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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Using 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 full 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 links to the methodology used, a data quality statement and a glossary of terms for the report. The data for all tables in the report can be directly exported from the interactive version.

How we watch and listen to content

Online viewing continued to grow in 2023, with more Australians watching subscription streaming services, both paid and free-to-air (FTA), and user-generated or short-form online videos. This year, YouTube overtook Netflix as the most watched platform for online content.

FTA viewership was stable overall in 2023 compared with 2022. However, we saw a shift in viewing, with FTA TV (excluding catch-up TV) audiences falling and FTA catch-up streaming services increasing.

Listening to and owning a radio both decreased in 2023 from 2022.

Watching

Online video services continued to dominate our viewing preferences. Compared with 2022, more of us watched paid subscription streaming services (66%, up from 59%), user-generated or short-form online video services (57%, up from 44%), and FTA catch-up TV and streaming services (43% up from 38%).

Although watching FTA TV (excluding catch-up TV) fell to 52% (from 56% in 2022), overall FTA viewing (68%) remained steady over the previous 12 months due to the increase in FTA catch-up TV and streaming services.

ABC iview continued to attract the largest FTA catch-up TV audience (58%), however, the growth in catch-up TV viewing was driven by 7plus and 9Now (both 41%, up from 33% and 32%, respectively, in 2021). It was also driven by older audiences (aged 55 plus).

Similar trends were seen in time spent viewing. The overall average time spent watching video content remained stable on last year (15.6 hours per week). We are spending more time watching user-generated or short-form online video services (up from 3.1 hrs a week in 2022 to 4.4 hrs in 2023) and less time watching FTA TV (excluding catch-up TV) (down from 6.6 hours a week in 2022 to 5.6 hours in 2023).

YouTube took the top place from Netflix for the most popular platform for watching online content in 2023. Over half of us watched YouTube in a given week (51%, up from 47% in 2022), compared with 45% who watched Netflix (down from 52% in 2022). Smaller services or platforms made inroads in 2023, with increases on 2022 for Amazon Prime Video (from 21% to 25%), Instagram Reels (from 19% to 24%), Kayo (from 9% to 12%), and Paramount+ (from 7% to 12%).

Smart TVs also continue to grow in popularity in Australian households, with 78% of adults now owning a smart TV (up from 73% in 2022). As smart TV adoption increased, standard TV ownership has fallen to 30% (from 35% in 2022).

Listening

Radio audiences continued to decline on 2022 levels. Fewer adults listened to FM radio in 2023 (56%, down from 60%), AM radio (23%, down from 26%) or radio online (9%, down from 14%) in a given week, compared with 2022.

We are still just as likely to listen using online services as we are to traditional services. In 2023, 70% of adults used a music streaming service and 69% listened to radio in the week surveyed. Younger people were most likely to listen to a music streaming service (94% for those aged 18–24) and least likely to listen to the radio (34%) when compared with all other age groups.

Radio ownership also declined on 2022 levels, with fewer adults owning a radio at home or in their car.

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. Information about the sample and the ACMA annual consumer survey is in the methodology.

Key findings

1. Viewing behaviours

Base: Australian adults, previous 7 days to June 2023.

> More than half of us viewed paid subscription streaming services (66%), user-generated or short-form online video services (57%), or free-to-air (FTA) TV excluding catch-up TV (52%).

> Overall, FTA TV audiences remained steady. Even so, FTA TV excluding catch-up TV declined to 52% (56% in 2022), and FTA catch-up TV and streaming services increased to 43% (38% in 2022).

> More of us watched user-generated content or short-form online videos (57%, up from 44% in 2022) and paid subscription streaming services (66%, up from 59% in 2022).

> Those aged 18–24 were less likely than all other age groups to watch FTA TV excluding catch-up TV (18%), FTA catch-up TV and streaming services (19%) or pay TV (4%). However, they were more likely than all other age groups to watch user-generated or short-form online video services (86%).

> Those aged 75+ were less likely than all other age groups to watch a paid subscription service (37%) or user-generated or short-form online video services (25%).

> Those living in regional areas (60%) were more likely than those living in metropolitan areas (48%) to watch FTA excluding catch-up TV. In contrast, those living in metropolitan areas were more likely than those living in regional areas to watch paid subscription streaming services (68% compared with 61%) and user-generated or short-form online videos (60% compared with 51%).

> Females (68%) were more likely than males (62%) to watch paid subscription streaming services. Conversely, males were more likely than females to watch pay TV (22% compared with 18%) and FTA TV excluding catch-up TV (55% compared with 49%).

