks	13	11
Created and uploaded video content to the internet (YouTube etc.)	6	5
Watched an IPTV service (e.g. FetchTV, etc.)	2	2
None of these	6	7

Source: ACMA, Digital Australians online survey, 2011.

B1 ASK ALL: In the past month, which of the following have you done? M/R RANDOMISE

Base: Media activity for past month, total sample n=1,250; media activity for past week, sample n=1,176.

Background to internet use by Australians

Roy Morgan Research found that most Australians aged 14 years and over had accessed the internet from home (77 per cent) in June 2010. Fewer were connected at work (40 per cent) and other locations (15 per cent). Sixty-six per cent had a home broadband connection, and 13 per cent had used a mobile phone to connect to the internet.¹

The ABS reports there were 10.9 million internet subscribers (excluding mobile handsets) at the end of June 2011, with households representing 80 per cent of all broadband subscriptions. Ninety-five per cent of subscriptions were broadband services, and in the year to June 2011 the volume of data downloads increased by about 77 per cent to 274,096 TB.²

In addition, there were almost 10 million mobile handset subscribers in Australia in June 2011. The volume of data downloaded to mobile handsets was 3,695 TB (during the second quarter of 2011) and complementary in terms of providing Australians with access to the internet.³

Young adults are heavier users of the internet than older adults. In 2010, 46 per cent of 18–24s and 40 per cent of 25–34s spent more than 15 hours a week using the internet for personal use (covers all personal internet activities, including

¹ Roy Morgan Single Source, cited in ACMA, Communications report 2009–10 series, *Report 1: Australia in the digital economy: The shift to the online environment*, 2010.

² Australian Bureau of Statistics, *8153.0 – Internet Activity, Australia, June 2011*.

³ *ibid.*

communications use and accessing media content). This compares with 19 per cent of 55–64s and eight per cent of those aged 65 years and over spending more than 15 hours per week online.⁴

Use of online and offline television and video

Many online respondents viewed video content online as well as catch-up television (online video more so than catch-up television), but substantially more respondents watched broadcast television.

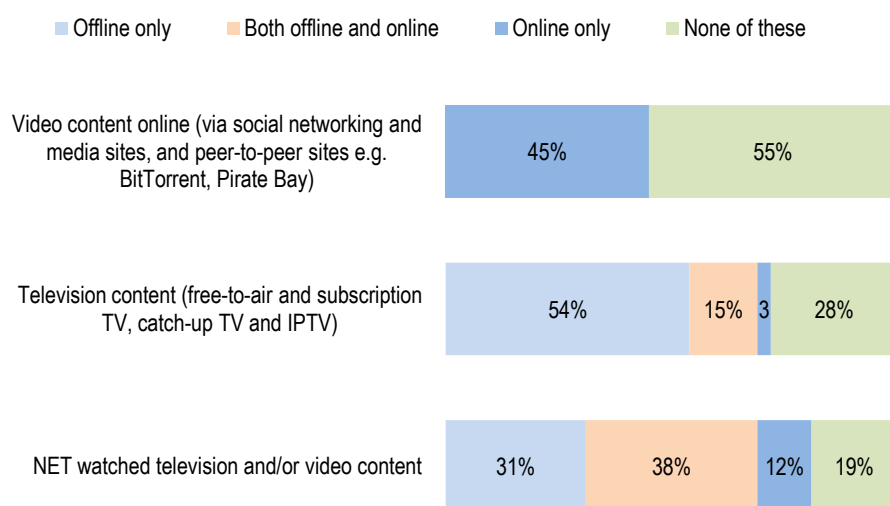
Television and online video activities were grouped together, and Figure 1 summarises the net proportion of respondents who watched television and/or video using online media compared to offline media. It shows that:

- > almost four in 10 respondents watched television and/or video content both offline and online (38 per cent)
- > less than a third watched this material solely offline (31 per cent)
- > some were solely online viewers (12 per cent).

A total of 45 per cent of survey respondents had watched online video content from either social networking sites (mainly Facebook), social media sites (mainly YouTube) or peer-to-peer sites such as BitTorrent or Pirate Bay. Fifty-five per cent of the online sample reported not having watched any online video content in the last month.

Just over half (54 per cent) of respondents had only watched broadcast television (free-to-air or subscription). Eighteen per cent watched television from both online (catch-up television or IPTV services) and offline sources, and a low three per cent reported having only watched television content online.

Figure 1 Television and video content viewing offline and/or online, 2011



Source: ACMA, Digital Australians online survey, 2011.

B1 ASK ALL: In the past month, which of the following have you done? M/R RANDOMISE

Base: Total sample, n=1,250.

⁴ Roy Morgan Single Source, cited in ACMA, Communications report 2009–10 series, *Report 1: Australia in the digital economy: The shift to the online environment*, 2010.

Age differences

The survey findings indicated a generational shift in the way media is used. Younger online survey respondents were generally more involved than other age groups in a range of media activities in the past month. They were more likely to have undertaken online media activities, particularly social networking and watching online video content (Table 2).

Table 2 Online media activities by age, 2011

Media activity	18–29 (n=262)	30–44 (n=353)	45–54 (n=233)	55+ (n=402)
	%	%	%	%
Undertaken other social networking activities, (e.g. browsing others' profiles, staying in touch with friends)	71	49	41	41
NET viewing online video content	68	50	34	32
Watched video content from the internet from sites like YouTube	53	36	23	22
Watched video content through a social media website such as Facebook	45	25	20	14
Watched video content from the internet from sites like BitTorrent or Pirate Bay or other peer-to-peer networks	26	15	7	6
Played games on the internet (online games)	41	31	25	25
Accessed the news through a social media website (e.g. Facebook, Twitter, MySpace, Bebo – not YouTube).	36	25	15	13
Watched catch-up TV over the internet (e.g. iView, Plus7, FIXplay, etc)	31	17	13	11

Source: ACMA, Digital Australians online survey, 2011.

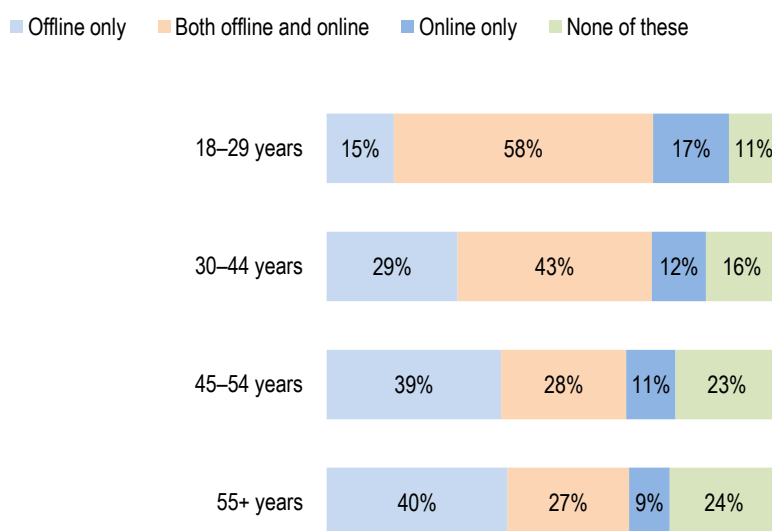
B1 ASK ALL: In the past month, which of the following have you done? M/R RANDOMISE

Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

Younger respondents were just as likely as older respondents to have watched broadcast television services or listened to broadcast radio in the past month. However, evidence from other research sources presented later in this chapter shows a decline in the average time young people spent on these activities over the last two decades.

