The 2022 Media Content Consumption Survey – Summary Report

Prepared for the Department of Infrastructure, Transport, Regional Development, Communications and the Arts – March 2023

Contents

Social Research Centre

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Report details.

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(This version corrects for an unintended error in the categorisation of services.)

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Overview and methodology

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List of abbreviations and terms

Abbreviations used in the report

Abbreviation	Full description
Ages 18-34	Respondents who are aged between 18 and 34 years old
Ages 35-54	Respondents who are aged between 35 and 54 years old
Ages 55+	Respondents who are aged 55 years old and over
B2B	Bottom Two Box score – sum of the results for the bottom two options in a response frame with a scale (e.g., ‘Disagree’ and ‘Strongly disagree’)
HH	Household
MCCS	Media Content Consumption Survey
ORU	Online Research Unit non-probability panel – in the MCCS the panel was parents of children aged 15 years old and under, in the TVCS the panel was adults living in regional Australia
P7D	Past 7 days
SEIFA Quintile	Socio-Economic Indexes for Areas (where Quintile 1 is most disadvantage, and Quintile 5 is least disadvantage)
T2B	Top Two Box score – sum of the results for the top two options in a response frame with a scale (e.g., ‘Strongly agree’ and ‘Agree’)
TVCS	Television Consumer Survey
TV	Television

Definitions of terms

Term	Definition
Respondents	People who responded to the quantitative survey
the Department	The Department of Infrastructure, Transport, Regional Development, Communications and the Arts
Parents	Respondents who are parents / guardians / carers of a child / children aged 15 years old and under
Screen content	Content watched on a screen, including things like television shows or programs, movies, documentaries and sports
Net	Sum of results for two or more categories

Methodology - MCCS

Overview

- n = 4002 respondents
- 12 September – 2 October 2022
- Sample: Australian general population aged 18+, and Parents / guardians /carers of children aged 0 to 15 years

Research methodology

- Quantitative online survey conducted via the Social Research Centre's national probability-based online panel, known as Life in Australia™
- Boost of parents or guardians of children aged 0 to 15 years via the ORU non-probability panel
- Weighted to increase accuracy and representativeness

For further information on methodology, please see the 'Appendix: Methodology' section in this report.

About the MCCS

The Media Content Consumption Survey provides information on the screen and media content viewing practices, habits, and expectations of Australians.

Survey scope

Australians' behaviours in relation to screen and media content consumption, specifically:

- General screen content habits
- Media viewing behaviour and content
- Audio content
- News content
- Advertising
- Children's content

Reading this report

When reading and interpreting the quantitative results of this report, where agreement scales (e.g. do you agree…?) have been used in the questionnaire, top two boxes (i.e. strongly agree and agree) and bottom two boxes (i.e. strongly disagree and disagree) have been used for analysis with reporting on netted agreement scales also included. These are indicated by ‘T2B’ (top two box), or ‘B2B’ (bottom 2 box) scores.

In reading quantitative findings based on a probability-based sample, reference is made to those who completed the survey throughout the report as ‘respondents’, ‘Australians’ or ‘adults’.

Rounding of numbers

Percentages are shown rounded to 0 decimal places. As rounding has been used in producing data tables and nets in analysis, some scales may not add to exactly 100%.

Chart labelling

For readability on certain charts, labels for values smaller than a certain percentage (specified on chart) have been suppressed due to space and readability.

Significance testing and confidence intervals

Data was analysed using Q Research Software (Q), including significance testing. Statistical testing was undertaken to establish whether the responses from one subgroup were statistically significantly different to other subgroups.

Where differences across subgroups are mentioned in the report commentary (for example, ‘higher than’, or ‘lower than’), unless otherwise noted, it implies that a statistically significant difference at a 95% confidence level has been established. This means that when a difference is described as being ‘significant’ one can be 95% confident that the difference is real and not due to random sampling variation.

For brevity and ease of reading, significance testing has been noted in this report for the following subgroups, and generally on the leading figure per chart.

Group
• Gender
• Age
• Regional / Metro (Capital city vs Rest of State)
• Household type

Groups where appropriate
• Age of TV
• Sports watchers
• SEIFA quintiles
• Household income
• Level of spend on subscription services
• Age of child
• Content watched past 7 days by child

Further sub group differences are noted in the Banner data table set, provided to the Department.

Significance between 2022 and 2021 data points is indicated by ⬆ or ⬇ symbols.

Sample profile

Full methodological details can be found in the Appendix 1 at the end of the report, and a copy of the survey instrument as Attachment 1.

In 2022, the MCCS and TVCS were run concurrently in the one survey instrument. A portion of the survey questions were asked of both the MCCS and TVCS streams, for a total of 5017 people completing these questions.

Questions specific to MCCS were asked of 4002 respondents in the Media stream, and questions specific to TVCS were asked of 4016 respondents in the TV stream.

This page shows the unweighted profile of the final sample (i.e., those who completed the survey) for respondents across the MCCS and TVCS, across a range of key demographic characteristics.

Boosts were also conducted for parents / guardians / carers and those in regional Australia.

		TOTAL		MCCS		TVCS	
		n	%	n	%	n	%
Total		**5017**	**100**	**4002**	**100**	**4016**	**100**
Gender	Male	2287	46	1757	44	1823	45
	Female	2713	54	2230	56	2176	54
	Non-binary / gender fluid / different identity	15	0.3	13	0.3	15	0.4
Age	18-24	155	3	143	4	154	4
	25-34	526	10	486	12	409	10
	35-44	971	19	909	23	535	13
	45-54	905	18	821	21	570	14
	55-64	918	18	657	16	833	21
	65-74	1050	21	670	17	1025	26
	75+	492	10	316	8	490	12
Capital city	Capital city	3129	62	2864	72	2307	57
	Rest of state	1887	38	1137	28	1709	43
Household	Single or couple (no children)	2487	50	1723	43	2487	62
	Parents (with dependent children)	1847	37	1770	44	871	22
	Parents (with non-dependent children	435	9	317	8	410	10
	Adults living in a share house	121	2	89	2	121	3
	Other household type	123	2	99	2	123	3

Executive summary

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Executive Summary - Introduction

The Media Content Consumption Survey (MCCS) provides information on the screen and media content viewing practices, habits, and expectations of Australians. Now in its third year, the trends observed highlight the changing nature of how Australians are consuming screen content.

The survey involved an online probability-based survey with adults in Australia, and non-probability-based surveys to boost for parents. The MCCS was conducted concurrently with the Television Consumer Survey (TVCS) in a single survey instrument. The first section of this report, on general screen content habits, forms a foundation for both surveys.

A total of 4002 surveys specific to the MCCS were completed during September and October 2022. This is the third iteration of the MCCS with comparisons made to the original 2020 and 2021 results where appropriate.

The following summary slides provide key points from a number of areas of interest that were explored in the survey.

MCCS
TVCS

General screen content habits

High volume consumption (time spent) seen in pay TV, commercial free-to-air TV, also online subscription services

Pay TV and commercial free-to-air TV (excluding on-demand) platforms had the highest average weekly viewing time (9.51 and 9.08 hours, respectively). While an average of 8.16 hours was spent watching online subscription services.

Online Services:

Platform access continues to be led by online subscription services, with several platforms increasing this year

Online subscription services were the leading type of platform for screen content in Australia in 2022, maintaining the trend seen in 2021.

In 2022, the most common platforms that respondents used to watch screen content in the past 7 days were online subscription services (66%), free video streaming services (58%), and commercial free-to-air TV (excluding on-demand TV, 53%). Publicly owned free-to-air was watched by 41%, while 34% watched publicly owned free-to-air on-demand TV. Almost half (49%) of respondents indicated they watched screen content on ‘other websites or apps’.

Also of note, in 2022 the use of ‘other websites or apps (e.g., Facebook, Tik Tok, Instagram)’ has increased significantly (watched past 7 days), while pay-per-view has declined significantly.

In terms of access, the primary online streaming subscription service respondents have access to was Netflix (68%). In 2022, Disney+, Amazon Prime Video, Binge, Kayo and Paramount + have all significantly increased.

Media viewing behaviour and content

News and current affairs are an important factor driving viewing of free-to-air

The majority of respondents watched news and current affairs on commercial free-to-air TV (excluding on-demand, 76%) or publicly owned free-to-air TV (excluding on-demand, 79%).

The consumption of news content on free-to-air TV is in contrast to the relatively low levels on online subscription services.

Households access more online subscription services than they pay for on average

On average, households pay for 2.40 online subscription services, however, on average households indicated they accessed 2.63 services. The number of households with access to at least one online subscription service remains stable in 2022 (81%) compared to 2021 (79%).

There is a difference between the number of online subscription services accessed by Australian households and those paid for.

Access to Australian content

Just over half of respondents indicated that online subscription streaming services have enough Australian content (53%), while almost one in five say it is difficult (15%) or very difficult (2%) to find Australian content on streaming services.

Almost one in five Australians say it is difficult or very difficult to find Australian content on streaming services.

MCCS

Audio content

Diversity in the platforms Australians listen to

Over half of respondents (57%) had listened to FM radio in the past 7 days, and half of respondents (51%) had listened to online music streaming services. A smaller proportion had listened to podcasts (24%) or AM radio (21%).

A breadth of audio platforms are used, but particularly FM radio and online music streaming services.

Music and news are important on AM / FM radio, emergency warnings are very important

The primary feature of AM / FM radio that was rated as ‘very important’ by respondents was emergency warnings (51%). When considering importance as a net of ‘somewhat important’ and ‘very important’, the most important feature was music stations (81%), followed closely by local news reports (80%).

AM / FM radio is perceived to have some important features for listeners, particularly emergency warnings, music, and local news reports.

Radio listening is highly linked to car travel

Using a car audio system was reported as the most common way to listen to FM (90%), AM (81%) or digital radio (61%). Smartphones were the most popular device for listening to online music streaming services (83%) and podcasts (88%).

Cars are the primary devices used for radio listening, and smartphones are the most used device for online audio content.

News Content

News at a local, national, and international level

A similar proportion of respondents consume Australian national news (37%) or local, state, or territory news (39%) more often than 5 times per week. Slightly fewer respondents reported consuming international news more often than 5 times per week (31%).

Australians consume local and national news in roughly equal measure, whilst consumption of international news is slightly lower.

News is accessed in many different ways

The primary methods that respondents reported consuming news and current affairs via were commercial free-to-air TV (56%), radio (56%), and news websites or apps (53%).

In 2022, news aggregator website or app has significantly increased (10% in 2022, 8% in 2021), as have radio (56% in 2022, 46% in 2021) and podcast (11% in 2022, 8% in 2021). While commercial free-to-air TV (56% in 2022, 62% in 2021) and publicly-owned TV (37% in 2022, 44% in 2021) have significantly declined.

Australians are using a range of sources to access news content.

Social media remains a popular way to access news

The majority of respondents who consumed news via social media indicated that it was either somewhat (43%) or very important (39%) to have access to news content on social media. The most popular social media platform for accessing news was Facebook, with almost two-thirds (65%) of those who access news via online search engines or social media reporting they had used it to access news content. However, other platforms, Instagram (27%), TikTok (10%) and Twitter (14%), have experienced significant increases.

Australians consider news on social media to be important, with social media remaining a popular way to access news, increasingly on more diverse platforms.

Advertising

Free video streaming and commercial free-to-air TV are the services where advertising is most seen

Almost half of respondents (43%) had seen advertisements on free video streaming services in the past 7 days, while 43% had seen advertisements on commercial free-to-air TV (excluding on-demand TV).

Australians are most frequently exposed to advertising on free video streaming and free-to-air services.

Gambling and betting advertisements are seen as inappropriate

Approximately one-fifth of respondents who saw advertising on free video streaming services disagreed to some extent that the advertisements were appropriate (net ‘disagree’ and ‘strongly disagree’, 18%). Sports specific websites or apps had a similar level of disagreement with the appropriateness of advertising (net ‘disagree’ and ‘strongly disagree’, 18%).

Nine in ten (90%) reported that they disagreed that advertisements on sports specific websites or apps were appropriate because of gambling or betting. This was also the most common reason for disagreeing that advertisements on commercial free-to-air TV were appropriate (82%), followed by frequency and/or repetition (62%).

Gambling / betting advertising is perceived to be inappropriate, especially on sports specific websites or apps and free-to-air TV. Frequency / repetition of advertising is also a reason for advertising inappropriateness.

Most respondents see a need to restrict advertisements on at least some screen content platforms

Four fifths of respondents support advertising restrictions for at least one type of content service (80%). Respondents most wanted restrictions for permitted advertising to be applied to online subscription services (43%), and free video streaming services (42%), though free-to-air TV platforms yielded similar results.

Over one-third of respondents who support restrictions on permitted advertisements (38%) said that protecting children from exposure to harmful or inappropriate content was the most important reason. While 33% said that limiting content that may encourage bad habits, such as gambling, tobacco, or alcohol use was the most important reason.

Online subscription services and free video services are the primary platforms respondents identified they would like to see permitted advertising restricted.

MCCS

Children’s Content

Increasing online and streaming content consumption by children

Children’s content has a heavy focus on online and streaming content types. In the past 7 days, over half of parents indicated that their child had watched screen content on free video streaming services (53%) or online subscription services (53%). In 2022, ‘other websites or apps (e.g. Facebook, TikTok, Instagram)’ have significantly increased as platforms children used to watch screen content (19% in 2022), increasing from 13% in 2021.

Children are using non-traditional platforms to consume content, such as free video streaming services and online subscription services, more so than commercial or publicly owned TV.

User generated content and animation are the most common types of content consumed by children

The most common types of content that parents report their child watches are Australian children’s animation (34%), user-generated videos (33%) and international children’s animation (33%).

There is relatively high consumption of user-generated video content by children.

Australian content is desired for children

A majority of parents (56%) said that the most important type of content to be available to children is Australian children’s educational programs, as well as Australian children’s animation (44%).

Parents place high importance on the availability of Australian children's programming

Children have high advertising exposure

Almost half of parents (47%) said their child saw advertisements on free video streaming services in the 7 days prior to completing the survey. The most cited reasons for parents disagreeing that advertisements their child saw were appropriate were: pressure to buy goods or services (56%); and frequency and / or repetition (53%).

Advertising is being seen by children across many platforms, especially free video streaming services.

General Screen Content Habits

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Chapter Summary – General Screen Content Habits

High volume consumption (time spent) seen in pay TV, commercial free-to-air TV, also online subscription services

Pay TV and commercial free-to-air TV (excluding on-demand) platforms had the highest average weekly viewing time (9.51 and 9.08 hours, respectively). While an average of 8.16 hours was spent watching online subscription services.

Online Services:

Platform access continues to be led by online subscription services, with several platforms increasing this year

Online subscription services were the leading type of platform for screen content in Australia in 2022, maintaining the trend seen in 2021.

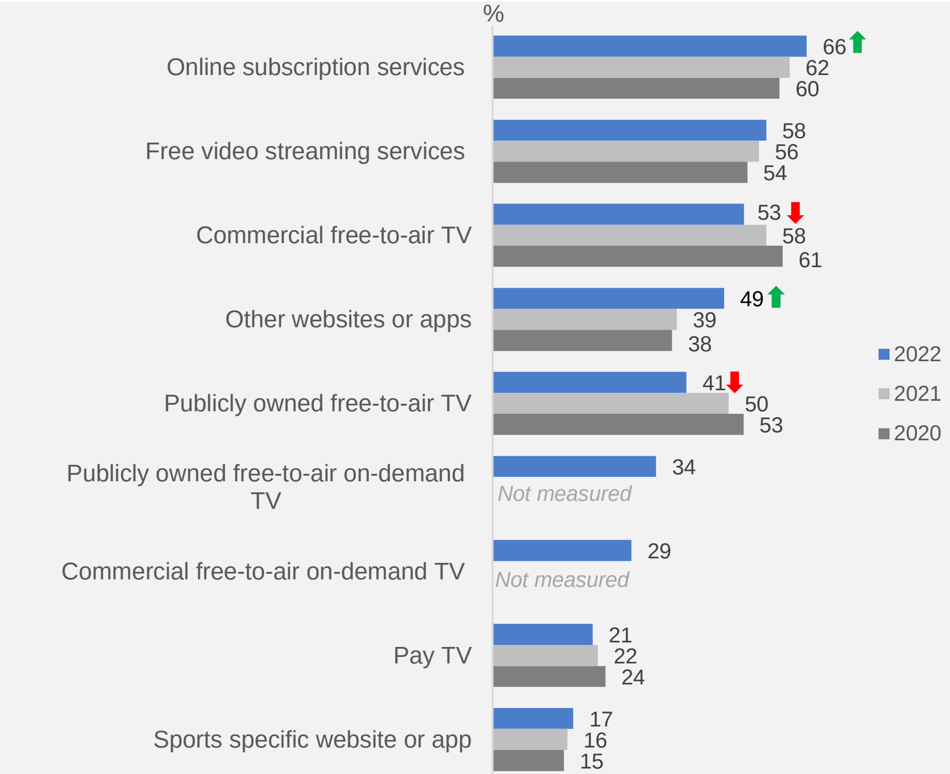
In 2022, the most common platforms that respondents used to watch screen content in the past 7 days were online subscription services (66%), free video streaming services (58%), and commercial free-to-air TV (excluding on-demand TV, 53%). Publicly owned free-to-air was watched by 41%, while 34% watched publicly owned free-to-air on-demand TV. Almost half (49%) of respondents indicated they watched screen content on ‘other websites or apps’.

Also of note, in 2022 the use of ‘other websites or apps (e.g., Facebook, Tik Tok, Instagram)’ has increased significantly (watched past 7 days), while pay-per-view has declined significantly.