2. Time spent watching video content

Base: Australian adults who watched a video service, previous 7 days to June 2023.

> We spent less time watching free-to-air (FTA) TV. On average, we watched 5.6 hours of FTA TV, down from 6.6 hours in 2022.

> We spent an average of 4.4 hours watching user-generated or short-form online video content, an increase from 3.1 hours in 2022.

> Younger Australians spent more time viewing user-generated or short-form online video content compared with all other age groups. Those aged 18–24 watched 11.1 hours on average, compared with those aged 75+ who watched 0.8 hours, less than any other age group.

> Older people were more likely to watch more FTA TV excluding catch-up. Those aged 75+ watched, on average, 16.9 hours of FTA TV excluding catch-up TV. In contrast, those aged 18–24 watched an average of 0.5 hours, less than all other age groups.

> Those living in regional areas watched more FTA TV (excluding catch up) (7.0 hours) than those in living in metropolitan areas (4.9 hours). However, those living in metropolitan areas watched more user-generated or short-form video services (4.8 hours) than those in regional areas (3.7 hours).

- Females spent more time on average (5.6 hours) than males watching paid subscription streaming services (5.2 hours).

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 2023.

- ABC iview dominated the free-to-air catch-up TV market (58%). However, compared with 2021, viewing increased for both 7plus (41%, from 33%) and 9Now (37%, from 32%).
- SBS On Demand and 7plus were on par as the second most popular services (both 41%).
- Regional Australians were more likely to watch ABC iview (63%) compared with those living in metropolitan areas (56%).
- Those aged 18–24 were less likely to have watched ABC iview (30%) than all other age groups.

4. Online video services

Base: Australian adults, **6 months** to June 2023.

- Overall, 88% of us used an online video service to watch video content, up from 86% in 2022.
- YouTube overtook Netflix as the leading online video service (63%, up from 60% in 2022).
- Males (68%) were more likely than females to watch YouTube (58%).
- Viewership of Netflix (61%) and Stan (22%) declined (from 64% and 25%, respectively, in 2022).
- Smaller players made inroads in 2023, with increases from 2022 for Amazon Prime Video (from 21% to 25%), Instagram Reels (from 19% to 24%), Kayo (from 9% to 12%), and Paramount+ (from 7% to 12%).
- TikTok was more likely to be used by young adults – 46% of those aged 18–24, followed by 30% of those aged 25–34 (both higher compared with all older age groups). Instagram Reels had a similar age profile, with users more likely to be aged 18–24 (45%) and 25–34 (42%), both higher than all older age groups.
- Those aged 75+ were the least likely to have watched any online video content (63%) and were less likely than all other age groups to have watched YouTube (33%), Netflix (29%), Facebook (15%), Disney+ (4%), Stan (8%), Amazon Prime (5%), Paramount+ (3%) and Instagram Reels (1%).
- Use of online video services differs with gender. Males were more likely than females to watch video content on YouTube (68% compared with 58%), Kayo (14% compared with 10%), Twitter (13% compared with 5%), Twitch (7% compared with 3%), and Optus Sport (5% compared with 1%).
- Females were more likely than males to have watched video content on Netflix (64% compared with 58%), Facebook (43% compared with 33%), Disney+ (33% compared with 23%), Instagram Reels (30% compared with 17%), Stan (25% compared with 19%), TikTok (22% compared with 13%), and Binge (16% compared with 11%).

Base: Australian adults, **previous 7 days** to June 2023.

> Overall, 83% watched an online video service, stable with 2022 (82%).
> YouTube overtook Netflix as the leading online video service, with viewing increasing to 51% from 47% in 2022.
> Viewership of Netflix (45%) and Stan (14%) fell, from 52% and 11%, respectively, in 2022.
> Smaller players made inroads in 2023, with increases in viewing for Instagram Reels (15% to 19%), Amazon Prime Video (12% to 14%), Paramount+ (4% to 5%) and Apple TV+ (3% to 5%).
> TikTok was more likely to be used by those aged 18–24 (40%), nearly twice as much than for those aged 25–43 (24%) and higher than all other age groups.
> Instagram Reels and Twitch were used most by those aged 18–24 (38% and 8%, respectively) and 25–34 (34% and 5%, respectively), higher than all other older age groups.
> Those aged 75+ were the least likely to have watched video content online (53%) and were less likely than all other age groups to have watched content on Netflix (22%), Facebook (10%), Amazon Prime (3%), Disney+ (1%), Instagram Reels (1%) and Foxtel Go/Now (0%).
> Use of online video services differs with gender. Males were more likely than females to have watched video content on YouTube (58% compared with 44%), Kayo (9% compared with 5%), Twitter (7% compared with 3%) and Optus Sport (2% compared with 0%). Females were more likely than males to watch video content on Netflix (48% compared with 42%), Facebook (33% compared with 24%), Instagram Reels (24% compared with 13%), Disney+ (18% compared with 14%), TikTok (18% compared with 9%) and Binge (9% compared with 5%).