Figure 2 summarises the proportion of online respondents in each age group who watched television and video content from online and offline sources. Over half (58 per cent) of those aged 18–29 used both offline and online sources for television and video content, decreasing to just over a quarter for those aged 45 years and over. Approximately 40 per cent of these older respondents used only offline sources for television and video compared with 15 per cent for those aged 18–29.

Figure 2 NET television and video content viewed offline and/or online by age group, 2011



Source: ACMA, Digital Australians online survey, 2011.

B1 ASK ALL: In the past month, which of the following have you done? M/R RANDOMISE

Base samples by age: 18–29 yrs n=262; 30–44 yrs n=353; 45–54 yrs n=233; 55+ yrs n=402.

Broadcast television

Television industry data collected by OzTAM and RegionalTAM provides audience measures across metropolitan and regional locations in Australia. It is not possible to compare these data to the ACMA's online survey findings because of the different research methods and samples used.

Industry measures indicate the importance of broadcast television viewing, both in terms of audience reach and the amount of time spent watching. Broadcast television is estimated to reach an average 77 per cent of Australians who tune in for at least five minutes per day (Table 3).

Table 3 Daily television reach, 2010

Type of television service	Average daily reach (5-minute threshold)	
	Number of people	%*
Total free-to-air	14,464,100	68.5
Total commercial	12,973,000	61.4
Total public	7,548,500	35.8
Total subscription	4,301,700	20.4
TOTAL TV	16,179,500	76.6

Source: Free-to-air: OzTAM and RegionalTAM, five-city metro, combined aggregate regional markets, 2am–2am, Jan–Dec 2010, consolidated (which includes time-shifted viewing data), ex spill. Metro and regional reach figures have been combined.

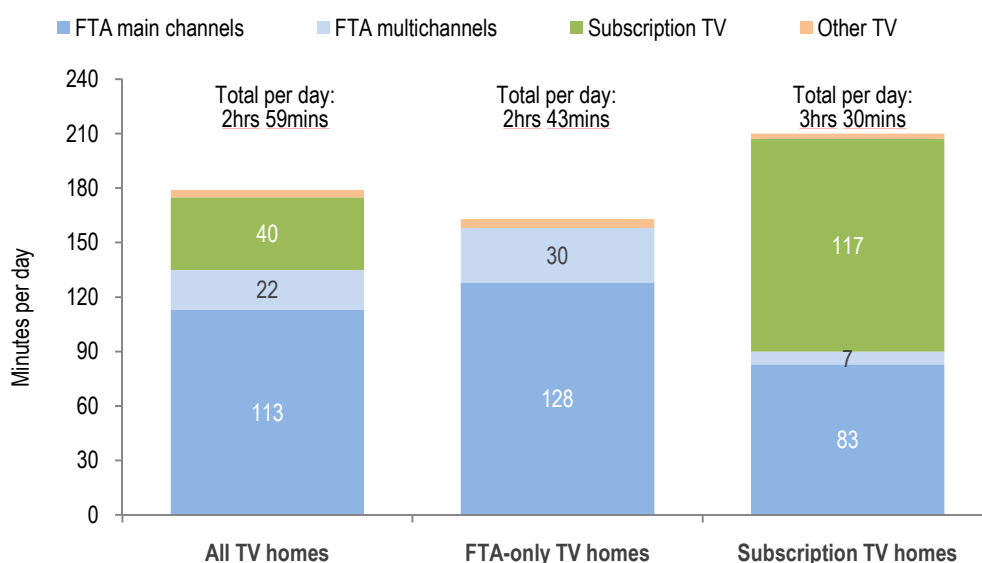
Subscription: OzTAM, National STV, 2am–2am, Jan–Dec 2010, consolidated—cited in Screen Australia (2011) Convergence 2011: Australian content state of play—Informing debate, August 2011.

*The ACMA calculated reach (%) against OzTAM and RegionalTAM 2010 universe estimates of 14,868,000 for five city metro markets and 6,246,000 for aggregated regional markets (excluding Tasmania).

In 2010, an average of almost three hours (two hours and 59 minutes) was spent watching television per day (6am to midnight) across all television households in the five Australian mainland capital cities (Figure 3). Compared with the metropolitan average, viewers in aggregated regional markets watched an additional six minutes per day on average.⁵

Australians in the 30 per cent of homes with subscription television viewed more television.⁶ Daily viewing averaged a high three hours and 30 minutes, compared with two hours and 43 minutes in metropolitan households with free-to-air television only—a difference of 47 minutes per day.

Figure 3 Average time spent viewing broadcast television by household type, 2010



Source: OzTAM consolidated time spent viewing (ATV) data, 2010, five-city metro, all people 0+ years, 6am–midnight. ‘Consolidated’ data includes time-shifted viewing. Includes free-to-air multichannels.

Of the average total time spent viewing free-to-air television in all television households, 17 per cent was spent watching free-to-air multichannels. The multichannel television services that were operating throughout 2010 were ABC2, ABC3, 7TWO, GO! and ONE, with the other multichannels—ABC News 24, 7mate and Gem—commencing in the third quarter of 2010.

Age and gender differences were evident. Young adults aged 18–24 years spent less time watching television than audiences aged 25 years and over. However, young adults still watched television for just over one-and-a-half hours (an average 94 minutes for those aged 18–24) per day in 2010 in all television households.

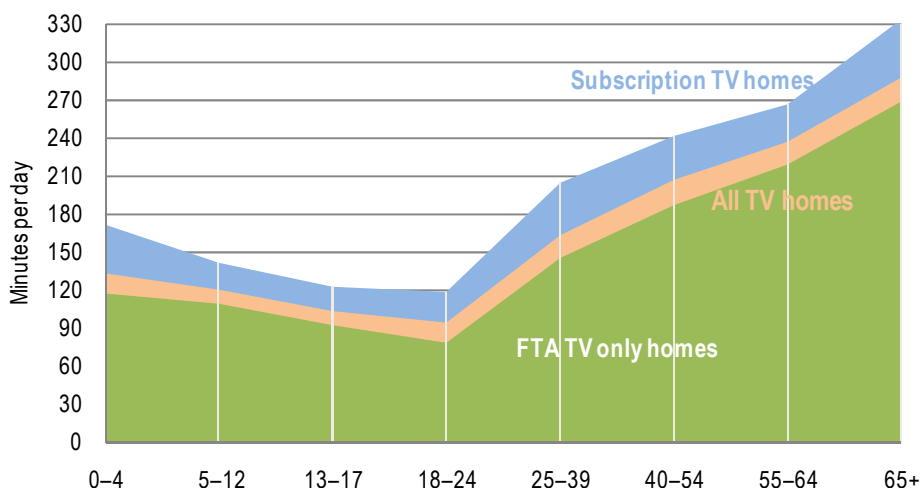
Broadcast television viewing appears to be particularly important for people aged 55–64 years, where average daily viewing ranged from three hours and 39 minutes (219 minutes) in free-to-air-only television households to four hours and 26 minutes (266 minutes) in households with subscription television. Those aged 65 years and over watched even more television (Figure 4).

