Australian Government

Australian Communications and Media Authority

*Communications and media in Australia* series:

# How we watch and listen to content

## Executive summary and key findings

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# Executive summary

## About this report

This report contains the executive summary and key findings from our *How we watch and listen to content* report, which is part of our *Media and communications in Australia* series.

An interactive version of the entire report can be accessed on our website. We recommend this document is read in conjunction with the entire report as the key findings reference charts in the report. The website also has data files, links to the methodology used, a data quality statement and a glossary of terms for the report.

## How we watch and listen to content

Following record increases on the levels of online video consumption during the COVID-19 pandemic in 2020 and 2021, take-up of online video largely stabilised in 2022. In contrast, free-to-air TV, including catch-up TV, increased after years of declining viewership.

There were also changes to the way we listen to content. While overall radio listening remained stable, there were declines in both radio ownership and FM audiences. Growth in radio listening via the internet or an app has continued. Use of music streaming has also continued to increase, with Spotify remaining the dominant audio streaming service.

In 2022, more Australians accessed news from online sources in the week surveyed than from traditional sources such as TV, radio or newspapers. Younger Australians consumed the majority of their news online, with social media being their primary source of news.

### Watching

Paid subscription streaming services continued to dominate our viewing preferences despite long-term growth plateauing in 2022 (59% vs 58% in 2021). While there was a decline in the average time spent watching paid subscription services, from 6.6 hours a week in 2021 to 5.5 hours in 2022, it is still higher than the 4.1 hours watched in 2019.

The overall average time – 16.1 hours per week – spent watching video content remained stable on last year (16.5 hours). These average times exclude viewing user generated content or short form online video services such as Tik Tok and Instagram Reels, which we started tracking for the first time in 2022. This format is viewed almost predominantly by 18-to 24-year-olds who spent on average 7.1 hours watching content in this format in the 7 days to June 2022 compared to 3.1 hours for Australian adults.

The number of adults who reported watching any free-to-air TV in a given week increased from 64% in 2021 to 70% in 2022 – that includes 56% who watched FTA TV excluding catch-up TV and 38% for FTA catch-up TV services.

Netflix remained the leading platform in 2022, used by 52% of us in the week surveyed, however usage has now plateaued. Overall, fewer Australians used an online service to watch video content, falling from 88% in 2021 to 82% in 2022. This downturn was driven by declines in YouTube and Facebook viewership. Some newer or smaller players, including Disney+, Instagram Reels, TikTok and Binge, made inroads, with increases driven by younger age groups.

Smart TVs also continue to grow in popularity in Australian households, with 73% of adults now owning a smart TV (up from 70% in 2021) and 62% owning a smart TV only (up from 47%). As smart TV adoption increases, standard TV ownership has fallen to 35% (from 49% in 2021).

### Listening

The use of music streaming services continued to rise in 2022, with over two-thirds of adults (70%) listening to a music streaming service in the week surveyed (up from 67% in 2021). Younger adults led the charge, with 94% of 18-to-24-year-olds listening compared to 31% for those aged 75 and over. For streaming audio content, Spotify remained the most popular platform in 2022. For those who streamed music, two-thirds (64%) used it to listen to music, while half (54%) of those who listened to podcasts or non-music audio in the week surveyed used Spotify for this type of audio content.

Despite overall radio listening remaining steady in 2022, there were notable shifts in our consumption. Radio ownership declined on 2021 levels, with fewer Australians owning a radio at home or in their car. FM listenership also fell to 60% in the week surveyed (from 64% in 2021) and listening to the radio via the internet or an app increased to 14% (from 10% in 2021).

### News

In 2022, the majority of Australians (81%) accessed news from online sources. This is higher than the proportion of Australians who access news from free to air tv more so than free-to-air, catch-up and pay TV (67%), radio and podcasts (44%) or newspapers (23%) in the week surveyed. Online news websites or apps were the most popular online news source accessed (58% during the week) and were Australian adults' main online news source (24% during the week).

Despite the demand for online news, free-to-air TV was still a leading source of news, accessed by 59% of Australian adults, and was cited as the main source of news by the highest proportion (28%).

Social media and communications websites or apps were used by almost half of Australian adults (49%) to access news in the week surveyed. The most common sources for those who accessed them were from professionally-produced news media outlets (78%) or official/reputable sources (51%). Younger Australians aged 18–24 were most likely to rank social media as their main source of news (40%) and were more likely to follow celebrities and influencers (35%), and trusted professionals (41%) for news than older age groups.

### About the research

This report is based on an ACMA-commissioned nationally representative tracking survey seeking to understand consumer take-up, views and attitudes around communications and media services. More detailed information relating to sample and the ACMA annual consumer survey is available in the methodology.

