

Trends in viewing and listening behaviour

ACMA consumer survey 2020

Quantitative research

November 2020



About the research

This quantitative consumer research was undertaken to further understand trends in consumer take-up and usage of communications and media services.

The Social Research Centre (SRC) was commissioned by the ACMA to conduct the survey using their probability-based panel, Life in Australia™. 2,009 surveys were completed from 9 to 21 June 2020, and the results are representative of the Australian population aged 18 years and over.

See the full [methodology](#) for sample sizes of subgroups and additional notes.

researchacma

The ACMA is undertaking research to:

- > support time-series tracking of patterns of consumer communications and media use
- > inform regulatory development by providing an evidence base on consumer behaviour, adoption of and attitudes towards media and communications services in Australia.

This research is part of the [ACMA research program](#).

Key research findings

We increasingly use the internet to watch and listen to content

In 2020, more Australian adults accessed viewing and listening services over the internet.



What we're watching

- > Viewing online content in the previous 7 days increased for subscription services such as Netflix or Stan (55% in 2020, up from 49% in 2019) and catch-up TV (36% in 2020, up from 28% in 2019).
- > Watching free-to-air TV continued to decrease (56% in 2020, down from 61% in 2019).



Streaming and online subscription services

- > 89% of online Australian adults watched online video content in the 6 months to June 2020 (up from 83% in 2019).
- > Netflix, YouTube and Facebook were the most common services used to stream or download video content.
- > 40% of online Australians who watched online video content in the 6 months to June had just started or increased this activity since the COVID-19 restrictions commenced in March 2020.
- > 77% of Australian internet users had a subscription and/or pay-per-view service in their household in 2020 (up from 70% in 2019).



What we're listening to

- > 69% of online Australian adults listened to audio content online in the 6 months to June 2020 (up from 65% in 2019).



Music streaming services and podcasts

- > 63% of Australian adults had listened to at least one music streaming service in the previous 7 days (up from 48% in 2019).
- > 20% of Australian adults listened to a podcast in the previous 7 days.



Radio

- > 95% of Australians had a radio, but ownership of a radio at home has fallen (60% in 2020, down from 67% in 2018).
- > Older Australians aged 45+ were more likely to listen to AM radio and digital radio at home than those aged 18 to 44 years.

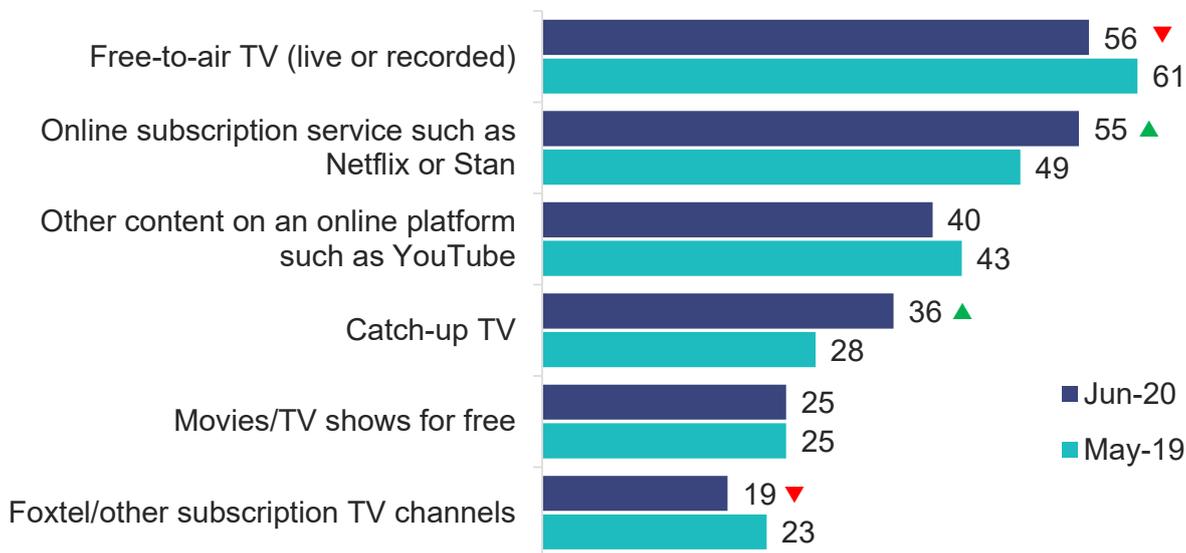


What we're watching

In 2020, more Australians watched video content, with the majority of the increase from online services