⁵ FreeTV Australia, *Year in review 2010, 2011*, www.thinktv.com.au/content_common/pg-reports.seo.

⁶ *ibid.*

Women spent more time watching television (free-to-air and subscription), averaging three hours and 11 minutes per day. Men watched an average two hours and 47 minutes in all television households.

Figure 4 Average time spent viewing broadcast television by age group and household type, 2010



Source: OzTAM consolidated time spent viewing (ATV) data, 2010, five-city metro, 6am–midnight. 'Consolidated' data includes time-shifted viewing. Includes free-to-air multichannels.

Trends in television viewing

The availability of additional free-to-air multichannels and access to time-shifting technologies appear to have contributed to a small overall increase in time spent viewing television between 2009 and 2010.⁷ Increases were higher for people aged 25 years and over, and lower or stable for younger audiences. In 2010, OzTAM introduced time-shifted viewing measures that replaced earlier measures of live-only viewing.

Since the early and mid 1990s, average time spent viewing all television decreased by approximately ten minutes per day. In 1994, prior to the introduction of subscription television in 1995, daily free-to-air television viewing averaged three hours and eight minutes. Sixteen years later in 2010, combined free-to-air and subscription television viewing averaged two hours and 59 minutes per day. Subscription television has taken up much of the decline in free-to-air viewing over that time (Table 4).

It is also notable that there has been a greater decrease in television viewing by children and young people over the past 20 years relative to adults. Viewing decreased by an average 39 minutes per day for children aged 5–12 years and by an average 57 minutes per day for those aged 13–17.

⁷ The penetration of Personal Video Recorders (PVRs) that allow time-shifted viewing in Australian households in 2010 was 35 per cent and is predicted to increase. Source: OzTAM Establishment Survey Q4 2010, cited in Free TV Australia, *Year in review 2010*, 2011, www.thinktv.com.au/content_common/pg-reports.seo.

Table 4 Average time spent viewing broadcast television per day, 1991–2010

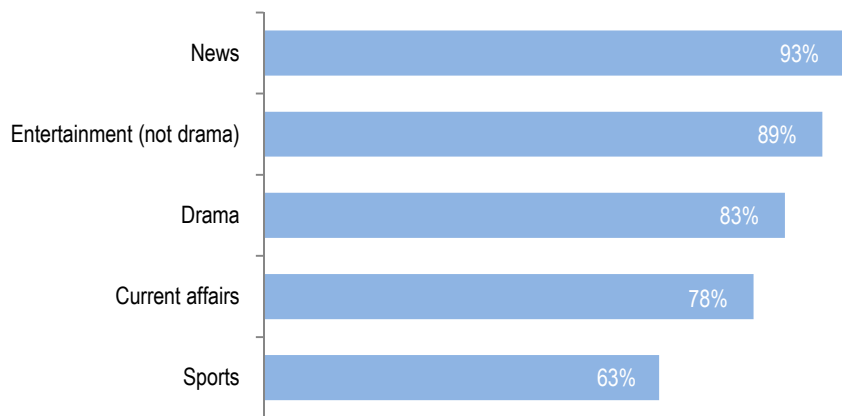
Year	All people 0+ years	Children 5–12 years	Young people 13–17 years
<i>Average minutes (hrs:mins) per day</i>			
<i>All television viewing (FTA and STV) in all television homes</i>			
2010	179 (2:59)	120 (2:00)	103 (1:43)
2009	175 (2:55)	118 (1:58)	104 (1:44)
2007	181 (3:01)	–	–
2006	184 (3:04)	–	–
2005	182 (3:02)	–	–
<i>Free-to-air television viewing in all television homes</i>			
2010	135 (2:15)	84 (1:24)	72 (1:12)
2009	132 (2:12)	83 (1:23)	69 (1:09)
1994	188 (3:08)	159 (2:39)	159 (2:39)
1993	186 (3:06)	153 (2:33)	158 (2:38)
1992	190 (3:10)	152 (2:32)	159 (2:39)
1991	189 (3:09)	159 (2:39)	160 (2:40)

Source: OzTAM 2005–2010; Nielsen Media Research (1991–1994). 2008–2010 data includes free-to-air multichannels. Annual averages are for five metro cities, 6am–midnight, Sunday–Saturday. 2010 OzTAM data is ‘consolidated’, which includes time-shifted viewing (live-only viewing was measured prior to 2010). Note: Dashes indicate that no data was obtained by the ACMA for those aged 5–17 in 2005–07.

Content viewed

In the online survey, most television viewers reported watching news (93 per cent of viewers) and entertainment programs—excluding drama (89 per cent)—in the past week. A smaller majority watched drama (83 per cent), current affairs (78 per cent) and sports (63 per cent) programs (Figure 5).

Figure 5 Programs watched by broadcast television viewers in last week, 2011



Source: ACMA, Digital Australians online survey, 2011.

B2 ASK THOSE WATCHED TV (ITEM 1 OR 2 = CODES 02-06 ON B1b): You mentioned earlier that you have watched television in the past week. Approximately how much time have you spent watching the following types of programs on TV over the past week? S/R PER ITEM, RANDOMISE

Base: Free-to-air and subscription television viewers n=859.

Table 5 shows that news and current affairs was the most watched free-to-air program genre in all television (free-to-air and subscription) households, comprising 22 per cent of the total time spent viewing free-to-air television in 2010. Drama (15 per cent of time spent viewing) and light entertainment programs (11 per cent) also attracted considerable viewing.

Table 5 Top 10 free-to-air television program genres by share of viewing, 2010

Ranking	Genre	Share of viewing (%)
1	News and current affairs	22
2	Drama	15
3	Light entertainment	11
4	Sport	9
5	Movies: Feature films	9
6	Comedy	7
7	Children's programs	6
8	Infotainment/lifestyle	6
9	Reality television	6
10	Documentary	4

Source: OzTAM share of viewing data for free-to-air television in all television (free-to-air and subscription) households, 2010, five-city metro, excl. spill, 2am-2am. Consolidated data includes time-shifted viewing.

Note: Each broadcaster defines and supplies the genre description for their programs independently of OzTAM.

Broadcast radio

At 54 per cent, listening to broadcast radio was the third-highest media activity undertaken by online survey respondents in the past month—after broadcast television and online news services. The incidence of radio listening was consistent across age and gender.

Time spent listening to radio by Australians aged 10 years and over was similar to the amount of total television viewing in 2010 in free-to-air and subscription television households. Nielsen Radio Ratings report average daily time spent listening to radio at almost three hours (two hours and 55 minutes) in the five mainland capital cities in 2009.

Older people spent substantially more time listening to radio than younger people. Radio listening ranged from a low average of one hour and 36 minutes for those aged 10–17 to three hours and 54 minutes per day by listeners aged 55 years and over.

Radio listening trends

Over the past 20 years, radio listening has declined by an average of approximately 20 minutes for all people aged 10 years and over. Most of the decline is attributable to younger adults aged 18–39 years (a reduction of 40–50 minutes per day), with smaller reductions for those aged 10–17 and 40–54 years (20–30 minutes per day each) since 1991 (Table 6).

