

researchacma
Evidence
that informs

Methodology

ACMA consumer survey 2020: *Snapshot—Trends in viewing and listening behaviour*

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General guidelines for reading the snapshot

- > All percentages are based on weighted survey estimates.
- > Base sizes are shown as the unweighted number of respondents.
- > All percentages have been rounded to the nearest whole number. As a result, there may be discrepancies between sums of the component items in a table or chart and the total.
- > The research often asked about ‘the last six months’—this is the period prior to when data was collected. For the 2020 survey, this was from approximately December 2019 to June 2020.
- > Some questions have been filtered depending on the respondent’s previous responses (for example, a question asked only of those who undertook an internet activity in the past 6 months). This is noted in descriptive language in the report and below as either ‘All respondents’ in the table or ‘Base’ in the table notes. Care needs to be taken when interpreting the results, so that the data is read in the correct context.
- > Some of the questions invited a multiple response, so total responses may sum to more than 100%.
- > In some cases, ‘don’t know’ or other responses with only small levels of response are not shown—these are noted in the tables below.
- > Categories with low sample sizes (less than n=100 interviews) are not shown.
- > All results shown have been tested for statistical significance at the 95% confidence level.
- > Statistically significant changes/differences between groups are identified with red and green arrows as follows:
 - > green arrows (▲): statistically significant increase to the prior year/other sub-groups at the 95% confidence level
 - > red arrows (▼): statistically significant decrease to the prior year/other sub-groups at the 95% confidence level.

About the research

The ACMA annual consumer survey provides an information base on consumer behaviour, adoption of and attitudes towards media and communications services, and the effectiveness of existing regulatory interventions. This research is part of the [ACMA research program](#), which gathers evidence that informs our decisions as a regulator, and ensures we are up-to-date on market developments and consumer trends.

Data contained in the *Trends in viewing and listening behaviour* snapshot is from ACMA annual consumer surveys, collected from 2018 to 2020. This ACMA-commissioned research was undertaken by The Social Research Centre (SRC) using the SRC's probability-based Life in Australia™ (LinA) online panel. LinA includes people with and without internet access—those without internet access or who are not comfortable completing surveys online are able to complete surveys by phone instead.

The methodology adopted for the consumer surveys was a mixed-mode approach, comprising online interviews with Australian adults and computer-aided phone interviews to reach the adult population who are not regularly online. The surveys were representative of the Australian population aged 18 years and over.

Table 1: ACMA consumer survey summary of key statistics, 2018, 2019 and 2020

	2018	2019	2020
Total sample (n)	2,107	2,067	2,009
Online interviews (n)	1,842	1,824	1,913
Telephone interviews (n)	265	243	96
Field work date	14–27 May	6–19 May	9–21 June
Average survey length	25.1 minutes	20 minutes	25 minutes

The tables below show the annual consumer survey research sample sizes for the charts used in the report.

What we're watching

Table 2: Research sample sizes for Australian adults who watched video content in the past 7 days, 2019 and 2020

	May 2019	Jun 2020
All respondents	2,067	2,009

QF4. Which of the following have you personally watched in the past 7 days at home or elsewhere? Free-to-air TV not including catch-up TV or recorded content; Foxtel or other subscription TV channels such as Fetch TV not including catch-up TV or recorded content; Something you recorded from free-to-air TV; Something you recorded from Foxtel or other subscription TV channels; Catch up TV such as ABC i-view, 10 play or 7Plus for free-to-air programs; Movies or TV shows for free over the internet; An online subscription service such as Netflix, Stan or Foxtel Now; Online pay-per-view services such as OzFlix, Google Play, iTunes; Other content on an online platform such as YouTube, including product reviews, vlogs, comedy/sketch videos excluding any video game content; Watched or played games online including e-sports and fantasy sports; None of these (EXCLUSIVE).