# Key findings

## 1. Viewing behaviours

*Base:* Australian adults, previous 7 days to June 2022.

> Most of us viewed either paid subscription streaming services (59%) or free-to-air (FTA) TV excluding catch-up TV (56%).

> Overall viewership of all FTA TV (including catch-up TV), increased to 70% from 64% in 2021.

> Those aged 18–24 were least likely to watch FTA TV excluding catch up TV, (24%) or pay TV (7%).

> Those aged 75+ were least likely to watch a paid subscription service (29%) or user-generated or short-form online video services (16%).

> Regional Australians were much more likely to watch FTA TV excluding catch-up TV (66% compared to 51% for those living in metropolitan areas).

> Females were more likely to watch paid subscription streaming services (62% compared to 57% of males). Males were also more likely than females to watch user-generated or short-form online video services (47% compared to 41%), pay TV (25% compared to 20%) and FTA TV excluding catch-up TV (61% compared to 52%).

## 2. Time spent watching video content

*Base:* Australian adults who watched a video service, previous 7 days to June 2022.

> We spent more time watching free-to-air (FTA) TV. On average, we watched 6.6 hours of FTA TV (excluding catch-up TV).

> Younger Australians spent more time viewing user-generated or short form online video content – those aged 18–24 watched 7.1 hours compared to those aged 75+ who watched 0.9 hours.

> Older people were more likely to watch more FTA TV – those aged 75+ watched, on average, 16.8 hours of FTA TV (excluding catch-up TV). Those living in regional areas were also watching more at 8.2 hours, on average, compared to 5.7 hours for those in metropolitan areas.

> We spent an average of 5.5 hours watching paid subscription streaming services, a decrease from the 6.6 hours spent watching in 2021. Those aged 75+ spent the least amount of time watching these subscription services at 2.3 hours on average (compared to all other age groups).

## 3. Free-to-air catch-up TV and streaming services

*Base:* Australian adults who watched free-to-air catch-up TV in the previous 7 days to June 2022.

> ABC iView dominates the free-to-air catch-up TV market (60%).

> SBS On Demand was the second most popular service (38%).

> Males were more likely to watch ABC iView and SBS On Demand (64% and 43%, respectively) than females (56% and 32%, respectively).

# 4. Online video services

*Base:* Australian adults, **6 months** to June 2022.

> Overall, 86% of us used an online video service to watch video content, down from 92% in 2021.
> Netflix (64%) remained the leading online video service, with viewership stable from 2021.
> YouTube viewing fell to 60% from 67% in 2021. Younger age groups were the biggest audience but declined the most – viewing for those aged 18–24 fell to 74% (from 86% in 2021) and for those aged 25–34 fell to 71% (from 79%).
> Smaller services/platforms made inroads in 2022, with increases in viewing for Disney+ (from 22% to 28%), Amazon Prime Video (from 18% to 21%), Instagram Reels (from 14% to 19%), TikTok (from 12% to 16%) and Binge (from 7% to 12%).
> TikTok was more likely to be used by young adults – 41% of those aged 18–24 and 26% of those aged 25–34 (each was higher compared to all older age groups).
> Males were more likely than females to watch video content on YouTube (65% compared to 55%), Amazon Prime Video (22% compared to 19%), Kayo (11% compared to 7%) and Twitter (10% compared to 5%).
> Females were more likely than males to watch video content on Facebook (39% compared to 33%), Disney+ (31% compared to 25%), Stan (27% compared to 22%), Instagram reels (24% compared to 13%), TikTok (21% compared to 11%), Binge (13% compared to 9%).

*Base:* Australian adults, **previous 7 days** to June 2022.

> Overall, use of an online video service to watch videos declined, from 82% to 88% in 2021.
> Netflix (52%) remained the leading online video service, with use stable from 2021.
> YouTube (47%) and Facebook (27%) use both declined (from 54% and 32%, respectively, in 2021).
> Smaller services/platforms made inroads in 2022, with increases in viewing for Disney+ (from 14% to 18%,) Instagram Reels (10% to 15%) and TikTok (9% to 12%).
> TikTok was more likely to be used by those aged 18–24 (35%), higher than all other age groups.
> Instagram Reels was used most by those aged 18–24 (34%) and 25–34 (26%) than all other older age groups.
> Males were more likely than females to watch video content on YouTube (55% compared to 40%), Amazon Prime Video (14% compared to 10%), Kayo (9% compared to 4%) and Twitter (7% compared to 3%).
> Females were more likely than males to watch video content on Facebook (30% compared to 25%), Instagram Reels (19% compared to 10%) and TikTok (16% compared to 9%).