More recently, time spent listening to broadcast radio increased by an average of five minutes per day between 2008 and 2009. This small increase comprises declines for those aged 18–39 and increases by those aged 10–17 years and 40 years and over.

No decline is evident for older people aged 55 years and over, for whom similar listening levels were recorded in 1991 and 2009. There was a dip however in their radio listening in the early 2000s.

Table 6 Average time spent listening to broadcast radio per day by age, 1991–2009

Year	All people 10+ years	10–17	18–24	25–39	40–54	55+
<i>Average minutes (hrs:mins) per day</i>						
2009	175 (2:55)	96 (1:36)	142 (2:22)	156 (2:36)	187 (3:07)	234 (3:54)
2008	170 (2:50)	87 (1:27)	155 (2:35)	161 (2:41)	177 (2:57)	213 (3:33)
2002	167 (2:47)	106 (1:46)	161 (2:41)	168 (2:48)	171 (2:51)	201 (3:21)
2001	169 (2:49)	106 (1:46)	165 (2:45)	170 (2:50)	174 (2:54)	203 (3:23)
2000	159 (2:39)	92 (1:32)	146 (2:26)	162 (2:42)	166 (2:46)	195 (3:15)
1993	195 (3:15)	118 (1:58)	196 (3:16)	199 (3:19)	205 (3:25)	225 (3:45)
1992	189 (3:09)	119 (1:59)	195 (3:15)	196 (3:16)	201 (3:21)	224 (3:44)
1991	198 (3:18)	125 (2:05)	205 (3:25)	197 (3:17)	201 (3:21)	235 (3:55)

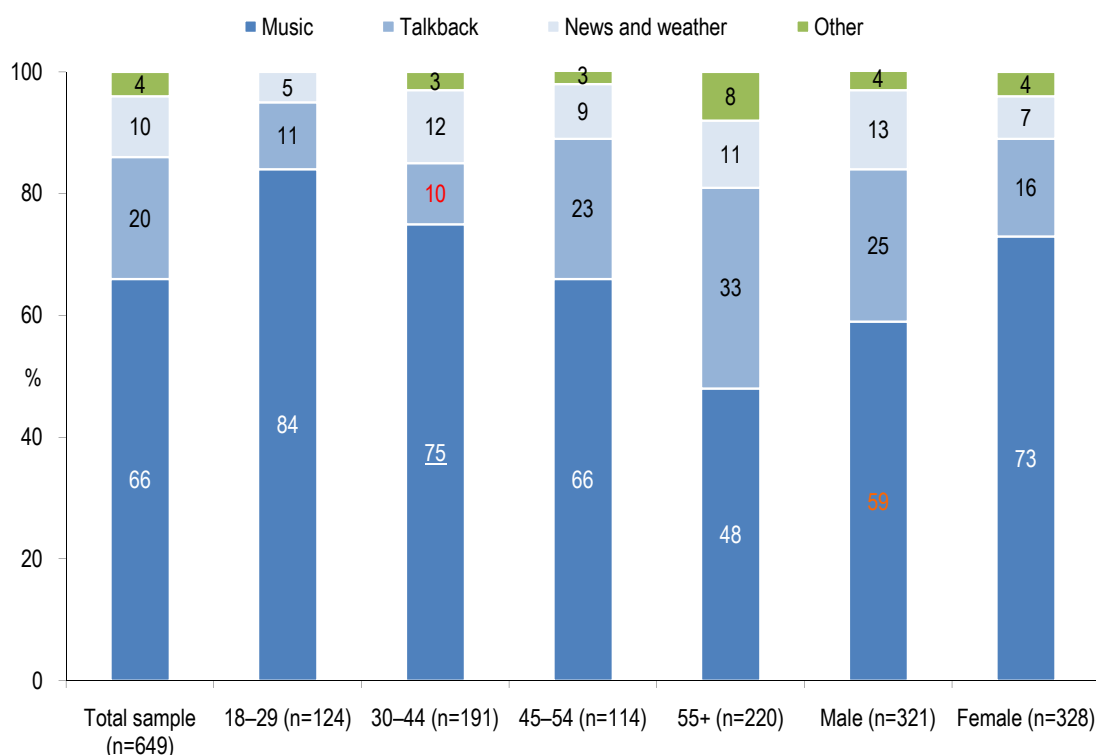
Source: Nielsen Radio Ratings 2008–2009; Nielsen Media Research (2001–2002); AGB McNair (1991–1994). Annual averages are for five metro cities, 5.30am–midnight, Monday–Sunday.

Radio formats

Two-thirds (66 per cent) of online survey respondents who reported listening to radio said that music was the format they listened to most, across age groups. However, with increasing age, music listening declined consistently in favour of other program formats.

Males and older online respondents aged 55 years and over who listened to radio were more likely to be talkback listeners than females and younger adult listeners (Figure 6).

Figure 6 Radio formats listened to the most, 2011



Source: ACMA, Digital Australians online survey, 2011.

B39 ASK THOSE LISTENED TO RADIO (ITEM 11 = CODES 02-06 ON B1a): Earlier you indicated that you have listened to the radio.

Which of the following have you listened to most in the past week? S/R RANDOMISE

Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

Base: Respondents who had listened to radio (not online) in the past week, n=649.

Newspapers

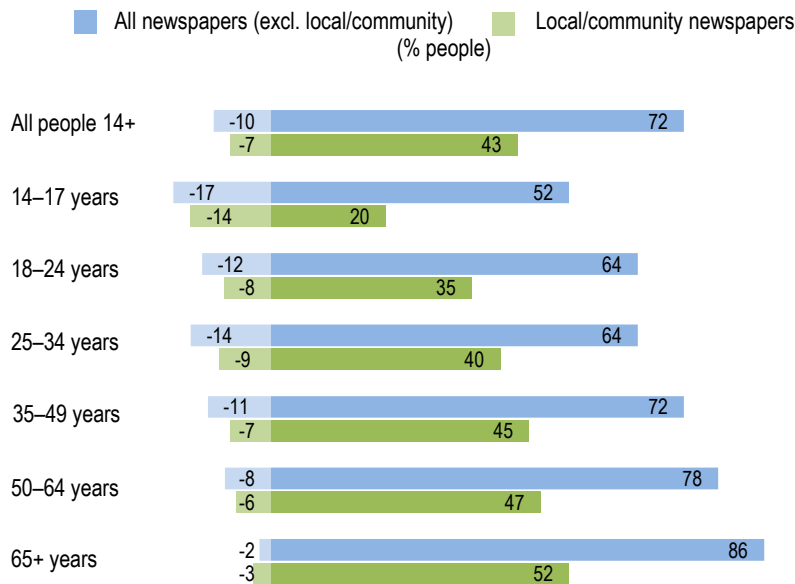
Newspaper readership data for Australians aged 14 years and over have been sourced from Roy Morgan Research and are presented in Figure 7. It shows that in 2010–11, an average 72 per cent of Australians had read a newspaper (excluding local and community newspapers) in the last seven days, and 43 per cent had read a local or community newspaper.

Readership generally increased with age. It was highest among older people aged 65 years and over (86 per cent) and lowest for those aged 14–17 (52 per cent) in 2010–11.