In terms of access, the primary online streaming subscription service respondents have access to was Netflix (68%). In 2022, Disney+, Amazon Prime Video, Binge, Kayo and Paramount + have all significantly increased.

Platforms used to watch screen content in past 7 days

The most common platforms that respondents used to watch screen content in the past 7 days were online subscription services (66%), free video streaming services (58%), and commercial free-to-air TV (excluding on-demand TV, 53%). Publicly owned free-to-air was watched by 41%, while 34% watched publicly owned free-to-air on-demand TV. Almost half (49%) of respondents indicated they watched screen content on 'other websites or apps'.



Source: C1. Which of the following did you watch in the past 7 days at home or elsewhere on any device?

Base: TVCS & MCCS, All respondents. 2022: n=5017. 2021: n=4135. 2020: n=4096

Notes: Don't know/refused responses not shown: 2022 DK = 0.0%, Ref = 0.0%. 2021 DK = 0.0%, Ref = 0.0%. 2020 DK = 0.0%, Ref = 0.0%. Responses for codes not shown on chart if <5% in 2022.

Subgroups

↑ **Online subscription services** was higher for:

- Women (68% vs 64% of men)
- Ages 18-34 (79% vs 73% of ages 35-54, and 49% of ages 55+)
- Ages 35-54 (73% vs 49% of ages 55+)
- Those living in a capital city (68% vs 61% of those living outside a capital city)
- Adults living in a share house (78%), and parents with dependent children (73% vs 59% of those living alone or in a couple without children).
- SEIFA Quintile 4 (71%), and Quintile 5 (72% and vs 57% Quintile 1, 64% Quintile 2 and 63% Quintile 3)

↑ **Net Online** was higher for:

- Ages 18-34 (96% vs 92% of ages 35-54, and 75% of ages 55+)
- Ages 35-54 (92% vs 75% of ages 55+)
- Those living in a capital city (90% vs 82% of those living outside a capital city)
- Parents with dependent children (92%), adults living in a share house (96%), and those living in another household type (94% vs 82% of those living alone or without children, and 86$ of parents with dependent children)
- Adults living in a share house (96% vs 92% of parents with dependent children)'
- Those whose TV is less than 2 years old (90% vs 86% of those whose TV is 2 or more years old)
- SEIFA Quintile 4 (89%) and Quintile 5 (91% vs 82% of Quintile 1, and 84% of Quintile 2)
- SEIFA Quintile 3 (88% vs 82% of Quintile 1)

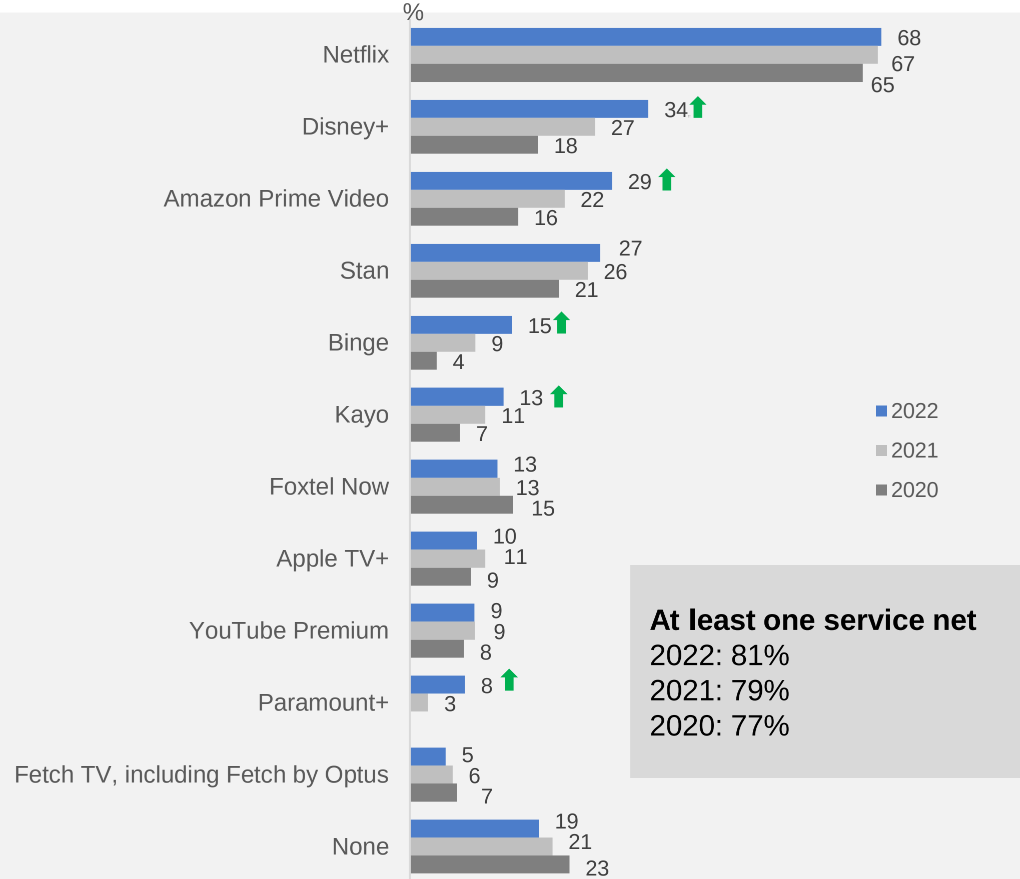
Callouts

- In 2022, 'other websites or apps (e.g., Facebook, TikTok, Instagram)' have increased significantly, while Pay-per-view has declined since 2021.

Online subscription services were the leading type of platform for screen content in Australia in 2022, maintaining the trend seen in 2021.

Online streaming subscription services households have access to

The primary online streaming subscription service respondents accessed was Netflix (68%), followed by Disney+ (34%), Amazon Prime Video (29%), and Stan (27%). While 19% indicated that they had no access to these types of services.



At least one service net
2022: 81%
2021: 79%
2020: 77%

Source: C8. Which of the following online subscription streaming services or sports-specific services does your household currently have access to? This excludes on-demand TV and pay-per-view.

Base: TVCS & MCCS, All respondents. 2022: n=5017. 2021 MCCS: n=4135. 2020 MCCS: n=4096.

Notes: Don't know/refused responses not shown: 2022 DK = 0.0%, REF = 0.0%. Responses for codes not shown on chart if <5% in 2022.

2022 NET shows TVCS & MCCS result, 2021 and 2020 nets show MCCS result.

Callouts

- In 2022, Disney+, Amazon Prime Video, Binge, Kayo and Paramount+ have all significantly increased since 2021.

Subgroups

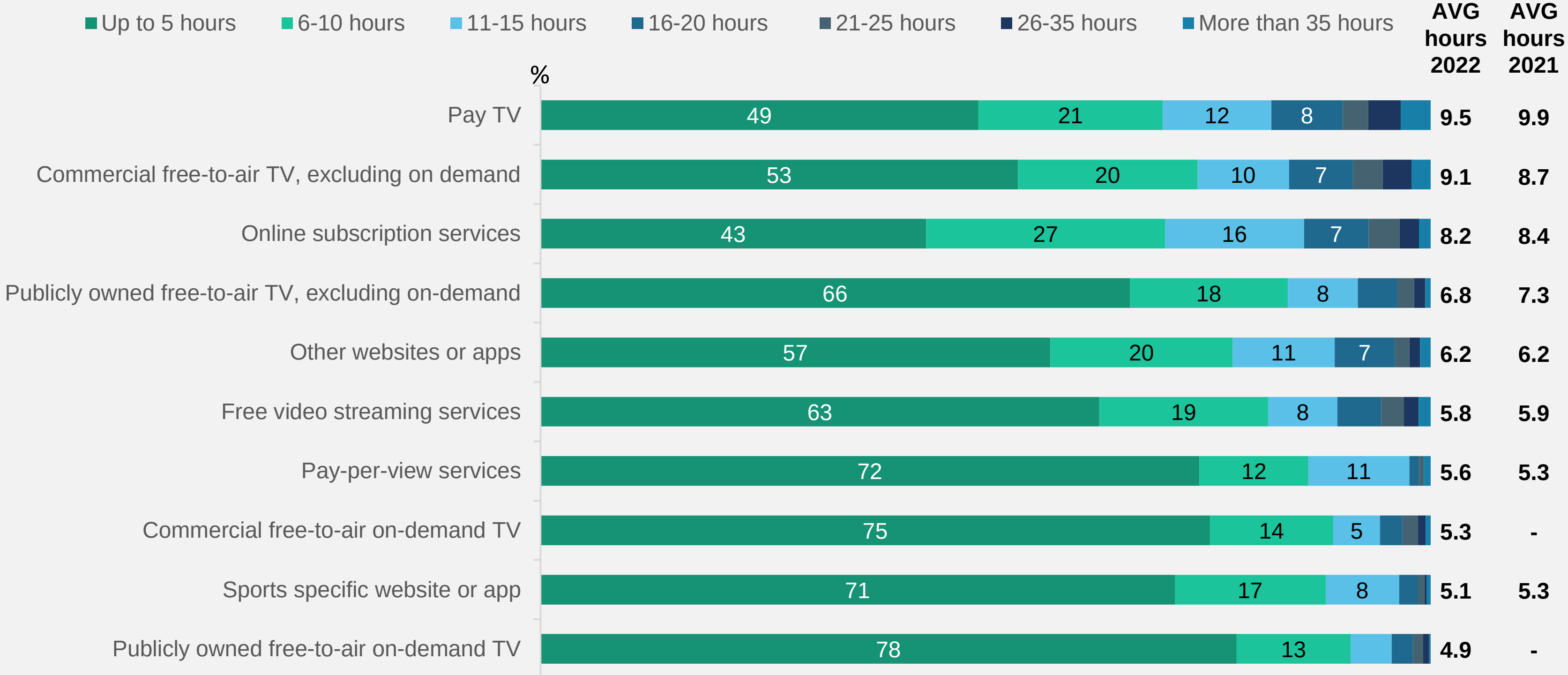
↑ **Netflix** was higher for:
- Women (72% vs 64% of men)
- Ages 18-34 (78%) and ages 35-54 (74% vs 54% of 55+)
- Those in a capital city (71% vs 62% outside a capital city)
- Parents with dependent children (76%), parents with non-dependent children (71%), and adults living in a share house (76% vs 59% of those living alone or without children)
- SEIFA Quintile 4 (71%) and Quintile 5 (73% vs 62% Quintile 1 and 64% Quintile 2)
- HH Income of $104,000 to $155,999 (81%) and $156,000 or more (82% vs 52% $51,999 and under and 67% $52,000 to $103,999)
- HH Income of $52,000 to $103,999 (67% vs 52% $51,999 and under)
- Those who pay for 3-5 subscription services (94%) and 6+ subscription services (96% vs 73% 0 services and 79% 1-2 services).

↑ **Disney+** was higher for:
- Women (39% vs 30% of men)
- Ages 18-34 (49% vs 42% of ages 35-54, and 16% of ages 55+)
- Ages 35-54 (42% vs 16% of ages 55+)
- Those in a capital city (37% vs 28% outside a capital city)
- Parents with dependent children (45%) and those living in another household type (50% vs 25% of those living alone or without children, and 31% of parents with non-dependent children)
- Parents with non-dependent children (31%) and adults living in a share house (38% vs 25% of those living alone or without children)

Netflix continues to be the dominant online streaming subscription service in Australian households.

Hours per week spent watching content on various platforms

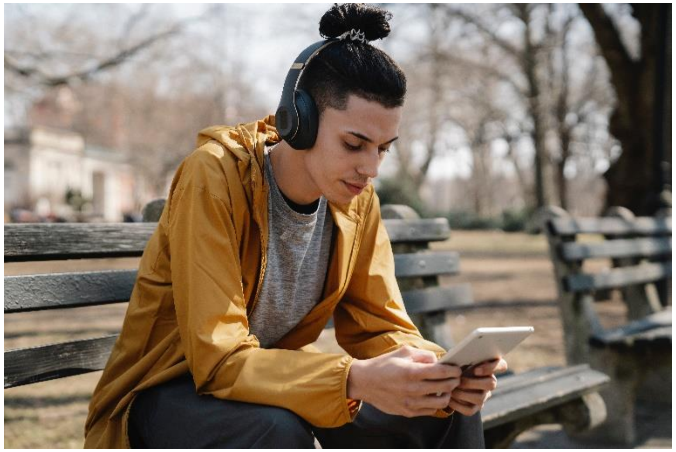
Pay TV and commercial free-to-air TV platforms had the highest average amount of time spent viewing per week (10 and 9 hours, respectively), while an average of 8 hours was spent watching online subscription services.



Source: C2. On average, how many hours per week do you spend watching each of the following?
Base: TVCS & MCCS, Respondents who watched screen content in past 7 days. 2022: n= from 189 to 2984.
Notes: Don't know/refused responses not shown, % very per statement. Labels for responses less than 5% not shown on chart.

AVG hours of 'Free to air on demand TV in 2021 was 5 hours. Not shown on chart due to the code being split out in 2022).

Despite having a lower rate of usage for watching screen content in households, pay TV tended to have longer average time spent viewing.



Media Content Consumption Survey Results

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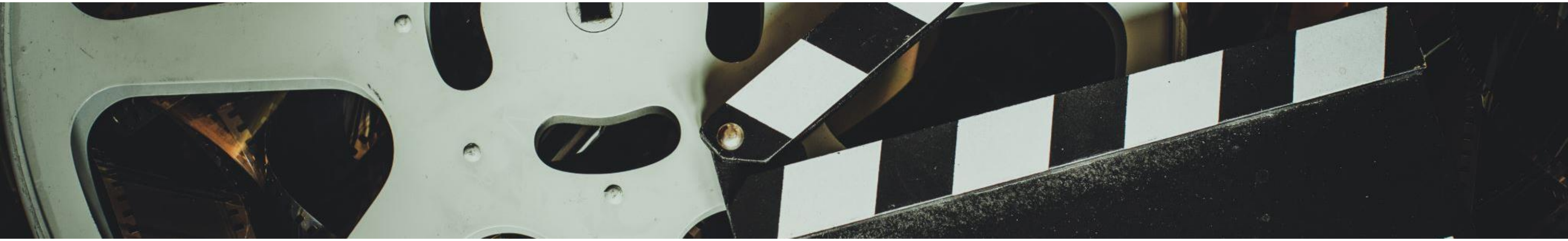
Media viewing behaviour and content



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Chapter Summary – Media Viewing Behaviour and Content

General media viewing behaviour and content habits:

News and current affairs are an important factor driving viewing of free-to-air

The majority of respondents watched news and current affairs on commercial free-to-air TV (excluding on-demand, 76%) or publicly owned free-to-air TV (excluding on-demand, 79%).

The consumption of news content on free-to-air TV is in contrast to the relatively low levels on online subscription services.

Households access more online subscription services than they pay for on average

On average, households pay for 2.40 online subscription services, however, on average households indicated they accessed 2.63 services. The number of households with access to at least one online subscription service remains stable in 2022 (81%) compared to 2021 (79%).

There is a difference between the number of online subscription services accessed by Australian households and those paid for.

Access to Australian content

Just over half of respondents indicated that online subscription streaming services have enough Australian content (53%), while-almost one in five say it is difficult (15%) or very difficult (2%) to find Australian content on streaming services.

Almost one in five Australians say it is difficult or very difficult to find Australian content on streaming services.

MCCS

2021: Types of screen content watched on various platforms (%)

	Publicly owned free-to-air TV, excluding catch up	Commercial free-to-air TV, excluding catch up	Publicly owned free-to-air catch-up TV	Commercial free-to-air catch-up TV	Pay TV	Other websites or apps	Free video streaming services	Pay-per-view services	Online subscription services	Sports specific website or app
News and current affairs	76	73	46	36	37	34	31	19	13	15
Sport	25	41	16	22	47	12	19	21	11	87
Documentary	61	47	53	36	59	19	40	43	51	15
Comedy	40	42	38	34	45	32	38	56	65	10
Drama	41	42	41	36	50	11	18	52	62	10
Reality	15	32	14	27	24	16	18	22	17	7
Crime / Thriller	35	37	32	29	52	8	17	44	59	8
Action / Adventure	24	33	22	24	43	11	20	47	64	9
Talk shows / Game shows	20	26	12	11	12	8	11	7	7	7
Fantasy / Science fiction	14	14	13	14	25	7	14	33	43	7
User-generated videos	1	2	0.7	1	0.9	46	38	4	5	0.8
Other	3	2	4	4	3	14	17	2	3	1

Source: C7. In general, which types of content do you watch on [INSERT STATEMENT SELECTED AT C1]?
Base: MCCS, Respondents who watched screen content in the past 7 days. 2021: n= from 350 to 2578.
Notes: Don't know/refused responses not shown, % vary per statement.
The top three genres for each platform are highlighted in green.
The bottom three genres for each platform are highlighted in red.

Please note: the 2021 report showed data re-based to 'Total'. The 2021 data shown on this slide shows figures based to each platform type.

Types of screen content watched on various platforms (%)

The majority of respondents watched news and current affairs on publicly owned free-to-air TV (excluding on-demand, 79%) or commercial free-to-air TV (excluding on-demand, 76%). Publicly owned free-to-air on-demand TV was commonly used to watch documentaries (59%), while online subscription services were mostly used to watch comedy (67%), drama (64%), or action or adventure (63%).