## 5. Number of online video services

*Base:* Australian adults, **6 months** to June 2022**.**

> We used an average of 3.2 different online services to watch video content, stable from 2021.

> Fewer people used online video services in 2022, with those using no services increasing to 14% (from 8% in 2021). Use of only one service decreased to 15% from 19% in 2021.

> Those living in regional areas were less likely to use an online video service.18% did not use an online video service compared to 12% of those living in metropolitan areas.

> Females were less likely to use a service to watch videos online than males (16% used no video services compared to 12% of males).

> Older age groups were less likely to use any online video services compared to younger people: 40% of those aged 75+ used no video services compared to 10% of those aged 18–24.

*Base:* Australian adults, **previous 7 days** to June 2022.

> We used an average of 2.3 different online services to watch video content, stable from 2021.

> Fewer people used online video services in 2022, with those using no services increasing to 19% (from 12% in 2021). Use of only one service decreased to 22% from 29% in 2021.

> Almost a quarter of those living in regional areas (24%) did not use an online video service, compared to 16% of those who live in metropolitan areas.

> Females were less likely to use a service to watch videos online than males (21% used no video services compared to 17% of males).

> Older age groups were less likely to use any online video services compared to younger people: 49% of those aged 75+ used no video services compared to 11% of those aged 18–24.

## 6. Television ownership

*Base:* Australian adults, at June 2022.

> More of us owned a smart TV at home (73%) than in 2021. The largest increases in smart TV ownership were among males (75% from 70% in 2022) and regional Australians (73% from 67% in 2021).

> Standard TV ownership decreased to 35% from 49% in 2021. This decline was seen across all age groups. Those aged 75+ were more likely to own a standard TV (51%) than all other age groups.

> Those with only a smart TV at home increased to 62% from 47% in 2021, while ownership of both a smart TV and standard TV dropped from 23% in 2021 to 11%. This indicates that Australians are replacing or upgrading their standard TV with smart TVs.

## 7. Devices used to stream

*Base:* Australian adults, at June 2022.

> Overall, most Australians used a device to watch online video content at home (90%) – down from 92% in 2021.

> While use of most devices remained stable from 2021, declines were seen for Google Chromecast (13% from 19%) and Apple TV box (7% from 11%).

> Males were more likely to stream video content at home using desktop computers and laptop computers (24% and 34% respectively) compared to females (9% and 29% respectively).

> More females were watching online videos at home using mobile phones (52%, up from 47% in 2021).

> Those living in metropolitan areas were more likely to use mobile phones (55% compared to 46% in regional areas), laptops (35% compared to 25%) and desktops (18% compared to 13%) to watch video content at home than those in regional areas.

## 8. Listening behaviours

*Base:* Australian adults, previous 7 days to June 2022.

> 75% of us listened to the radio – on par with 2021 (77%) but still lower compared with 2017 (85%).

> Music streaming continues to increase. 70% of us listened to a music streaming service, up from 67% in 2021 and 37% in 2017.

> Those aged 18–24 were most likely to listen to a music streaming service (94%) and least likely to listen to the radio (41%) than all other age groups.

> Those aged 75+ were least likely to listen to podcasts (20%) or stream music (31%) than all other age groups.

> Males were more likely to listen to the radio (77% compared to 72% of females).

> Those living in regional areas were more likely to listen to the radio (78% compared to 73%) than those in metropolitan areas.

> Those living in metropolitan areas were more likely to listen to a podcast or stream music online (51% and 73% respectively) compared to those in regional areas (44% and 65% respectively).

## 9. Radio ownership

*Base:* Australian adults, at June 2022.

> Radio ownership has remained stable from 2021, both at home (53% in 2022, compared to 52% in 2021) and in the car (88% in 2022, compared to 91% in 2021).

> Those living in metropolitan areas were less likely to own a radio at home (50% compared to 60% of those in regional areas) or in the car (86% compared to 93%).

> Males were more likely to own a radio at home – 58% compared to 49% of females.

## 10. Radio listenership

*Base:* Australian adults, **6 months** to June 2022**.**

> Listening to the radio online (via the internet or an app) increased to 34%, up notably from 19% in 2021.

> Despite declines over the previous 2 years, FM radio has the highest listenership at 72% (down from 75% in 2021 and 79% in 2020).

> Older Australians were more likely to listen to AM radio – 69% of those aged 75+, 58% of those aged 65–74 and 49% of those aged 55–64, higher than all younger age groups.

> Males were more likely to listen to AM radio (41% compared to 28% of females).