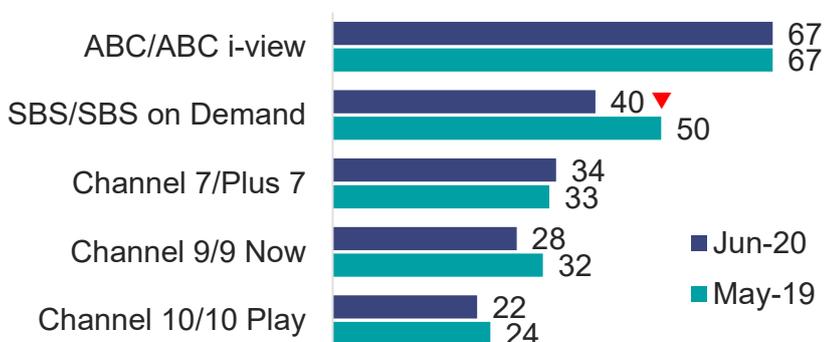
- > **Watching online subscription services and catch-up TV increased**, while viewing 'live' free-to-air TV continued to fall from 2019 to 2020.
- > From 2019 to 2020, **increases in time spent viewing many types of video content were likely driven by COVID-19 restrictions**. There were no significant changes to viewing from 2018 to 2019.

Viewing behaviours* (%)



▲ ▼ Significantly different to prior year at the 95% confidence level.

Watched catch-up TV† (%)



ABC i-view remained the leading catch-up TV service at June 2020.

*In the previous 7 days.

†Australian adults who watched a catch-up TV service in the previous 7 days at May 2019 and June 2020.

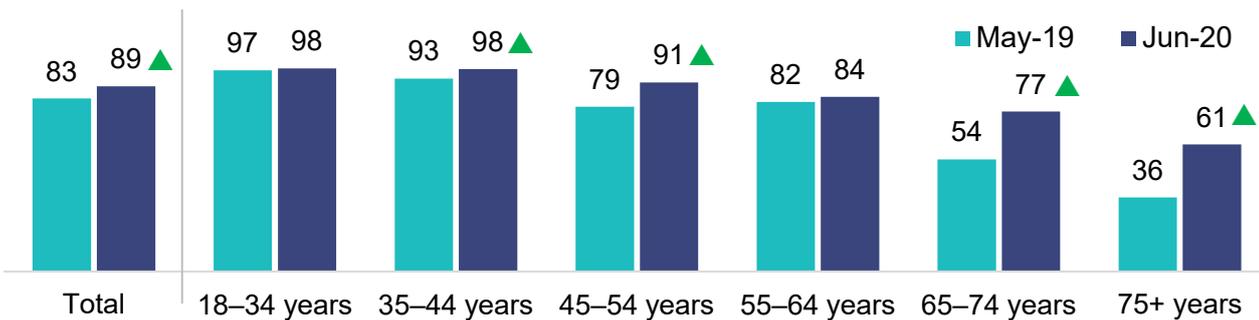


Streaming and online subscription services

In 2020, we watched more video content online, particularly via online subscription services and catch-up TV

89% of online Australian adults watched video content online in the 6 months to June 2020 (up from 83% in 2019).

Watched online video content in the past 6 months, by age* (%)