	Publicly owned free-to-air TV, excluding on-demand	Commercial free-to-air TV, excluding on-demand	Publicly owned free-to-air on-demand TV	Commercial free-to-air on-demand TV	Pay TV	Other websites or apps	Free video streaming services	Pay-per-view services	Online subscription services	Sports specific website or app
News and current affairs	79	76	61	50	35	35	33	19	12	10
Sport	26	46	19	34	52	12	19	22	12	94
Documentary	61	44	59	42	54	17	40	35	53	12
Comedy	42	42	41	37	49	32	39	45	67	8
Drama	41	36	45	39	46	10	15	40	64	7
Reality	14	32	14	33	25	20	21	19	19	5
Crime / Thriller	35	32	35	32	48	7	16	42	57	8
Action / Adventure	22	32	24	29	42	7	19	42	63	8
Talk shows / Game shows	20	27	15	17	10	7	13	8	6	7
Fantasy / Science fiction	13	14	16	15	24	6	12	28	44	6
User-generated videos	1	0.9	1	2	2	55	46	6	6	0.9
Other	4	2	5	2	4	13	15	8	4	0.2

Source: C7. In general, which types of content do you watch on [INSERT STATEMENT SELECTED AT C1]?
Base: MCCS, Respondents who watched screen content in the past 7 days. 2022: n= from 172 to 2507.
Notes: Don't know/refused responses not shown, % vary per statement.
The top three genres for each platform are highlighted in green.
The bottom three genres for each platform are highlighted in red.

Please note: the 2022 data shown on this slide shows figures based to each platform type.

Subgroups

↑ **News and current affairs** was higher for:

- Publicly owned free-to-air TV, excluding on-demand:
  - Ages 35-54 (77%), and ages 55+ (85% vs 66% of ages 18-34)
  - Ages 55+ (85% vs 77% of ages 35-54)
  - Those living alone or without children (85% vs 73% of parents with dependent children)
  - SEIFA Quintile 5 (85% vs 74% of Quintile 1, 75% of Quintile 3, and 74% of Quintile 4

The consumption of news content on free-to-air TV is in contrast to the relatively low levels on online subscription services. Choice of platforms for viewing content is very much genre specific.

MCCS

Ease of accessing Australian content on streaming services

Just over half considered that online subscription streaming services have enough Australian content (53%). Over one-third (37%) reported that it was neither easy nor difficult to find Australia content, while 19% did not look for Australian content on streaming services. Almost one in five say it is difficult (15%) or very difficult (2%) to find Australian content on streaming services.

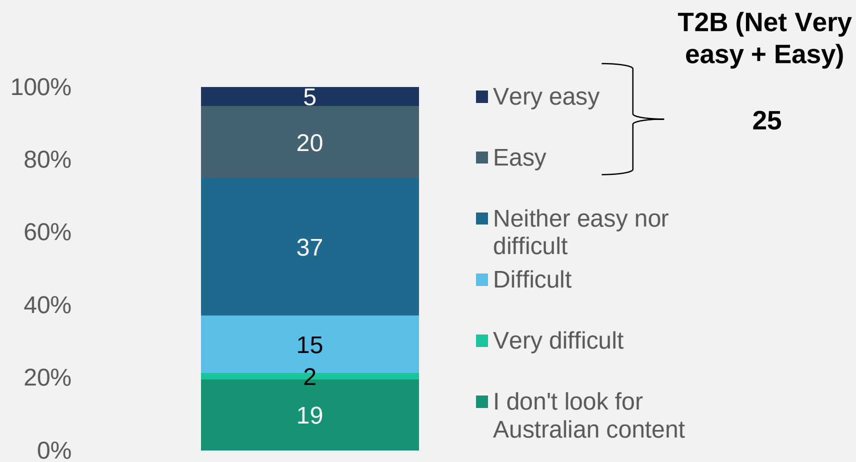
“Yes, online subscription streaming services have enough Australian content”

53%

Source: C11. In your opinion, do online subscription streaming services (excluding on-demand TV services) have enough Australian content?

Base: MCCS, All respondents. 2022: n=4002.

Notes: No/Don’t know/refused responses not shown: No =42%, DK = 4%, Ref = 0.4%



Source: C18. To what extent is Australian content easy or difficult to find on streaming services?

Base: MCCS, All respondents. 2022: n=4002.

Notes: Don’t know/refused responses not shown: DK = 2%, Ref = 0.2%

Subgroups

↑ **Net easy and very easy** was higher for:

- Ages 18-34 (26%) and ages 35-54 (28% vs 18% of ages 55+)
- Those living in a capital city (26% vs 21% of those living outside a capital city)
- Parents with dependent children (29% vs 20% of those living alone or without children)
- Those with a TV less than 2 years old (29%, vs 22% of those with a TV 2 or more years old)

↑ **Net difficult and very difficult** was higher for:

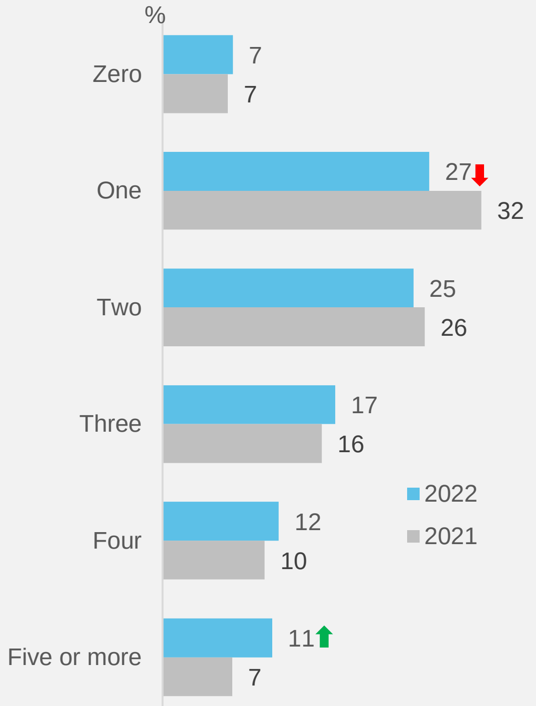
- Ages 18-34 (21% vs 16% of ages 35-44, and 14% of ages 55+)
- Those with HH income of $52,000 to $103,999 (20% vs 14% of Those with HH income of $1 to $51,999).

The proportion of adults who rate accessing Australian content on streaming services as easy (25%) is not that much higher than those who consider it difficult (17%). Almost a fifth don’t even look for Australian content.

Number of online subscription services households pay for

Respondents were then asked about whether they paid for the subscription services their households access. On average, households indicated that they paid for 2.40 online subscription services. However, on average, households indicated they *accessed* 2.63 services, indicating a household discrepancy in access versus paying for services. Less than one-tenth of respondents (7%) said they do not pay for *any* of the subscription services they access. One-quarter (27%) of respondents said their household pays for one online subscription service, while 25% said they pay for two, and 17% pay for three.

Number of online subscription services households pay for



Source: C10. How many video streaming subscriptions does your household currently pay for? This excludes on-demand TV and pay-per-view.

Base: MCCS, Respondents who have access to one or more online subscription streaming services. 2022: n=3122. 2021: n=3296.

Notes: Don't know/refused responses not shown: 2022 DK = 1%, Ref = 0.1%. 2021 DK = 2%, Ref = 0.3%. (Individual results for five and over not shown on chart).

Of those who have online subscription service(s) :

2022 MCCS: AVG paid for: 2.40

2021: 2.20

2022 MCCS: AVG accessed: 2.63

2021: 2.17

Source: C8. Which of the following online subscription streaming services or sports-specific services does your household currently have access to?

Base: MCCS respondents, 2022 n=4002

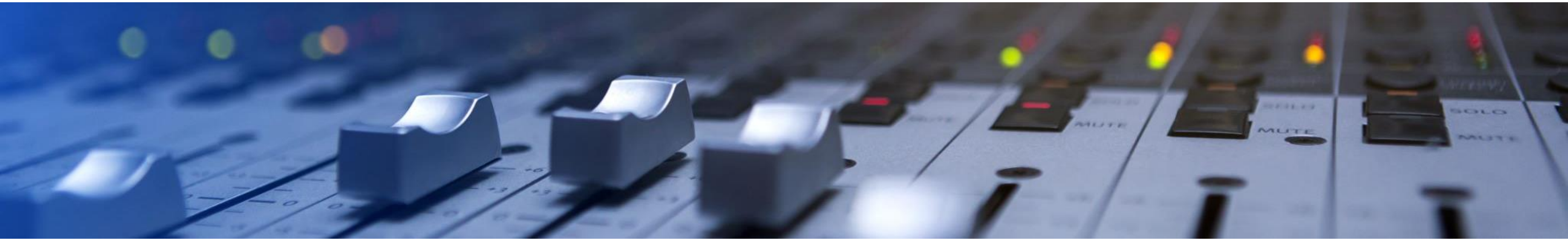
Subgroups

↑ **Pay for at least one streaming service (net 1-20)** was higher for:
- Men (93% vs 91% of women)
- Ages 18-34 (94) and ages 35-54 (93% vs 88% of ages 55+)
- Parents with dependent children (94% vs 88% of those living alone)
- HH income of $104,000 to $155,999 (94% vs 89% of those with HH income of $1 to $51,999)

↑ **Pay for no streaming services** was higher for:
- Ages 55+ (11% vs 5% of ages 35-54 and 7% of ages 35-54)
- Those living alone (11% vs 5% of parents with dependent children)
- Those with HH income of $1 to $51,999 (9%) and $52,000 to $103,999 (9% vs 5% of HH income $104,000 to $155,999, and 4% of HH income $156,000 or more)

There is a difference between the number of online subscription services accessed by Australian households and those paid for.

Audio Content



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Chapter Summary – Audio Content

Audio Content:

Diversity in the platforms Australians listen to

Over half of respondents (57%) had listened to FM radio in the past 7 days, and half of respondents (51%) had listened to online music streaming services. A smaller proportion had listened to podcasts (24%) or AM radio (21%).

A breadth of audio is listened to, but particularly FM radio and online music streaming services.

Music and news are important on AM / FM radio, emergency warnings are very important

The primary feature of AM / FM radio that was rated as ‘very important’ by respondents was emergency warnings (51%). When considering importance as a net of ‘somewhat important’ and ‘very important’, the most important feature was music stations (81%).

AM / FM radio is perceived to have an important role in the community, particularly emergency warnings, music, and local news reports.

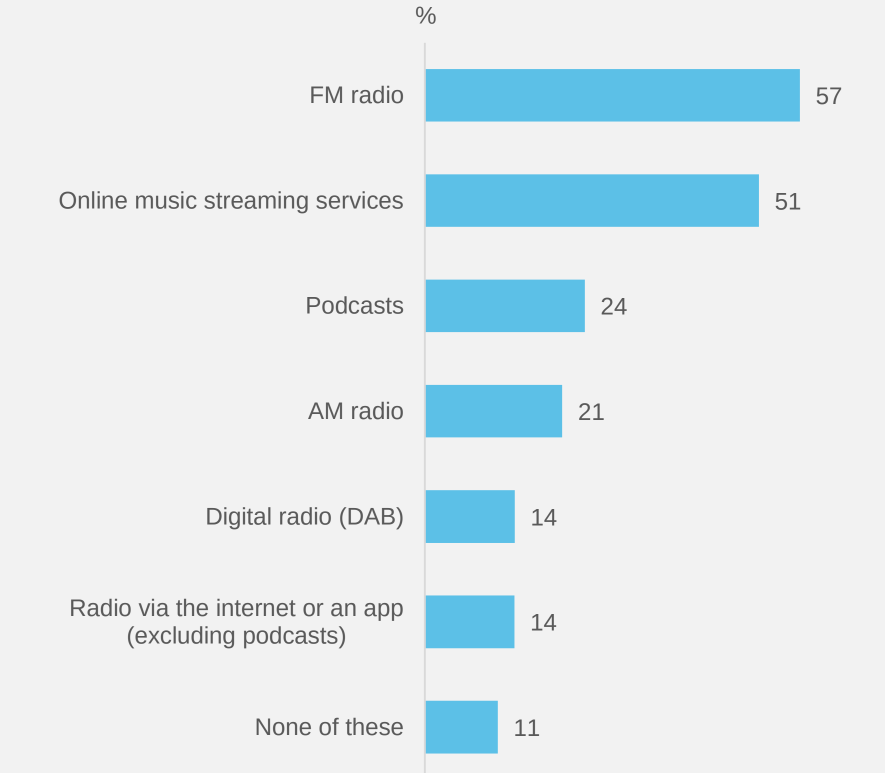
Radio listening is highly linked to car travel

Using a car audio system was reported as the most common way to listen to FM (90%), AM (81%) or digital radio (61%). Smartphones were the most popular device for listening to online music streaming services (83%) and podcasts (88%).

Cars are the primary devices for radio listening and smartphones are the most used device for online audio content.

MCCS Audio listened to in the past 7 days

Over half of respondents (57%) had listened to FM radio in the past 7 days, and half of respondents (51%) had listened to online music streaming services. A smaller proportion had listened to podcasts (24%) or AM radio (21%), while one-tenth (11%) had not listened to any of the listed audio sources.



Source: NEW28. Which, if any, of the following have you listened to in the past 7 days? This includes all listening at home, in a car, or somewhere else on any device.

Base: MCCS, All respondents. 2022: n=4002.

Notes: Don't know/refused responses not shown: DK = 0.1%, Ref = 0.0%

Subgroups

↑ **FM radio** was higher for**:**

- Ages 35-54 (64%) and ages 55+ (61% vs 46% of ages 18-34)
- Those living outside a capital city (64% vs 55% of those living in a capital city)
- Those living alone or without children (53%), parents with dependent children (62%), parents with non-dependent children (56%), and those living in another household type (57% vs 33% of adults living in a share house)
- Parents with dependent children (62% vs 53% of those living alone or without children)
- Watched sport in P7D (61% vs 52% did not watch sport)
- Those with HH income of $104,000 to $155,999 (59%) and $156,000 or more (64% vs 51% of those with HH income of $1 to $51,999)

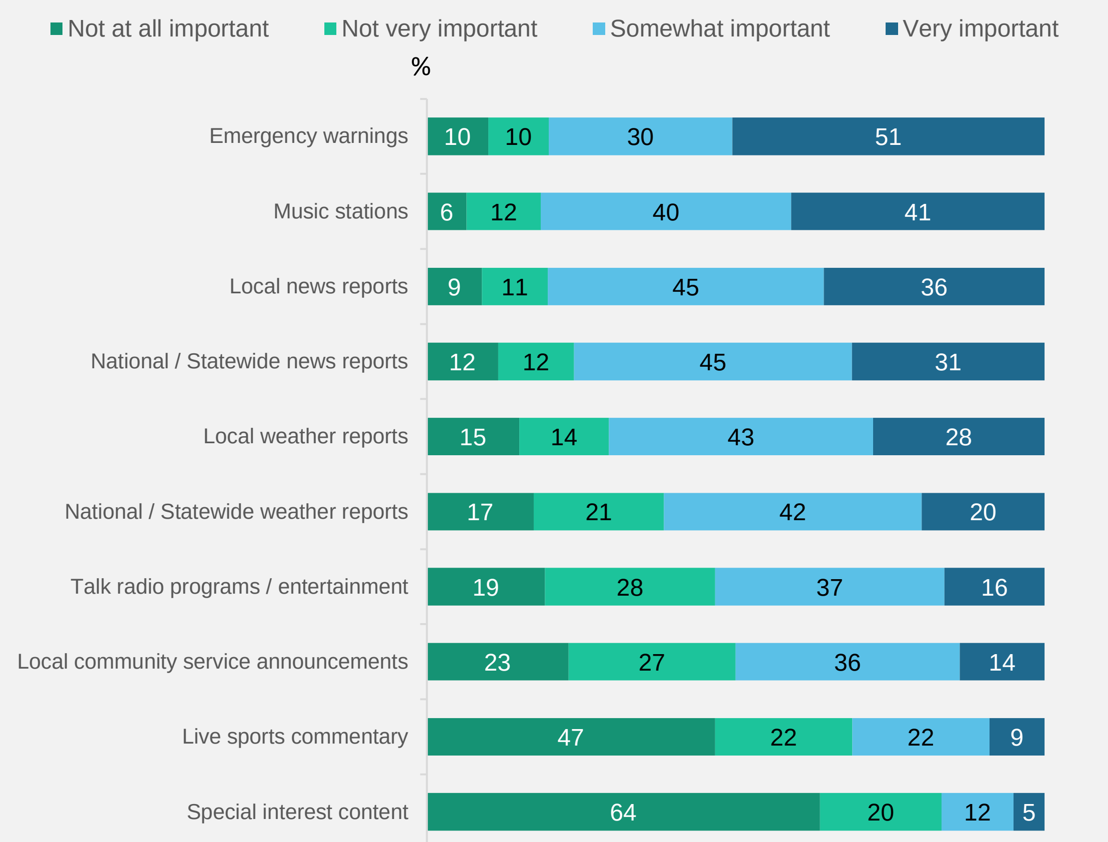
↑ **Online music streaming services** was higher for:

- Women (55% vs 46% of men)
- Ages 18-34 (70%) and ages 35-54 (51% vs 28% of ages 55+)
- Ages 18-34 (70% vs 51% of ages 35-54)
- Those living in a capital city (52% vs 47% of those living outside a capital city)
- SEIFA Quintile 4 (52%) and Quintile 5 (58% vs 43% of Quintile 1)
- SEIFA Quintile 5 (58% vs 47% of Quintile 2 and 49% of Quintile 3)
- Those with HH income of $104,000 to $155, 999 (58%) and $156,000 or more (63% vs 39% of those with HH income of $1 to $51,999, and 49% of those with HH income of $52,000 to $103,999)
- Those with HH income of $52,000 to $103,999 (49% vs 39% of those with HH income of $1 to $51,999)

A breadth of audio platforms are used, but particularly FM radio and online music streaming services.