Since 2006–07, newspaper readership has generally declined. Reading newspapers (excluding local and community newspapers) dropped 10 per cent, from 82 per cent in

2006–07. Readership of local and community newspapers dropped seven per cent over the same period. It is also notable that for people aged 65 years and over readership levels have remained much the same since 2006–07.

Figure 7 Newspaper readership in 2010–11 and decline since 2006–07



Source: Roy Morgan Single Source, July 2006 to June 2007, and July 2010 to June 2011. Weighted to the projected population of Australia aged 14+ years.

Online television and radio

This section presents further findings from the ACMA’s online survey about the use of online television and radio services, with subsequent sections covering other online media activities.

Catch-up and internet television

Each of the free-to-air television broadcasters in Australia provides catch-up television services. Seventeen per cent of online respondents reported having watched catch-up television in the past month (Table 7). This compares with 69 per cent who watched broadcast television. Younger adults were significantly more likely to have watched catch-up television than older people (31 per cent of those aged 18–29).

The use of Internet Protocol Television (IPTV) was relatively uncommon, with only two per cent of respondents reporting they had watched IPTV in the past month. This small number of respondents does not allow reliable analysis against different demographic characteristics or the devices used to access these services.

Table 7 Online television viewing and radio listening in past month by age and gender, 2011

	Total sample (n=1,250)	18–29 (n=262)	30–44 (n=353)	45–54 (n=233)	55+ (n=402)	Male (n=613)	Female (n=637)
	%	%	%	%	%	%	%
Visited a TV broadcaster's or radio station's website (but not for catch-up TV)	20	20	22	19	18	22	18
Watched catch-up TV over the internet (e.g. iView, Plus7, FIXPlay etc)	17	31	17	13	11	16	18
Listened to an internet radio service	14	16	17	11	12	18	10
Watched an IPTV service (e.g. FetchTV)	2	3	4	1	0	3	1

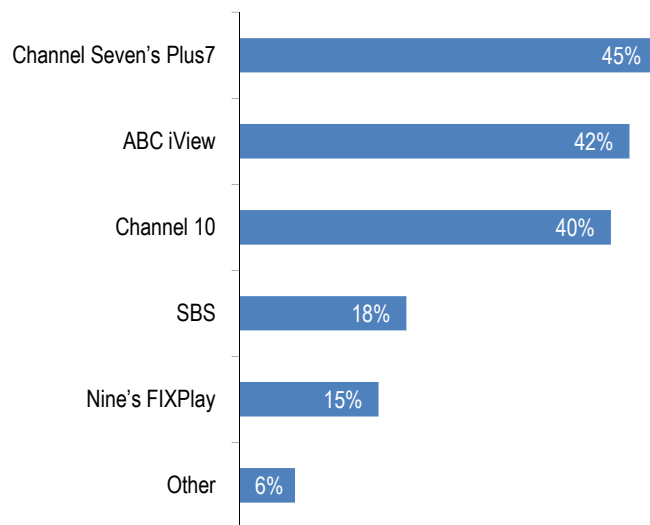
Source: ACMA, Digital Australians online survey, 2011.

B1 ASK ALL: In the past month which of the following have you done? M/R RANDOMISE

Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

Respondents highlighted Channel 7's Plus7, ABC's iView and Channel 10 as the most frequently used catch-up television services (Figure 8).

Figure 8 Catch-up television services used in the past month, 2011



Source: ACMA, Digital Australians online survey, 2011.

B26 ASK THOSE WATCHED CATCH UP TV (CODE 7 ON B1): You mentioned earlier that you have watched catch-up TV. Which of the following catch-up TV services have you used in the past month? M/R RANDOMISE

Base: Respondents who have watched catch-up TV in the last month, n=217.

Internet radio services

Fourteen per cent had listened to online radio services in the last month compared to 54 per cent who listened to broadcast radio. Online radio listeners were more likely to be male (18 per cent) than female (10 per cent)—see Table 7.

Survey respondents who listened to online radio reported listening to the radio formats at similar proportions as broadcast radio listeners (see Figure 6 for broadcast radio formats). For online radio listeners:

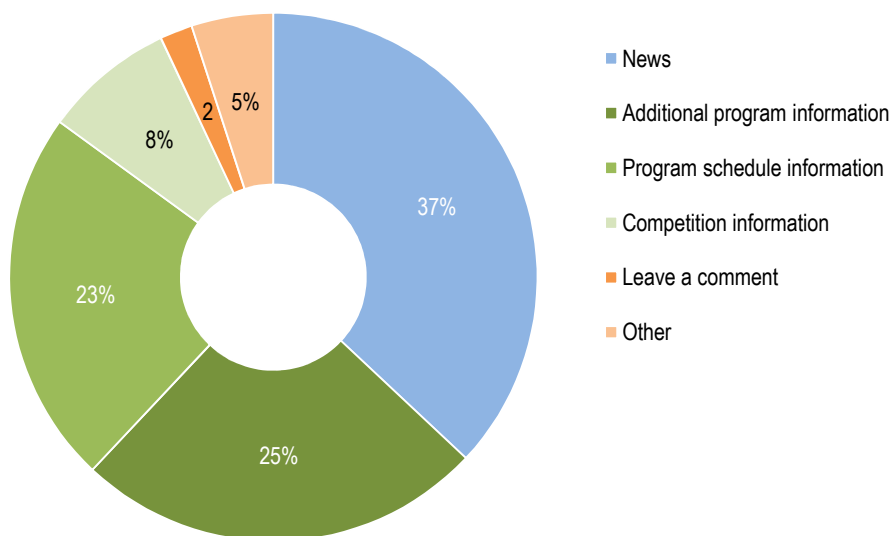
- > 66 per cent listened to music in the past week
- > 15 per cent listened to talkback programming
- > 12 per cent listened to news and weather
- > seven per cent gave other responses (mainly sport).

Visits to broadcaster websites

Twenty per cent of respondents reported visiting the website of a television or radio broadcaster in the past month, and no significant differences were found by age or gender for this activity. Almost all of these website visitors (93 per cent) had visited Australian broadcaster websites and seven per cent had visited websites of international broadcasters.

Figure 9 shows that seeking information about programs, schedules and competitions were the main reasons for visiting the websites of Australian broadcasters (a total of 56 per cent), followed by seeking news (37 per cent).

Figure 9 Main reasons for visiting Australian television or radio broadcasters' websites in the past month, 2011



Source: ACMA, Digital Australians online survey, 2011.

B13 ASK IF VISITED AUSTRALIAN WEBSITES (CODE 01 ON B11): What was your main reason for visiting these sites in the past month? S/R

Base: Respondents who had visited an Australian television or radio website in the past month, n=232.

Social networking

Social networking is a popular online communication activity that also provides a gateway to video and news content for many internet users.

Almost half (49 per cent) of survey respondents reported visiting social networking sites in the last month to browse personal profiles or stay in touch with friends, 25 per cent watched video content or clips via social networking sites, and 22 per cent accessed news through these sites (Table 8).

Social networking activities were more prevalent among younger age groups than the older groups. More females reported using social networking sites for browsing, connecting with friends and accessing news services than did males.