Table 3: Research sample sizes for Australian adults who watched catch-up TV in the past 7 days, 2019 and 2020

	May 2019	Jun 2020
All respondents	765	813

QF9. You said you watched catch up TV for free-to-air programs in the past 7 days. Which channels have you watched using catch up TV in the past 7 days? Please include all that you have watched. 7plus (7mate, 7flix, 7TWO, Racing.com, 7FOOD); 9Now (9Gem, 9Go, 9Life, NBN Television, 9Rush); 10 play (10Bold, 10Peach, TVSN, Spree TV); ABC i-view (ABC Kids, ABC Me, ABC Comedy, ABC News); SBS on Demand (SBS Viceland, SBS Food, NITV); Don't know (EXCLUSIVE); Refused (EXCLUSIVE).

Streaming and online subscription services

Table 4: Research sample sizes for Australian adults who watched online video content in the past 6 months, by age group, 2019 and 2020

	May 2019	Jun 2020
All respondents	1,986	1,963
18–34 years	343	346
35–44 years	298	308
45–54 years	365	310
55–64 years	395	414
65–74 years	403	405
75+ years	182	180

'Don't know' and 'Refused' responses are excluded from analysis.

Chart base: Australian adults who accessed the internet in the past 6 months for personal use.

2019 wording was 'Viewing content online such as catch up TV, YouTube, or movies'.

Statements (for internet-based activity categories) reflect wording from the 2020 survey.

QD8. Below is a range of internet-based activities. Please indicate whether or not you have done any of the following in the past 6 months at home or elsewhere. Relevant response option: Watching video content online such as subscription services, catch up TV, live streaming or YouTube.

Table 5: Research sample sizes for change in participation in viewing online video content since COVID-19 restrictions were introduced in March 2020, by age group, 2020

	18–54 years	55+ years
Viewing online video content	2,009	1,627

'Don't know' and 'Refused' responses are excluded from analysis.

Base: Australian adults who participated in at least one internet activity in past 6 months and accessed the internet in the past 6 months for personal use.

Statements (for internet-based activity categories) reflect wording from the 2020 survey.

QD8. Below is a range of internet-based activities. Please indicate whether or not you have done any of the following in the past 6 months at home or elsewhere. Relevant response option: Watched or played games online including e-sports and fantasy sports.

QD17. Since the COVID-19 social and physical distancing restrictions were introduced in March 2020, how has your participation in the following activities changed or has it stayed about the same? It has decreased; It has stayed about the same; It has increased; First started this activity since March 2020; Don't know; Refused.

Table 6: Research sample sizes for services used to stream or download video content in the past 6 months and past 7 days, 2020

	Past 6 months	Past 7 days
All respondents	2,009	1,627

The number of services reported by respondents each year can be impacted by the services that are on the prompted survey list and services that were recalled unprompted. This may have a small impact on comparisons across years.

Chart base: Past 6 months – Australian adults; Past 7 days – Australian adults who used online service to stream in the past 6 months.

QF7. Which of the following online services, if any, have you used to stream or download video content in the past 6 months? Telstra TV Box Office; Fetch TV (on Optus); Foxtel, including Foxtel Now or Foxtel Go; Google Play; iTunes; Netflix; Stan; YouTube; YouTube Premium; Optus TV; Telstra TV; Apple TV; Amazon Prime; Kayo; Disney Plus; Facebook; TikTok; Some other video service (Please specify); None of these (EXCLUSIVE); Don't know (EXCLUSIVE); Refused (EXCLUSIVE).

QF8. Which of the following online services, if any, have you used to stream or download video content in the past 7 days? For response options see QF7.

Table 7: Research sample sizes for Australians who had a subscription service at home and number of services at home, 2019 and 2020

	May 2019	Jun 2020
All respondents	2,067	2,009

QF2. Which, if any, television or video subscriptions or pay-per-view services do you have in your household? Foxtel; Netflix; Stan; Telstra TV Box Office; YouTube Premium; Optus TV; Telstra TV; Fetch TV; iTunes; Google Play; Foxtel Now; Fetch on Optus; Apple TV; Amazon Prime; Kayo; Disney Plus; Something else (Please specify); None of these (EXCLUSIVE); Don't know (EXCLUSIVE); Refused (EXCLUSIVE).