Importance of various features as a reason for listening to AM/FM radio

The feature of AM / FM radio that was most commonly rated as ‘very important’ by respondents was emergency warnings (51%). When considering importance as a net of ‘somewhat important’ and ‘very important’, the most important feature was music stations (81%), followed closely by local news reports (80%).



Source: NEW28a. Thinking about the following features of AM/FM Radio, please rate each in terms of how important or unimportant they are to you in your reason for listening to AM/FM Radio? Would you say it is…

Base: MCCS, Respondents who listened to AM/FM radio in the past 7 days. 2022: n=2806.

Notes: Don’t know/refused responses not shown, % vary per statement.

Subgroups

↑ **Emergency warnings** was higher for

- <u>Net very important and somewhat important:</u>
  - Women (85% vs 75% of men)
  - Those living outside a capital city (86% vs 78% of those living in a capital city)
  - SEIFA Quintile 1 (87%), Quintile 2 (84%) and Quintile 4 (83% vs 74% of Quintile 5)
  - SEIFA Quintile 1 (87% vs 78% Quintile 3)

↑ **Music stations** was higher for:

- <u>Net very important and somewhat important:</u>
  - Women (87% vs 76% of men)
  - Ages 18-34 (88%) and ages 35-54 (83% vs 75% of ages 55+)
  - Ages 18-34 (88% vs 83% ages 35-54)
  - Parents with dependent children (87% vs 77% of those living alone or without children, 79% of those with non-dependent children, and 63% of adults living in a share house)
  - Those who didn’t watch sport P7D (84% vs 79% of those who watched sport P7D)
  - Those with HH income of $104,000 to $155,999 (87% vs 80% of those with HH income of $1 to $51,999, 80% of those with HH income of $52,000 to $103,999, and 79% of those with HH income of $156,000 or more)

AM / FM radio is perceived to have some important features for listeners, particularly emergency warnings, music, and local news reports.

Devices used to listen to audio content (%)

Using a car audio system was reported as the most common way to listen to FM (90%), AM (81%) or digital radio (61%). Conversely, smartphones were the most popular device for listening to online music streaming services (83%), podcasts (88%) and radio via the internet or an app (63%).

	Car audio system	Dedicated radio	Smartphone	Computer / Tablet / Laptop	Smart Speaker	Other
FM radio	90	24	10	4	7	0.5
AM radio	81	44	16	7	5	2
Digital radio (DAB)	61	42	18	8	9	1
Radio via the internet or an app (excluding podcasts)	32	11	63	31	19	2
Online music streaming services (e.g., Spotify or Apple Music)	29	2	83	32	26	2
Podcasts	21	2	88	23	9	0.7

Source: NEWG29. In general, what do you use to listen to ['insert NEW28 Response of codes 1-6']
Base: MCCS, Respondents who listened to AM/FM radio in the past 7 days. 2022: n= from 597 to 2072.
Notes: Don't know/refused responses not shown, % vary per statement.

Subgroups

↑ **FM radio** was higher for:

- Car audio system:
  - Those with HH income of $52,000 to $103,999 (90%), $104,000 to $155,999 (92%), and $156,000 or more (95% vs 81% of those with HH income of $1 to $51,999)
  - Those with HH income of $156,000 or more (95% vs 90% of those with HH income of $52,000 to $103,999)
- Smartphone:
  - Ages 35-54 (13% vs 8% of ages 55+)
  - Those living in a capital city (11% vs 8% outside of a city)

Subgroups

↑ **FM radio** was higher for:

- Dedicated radio:
  - Men (28% vs 21% of women)
  - Ages 35-54 (21%),and ages 55+ (40% vs 11% of ages 18-34)
  - Ages 55+ (40% vs 21% of ages 35-54)
  - Those living outside of a capital city (28% vs 22% of those living in a capital city)
  - Those living alone or without children (32% vs 20% of parents with dependent children)

Cars are the primary devices for radio listening and smartphones are the most used device for online audio content.

News Content

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Chapter Summary – News Content

News content:

News at a local, national, and international level

A similar proportion of respondents consume Australian national news (37%) or local, state, or territory news (39%) more often than 5 times per week. Slightly fewer respondents reported consuming international news more often than 5 times per week (31%).

Australians consume local and national news in roughly equal measure, whilst consumption of international news is slightly lower.

News is accessed in many different ways

The primary methods that respondents reported consuming news and current affairs via were commercial free-to-air TV (56%), radio (56%), and news websites or apps (53%).

In 2022, news aggregator website or app has significantly increased (10% in 2022, 8% in 2021), as have radio (56% in 2022, 46% in 2021) and podcast (11% in 2022, 8% in 2021). While commercial free-to-air TV (56% in 2022, 62% in 2021) and publicly-owned TV (37% in 2022, 44% in 2021) have significantly declined.

Australians are using a range of sources to access news content.

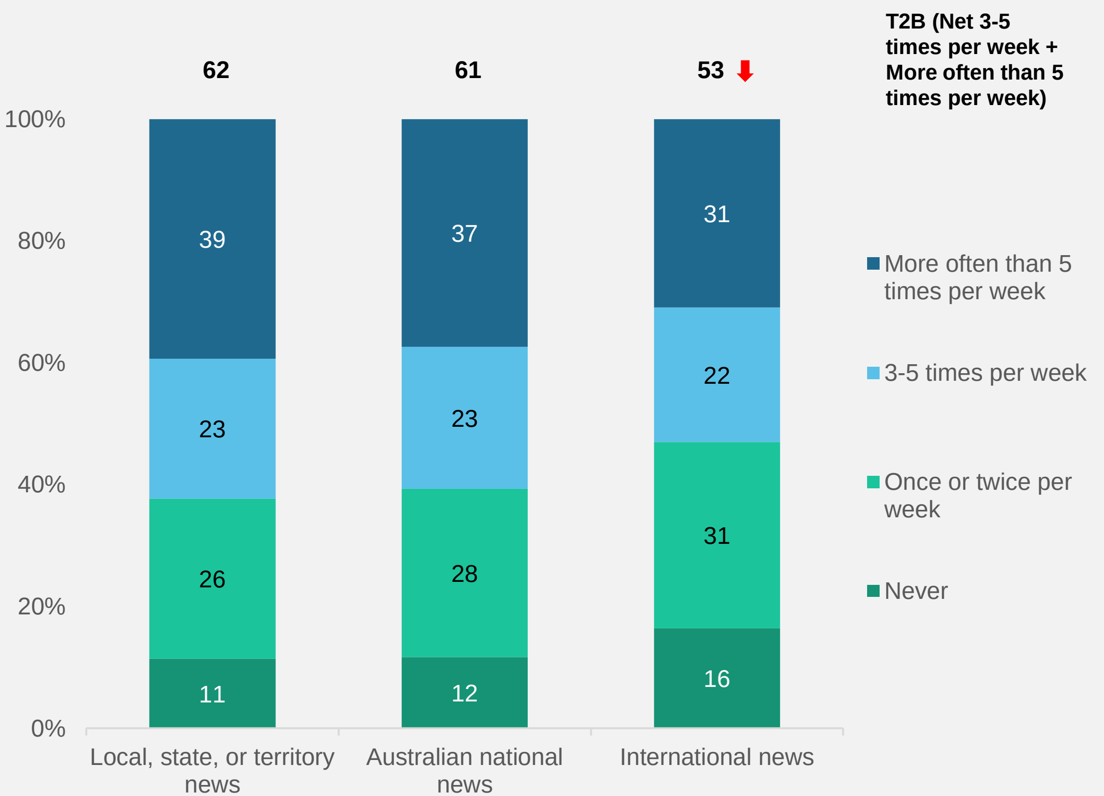
Social media remains a popular way to access news

The majority of respondents who consumed news via social media indicated that it was either somewhat (43%) or very important (39%) to have access to news content on social media. The most popular social media platform for accessing news was Facebook, with almost two-thirds (65%) of those who access news via online search engines or social media reporting they had used it to access news content. However, other platforms, Instagram (27%), TikTok (10%) and Twitter (14%), have experienced significant increases.

Australians consider news on social media to be important, with social media remaining a popular way to access news, increasingly on more diverse platforms.

Frequency of consuming news and current affairs content

A similar proportion of respondents consume Australian national news (37%) or local, state, or territory news (39%) more often than 5 times per week. Slightly fewer respondents reported consuming international news more often than 5 times per week (31%).



Source: D1. On average per week, how often do you read, watch, or listen to any of the following types of news and current affairs? This includes TV, radio, newspapers, and online.

Base: MCCS, All respondents. 2022: n=4002.

Notes: Don't know/refused responses not shown, % vary per statement.

Subgroups

↑ **Local, state, or territory news** was higher for:

- Net consumption:
  - Ages 35-54 (90%) and ages 55+ (96% vs 81% of ages 18-34)
  - Ages 55+ (96% vs 90% of ages 35-54)
  - Watched sport P7D (92% vs 86% of did not watch sport P7D)

↑ **Australian national news** was higher for:

- Net consumption:
  - Men (90% vs 86% of women)
  - Ages 35-54 (88%) and ages 55+ (96% vs 82% of ages 18-34)
  - Ages 55+ (96% vs 88% of ages 35-54)
  - Those living alone or without children (91% vs 86% of parents with dependent children, and 81% of those living in another household type)
  - Watched sport P7D (93% vs 85% did not watch sport P7D)

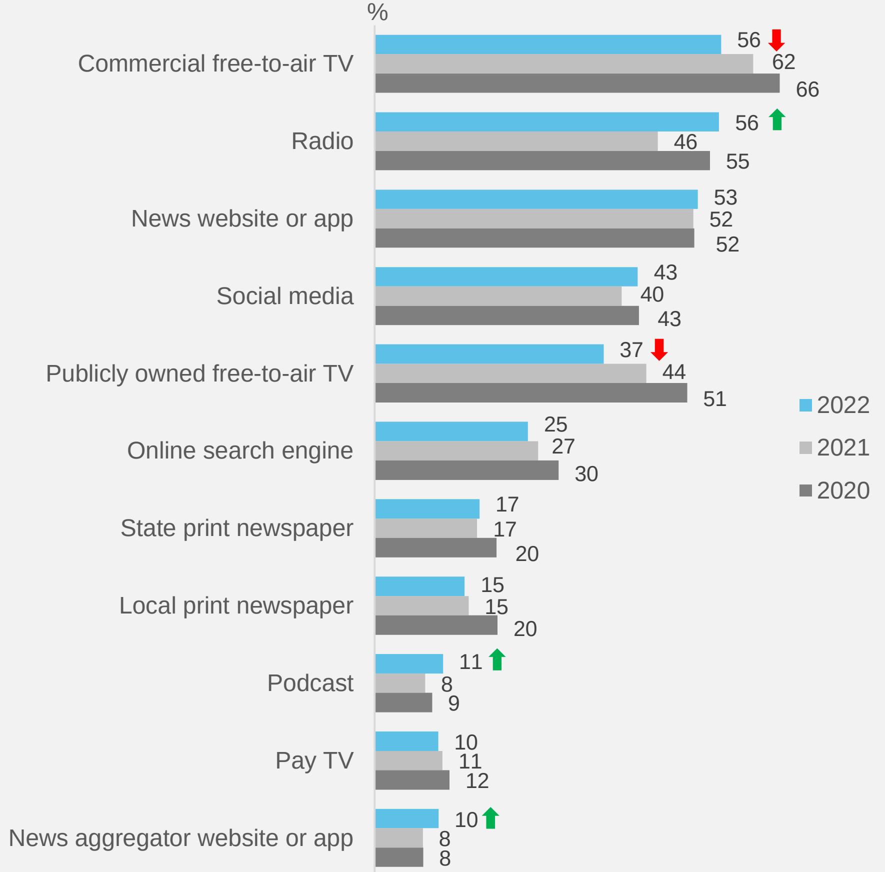
↑ **International news** was higher for**:**

- Net consumption:
  - Men (86% vs 81% of women)
  - Ages 55+ (91% vs 79% ages 18-34 and 82% of ages 35-54)
  - Those living alone or without children (86% vs 80% of parents with dependent children)
  - Watched sport P7D (88% vs 82% did not watch sport P7D)

Australians consume local and national news in roughly equal measure, whilst consumption of international news is slightly lower.

Sources of news

The primary methods that respondents reported consuming news and current affairs via were commercial free-to-air TV (56%), radio (56%), news websites or apps (53%) and social media (43%).



Source: D2. In general, how do you currently access most of your news and/ or current affairs?

Base: MCCS, Respondents who consume news content. 2022: n=3807. 2021: n=3981. 2020: n=3942.

Notes: Don't know/refused responses not shown: 2022 DK = 0.3%, Ref = 0.0%. 2021 DK = 0.1%, Ref = 0.0%. 2020 DK = 0.1%, Ref = 0.0%. Responses for codes not shown on chart if <10% in 2022.

Subgroups

↑ **Commercial free-to-air TV** was higher for:

- Ages 35-54 (60%) and ages 55+ (66% vs 43% of ages 18-34)
- Ages 55+ (66% vs 60% ages 35-54)
- Those living alone or without children (56%), parents with dependent children (58%), parents with non-dependent children (57%), and those living in another household type (60% vs 27% of adults living in a share house)
- Watched sport P7D (64% vs 47% of did not watch sport P7D)
- SEIFA Quintile 1 (64%) and Quintile 2 (62% vs 53% Quintile 3 and 51% of Quintile 5)
- Those with HH income of $1 to $51,999 (61%), $52,000 to $103,999 (56%), and $104,000 to $155,999 (58% vs 48% of those with HH income of $156,000 or more)

↑ **Radio** was higher for:

- Ages 35-54 (59%) and ages 55+ (65% vs 44% of ages 18-34)
- Ages 55+ (65% vs 59% ages 35-54)
- Those outside a capital city (60% vs 55% of those in a capital city)
- Watched sport P7D (63% vs 52% did not watch sport P7D)

Callouts

- In 2022, news aggregator website or app has significantly increased, as have radio and podcast. Commercial free-to-air TV and publicly-owned TV have declined in 2022.

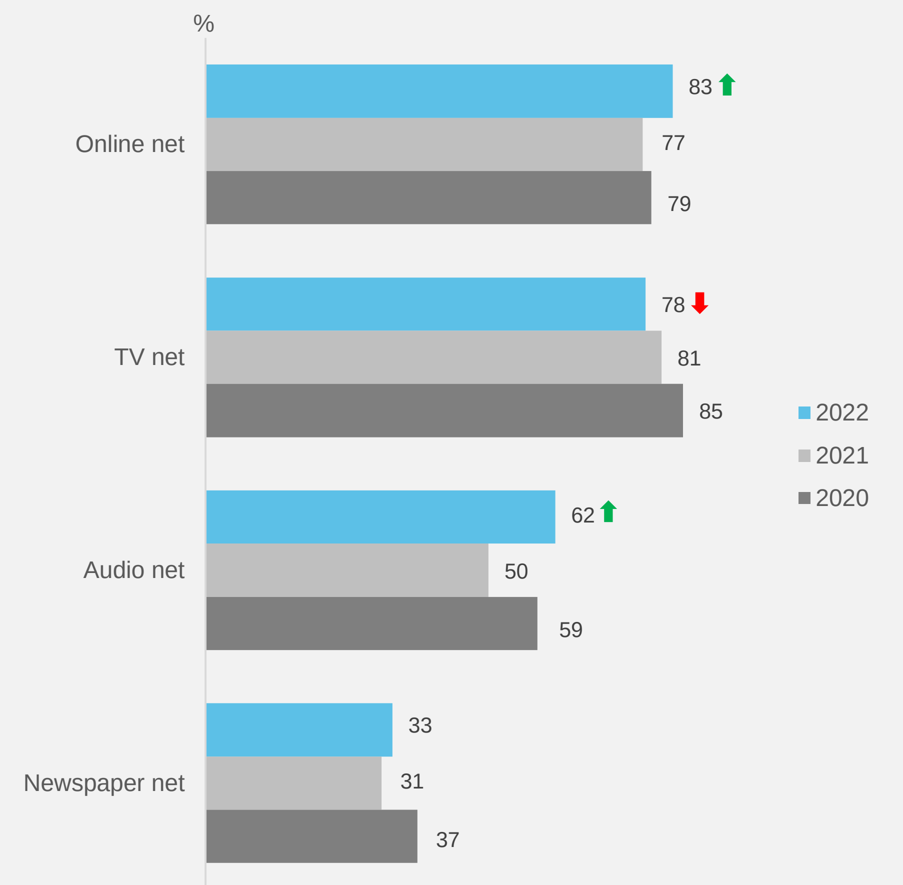
Note - The chart shows figures for 2020/2021 rebased to use the same base as 2022 for consistency (only those who consumed news).

Australians use a range of sources to access news content but with a focus on free-to-air.

MCCS

Sources of News: by category

The main source of news is Online (net 83%).



Source: D2. In general, how do you currently access most of your news and/ or current affairs?

Base: MCCS, Respondents who consume news content. 2022: n=3807. 2021: n=3981. 2020: n=3942.

Note - The chart shows figures for 2020/2021 rebased to use the same base as 2022 for consistency (only those who consumed news).

Callouts

- In 2022, Online and Audio have significantly increased, while TV has declined.

Note for 'net' inclusions

'NET: Television' includes:

'Commercial free-to-air TV, inc. catch-up TV', 'Publicly owned free-to-air TV, inc. catch-up TV', and 'Pay TV, inc. streaming'.

'NET: Online' includes:

'News website or app', 'Social media', 'Online search engine', 'News aggregator website or app', and 'Other website or app'.

'NET: Audio' includes:

'Radio' and 'Podcast'.