Table 8 Social networking activities undertaken in past month by age and gender, 2011

	Total sample (n=1,250)	18–29 (n=262)	30–44 (n=353)	45–54 (n=233)	55+ (n=402)	Male (n=613)	Female (n=637)
	%	%	%	%	%	%	%
Undertaken other social networking activities (e.g. browsing others' profiles, staying in touch with friends)	49	71	49	41	41	43	56
Watched video content or clips through a social media site such as Facebook	25	45	25	20	14	26	24
Accessed the news through a social media website (e.g. Facebook, Twitter, MySpace – not YouTube)	22	36	25	15	13	18	25

Source: ACMA, Digital Australians online survey, 2011.

B1 ASK ALL: In the past month, which of the following have you done? M/R RANDOMISE

Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

Of those who had accessed news stories and video content through social networking websites, Facebook was the most commonly used—more than eight in 10 had used Facebook for these purposes (Table 9). Up to 17 per cent had sourced news stories through Twitter, Windows Live Spaces and Yahoo! 360.

Table 9 Social networking websites used to access video content and news stories, 2011

Social networking websites	Video content (n=313)	News stories (n=252)
	%	%
Facebook	89	83
Twitter	–	17
Windows Live Space (formerly MSN Space)	10	15
Yahoo! 360	7	17
MySpace	4	5
Tumblr	3	2
Bebo	0	1
Flixter	1	0
Other	7	6

Source: ACMA, Digital Australians online survey, 2011.

B17 ASK THOSE ACCESSED NEWS THROUGH SOCIAL MEDIA (ITEM 5 = CODES 02-06 ON B1a): Which, if any, of the following social media website(s) have you used to access news stories over the past week? M/R RANDOMISE

B21 ASK THOSE ACCESSED VIDEO CONTENT THROUGH SOCIAL MEDIA (CODE 6 ON B1): Earlier you indicated that you had accessed video content through social media websites in the past month. Which of the following social media website(s) have you used to access video content over the past month? M/R RANDOMISE

Note: Figures do not add to 100 per cent due to multiple responses.

Base: Respondents who accessed video content through social media websites in the past month, n=313; Respondents who accessed news through social media websites in the past month, n=252.

Online video content

Table 10 shows that a third of online respondents watched video content from social media sites such as YouTube in the past month, and 13 per cent watched video from peer-to-peer sites such as BitTorrent and Pirate Bay. As mentioned earlier, a quarter had also watched video content from social networking sites such as Facebook. From these three sources, online video content was viewed by a total of 45 per cent of the surveyed respondents.

It was far less common for respondents to have created and uploaded their own video content to the internet (6 per cent). Viewing of online video content was significantly more prevalent amongst 18-29 year olds than respondents aged 45 years and older.

Table 10 Online video content watched and created in past month by age and gender, 2011

	Total sample (n=1,250)	18-29 (n=262)	30-44 (n=353)	45-54 (n=233)	55+ (n=402)	Male (n=613)	Female (n=637)
	%	%	%	%	%	%	%
Watched video content from the internet from sites like YouTube	33	53	36	23	22	33	32
Watched video content from the internet from sites like BitTorrent, Pirate Bay or other peer-to-peer networks	13	26	15	7	6	15	11
Created and uploaded video content to the internet	6	9	8	7	3	7	5

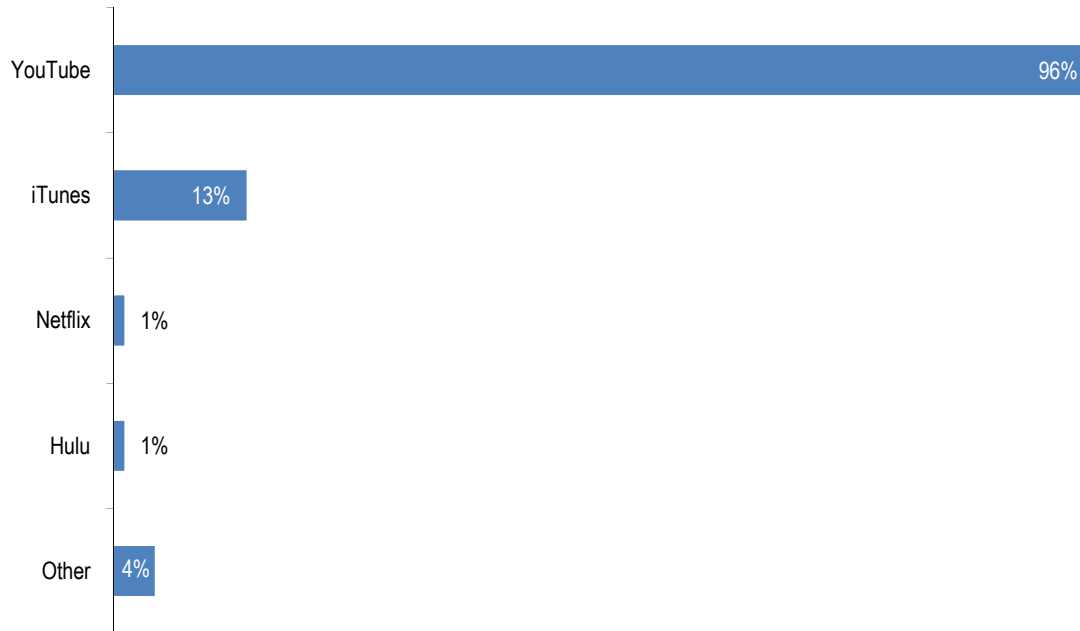
Source: ACMA, *Digital Australians online survey, 2011*

B1 ASK ALL: In the past month which of the following have you done? M/R RANDOMISE

Note: Blue numbers represent differences that are significantly higher and red numbers significantly lower.

Figure 10 shows that YouTube was the most commonly used source of video content among respondents who had watched video content from social media sites (96 per cent), followed by iTunes (13 per cent).

Figure 10 Websites used to download video content, 2011



Source: ACMA, Digital Australians online survey, 2011.

B33 ASK THOSE DOWNLOADED VIDEO CONTENT (CODE 9 ON B1): Earlier you indicated that you have watched video content that you downloaded from the internet from sites like YouTube. Which of the following website(s) have you used to download video content from the internet over the past month? M/R RANDOMISE

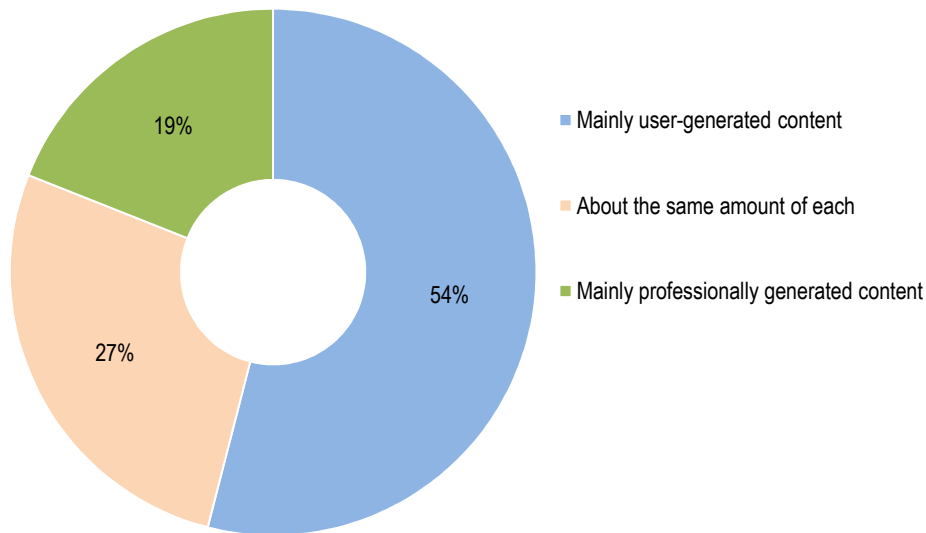
Base: Respondents who had downloaded video content from websites such as YouTube in the past month, n=407.