What we're listening to

Table 8: Research sample sizes for Australian adults who listened to online audio content, 2019 and 2020

	May 2019	Jun 2020
All respondents	1,986	1,962
18–34 years	343	345
35–44 years	298	308
45–54 years	365	310
55–64 years	395	414
65–74 years	403	405
75+ years	182	180

'Don't know' and 'Refused' responses are excluded from analysis.

Chart base: Australian adults who participated in at least one internet activity in past 6 months and accessed the internet in the past 6 months for personal use.

QD8. Below is a range of internet-based activities. Please indicate whether or not you have done any of the following in the past 6 months at home or elsewhere. Relevant response option: Accessing audio content online such as internet radio, podcasts, Apple Music or Spotify.

Table 9: Research sample sizes for change in participation in listening to online audio content since COVID-19 restrictions were introduced in March 2020, by age group, 2020

	18–54 years	55+ years
Accessing audio content online such as internet radio, podcasts, Apple Music or Spotify	791	501

Statements (for internet-based activity categories) reflect wording from the 2020 survey.

'Don't know' and 'Refused' responses are excluded from analysis.

Chart base: Australian adults who participated in at least one internet activity in past 6 months and accessed the internet in the past 6 months for personal use.

QD8. Below is a range of internet-based activities. Please indicate whether or not you have done any of the following in the past 6 months at home or elsewhere. Relevant response option: Accessing audio content online such as internet radio, podcasts, Apple Music or Spotify.

QD17. Since the COVID-19 social and physical distancing restrictions were introduced in March 2020, how has your participation in the following activities changed or has it stayed about the same? Relevant response option: Accessing audio content online such as internet radio, podcasts, Apple Music or Spotify.

Music streaming services and podcasts

Table 10: Research sample sizes for Australian adults who used an online music streaming service in the past 7 days, 2019 and 2020

	May 2019	Jun 2020
All respondents	2,067	2,009

QH5. Which of the following online services have you used to stream music in the past 7 days? This may include using apps. Apple Music; Google Play Music; iHeartRadio; iTunes Radio; Spotify; ABC listen exploring; TuneIn; YouTube Music; Amazon Music; Some other music service (Please specify); I don't stream music (EXCLUSIVE); Don't know (EXCLUSIVE); Refused (EXCLUSIVE).

Table 11: Research sample sizes for Australian adults who used an online music streaming service in the past 7 days and time spent, 2019 and 2020

	May 2019	Jun 2020
All respondents	935	1,153

Chart base: Australian adults who streamed music in the past 7 days.

QH5. Which of the following online services have you used to stream music in the past 7 days? This may include using apps. Apple Music; Google Play Music; iHeartRadio; iTunes Radio; Spotify; ABC listen exploring; TuneIn; YouTube Music; Amazon Music; Some other music service (Please specify); I don't stream music (EXCLUSIVE); Don't know (EXCLUSIVE); Refused (EXCLUSIVE).

QH6. And how many hours have you spent listening to online music streaming services in the past 7 days?

Table 12: Research sample sizes for Australian adults who used an online music streaming service in the past 7 days, by age group, 2020

	Jun 2020
18–44 years	654
45+ years	1,334

QH5. Which of the following online services have you used to stream music in the past 7 days? This may include using apps. Apple Music; Google Play Music; iHeartRadio; iTunes Radio; Spotify; ABC listen exploring; TuneIn; YouTube Music; Amazon Music; Some other music service (Please specify); I don't stream music (EXCLUSIVE); Don't know (EXCLUSIVE); Refused (EXCLUSIVE).

Table 13: Research sample sizes for Australian adults who listened to a podcast in the past 7 days and time spent, 2020

	Jun 2020
All respondents	2,006

'Don't know' and 'Refused' responses are excluded from analysis.

QH10. Now thinking about podcasts. Have you listened to at least one podcast in the past 7 days? Yes; No; Don't know; Refused.

QH11. And how many hours have you spent listening to podcasts in the past 7 days?