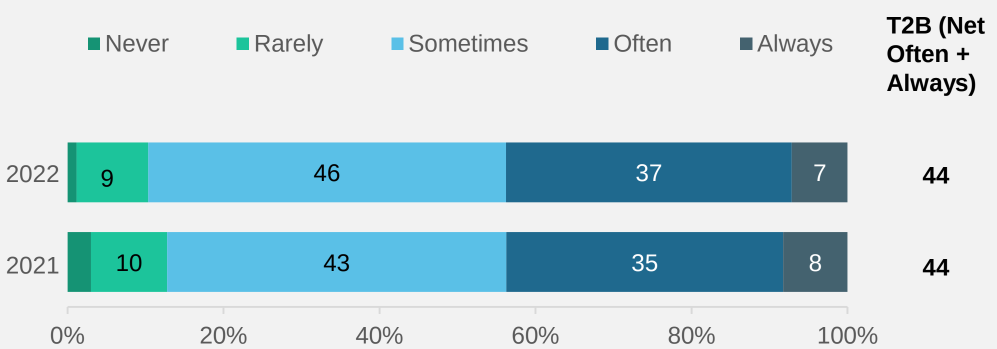
'NET: Newspaper' includes:

'National print newspaper', 'State print newspaper', and 'Local print newspaper'.

Australians are increasingly turning to online and audio sources for news content.

MCCS Clicking through to the full news story

The majority of respondents who use online search engines or social media to access news content click through to the full news story either sometimes (46%), often (37%), or always (7%).



Source: D12. When you find a news story of interest in search results or on social media websites, how often do you typically click through to the full story on the news publisher?

Base: MCCS, Respondents who access news content via an online search engine or social media. 2022: n=1777. 2021: n=1819.

Notes: Don't know/refused responses not shown: 2022 DK = 0.1%, Ref = 0.01%. 2021 DK = 0.0%, Ref = 0.0% Labels for responses less than 5% are not shown on chart.

Subgroups

↑ **Net Often and Always** was higher for**:**

- Ages 55+ (50% vs 39% of ages 18-34)

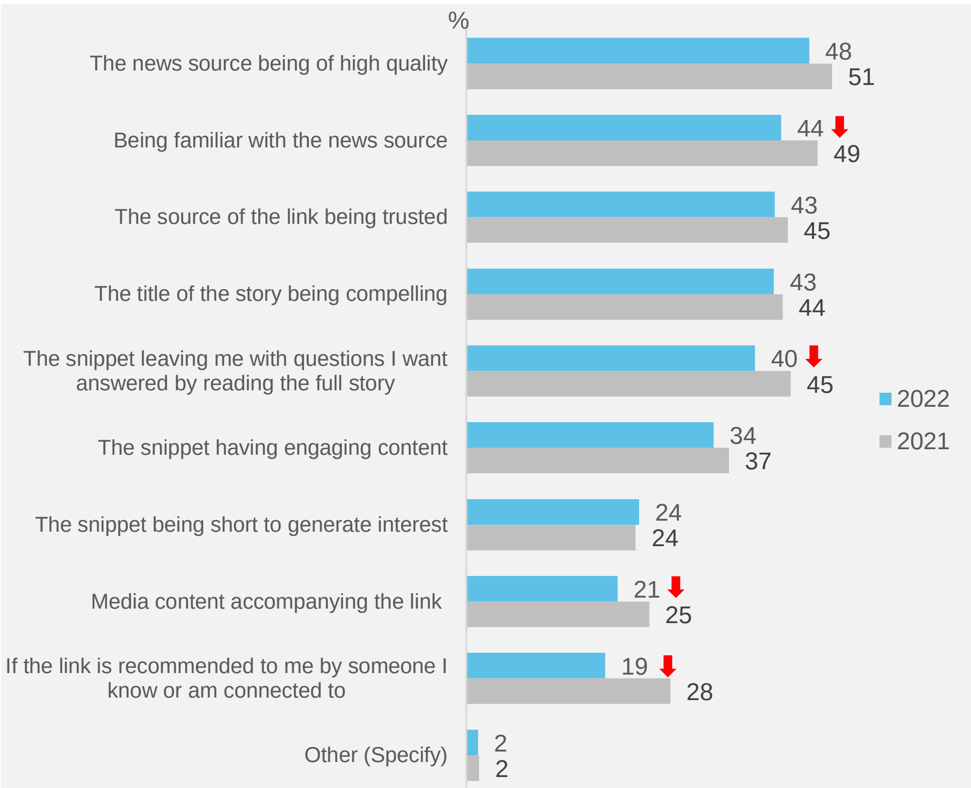
Callouts

- In 2022, 'never click through' has significantly declined (from 3% in 2021 to 1% in 2022). *(Labels not shown on chart due to being less than 5%).*

There has been a decline in 2022 of those who 'never' click through to a full news story in search results or on social media websites.

Reasons for clicking through to the full news story

The primary factor that contributed to respondents deciding to click through to a full news story was “the news source being of high quality” (48%). Other common factors were “being familiar with the news source” (44%), “the source of the link being trusted” (43%), “the title of the story being compelling” (43%), and “the snippet leaving the reader with questions they want answered by reading the full story” (40%).
People generally selected fewer reasons in 2022 than 2021, and this has resulted in declines across the board.



Source: D13. Which of the following factors are most important to you when deciding whether to click through to a news story on a subject that interests you?

Base: MCCS, Respondents who click through to the full news story rarely, sometimes, often or always. 2022: n=1745. 2021: n=1772.

Notes: Don’t know/refused responses not shown: 2022 DK = 0.1%, Ref = 0.5%. 2021 DK = 0.6%, Ref = 0.2%.

Subgroups

↑ **The news source being of high quality** was higher for:
- Men (52% vs 45% of women)
- SEIFA Quintile 5 (53% vs 38% of Quintile 1)

↑ **The source of the link being trusted** was higher for:
- Ages 18-34 (50% vs 39% of ages 35-54, and 37% of ages 55+)

Callouts

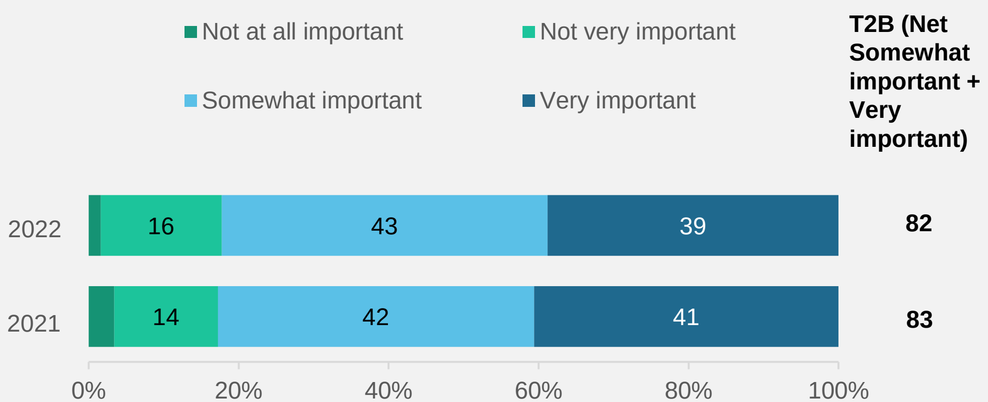
- In 2022, there have been several significant declines since 2021:
  - Being familiar with the news source
  - The snippet leaving me with questions I want answered by reading the full story
  - Media content accompanying the link
  - If the link is recommended to me by someone I know or am connected to

Items that are less important in prompting click through to full news stories are the link being recommended to them and media content accompanying the link (both of which have significantly declined in 2022).

MCCS

Importance of accessing news via social media

The majority of respondents who consumed news via social media indicated that it was either somewhat (43%) or very important (39%) to have access to news content on social media.



Source: D14. How important is it to you to have access to news on social media?

Base: MCCS, Respondents who access news content via social media. 2022: n=1318. 2021: n=1350.

Notes: Don't know/refused responses not shown: 2022 Dk = 0.0%, Ref = 0.0%. 2021 DK = 0.0%, Ref = 0.0%. Labels for responses <5% not shown on chart.

Subgroups

↑ **Very important** was higher for:

- Those who look for information over the internet daily or more (41% vs 24% of those who look for information less than daily)
- Those who comment or post images to social media sites daily or more (46% vs 36% of those who comment or post less than daily)
- Those who read comments on posts and images on social media sites daily or more (43% vs 29% of those who read comments less than daily)

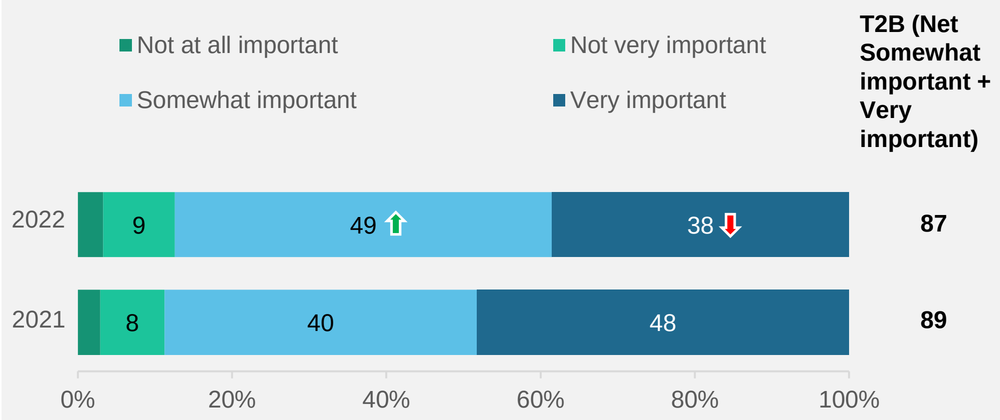
Callouts

- In 2022, 'not at all important' has significantly decreased (from 3% in 2021 to 2% in 2022). *(Labels not shown on chart due to being less than 5%).*

In general, accessing news via social media is important to most Australians who use social media to access news.

MCCS Importance of accessing news via online search engines

Similarly, a majority of respondents who accessed news content via online search engines said that it was somewhat (49%) or very important (38%) to be able to access news in this way.



Source: D15. How important is it for you to be able to discover news stories via search engines?

Base: MCCS, Respondents who access news content via online search engines. 2022: n=897. 2021: n=958.
Notes: Don't know/refused responses not shown: 2022 DK = 0.0%, Ref = 0.1%. 2021 DK = 0.0%, Ref = 0.1%.
Labels for responses <5% not shown on chart.

Subgroups

↑ **Net Somewhat important and very important** was higher for**:**

- Ages 18-34 (91%), and ages 35-54 (90% vs 78% of ages 55+)

↑ **Net Not very important and not at all important** was higher for**:**

- Ages 55+ (22% vs 10% of ages 35-54 and 9% of ages 18-34)

Callouts

- In 2022, 'very important' has decreased, while somewhat important has increased significantly since 2021.

Accessing news via search engines remains at least somewhat important to those who use search engines to access news, however fewer respondents felt this was very important in 2022 than in 2021

MCCS

Sources of local, national, and international news (%)

Commercial free-to-air TV was the most common source of local, state, or territory (28%), Australian national (30%), and international news (23%).

	Local, state, or territory news	Australian national news	International news
Commercial free-to-air TV	28	30	23
News website or app	19	20	22
Publicly owned free-to-air TV	12	14	14
Radio	11	10	7
Social media	14	11	15
Online search engine	5	4	5
State print newspaper	3	3	2
Pay TV	2	3	3
News aggregator website or app	2	2	3
National print newspaper	0.9	1	1
Local print newspaper	0.9	0.5	0.3
Podcast	1	1	1
Other website or app	0.6	1	2
Other	0.8	1	2

Source: D3. In general, what is your main source for accessing news about each of the following? Base: MCCS, Respondents who recall source/s of news they use. 2022: n= from 3451 to 3666. Notes: Don't know/refused responses not shown, % vary per statement.

Subgroups

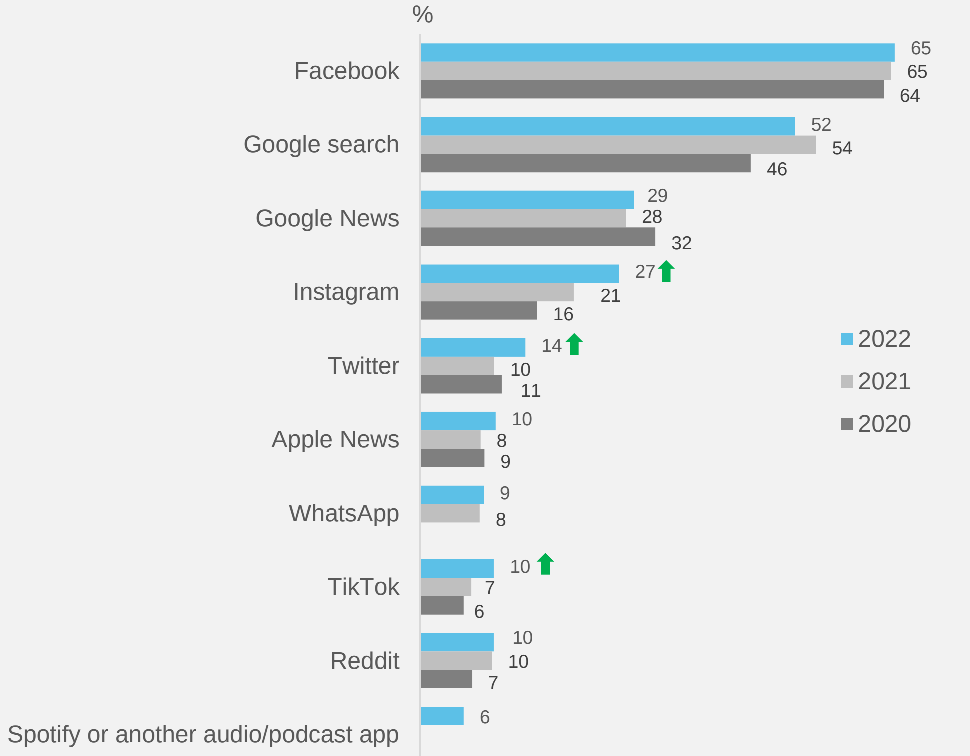
↑ **Commercial free-to-air TV** was higher for:

- Local, state, or territory news:
  - Ages 35-54 (31%), and ages 55+ (38% vs 15% of ages 18-34)
  - Ages 55+ (38% vs 31% of ages 35-54)
  - Those living outside a capital city (33% vs 27% of those living in a capital city)
  - Watched sport in P7D (32% vs 23% of did not watch sport)
  - SEIFA Quintile 1 (35%), Quintile 2 (32%) and Quintile 3 (30% vs 22% of Quintile 5)
  - HH income $1 to $51,999 (33%) and HH income $52,000 to $103,999 (29% vs 21% of HH income $156,000 or more)

Free-to-air TV and news websites / apps are the most common way to access all news types.

Online sources of news

The most popular online search engine or social media platform was Facebook, with almost two-thirds (65%) of those who use online search engines or social media to access news reporting they had used this platform to access news content in the week prior to completing the survey. The next most common was Google search (52%), followed by Google News (29%). Instagram (27%), Twitter (14%), and TikTok (10%) saw significant increases in 2022.



Source: D4. Which online search engines or social media websites or apps have you used to access news and current affairs in the past 7 days?

Base: MCCS, Respondents who access news via online search engines or social media. 2022: n=1777. 2021: n=1820. 2020: n=1971.

Notes: Don't know/refused responses not shown: 2022 DK = 0.1%, Ref = 0.2%. 2021 DK = 0.4%, Ref = 0.3%. 2020 DK = 0.6%, Ref = 0.1%. Under 5% for 2022 not shown on chart for ease of reading.

Subgroups

↑ **Facebook** was higher for**:**
- Women (71% vs 58% of men)

↑ **Google News** was higher for:
- Men (35% vs 25% of women)

↑ **Instagram** was higher for:
- Women (32% vs 20% of men)
- Ages 18-34 (42% vs 22% of ages 35-54 and 9% of ages 55+)
- Ages 35-54 (22% vs 9% of ages 55+)
- Those in a capital city (30% vs 19% of those outside a capital city)

Callouts

- In 2022, Instagram, TikTok and Twitter have increased as online sources of news since 2021.

Facebook and Google continue to be the major social media sources for accessing news and current affairs, however, news access through other, smaller social platforms increased.

MCCS

Paid news subscriptions

Less than one-fifth of respondents indicated that they pay for a news and current affairs subscription (13%). Of those who do, the majority only pay for one subscription (66%), although one-fifth (19%) pay for two.

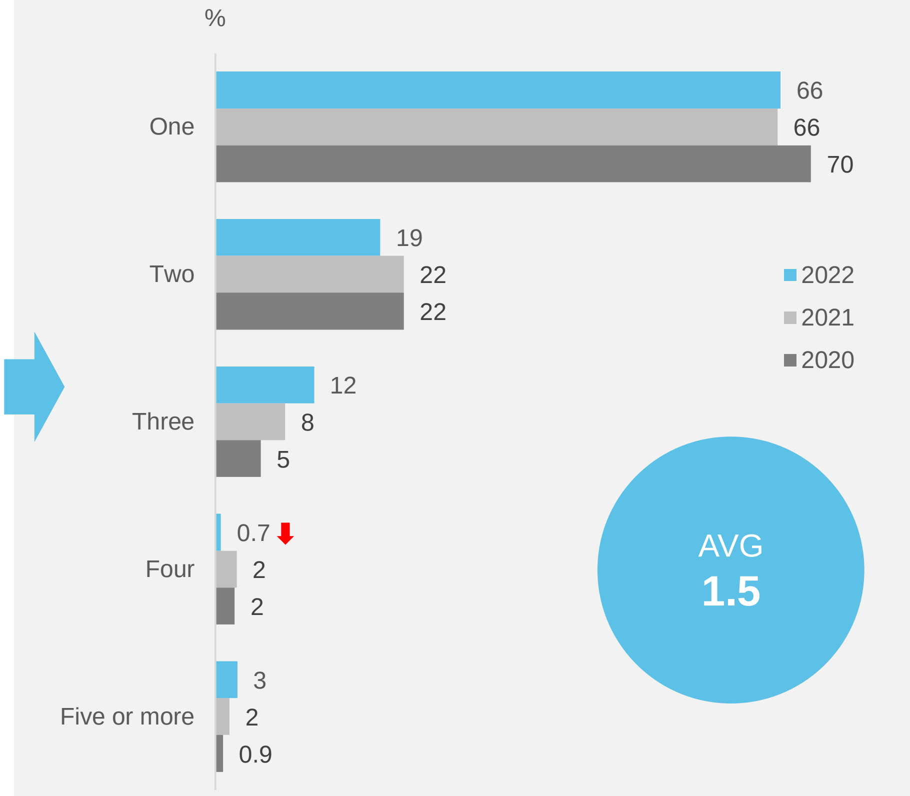
"Yes, I personally pay for a paid news and current affairs subscription"

13%

Source: D5. Do you currently personally pay for a paid news and current affairs subscription? This includes print or digital subscriptions to news and magazine publications.