5. Number of online video services

Base: Australian adults, **6 months** to June 2023.

> We used an average of 3.6 different online services to watch video content, an increase from 3.4 in 2022.
> Those living in regional areas were less likely to use an online video service – 16% did not use an online video service compared with 10% of those living in metropolitan areas.
> Females (36%) were more likely than males (31%) to use 5 or more services to watch videos online.

Older age groups were less likely to use any online video services compared with younger people – 37% of those aged 75+ did not use a video service, whereas 5% of those aged 18–24 did not use a service.

Base: Australian adults, **previous 7 days** to June 2023.

> On average, 2.4 different online services were used to watch video content, stable from 2022.
> 22% of those living in regional areas did not use an online video service, compared with 15% of those who live in metropolitan areas.
> Females (18%) were more likely than males (14%) to use 5 or more services to watch videos online.
> Older age groups were less likely than younger people to use any online video services – 47% of those aged 75+ did not use a video service, whereas 5% of those aged 18–24 did not use a service.

6. Television ownership

Base: Australian adults, at June 2023.

> More of us owned a smart TV at home (78%) than in 2022 (73%). The largest increase in smart TV ownership was among older Australians aged 75+ (73%, from 59% in 2022).

> Standard TVs are being replaced or upgrading with smart TVs. Those with only a smart TV at home increased to 66% from 62% in 2022, while ownership of only a standard TV dropped from 23% in 2022 to 18%.

> Standard TV ownership decreased to 30% from 35% in 2022. The largest declines were seen in those aged 75+ (34%, from 51% in 2022) and 55–64 (26%, from 35% in 2022).

> Those living in regional areas (63%) were less likely than those living in metropolitan areas (68%) to have *only* a smart TV. However, those living in regional areas are more likely to own *both* a smart TV and a standard TV (15%) compared with those living in metropolitan areas (11%).

7. Devices used to stream

Base: Australian adults, at June 2023.

> Overall, most of us used a device to watch online video content at home (91%) – unchanged from 2022.

> While use of most devices remained stable from 2022, use of smart TVs increased (52% from 48%), while use of Telstra TV boxes decreased (4% from 6%).

> Males (22%) were more likely to stream video content at home using a desktop computer than females (9%).

> More females were watching online videos at home using a smart TV (54%, up from 46% in 2022).

> Those living in metropolitan areas were more likely than those in regional areas to watch video content at home using a mobile phone (56% compared with 49%) and laptop (34% compared with 23%)

> Older Australians aged 75+ were least likely to use a device to stream than all other age groups; 25% reported they didn't watch online video content.

8. Radio ownership

Base: Australian adults, at June 2023.

> Radio ownership at home decreased to 44% (from 53% in 2022) while radio ownership in the car remained stable (87%, from 88% in 2022).

> Those living in metropolitan areas were less likely to own a radio at home (41% compared with 51% of those in regional areas) or in the car (84% compared with 92%).

> Males (50%) were more likely to own a radio at home than females (39%).

> Those aged 65–74 were most likely to have a radio in the car (97%) than all other age groups, while those aged 18–24 were least likely to have a radio in the car (66%) than all other age groups.

> Those aged 75+ were most likely to own a radio at home (87%) than all other age groups.

9. Listening behaviours

Base: Australian adults, previous 7 days to June 2023.

> 69% listened to the radio, a decline from 2022 (75%).

> 70% listened to a music streaming service, stable over the previous 12 months, after consecutive increases from 2020 (63%).

> Those aged 18–24 were most likely to listen to a music streaming service (94%) and least likely to listen to the radio (34%) than all other age groups.

> Those aged 75+ were least likely to stream music (35%) than all other age groups, and least likely to listen to podcasts (25%) than all age groups younger than 65.

> Males (72%) were more likely to listen to the radio than females (67%). Females (71%) were more likely than males ((67%) to listen to online music streaming services.

> Those living in regional areas (73%) were more likely to listen to the radio than those in metropolitan areas (68%).

> Those living in metropolitan areas (71%) were more likely to listen to a music streaming service than those in regional areas (67%).

10. Audio types

Base: Australian adults, **6 months** to June 2023**.**

> Overall, radio listenership declined to 79% from 85% in 2022.