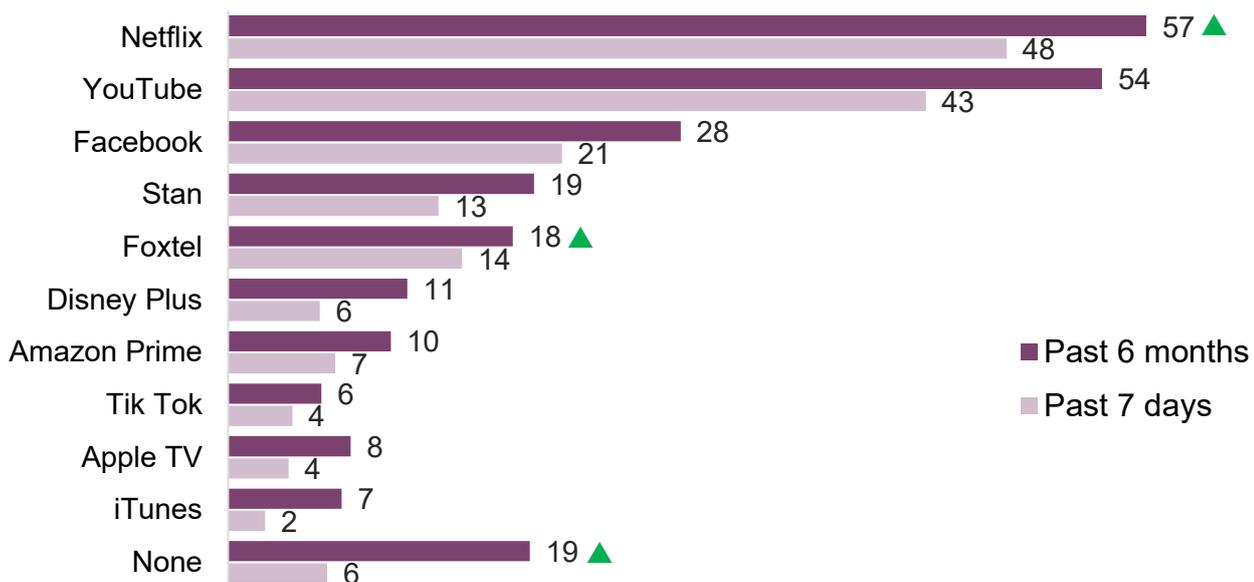


Of those who watched online video content[†], 40% had just started or increased since the COVID-19 restrictions in March 2020 (1% started, 39% increased).

For those viewers:

- > aged 18–54, 43% just started or increased watching online video content
- > aged 55+, 32% just started or increased watching online video content.

Services used to stream or download video content[†] (%)



*Adult internet users in the 6 months to May 2019 and June 2020.

[†]Australian adults at June 2020.

▲ Significantly different to prior year at the 95% confidence level.