Base: MCCS, All respondents. 2022: n=4002.

Notes: No/Don't know/refused responses not shown: No = 86%, DK = 0.1%, Ref = 0.0%



Source: D6. How many news subscriptions are you currently personally paying for?

Base: MCCS, Respondents who pay for a paid news and current affairs subscription. 2022: n=721. 2021: n=746. 2020: n=750.

Notes: Don't know/refused responses not shown: 2022 Dk = 0.0%, Ref = 0.0%. 2021 DK = 0.1% Ref = 0.0%. 2020 DK = 0.0%, Ref = 0.0%.

Subgroups

↑ **Yes - paying for at least one news and current affairs subscription (at D5)** was higher for:

- Ages 35-54 (12%), and ages 55+ (21% vs 8% of ages 18-34)
- Ages 55+ (21% vs 12% of ages 35-54)
- Watched sport in P7D (17% vs 9% of those who did not watch sport P7D)

Callouts

- In 2022, adults were less likely to have 4 paid news subscriptions

Whilst paid news subscriptions are generally low in Australia, there are cohorts of the population willing to subscribe to this type of content.

Importance of local news content

Just under three-quarters of respondents (70%) said they had sufficient choice of news sources to inform them about their local community. The types of content that were considered most important in local news were local health issues (33% rated as 'very important') and local crime / legal issues / court decisions (28% rated as 'very important').

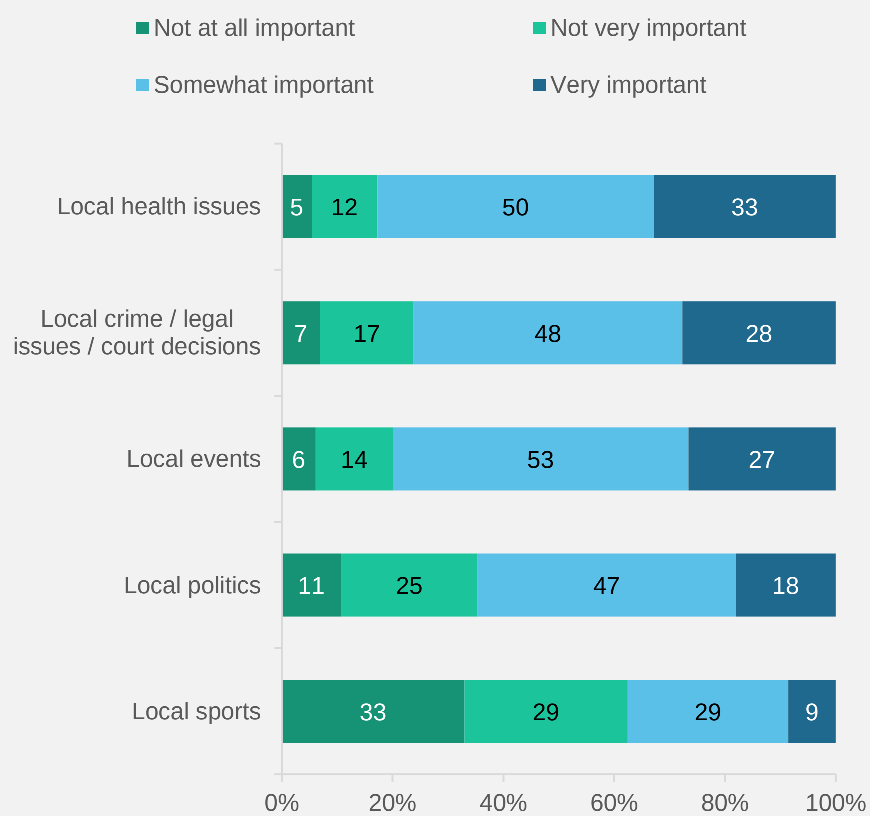
"Yes, I have sufficient choice of news sources to inform [me] about local community"

70%

Source: D10. Do you feel you have sufficient choice of news sources to inform you about your local community?

Base: MCCS, All respondents. 2022: n=4002.

Notes: No/Don't know/refused responses not shown: No = 29.91%, DK = 0.3%, Ref = 0.0%



Source: D16. Thinking now about watching local news and coverage of various topics, to what extent are each of the following topics important or not important to you...

Base: MCCS, All respondents. 2022: n=4002.

Notes: Don't know/refused responses not shown, % vary per statement.

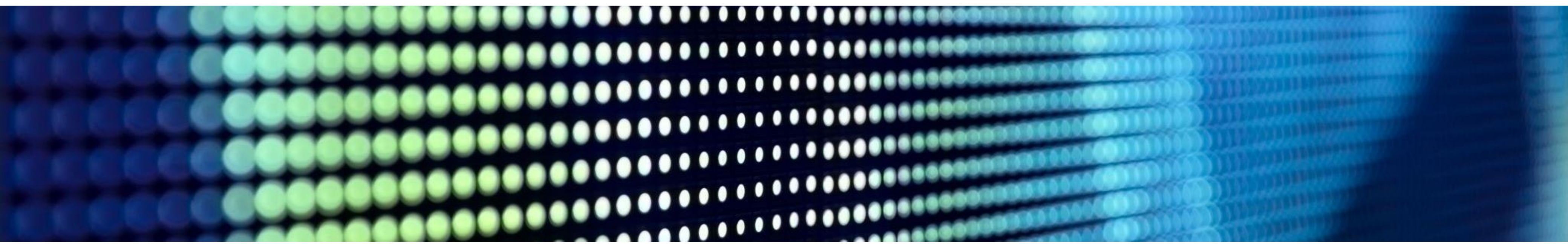
Subgroups

↑ **Net Somewhat important and Very important** was higher for:

- Local health issues:
  - Women (88% vs 77% of men)
- Local crime / legal issues / court decisions:
  - Women (81% vs 71% of men)
  - Those with a TV less than 2 years old (79%, vs 74% of those with a TV 2 or more years old)
  - Those who watched sport P7D (80% vs 72% of those who didn't watch sport P7D)

Local health issues are perceived as important local news content, especially for women.

Advertising



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Chapter Summary – Advertising

Advertising:

Free video streaming and commercial free-to-air TV are the services where advertising is most seen

Almost half of respondents (43%) had seen advertisements on free video streaming services in the past 7 days, while 43% had seen advertisements on commercial free-to-air TV (excluding on-demand TV).

Australians are most frequently exposed to advertising on free video streaming and free-to-air services.

Gambling and betting advertisements are seen as inappropriate

Approximately one-fifth of respondents who saw advertising on free video streaming services disagreed to some extent that the advertisements were appropriate (net ‘disagree’ and ‘strongly disagree’, 18%). Sports specific websites or apps had a similar level of disagreement with the appropriateness of advertising (net ‘disagree’ and ‘strongly disagree’, 18%).

Nine in ten (90%) reported that they disagreed that advertisements on sports specific websites or apps were appropriate because of gambling or betting. This was also the most common reason for disagreeing that advertisements on commercial free-to-air TV were appropriate (82%), followed by frequency and/or repetition (62%).

Gambling / betting advertising is perceived to be inappropriate, especially on sports specific websites or apps and free-to-air TV. Frequency / repetition of advertising is also a reason for advertising inappropriateness.

Most respondents see a need to restrict advertisements on at least some screen content platforms

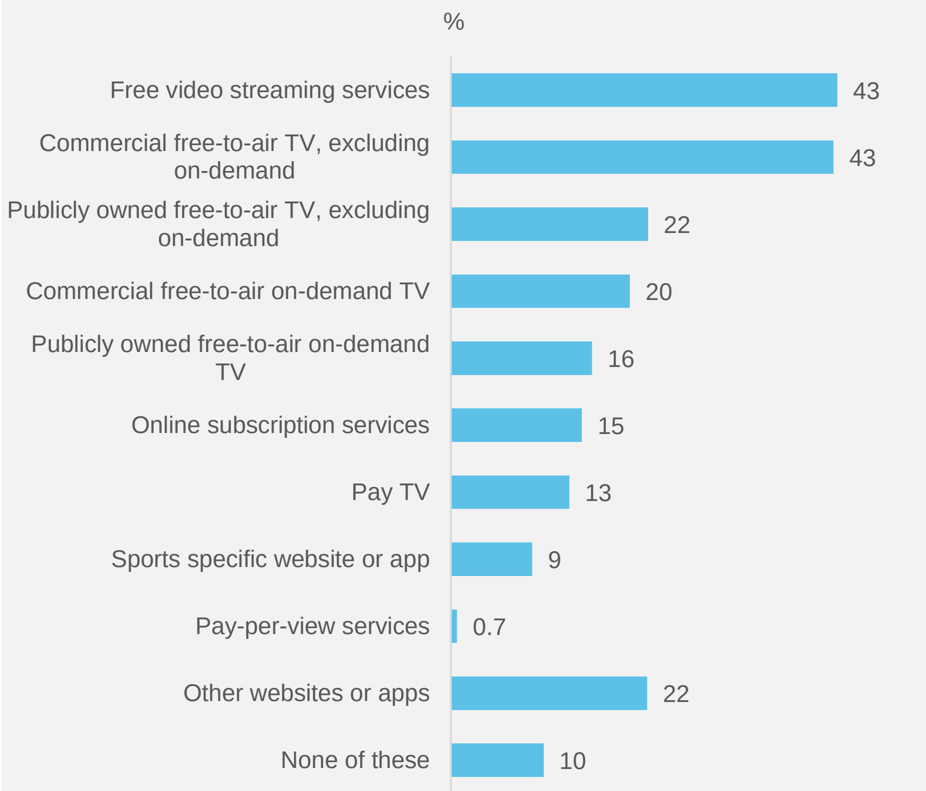
Four fifths of respondents support advertising restrictions for at least one type of content service (80%). Respondents most wanted restrictions for permitted advertising to be applied to online subscription services (43%), and free video streaming services (42%), though free-to-air TV platforms yielded similar results.

Over one-third of respondents who support restrictions on permitted advertisements (38%) said that protecting children from exposure to harmful or inappropriate content was the most important reason. While 33% said that limiting content that may encourage bad habits, such as gambling, tobacco, or alcohol use was the most important reason.

Online subscription services and free video services are the primary platforms respondents identified they would like to see permitted advertising restricted.

Platforms that respondents saw advertisements on in the past 7 days

More than four in ten respondents (43%) had seen advertisements on free video streaming services, while 43% had seen advertisements on commercial free-to-air TV (excluding on-demand TV) in the past 7 days, and 22% on publicly owned free-to-air TV (excluding on-demand TV). One-in-ten respondents (10%) reported not seeing advertisements on any platform.



Source: NEW22. In the past 7 days, on which of the following did you see advertisements?
Base: MCCS, Respondents who watched screen content in past 7 days. 2022: n=3935.
Notes: Don't know/refused responses not shown: DK = 0.2%, Ref = 0.0%

Subgroups

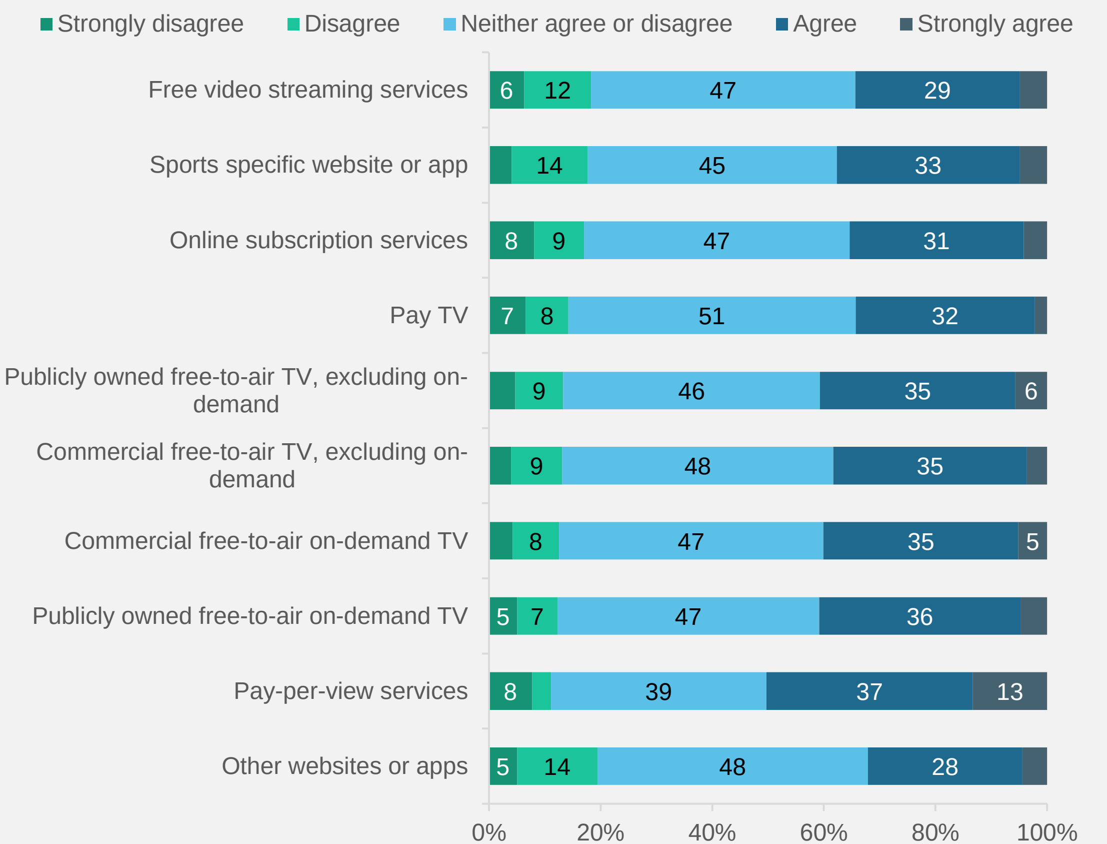
↑ **Free video streaming services** was higher for:
- Men (45% vs 41% of women)
- Ages 18-34 (61%), and ages 35-54 (40% vs 26% of ages 55+)
- Ages 18-34 (61% vs 40% of ages 35-54)
- Those living in a capital city (46% vs 34% of those living outside a capital city)
- Did not watch sport P7D (52% vs 37% watched sport P7D)
- Those in Quintile 3 (49%) and Quintile 5 (46% vs 36% Quintile 2)

↑ **Commercial free-to-air TV** was higher for:
- Men (45% vs 41% of women)
- Ages 35-54 (43%), and ages 55+ (63% vs 24% of ages 18-34)
- Ages 55+ (63% vs 43% of ages 35-54)
- Those living outside a capital city (49% vs 41% of those living in a capital city)
- Those living alone or without children (49%), parents with dependent children (38%), parents with non-dependent children (44%), and other households (42% vs 19% living in a share house)
- Those living alone or without children (49% vs 38% of parents with dependent children)
- Those who watched sport P7D (57% vs 32% of those who did not watch sport)
- Those who pay for 0 subscription services (52% vs 28% of pay for 6+)

Australians are most frequently exposed to advertising on free video streaming and free-to-air services.

Appropriateness of advertisements

While most respondents had a neutral opinion or agreed that the advertisements they saw were appropriate, approximately one-fifth disagreed that the advertisements seen on free video streaming services were appropriate (net 'disagree' and 'strongly disagree', 18%), or on sports specific websites or apps (net 'disagree' and 'strongly disagree', 18%).



Source: NEW23. Thinking generally about the advertisements you saw on each of the following platforms over the past 7 days, to what extent do you agree or disagree that they were appropriate?

Base: MCCS, Respondents who saw advertisements in past 7 days. 2022: n=from 38 to 1934.

Notes: Don't know/refused responses not shown, % vary per statement. Labels for responses less than 5% are not shown on chart.

Subgroups

↑ **Net Disagree and strongly disagree** was higher for:

- Free video streaming services:
  - Men (21% vs 15% of women)

Despite most respondents feeling neutral or agreeing that advertisements were appropriate, around one fifth disagreed with this sentiment.

MCCS

Reasons for disagreeing that advertisements were appropriate (%)

Reasons for disagreeing that advertisements were appropriate varied by platform. Nine in ten respondents (90%) indicated that they disagreed that advertisements on sports specific websites or apps were appropriate because of gambling or betting. This was also the most common reason for disagreeing that advertisements on commercial free-to-air TV were appropriate (82%), followed by frequency and/or repetition (62%).