> Those living in metropolitan areas were more likely to listen to digital radio (DAB+) – 20% compared to 14% of people who lived in regional areas.

> Those living in regional areas were more likely to listen to AM radio (38% compared to 32% of those in metropolitan areas) and FM radio (77% compared to 69%).

*Base:* Australian adults, **previous 7 days** to June 2022.

> FM radio listening continues to decline in use on 2021 levels, from 64% to 60%. Listening to the radio via the internet or an app has increased on 2021, up from 10% to 14%.

> Older Australians were more likely to listen to AM radio – 62% of those aged 75+, 48% of those aged 65–74 and 39% of those aged 55–64) compared to all other age groups.

> People living in metropolitan areas were more likely to listen to digital radio (DAB) – 15% compared to 8% of people who lived in regional areas.

> Fewer people in metropolitan areas listened to FM radio (57%) compared to 2021 (61%) and digital radio (15%, down from 19% in 2021).

> People living in regional areas were more likely to listen to FM radio – 67% compared to 57% of those in metropolitan areas.

***Where we listen***

*Base:* among listeners of the relevant audio media service, in the previous 7 days to June 2022.

> We were more likely to listen to AM radio (88%), FM radio (93%) and DAB+ (72%) in a car than anywhere else.

> Listeners of online music streaming services were more likely to listen at home (82%) than those who listened to any other audio content channel.

> Those in regional areas were more likely to listen to FM radio at home (36%) compared to those in metropolitan areas (27%).

> Males were more likely to listen to FM radio at home (34%) than females (27%).

## 11. Audio streaming services

***Listening to music***

*Base:* Australian adults who used online services to stream music, in the previous 7 days to June 2022.

> Spotify remained the most used music streaming service, with listenership steady on 2021 levels (64%).

> Spotify listeners were more likely to be aged 18–24 (84%), higher than all other age groups, and female (69% compared to 60% of males).

> Males were more likely to listen to YouTube Music (33% compared to 25% of females) and ABC Listen (9% compared to 7%).

***Listening to podcasts or other audio***

*Base:* Australian adults who used online services to listen to podcasts, in the previous 7 days to June 2022**.**

> Spotify is the most popular service for listening to podcasts or other non-music programs (54%). Those aged 18–24 (78%) were more likely to use the platform than older age groups.

> Older Australians were more likely to tune into ABC Listen – 55% of those aged 75+, higher than all other age groups.

> Males were more likely to use YouTube Music to stream podcasts – 29% compared to 17% of females.

## 12. Time spent listening

*Base:* average hours among listeners of the relevant audio media service, in the previous 7 days to June 2022.

> Among radio listeners, those who consume the most radio are listeners of AM radio. On average they listen to 7.2 hours a week.

> Those aged 75+ spent more time listening to AM radio than all other age groups. They listen, on average, for 11.5 hours a week.

> Of those who listen to FM radio, people who lived in regional areas spent more time listening than those who live in metropolitan areas – 6.7 hours a week compared to 5.2 hours a week.

## 13. Source of news

*Base:* Australian adults, in the previous 7 days to June 2022.

> More of us accessed news from online sources (81%) compared to traditional sources such as TV (67%), audio (44%) and print newspapers (23%).

> Free-to-air (FTA) TV was a leading source of news (59%) and more likely viewed by older Australians. Those aged 75+ (89%) and 65–74 (85%) accessed news on FTA TV in greater numbers than all younger age groups.

> Online news websites or apps were the second most popular medium for accessing news, used by 58% of Australians.

> Older Australians were least likely to access their news online. Among those aged 75+, 45% used a news website or app to access their news, 22% accessed the news over a social media or communications website or app (e.g. YouTube, Facebook, Twitter, WhatsApp), and 23% used an online search engine. Those aged 75+ were least likely to access news over all 3 of these media sources.

- Free-to-air (FTA) TV was our main source of news (28%), followed by online news websites or apps (24%).
- Social media or communications websites or apps (e.g., YouTube, Facebook, Twitter, WhatsApp) were the most popular main source of news for those aged 18–24 (40%).
- Those aged 75+ were least likely to use social media or communications websites or apps and online search engines as their main source of news (1% and 0%, respectively). They were also the most likely to use FTA TV as their main source of news (55%).

## 14. Source of news on social media or communications websites

*Base:* Australian adults, at June 2022

- Professionally produced news media was the most common source of news (78%), followed by official or reputable sources of information (51%).
- Those aged 18–24 were more likely to use celebrities and influencers (35%), and trusted professionals using their personal account (41%) as a source of news than all other age groups.
- Females were more likely to use celebrities or social media influencers as a source of news on social media (18% compared to 10% of males).