Types of content watched

Just over half (54 per cent) of the respondents who had watched video content from YouTube watched 'mainly user-generated content', while 19 per cent watched 'mainly professionally generated content'. Over a quarter (27 per cent) reported watching about the same amount of each content type (Figure 11).

Very similar findings also applied to video content that had been downloaded through social networking sites.

Figure 11 Type of video content downloaded from YouTube, 2011



Source: ACMA, Digital Australians online survey, 2011.

B34 ASK IF YOUTUBE OR OTHER (CODES 03 OR 90 ON B33): Was the content you downloaded mainly professionally generated or user-generated? S/R PER ITEM ONLY PRESENT THOSE ITEMS SELECTED AT B33

Base: Respondents who had downloaded video content from YouTube in the past month, n=391.

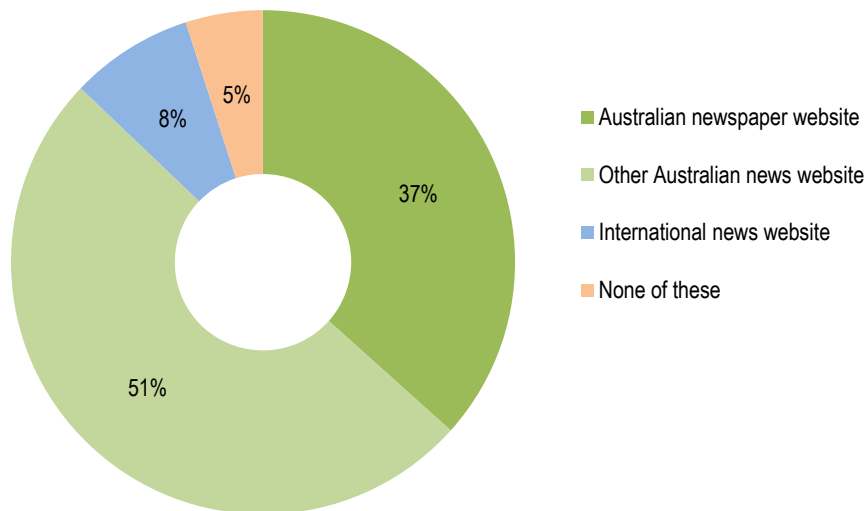
Online news

Just over half (52 per cent) of respondents reported visiting a news website in the past month. More males (57 per cent) than females (47 per cent) did so and there were no significant age differences. As mentioned above, 22 per cent of respondents had also accessed news through social networking sites.

A total of 59 per cent of respondents had accessed news from news websites or social networking sites, making access to online news content the second-highest media activity overall after watching broadcast television.

Australian websites were most preferred by 88 per cent of those who visited news websites. Thirty-seven per cent had mainly visited an Australian newspaper website and 51 per cent identified other Australian news websites (Figure 12).

Figure 12 Type of news website visited most, 2011



Source: ACMA, Digital Australians online survey, 2011.

B6 ASK THOSE VISITED NEWS WEBSITE (ITEM 1 = CODES 02-06 ON B1a): You mentioned earlier that you have visited website(s) of a news organisation(s). Which, if any, of the following news websites have you visited most in the past week? S/R RANDOMISE
Base: Respondents who had visited the website of a news organisation in the past week, n=607.

Chapter 4 presents more detailed findings about the use of different offline and online news sources.

Devices used to access online content

Although there are an increasing range of devices for accessing online content, desktop computers and laptops were found to be the primary devices used for all forms of online media activities.

For most activities, the proportion of online respondents who mostly used a desktop computer is similar to the proportion who mostly used a laptop. Exceptions were a higher proportion of respondents who mostly used a laptop to access online news sites. Desktop computers were mainly used to visit broadcaster websites, play online games and listen to online radio. Desktop and laptop computers were used almost equally to watch catch-up television and radio content.

Considerably fewer respondents identified mobile phones, tablet computers, internet-enabled television and game consoles as their main access device. Mobile phones were nominated by less than one in 10 and tablets by one in 20 or less.

Table 11 Devices most used for online media content, 2011

Online media content/activity	Desktop computer	Laptop	Mobile phone	Tablet computer	MP3/4 player	Internet enabled TV	Games console	Other
	%	%	%	%	%	%	%	%
Online news sites (n=607)	37	57	4	2	–	–	–	0
Video content from a social media site e.g. YouTube (n=407)	48	43	5	2	1	0	0	0
Online games on the internet (n=350)	49	40	7	1	1	–	2	0
Video content through a social media site e.g. Facebook (n=313)	47	44	7	1	–	–	–	0
News through a social media website e.g. Facebook (n=252)	38	50	9	3	–	–	–	0
Website(s) of television broadcasters and/or radio stations (n=250)	52	42	3	3	–	–	–	0
Catch-up TV on the internet (n=217)	43	47	3	1	–	4	–	1
Video content from sites like BitTorrent, Pirate Bay, or other peer-to-peer networks (n=162)	38	46	1	3	0	5	2	5
Radio on the internet (n=155)	48	35	6	5	–	–	–	5

Source: ACMA, Digital Australians online survey, 2011.

B8, B19, B42, B44, B15, B24, B28, B36, B38: Which of the following devices did you use most to <do media activity> in the past month/week? S/R RANDOMISE

Note: Dashes indicate where data was not collected.

Internet access using mobile phones and tablets/e-readers

Nielsen’s online consumer study, conducted in 2010 with respondents aged 14 years and over, examined the use of mobile phones and tablets/e-readers and the impact on the consumption of online content.

Nielsen found that ownership of mobile phones with internet capability had increased from 43 per cent in 2009 to 65 per cent in 2010, including 35 per cent of respondents who owned a smartphone in 2010.⁸ Smartphone owners were more likely to be men (43 per cent) than women (32 per cent) and live in a metropolitan area (40 per cent) than a non-metropolitan area (32 per cent), and be aged 25–34 years (55 per cent).

Over half (52 per cent) of online mobile phone users browsed the internet, up from 29 per cent in 2009. The use of email also increased significantly from 20 per cent to 39 per cent between 2009 and 2010. Smartphone users were much more likely to use internet-related functions than other mobile phone owners—87 per cent of smartphone owners browsed the internet and 74 per cent used email.

Ten per cent of online respondents had at some time used a tablet or e-reader to access the internet. Fewer owned a tablet computer (eight per cent), an e-reader or a portable reading device (seven per cent) in 2010. The larger screen size of tablets was more readily used to watch online video content (43 per cent) than were smartphones (33 per cent).