Table 14: Research sample sizes for Australian adults who listened to a podcast in the past 7 days, by age group, 2020

	Jun 2020
18–54 years	964
55+ years	1,021

'Don't know' and 'Refused' responses are excluded from analysis.

QH10. Now thinking about podcasts. Have you listened to at least one podcast in the past 7 days? Yes; No; Don't know; Refused.

Radio

Table 15: Research sample sizes for Australian adults who owned a radio, 2019 and 2020

	May 2019	Jun 2020
All respondents	2,067	2,009
Respondents living in capital cities (for Digital radio at home)	1,366	1,335

QH1. Now some questions about radio...Do you have a radio at home? Do you have a radio in your car? Don't know; Refused.

QH8. Which of the following have you personally listened to in the past six months? AM radio at home or in a car or somewhere else; FM radio at home or in a car or somewhere else; Digital radio (DAB+) radio at home or in a car or somewhere else; Radio online via the internet, at home or somewhere else not including podcasts; None of these (EXCLUSIVE); Don't know (EXCLUSIVE); Refused (EXCLUSIVE).

QA7. Do you live within or outside your state's capital city? Within capital city; Outside capital city; Don't know; Refused.

Table 16: Research sample size for Australian adults who owned a radio at home, by age group, 2020

	Jun 2020
18–34 years	346
55+ years	1,023

QH1. Now some questions about radio...Do you have a radio at home? Do you have a radio in your car? Don't know; Refused.

Table 17: Research sample size for Australian adults who listened to the radio in the past 7 days, 2019 and 2020

	May 2019	Jun 2020
All respondents	1,894	1,830
Respondents living in capital cities (for Digital radio at home)	1,248	1,231

Chart base: Past 7 days – Australian adults who listened to the radio in the past 6 months.

QH8. Which of the following have you personally listened to in the past six months? AM radio at home or in a car or somewhere else; FM radio at home or in a car or somewhere else; Digital radio (DAB+) radio at home or in a car or somewhere else; Radio online via the internet, at home or somewhere else not including podcasts; None of these (EXCLUSIVE); Don't know (EXCLUSIVE); Refused (EXCLUSIVE).

QH3. Which of the following have you listened to in the past 7 days? For response options see QH8

Table 18: Research sample size for Australian adults who listened to the radio in the past 7 days, by age group, 2020

	Jun 2020
18–44 years	562
45+ years	1,250

QH8. Which of the following have you personally listened to in the past six months? AM radio at home or in a car or somewhere else; FM radio at home or in a car or somewhere else; Digital radio (DAB+) radio at home or in a car or somewhere else; Radio online via the internet, at home or somewhere else not including podcasts; None of these (EXCLUSIVE); Don't know (EXCLUSIVE); Refused (EXCLUSIVE).

Table 19: Research sample sizes for regional Australian adults who listened to a radio in the past 7 days, 2019 and 2020

	May 2019	Jun 2020
Respondents living in regional areas	646	617

QH3. Which of the following have you listened to in the past 7 days? AM radio at home or in a car or somewhere else; FM radio at home or in a car or somewhere else; Digital radio (DAB+) radio at home or in a car or somewhere else; Radio online via the internet, at home or somewhere else not including podcasts; None of these (EXCLUSIVE); Don't know (EXCLUSIVE); Refused (EXCLUSIVE).

QA7. Do you live within or outside your state's capital city? Within capital city; Outside capital city; Don't know; Refused.

Table 20: Research sample size for Australian adults who listened to the radio in the past 7 days, by time spent, 2020

	Jun 2020
All respondents	1,699

'Don't know' and 'Refused' responses are excluded from analysis.

Base. Australian adults who listened to the radio in the past 7 days.

QH4. And how many hours have you spent listening to each of the following in the past 7 days? AM radio in a car or another vehicle; AM radio at home or somewhere else (but not in a vehicle); FM radio in a car or another vehicle; FM radio at home or somewhere else (but not in a vehicle); Digital radio (DAB+) in a car or in another vehicle; Digital radio (DAB+) at home or somewhere else (but not in a vehicle); Radio online via the internet (not including podcasts). Respondent options; Enter hours; Don't know.