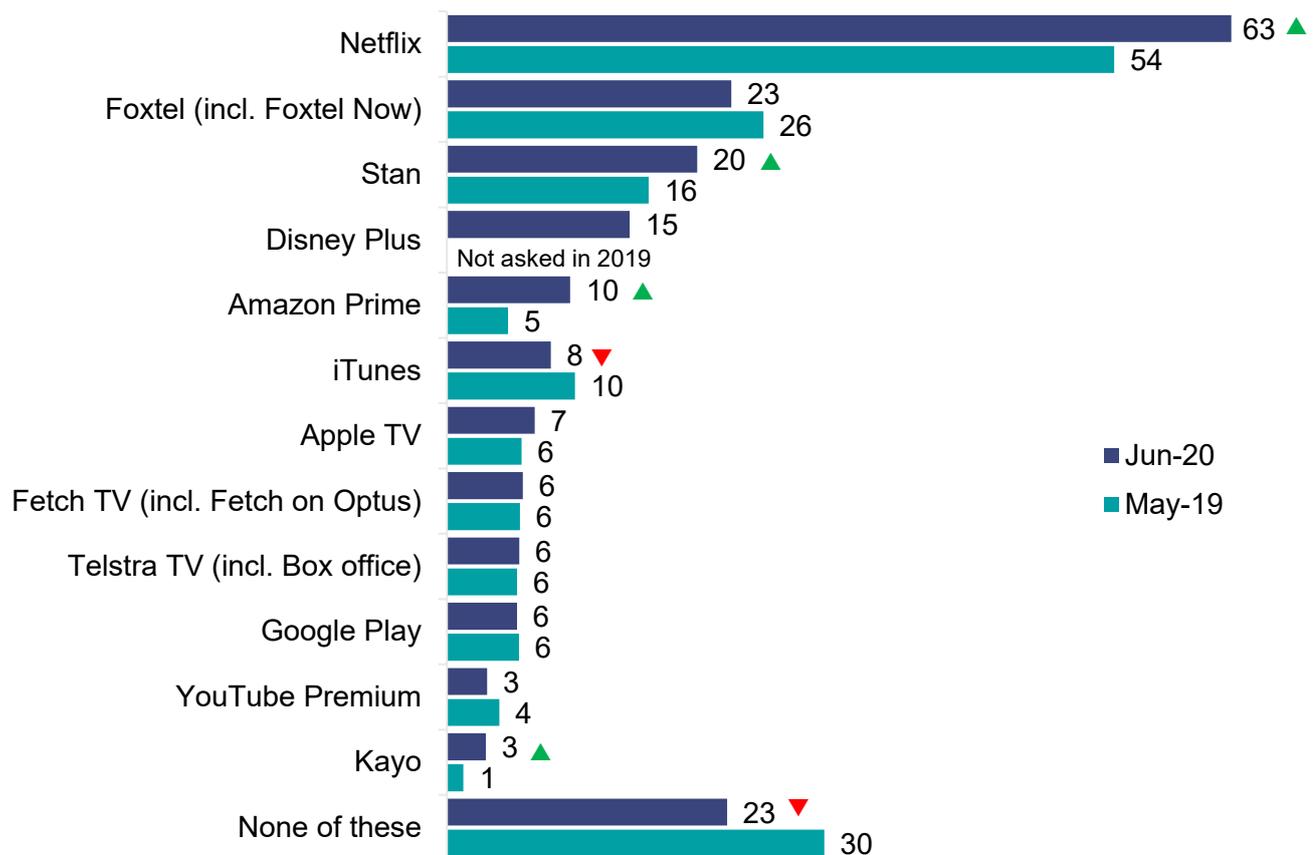


Streaming and online subscription services

More of us have subscription, pay-per-view or online viewing platforms at home in 2020

77% of Australian internet users had a subscription and/or pay-per-view service in their household in 2020 (up from 70% in 2019).*

Subscription services at home* (%)



▲▼ Significantly different to prior year at the 95% confidence level.

Number of subscription services at home, June 2020* (%)



> On average, households had 1.8 subscription services in 2020 (up from 1.5 in 2019).†

*Australian adults at May 2019 and June 2020.

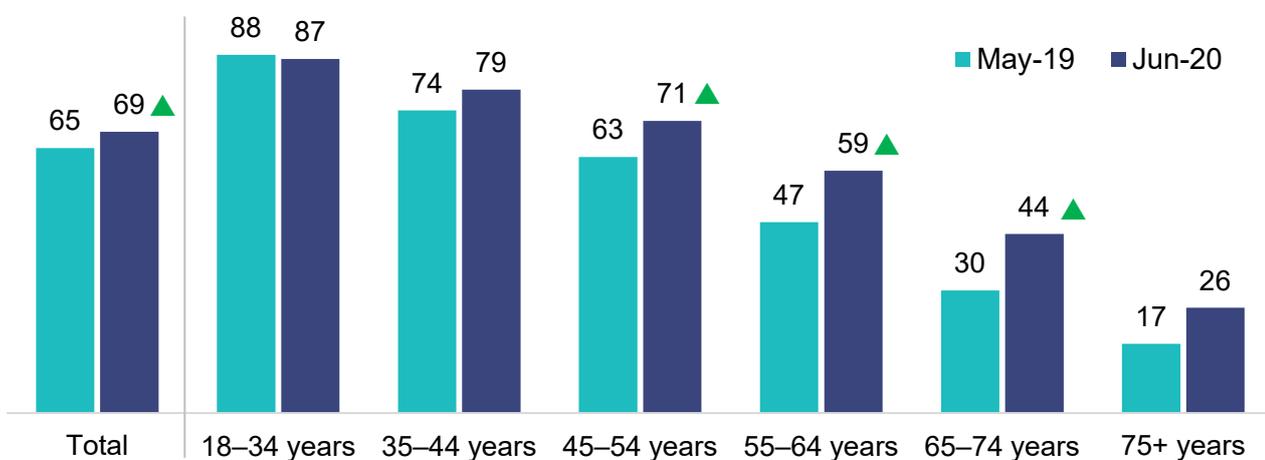
†Differing numbers of services in the response list (Disney Plus was added in 2020) may attribute to varying average numbers.

What we're listening to

Listening to audio content online increased from 2019 and 2020

- > **69% of online Australians listened to online audio content** in the 6 months to June 2020 (up from 65% in 2019).
- > While the **majority of young Australians listened to online audio content, more older Australians are also listening**, with overall participation increasing since 2019.

Listened to online audio content in the past 6 months, by age* (%)



▲ Significantly different to prior year at the 95% confidence level.

Of those who listened to online audio content[†], **30% had just started or increased since the COVID-19 restrictions in March 2020** (<1% started, 29% increased).[‡]
For those listeners:

- > **aged 18–54, 33% just started or increased** listening to online audio content
- > **aged 55+, 19% just started or increased** listening to online audio content.

*Adults internet users in the 6 months to May 2019 and June 2020.

†Adult internet users in the 6 months to June 2020.

‡Figures do not sum to the displayed total due to rounding.