⁸ Nielsen defines smartphones as internet-capable mobile handsets with advanced functionality, such as handsets capable of accessing email, browsing the web, opening documents, and downloading and using applications or software, and that have a ‘qwerty’ keyboard or a touch screen.

Apps

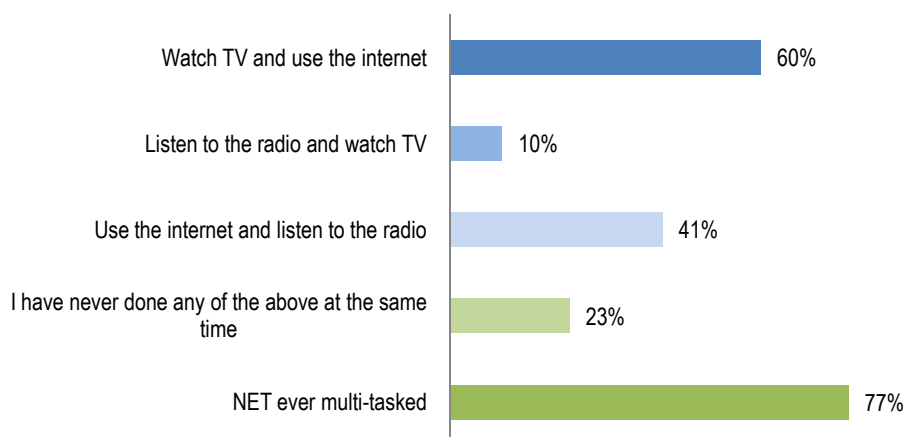
Sixty-nine per cent of Nielsen's online respondents who accessed the internet from a mobile phone had downloaded an app and 54 per cent reported using apps regularly. Of those who accessed the internet via a tablet or e-reader, 59 per cent had downloaded an app and 49 per cent said they used apps regularly. Males (73 per cent) were more likely than females (64 per cent) to download apps.

Games apps were regarded as the most useful app category by 39 per cent of mobile app users. This was followed by social networking apps (23 per cent), and the more functional maps/directions- (18 per cent) and weather-related apps (17 per cent).

Multi-tasking

The Nielsen study also reported on the simultaneous use of different media (or multi-tasking).⁹ It found that over three-quarters (77 per cent) of online Australians had used two or more media at one time. Figure 13 shows watching television and using the internet were the two most likely media activities to be undertaken simultaneously in 2010.¹⁰

Figure 13 Simultaneous media consumption, 2010



Source: Nielsen, *The Australian Online Consumer Report, 2011*.

Base: Online Australians 16+ (n=5,886).

Nielsen also found that online media often attracted a user's primary attention when combined with watching television or listening to radio. Sixty-five per cent of online respondents who used traditional media with online activities reported giving their primary focus of attention to the internet.

General patterns of media use

The media use diaries that the focus group participants completed as part of the homework task provide insights into media consumption patterns. Offline media use tended to follow a daily routine with clear use patterns at particular times of the day. For example, radio was often listened to throughout the day (commonly in the background while doing other activities), newspapers were read in the morning, and television was viewed at the start and end of each day.

⁹ Multi-tasking explains why looking at individual hours spent per media activity can grossly overestimate the amount of time people are spending on media activities in total, and it also affects the level of attention they are giving to any one media activity.

¹⁰ Nielsen, *The Australian Online Consumer Report, 2011*.

Online media content, on the other hand, was typically accessed throughout the day ‘on demand’ as and when required. It was usually driven by particular interests and/or specific needs for information. Typical examples include catch-up television, online news and communicating via social networking sites.

Variations in media use patterns

As shown in this chapter, Australians vary in their media preferences, levels of media use and the types of media content accessed. The following three examples from participant diaries illustrate low, equal and high patterns of online media use.¹¹

1. **Primary use of traditional media**—this group tended to consume more traditional media content from broadcast television, broadcast radio and newspapers than online content. They were least likely to own a smartphone or to use social networking or social media sites.

Table 12 Typical day for participants who primarily used traditional media, 2011

Time of day	Device	Content	Location	Time spent
7–9 am	AM radio Newspaper	ABC – FM Coffs Harbour Advocate	Home	20 mins
9–11 am				
11 am–1 pm	Computer	Greenslip website Hospital website	Home	25 mins
1–3 pm				
3–5 pm				
5–7 pm	TV	ABC News A Current Affair Escape to the Country Better Homes and Gardens	Home	2 hours 15 mins

Source: ACMA, Digital Australians qualitative research, 2011.

2. **Equally use offline and online media**—this group used online and traditional media at roughly equal levels. If they owned a smartphone, they tended to use it for accessing online sites and apps that assisted them to organise their daily lives. They occasionally used social media and/or social networking sites.

¹¹ These three examples of media use have been described rather than quantified because the information was gathered from qualitative research.

Table 13 Typical day for participants who equally used offline and online media, 2011

Time of day	Device	Content	Location	Time spent
7–9 am	TV	Channel 9 – Today Program	At home	15 minutes
9–11 am	iPhone	Weatherwatch	At home	5 minutes
11 am–1 pm				
1–3 pm				
3–5 pm	Computer	Real estate.com.au	At work (break)	1 hour
5–7 pm				
7–9 pm	Computer	Facebook – emails	At home	15 minutes
9–11 pm	TV – T-box	Recorded TV programs	At home	2 hours

Source: ACMA, Digital Australians qualitative research, 2011.

3. **Primary use of online media**—while this group rarely accessed content through traditional media, they compensated with their heavier use of online content. They owned and relied on smartphones, accessed social networking and media sites on a daily basis, and used online content on demand throughout the day.

Table 14 Typical day for participants who primarily used online media, 2011

Time of day	Device	Content	Location	Time spent
7–9 am	Smartphone	Football scores – BBC	Home –in bed	10 mins
9–11 am	Computer	Facebook / emails	At home	30 mins
11 am–1 pm	Smartphone	iTunes store – downloading movie to rent	In town	5 mins
1–3 pm	Computer	Twitter	At home	5 mins
3–5 pm	Computer	Facebook, specific websites	At home	5 mins
5–7 pm				
7–9 pm	Apple TV	Movie	At home	2 hours
9–11 pm	Smartphone	Facebook emails YouTube	At home	10 mins
7–9 am	Smartphone	Football scores – BBC	Home –in bed	10 mins

Source: ACMA, Digital Australians qualitative research, 2011.

The impact of age on media use reported earlier in this chapter was also apparent in the focus groups. Younger adults were more likely to be medium- and high-level users of converging media, and low-level users were mostly older.

Types of content consumed also differed by age. Participants aged under 35 years had a substantial ‘entertainment’ focus that was indicated by their interest in video content from YouTube. They made time and space available to view this type of

content, and were more likely to access media content online and engage with friends through social networking sites.

Participants aged 35 years and over were more pragmatic in their use of content. Their behaviour was influenced by the demands of their jobs and the presence of children in their lives, and they claimed to have less free time to follow their own interests. They appreciated easy access to media that helped them to successfully negotiate their lives. They tended to seek online information such as weather and traffic reports to plan their day.