	Gambling or betting	Frequency and / or repetition	Encouraging unhealthy eating habits	Pressure to buy goods or services	Inappropriate for children	Alcohol	Sex / sexuality and / or nudity	Depiction of harmful behaviour	Depiction of violence	Other
Commercial free-to-air TV	82	62	41	34	33	25	18	11	8	7
Publicly owned free-to-air TV	61	58	32	48	34	27	23	14	13	20
Pay TV	66	64	26	28	19	19	12	11	10	16
Commercial free-to-air on-demand TV	54	64	23	26	31	19	14	10	12	13
Publicly owned free-to-air on-demand TV	43	51	31	40	26	15	11	8	11	15
Free video streaming services	49	73	24	52	33	11	11	8	8	9
Online subscription services	45	42	20	45	24	13	11	11	15	18
Sports specific website or app	90	39	19	14	13	22	2	8	4	1
Other websites or apps	42	77	27	61	30	14	22	12	8	10

Source: NEW23a. Why did you disagree that the advertisements were appropriate on <insert statement from NEW23>?

Base: MCCS, Respondents who disagree that the advertisements they saw in past 7 days were appropriate. 2022: n= from 4 to 293.

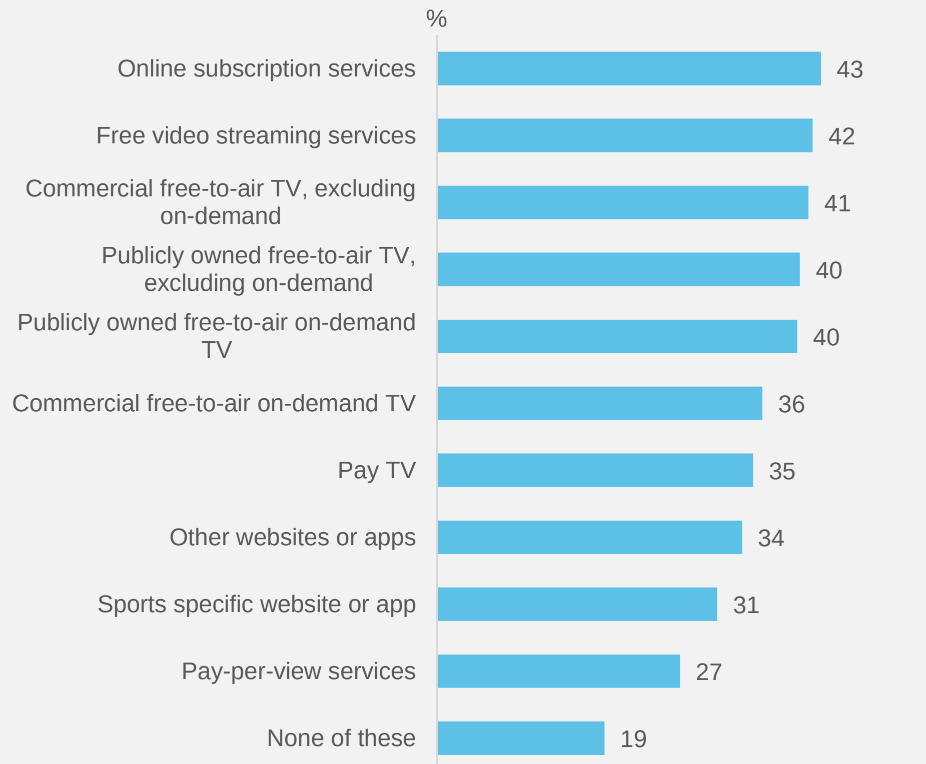
Notes: Don't know/refused responses not shown, % vary per statement. Results for 'pay-per-view service' not reported due to small base size (n=4).

The top three reasons for each platform are highlighted in green.

Gambling or betting advertising is perceived to be inappropriate, especially on sports specific websites or apps and free-to-air TV.
The frequency and repetition of advertising are the main reasons for perceived inappropriateness.

Platforms respondents want restrictions on permitted advertising to be applied to

The platforms that respondents most commonly want restrictions on permitted advertising to be applied to were online subscription services (43%), free video streaming services (42%), commercial free-to-air TV (excluding on-demand TV, 41%), publicly owned free-to-air TV (excluding on-demand TV, 40%), and publicly owned free-to-air on-demand TV (40%).



Source: NEW24. On which, if any, of the following platforms would you want restrictions on permitted advertising to be applied?

Base: MCCS, All respondents. 2022: n=4002

Notes: Don't know/refused responses not shown: DK = 1%, Ref = 0.1%

Subgroups

↑ **Online subscription services was higher for:**

- Women (47% vs 38% men)
- Ages 18-34 (50%) and ages 35-54 (43% vs 34% ages 55+)
- Ages 18-34 (50% vs 43%)
- Did not watch sport P7D (48% vs 39% did watch sport)
- SEIFA Quintile 5 (48% vs 40% Quintile 2, 41% Quintile 3 and 40% Quintile 4)
- Those who pay for 3-5 services (54% vs 38% of those who pay for 0 services and 43% of those who pay for 1-2 services)

Net want restrictions applied
80%

Online subscription services and free video services are the primary platforms respondents identified they would like to see permitted advertising restricted.

MCCS

Most important reason for restricting permitted advertisements (%)

Over one-third of respondents (38%) said that protecting children from exposure to harmful or inappropriate content was the most important reason for restricting permitted advertisements. While 33% of respondents reported that limiting content that may encourage bad habits, such as gambling, tobacco, or alcohol use was the most important reason.

	Total
Protecting children from exposure to harmful or inappropriate content	38
Limiting content that may encourage bad habits, such as gambling, tobacco, or alcohol use	33
Limiting the influence of advertising on consumer behaviour	20
Other	4
None of these	3

Source: NEW24b. Which of the following do you consider to be the most important reason for restricting permitted advertisements?

Base: MCCS, Respondents who want restrictions to apply to permitted advertisements. 2022: n=3272.

Notes: Don't know/refused responses not shown: DK = 0.1%, Ref = 0.8%

Subgroups

↑ **Protecting children from exposure to harmful or inappropriate content** was higher for:

- Women (42% vs 34% of men)
- Ages 18-34 (37%), and ages 35-54 (46% vs 30% of ages 55+)
- Ages 35-54 (46% vs 37% of ages 18-34)
- Parents with dependent children (52% vs 30% of those living alone, 30% of parents with non-dependent children, 33% of people in a share house, and 32% of those in another household)

↑ **Limiting content that may encourage bad habits, such as gambling, tobacco, or alcohol use** was higher for:

- Men (37% vs 30% of women)
- Ages 55+ (42% vs 28% of ages 35-54 and 31% of ages 18-34)
- Those living alone (40%), and parents with non-dependent children (40% vs 24% of parents with dependent children)
- Watched sport P7D (39% vs 32% did not watch sport)

Protecting children from being exposed to harmful or inappropriate content was the primary reason for wanting restrictions on permitted advertising.

Children's Content

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Chapter Summary – Children's Content

Children's content:

Increasing online and streaming content consumption by children

Children's content has a heavy focus on online and streaming content types. In the past 7 days, over half of parents indicated that their child had watched screen content on free video streaming services (53%) or online subscription services (53%). In 2022, 'other websites or apps (e.g. Facebook, TikTok, Instagram)' have significantly increased as platforms children used to watch screen content (19% in 2022), increasing from 13% in 2021.

Children are using non-traditional platforms to consume content, such as free video streaming services and online subscription services, more so than commercial or publicly owned TV.

User generated content and animation are the most common types of content consumed by children

The most common types of content that parents report their child watches are Australian children's animation (34%), user-generated videos (33%) and international children's animation (33%).

There is relatively high consumption of user-generated video content by children.

Australian content is desired for children

A majority of parents (56%) said that the most important type of content to be available to children is Australian children's educational programs, as well as Australian children's animation (44%).

Parents place high importance on the availability of Australian children's programming

Children have high advertising exposure

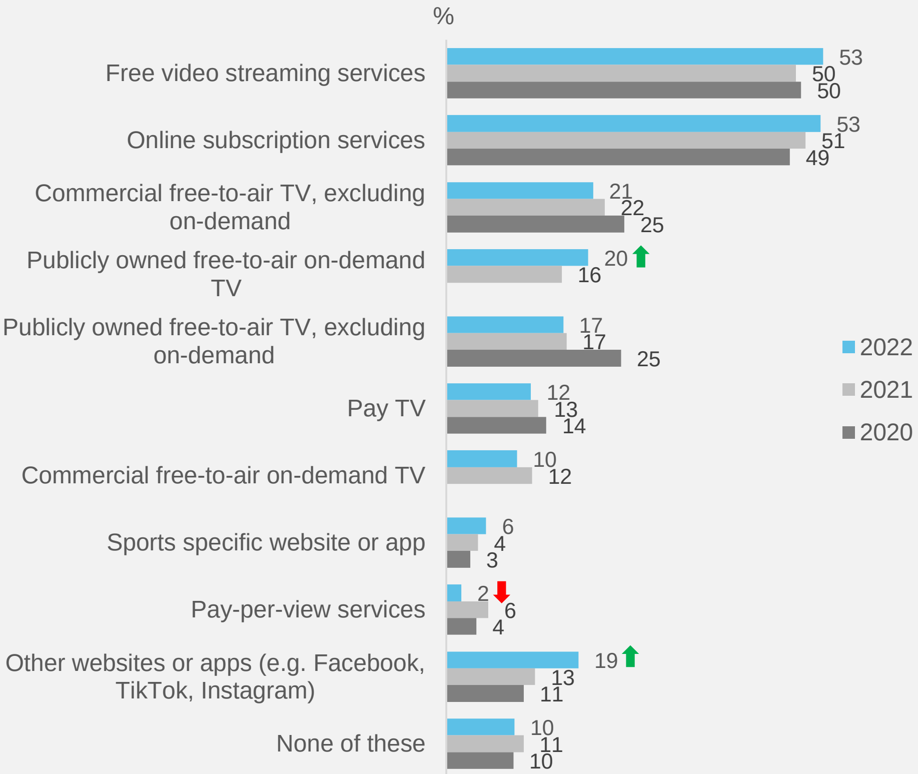
Almost half of parents (47%) said their child saw advertisements on free video streaming services in the 7 days prior to completing the survey. The most cited reasons for parents <u>disagreeing</u> that advertisements their child saw were appropriate were: pressure to buy goods or services (56%); and frequency and / or repetition (53%).

Advertising is being seen by children across many platforms, especially free video streaming services.

MCCS

Platforms children used to watch screen content

Over half of parents indicated that their child had watched screen content on free video streaming services (53%) or online subscription services (53%) in the past 7 days. A smaller proportion said their child had watched commercial free-to-air TV (excluding on-demand TV, 21%) or publicly owned free-to-air on-demand TV (20%).



Source: F1. In the past 7 days, which of the following did your child watch at home or elsewhere on any device?

Base: MCCS, All respondents who are parents of a child aged 15 years or under. 2022: n=1618. 2021: n=1603. 2020: n=1531.

Notes: Don't know/refused responses not shown: 2022 DK = 0.2%, Ref = 0.0%. 2021 DK = 0.1%, Ref = 0.0%. 2020 DK = 0.0%, Ref = 0.0%.

Subgroups

↑ **Free video streaming services** was higher for:

- Ages 35-54 (57%), and ages 55+ (60% vs 45% of ages 18-34)
- Child is 6-12 years old (56%), and 13-15 years old (61% vs 49% of child is 0-5 years old)
- Child is 13-15 years old (61% vs 56% of child is 6-12 years old)

↑ **Online subscription services** was higher for:

- Women (56% vs 50% of men)
- Those living outside a capital city (61% vs 51% of those living in a capital city)
- Child is 6-12 years old (57%), and 13-15 years old (63% vs 47% of child is 0-5 years old)

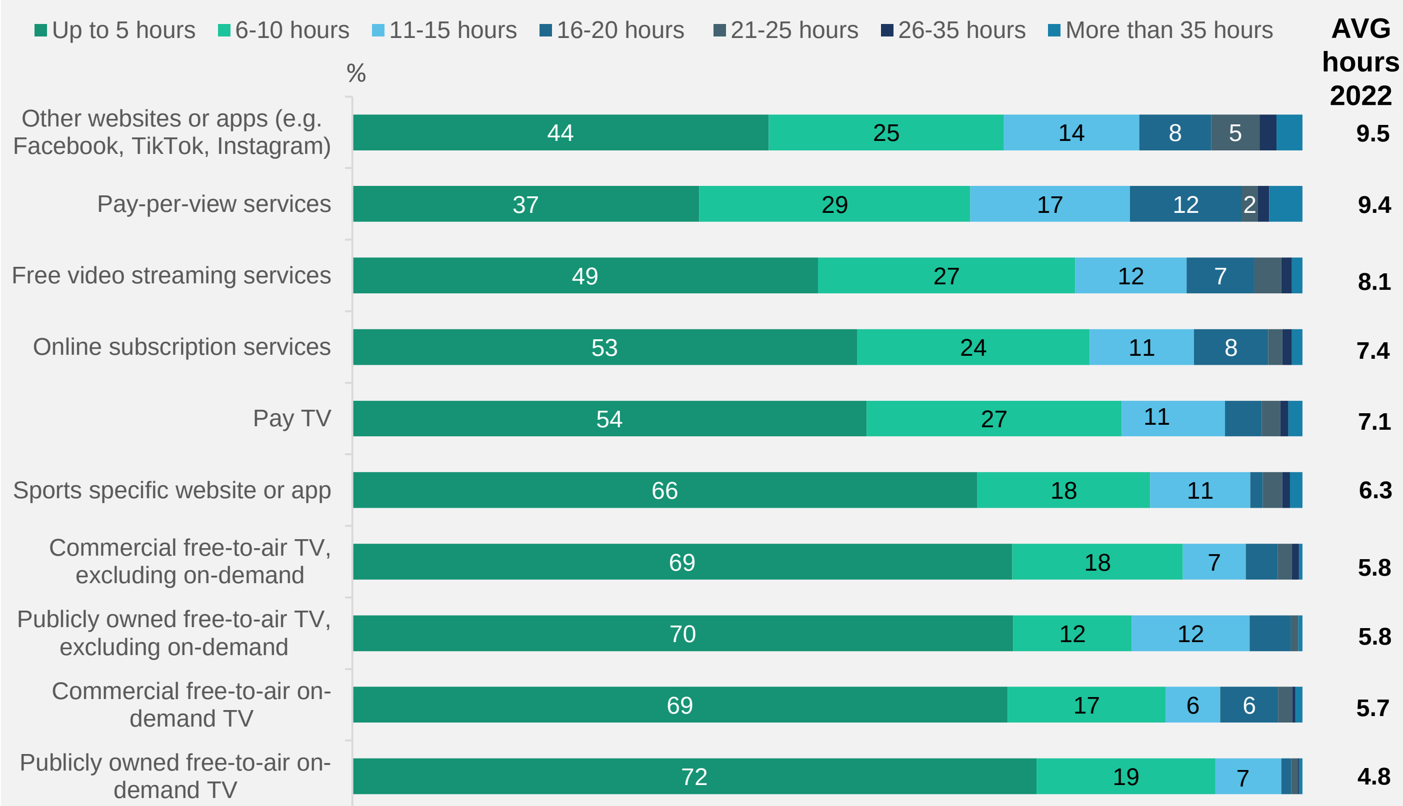
Callouts

- In 2022, publicly owned free-to-air on-demand TV and 'other websites or apps (e.g. Facebook, TikTok, Instagram)' have significantly increased, while pay-per-view has decreased.

Children are using non-traditional platforms to consume content, such as free video streaming services and online subscription services, more so than commercial or publicly owned TV.

Hours spent watching screen content on various platforms

Just under three-quarters of parents reported that their child spends up to 5 hours per week watching publicly owned free-to-air on-demand TV (72%). Results for publicly owned free-to-air TV (70%), commercial free to air TV (69%), and commercial free-to-air on-demand TV (69%) were marginally lower.



Source: F2. On average, how many hours per week does your child spend watching each of the following?

Base: MCCS, Respondents whose child watched screen content in the past 7 days. 2022: n= from 48 to 885.

Notes: Don't know/refused responses not shown, % vary per statement. Labels for responses less than 5% are not shown on chart

Subgroups

↑ **'Other websites or apps'** was higher for:

- Up to 5 hours:
  - Child is 0-5 years old (58%) and child is 6-12 years old (52 vs 35% of child is 13-15 years old)
- 16 to 20 hours:
  - Men (11% vs 4% of women)
  - Child did not watch live free-to-air TV (commercial or publicly owned) in P7D (9% vs 3% of child watched live free-to-air TV)
- 26 to 35 hours: Men (3% vs 0.6% of women)

Children have higher rates of average consumption than adults for online platforms in particular – 'other websites or apps (e.g., Facebook, TikTok, Instagram)', free video streaming services (e.g., YouTube, Twitch, Tubi), and pay-per-view services (e.g., Google Play).

Types of content child watches (%)

The most common types of content that parents reported their child watching are Australian children's animation (34%), user-generated videos (33%) and international children's animation (33%). One-fifth of parents (21%) said their child watches Australian children's educational programs.

Content	Total
Australian children's animation	34
User-generated videos	33
International children's animation	33
Australian children's educational programs	21
Sport	14
International children's educational programs	13
Live action fantasy/Science fiction	13
Reality	12
Australian children's live action drama	12
International children's live action drama	12
Live action comedy	7
Talk shows/Game shows	6
News and current affairs	6
Other drama	9
Other animation	19
Other	7

Source: NEWF4. Which types of content does your child watch most?
Base: MCCS, Respondents whose child watched screen content in past 7 days. 2022: n=1490.
Notes: Don't know/refused responses not shown: DK = 0.3%, Ref = 0.1%.