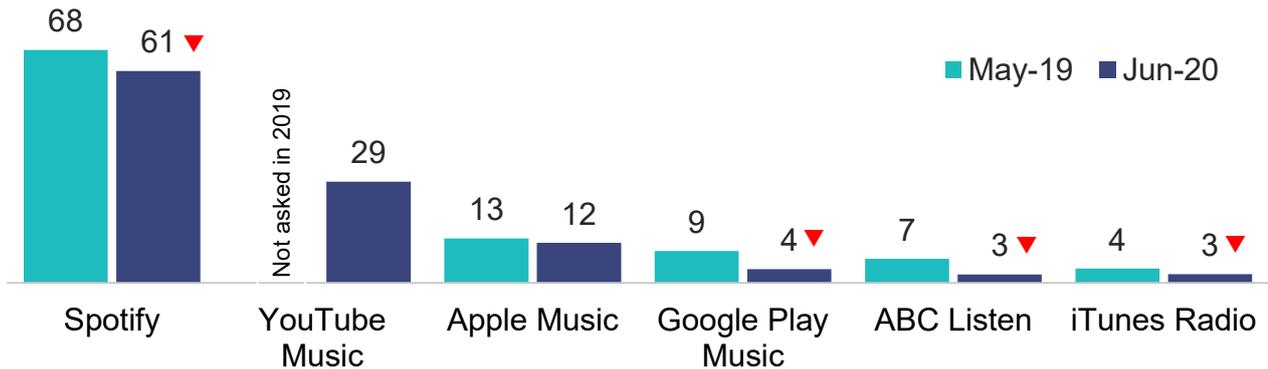


Music streaming services and podcasts

We continued to increase our use of music streaming services

63% of Australian adults listened to a music streaming service in the previous 7 days in June 2020, up from 48% in 2019.

Music streaming services used in the past 7 days* (%)



▼ Significantly different to prior year at the 95% confidence level.

Streaming music

Australian adults spent an average of 13.3 hours a week streaming online music services* in June 2020 (up from 10.8 hours in 2019).

Streaming music in the previous 7 days* was **more common for younger Australians**. For those listeners:

- > **aged 18–44, 83% streamed music** in the previous 7 days
- > **aged 45+, 44% streamed music** in the previous 7 days.

Podcasts

In June 2020, **20% of Australian adults had listened to a podcast** in the previous 7 days – they listened for an average of 4.4 hours.†

Younger Australians were more likely to have listened to a podcast in the previous 7 days.† For those listeners:

- > **aged 18–54, 25% listened to a podcast** in the previous 7 days
- > **aged 55+, 12% listened to a podcast** in the previous 7 days.

*Australian adults who used music streaming services in the previous 7 days in May 2019 and June 2020.

†Australian adults in June 2020.



Radio

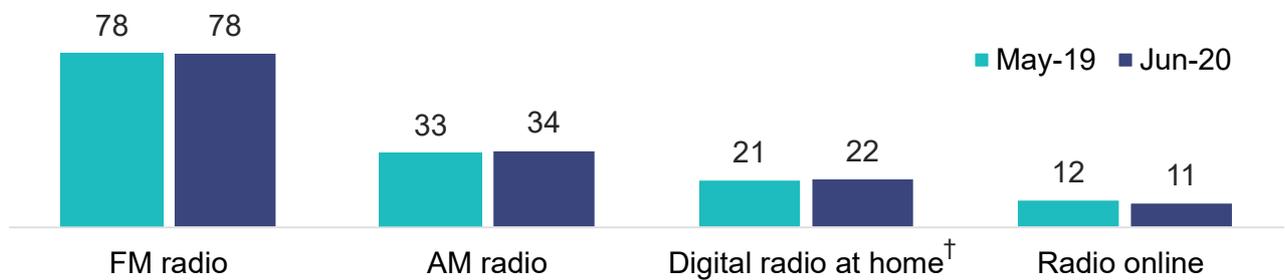
In 2020, nearly all Australian adults had a radio, but owning a radio at home is declining

- > 95% of Australian adults had a radio in 2020 (stable since 2017):
 - > most had a radio in the car (93% in 2020, stable since 2017)
 - > having a radio at home declined (60% in 2020, down from 67% in 2018).

Older Australians were more likely to own a radio at home:

- > 85% for those aged 55+ compared to 37% for 18 to 34 year-olds.

Listened to the radio in the past 7 days* (%)



In regional areas, Australian adults listening to AM radio in the previous 7 days dropped from 37% in 2019 to 29% in 2020.

More older Australians listened to the radio in the previous 7 days:*

	18–44 years	45+ years
AM radio	18%	49% ▲
Digital radio at home [†]	13%	30% ▲

▲ Significantly different to other sub-groups at the 95% confidence level.

Time spent listening to the radio in the past 7 days[‡] (average hours)



*Australian adults in the 6 months to May 2019 and June 2020.

[†] Australian adults living in capital cities in May 2019 and June 2020.

[‡] Australian adults who listened to the radio in the previous 7 days at June 2020.