> Despite declines over the previous 2 years, FM radio had the highest listenership at 68% (down from 72% in 2022 and 79% in 2019).

> AM radio listenership also continued to decline at 31% (down from 34% in 2022 and 38% in 2019).

> Older Australians were more likely to listen to AM radio – 70% of those aged 75+, 52% of those aged 65–74 and 41% of those aged 55–64, higher than all younger age groups.

> Males were more likely than females to listen to AM radio (36% compared with 27%) and digital radio (DAB+) (22% compared with 14%).

> People living in metropolitan areas were more likely to listen to digital radio (DAB+) (21%) than those in regional areas (11%).

> People living in regional areas were more likely to listen to FM radio (73%) than those in metropolitan areas (65%).

Base: Australian adults, **previous 7 days** to June 2023.

> Overall radio listenership declined to 69% from 75% in 2022.

> Despite declines over the previous 2 years, FM radio had the highest listenership at 56% (60% in 2022, 70% in 2019).

> AM radio listenership also continued to decline at 23% (26% in 2022, 30% in 2019).

> Older Australians were more likely to listen to AM radio – 62% of those aged 75+, 42% of those aged 65–74 and 30% of those aged 55–64 compared with all younger age groups.

> Males were more likely than females to listen to AM radio (26% compared with 20%) and DAB+ (15% compared with 10%).

> People living in metropolitan areas were more likely to listen to digital radio (DAB+) (16%) than those in regional areas (6%).

> People living in regional areas were more likely to listen to FM radio (62%) than those in metropolitan areas (53%).

Where we listen

Base: among listeners of the relevant audio media service, in the previous 7 days to June 2023.

> Listeners of FM radio (94%), AM radio (89%), and DAB+ (70%) were most likely to do so in a car than anywhere else.

> Listeners of online music streaming services were more likely to do so at home (78%) than those who listened to any other audio content channel.

> Fewer online music streaming service users listened at home (78% compared with 82% in 2022), while listening in the car increased (78% from 74% in 2022).

> Older Australians aged 75+ were more likely to listen to AM radio (74%) and FM radio (60%) at home than any other age group.

> Those in regional areas were more likely than those in metropolitan areas to listen to FM radio at home (32%) and radio online (via the internet or an app) at home (78%) (compared with 27% and 66%, respectively).

> Those in metropolitan areas were more likely to listen to online music streaming at home (80%) than those in regional areas (73%).

11. Audio streaming services

Listening to music

Base: Australian adults who used online services to stream music, in the previous 7 days to June 2023.

> Spotify remained the most used music streaming service (62%), with listenership steady on 2022 levels.

> Spotify listeners were more likely to be aged 18–24 (78%) and 25–34 (69%), compared with all older age groups. They were also more likely to be female (68%) than male (56%).

> Older Australians were more likely to use ABC Listen and Community Radio Plus. Those aged 65–74 (28%) and 75+ (39%) used ABC Listen – higher than all other age groups. While 18% of those aged 75+ listened to Community Radio Plus – also higher than all other age groups.

> Males were more likely to listen to YouTube Music (31% compared with 24% of females), ABC Listen (11% compared with 7%) and SoundCloud (5% compared with 2%).

> Those in regional areas (12%) were more likely to listen to ABC Listen than those in metropolitan areas (7%).

Listening to podcasts or other audio

Base: Australian adults who used online services to listen to podcasts or other non-music audio, in the previous 7 days to June 2023**.**

> Spotify is the most popular service for listening to podcasts or other non-music programs (54%), steady from 2022. Those aged 18–24 (67%) and 25–34 (62%) were more likely to use the platform than older age groups.

> Older Australians were more likely to tune into ABC Listen – 58% of those aged 75+, higher than all other age groups.

> Males (24%) were more likely than females (16%) to use YouTube Music to stream podcasts and were also more likely to stream podcasts using Amazon Music (5%) than females (2%).

- Those in regional areas (18%) were more likely to stream podcasts using ABC Listen than those in metropolitan areas (13%).

12. Time spent listening

Base: average hours among listeners of the relevant audio media service, in the previous 7 days to June 2023.

- Time spent listening across audio media services remained steady (9.3 hours compared with 9.2 in 2022).
- Users of online music streaming services spent more time listening (9.0 hours) than users of all other services.
- Of those who listened to digital radio (DAB+), younger Australians spent less time compared with all older age groups. On average, those aged 18–24 listened for 1.4 hours and those aged 25–34 listened for 3.5 hours.
- Of those who listened to FM radio, people who lived in regional areas spent more time listening (7.5 hours) than those who live in metropolitan areas (5.5 hours).