Subgroups

↑ **Australian children's animation** was higher for:
- Women (37% vs 30% of men)
- Ages 18-34 (44% vs 31% of ages 35-54, and 17% of ages 55+)
- Ages 35-54 (31% vs 17% of ages 55+)
- Child is 0-5 years old (53% vs 34% of child is 6-12 years old, and 13% of child is 13-15 years old)
- Child is 6-12 years old (34% vs 13% of child is 13-15 years old)
- Child watched commercial TV (live or on-demand) in P7D (41% vs 31% of child did not watch commercial TV)
- Child watched publicly owned TV (live or on-demand) in P7D (61% vs 20% of child did not watch publicly owned TV)
- Child watched live free-to-air TV (commercial or publicly owned) in P7D (47% vs 27% of child did not watch live free-to-air TV)
- Child watched on-demand TV (commercial or publicly owned) in P7D (59% vs 23% of child did not watch on-demand TV)

↑ **User-generated videos** was higher for:
- Parents aged 35-54 (38%), and ages 55+ (42% vs 18% of ages 18-34)
- Child is 6-12 years old (34%), and 13-15 years old (47% vs 23% of child is 0-5 years old)
- Child is 13-15 years old (47% vs 34% of child is 6-12 years old)
- Child did not watch commercial TV (live or on-demand) in P7D (35% vs 29% of child watched commercial TV)
- Child did not watch publicly owned TV (live or on-demand) in P7D (36% vs 28% of child watched publicly owned TV)
- Child did not watch on-demand TV (commercial or publicly owned) in P7D (37% vs 24% of child watched on-demand TV)

There is relatively high consumption of user-generated video content by children, and a similar level of consumption of children's animation.

Types of content most important to be available to children (%)

A majority of parents (56%) said that the most important type of content to be available to children is Australian children's educational programs, as well as Australian children's animation (44%). International children's educational programs (40%) and Australian children's live action drama (28%) were other types of content commonly listed as being most important to be available to children.

Content	Total
Australian children's educational programs	56
Australian children's animation	44
International children's educational programs	40
International children's animation	28
Australian children's live action drama	26
Sport	17
News and current affairs	15
International children's live action drama	13
Live action fantasy/Science fiction	12
User-generated videos	9
Live action comedy	7
Talk shows/Game shows	6
Reality	6
Other drama	4
Other animation	8
Other	4

Source: NEWF5. Which types of content are most important to be made available to children?
Base: MCCS, Respondents who are parents of a child aged 15 or under. 2022: n=1618.
Notes: Don't know/refused responses not shown: DK = 0.7%, Ref = 0.4%

Subgroups

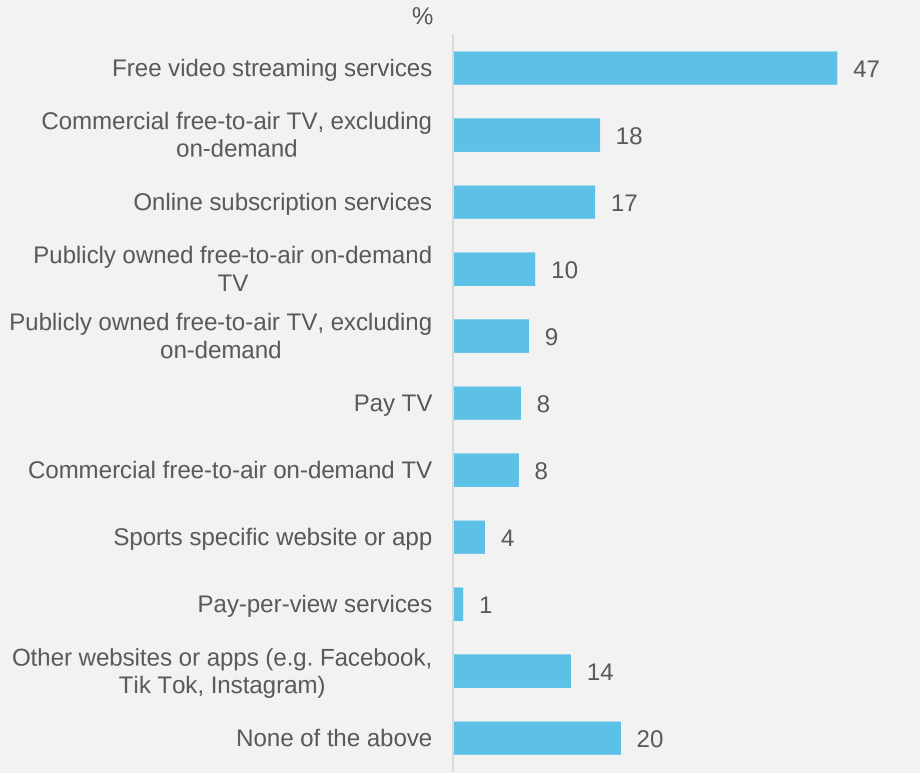
↑ **Australian children's educational programs** was higher for:
- Child watched publicly owned TV (live or on-demand) in P7D (63% vs 53% of child did not watch publicly owned TV)
- Child watched live free-to-air TV (commercial or publicly owned) in P7D (62% vs 54% of child did not watch live free-to-air TV)
- Child watched on-demand TV (commercial or publicly owned) in P7D (62% vs 54% of child did not watch on-demand TV)

↑ **Australian children's animation** was higher for:
- Ages 18-34 (50%) and ages 35-54 (42% vs 31% of ages 55+)
- Ages 18-34 (50% vs 42% of ages 35-54)
- Children aged 0-5 years old (54%) and 6-12 years old (45% vs 30% of 13-15 year olds)
- Child aged 0-5 years old (54% vs 45% of child aged 6-12 years old)
- Child watched public TV (live or on-demand) in P7D (57% vs 38% child did not watch public TV)
- Child watched live free-to-air TV (commercial or publicly owned) in P7D (52% vs 40% of child did not watch live free to air TV)
- Child watched on-demand TV (commercial or publicly owned) in P7D (55% vs 39% of child did not watch on-demand TV)

Parents place high importance on the availability of Australian children's programming.

MCCS Platforms child saw advertisements on in past 7 days

Almost half of parents (47%) said their child saw advertisements on free video streaming services in the 7 days prior to completing the survey. Smaller proportions of parents indicated that their child saw advertisements on commercial free-to-air TV (18%) or online subscription services (17%).



Source: NEW27. On which, if any, of the following did your child see advertisements in the past 7 days?
Base: MCCS, Respondents whose child watched screen content in past 7 days. 2022: n=1490.
Notes: Don't know/refused responses not shown: DK = 0.4%, Ref = 0.1%

Subgroups

↑ **Free video streaming services** was higher for:

- Those living in a capital city (48% vs 41% of those living outside a capital city)
- Child did not watch commercial TV (live or on-demand) in P7D (49% vs 41% of child watched commercial TV)
- Child did not watch publicly owned TV (live or on-demand) in P7D (50% vs 40% of child watched publicly owned TV)
- Child did not watch live free-to-air TV (commercial or publicly owned) in P7D (49% vs 42% of child watched live free-to-air TV)
- Child did not watch on-demand TV (commercial or publicly owned) in P7D (50% vs 38% of child watched on-demand TV)

↑ **Commercial free-to-air TV** was higher for:

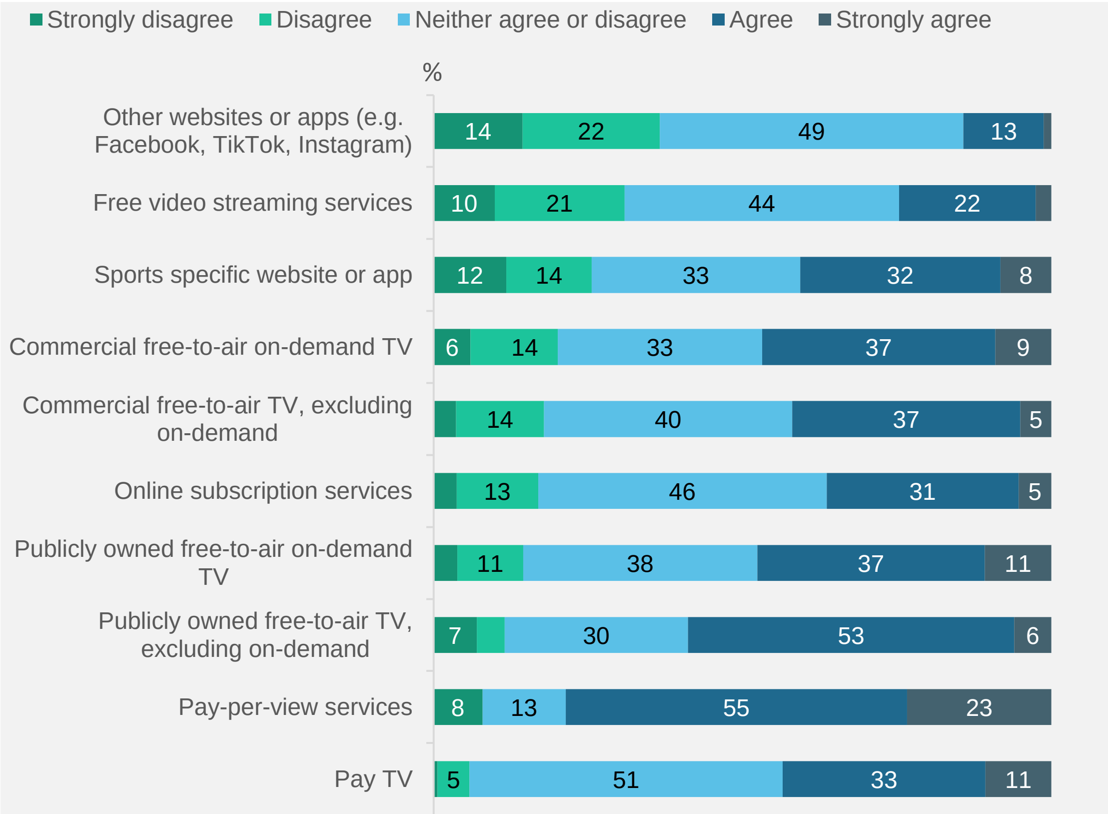
- Ages 55+ (34% vs 19% of ages 35-54)
- Ages 35-54 (19%), and ages 55+ (34% vs 12% of ages 18-34)
- Child is 6-12 years old (19%), and 13-15 years old (26% vs 12% of child is 0-5 years old)
- Child is 13-15 years old (26% vs 19% of child is 6-12 years old)
- Child watched publicly owned TV (live or on-demand) in P7D (23% vs 15% of child did not watch publicly owned TV)

Advertising is being seen by children across many platforms, but mostly free video streaming services.

MCCS

Appropriateness of advertisements child saw

Parents generally were less inclined to agree that advertisements were appropriate in the context of children viewing, when compared to themselves. Over one-third disagreed that the advertisements on 'other websites or apps' were appropriate (36%, net 'disagree' and 'strongly disagree'). Other platforms that had a higher proportion of parents disagree that the advertisements were appropriate were free video streaming services (31%, net 'disagree' and 'strongly disagree'), and sports specific websites or apps (25%, net 'disagree' and 'strongly disagree').



Source: NEW27a. Thinking generally about the advertisements your child saw on each of the following over the past 7 days, to what extent do you agree or disagree that they were appropriate?

Base: MCCS, Respondents whose child saw advertisements in past 7 days. 2022: n= from 29 to 690.

Notes: Don't know/refused responses not shown, % vary per statement. Labels for responses less than 5% are not shown on chart.

Subgroups

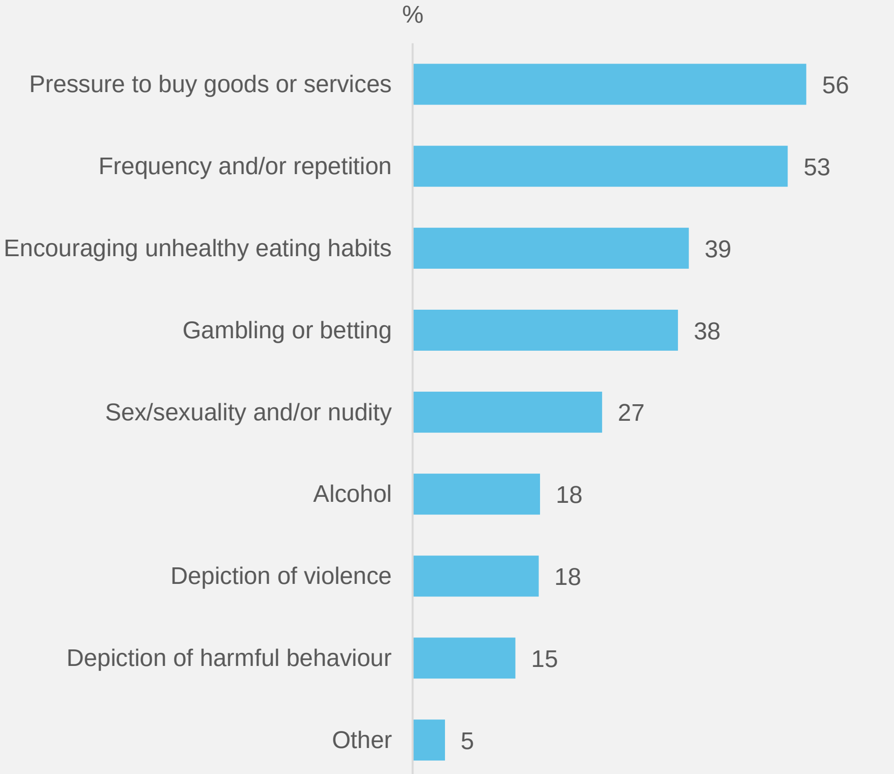
↑ **Net Disagree and Strongly disagree** was higher for:

- Publicly owned free-to-air TV, excluding on-demand TV:
  - Men (19% vs 5% of women)
  - Those living in a capital city (14% vs 3% of those living outside a capital city)
- Publicly owned free-to-air on-demand TV:
  - Parents whose child is 13-15 years old (32% vs 8% of parents whose child is 0-5 years old)

Advertising on publicly owned free-to-air TV was rated as being more appropriate than commercial free-to-air TV, and much more so than free video streaming services and 'other websites or apps'.

Reasons for disagreeing that advertisements child saw were appropriate

The most cited reasons for parents disagreeing that advertisements their child saw were appropriate were: pressure to buy goods or services (56%); and frequency and / or repetition (53%). Other reasons included encouraging unhealthy eating habits (39%), gambling or betting (38%) and containing sex, sexuality, and / or nudity (27%).



Source: NEW27b. Why did you disagree that the advertisements on <insert source from NEW27a> were appropriate?

Base: MCCS, Respondents who disagree that the advertisements their child saw in past 7 days were appropriate. 2022: n=307.

Notes: Don't know/refused responses not shown: DK = 0.5%, Ref = 0.3%

Subgroups

↑ **Frequency and / or repetition** was higher for:

- Child watched publicly owned TV (live or on-demand) in P7D (64% vs 47% of child did not watch publicly owned TV)

The primary objection from parents to advertising is the pressure to buy goods or services, followed by frequency and / or repetition of advertising.

Social Research Centre

Thank you

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Appendix

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Appendix 1: Methodology

Methodology Summary

For the 2022 TVCS and MCCS, the Social Research Centre's probability based online panel – Life in Australia™ was used as the primary data collection vehicle for the probability-based sample estimates. The Social Research Centre established Life in Australia™ – Australia's first and only national probability-based online panel – in December 2016. Cohorts included adults, parents, children, and teachers / educators.

An opt-in online panel, Online Research Unit (ORU), was used to source a non-probability sample boost of parents or guardians of children aged 0 to15 years (MCCS), and regional Australians (TVCS).

Data from the Life in Australia™ and ORU panels were then blended together using statistical techniques to minimise the bias associated with non-probability samples.

More details on the survey methodology can be found in the Technical Report delivered to the Department (named 'Attachment 2 - 2853 Television and Media Content Consumption Survey Technical Report').

Survey design

The structure and questions of the 2020 and 2021 questionnaires provided the basis for development of the MCCS and TVCS 2022 instrument. New items were developed to reflect areas of contemporary policy significance. Future of Broadcasting Working Group (Working Group) were consulted on the design of the TVCS instrument.

Survey length

The 2022 MCCS and TVCS conducted via Life in Australia™ had a combined average completion length of 37.9 minutes.

Cognitive Testing

Cognitive testing was used to inform the development of new survey questions for the TVCS questionnaire. Changes to questions and terminology previously used in the MCCS were also tested through this process. This was to ensure that the questions as phrased would be well-understood by survey participants and provide consistent, quantifiable results.

The testing was conducted through 8 cognitive interviews with adults and occurred via video-conference.

These interviews examined the extent to which respondents understood the question being asked and were are able to provide sensible and accurate answers.

Ethical considerations

The Social Research Centre is aware of its obligations and responsibilities of ethical and legal responsibilities in undertaking any form of general community survey. To this end, the Social Research Centre is aware of and adheres to the National Health and Medical Research Council's (NHMRC) National Statement on Ethical Conduct in Human Research (the National Statement) and confirms our compliance with all appropriate privacy and confidentiality legislation and guidelines covering issues such as informed consent and data handling and security.

All aspects of this research were undertaken within a strict ethical framework and ensure compliance with the National Statement, Australian Privacy Principles, and Research Society Code of Conduct. Given the Survey content for this study (as deployed in 2020 and 2021) was unlikely to cause psychological distress and did not seek to capture sensitive information, formal ethics approval was not undertaken. The NHMRC National Statement would refer to a project of this nature as 'negligible risk', that is, "research in which there is no foreseeable risk of harm or discomfort; and any foreseeable risk is no more than inconvenience" (associated with giving up time to participate in research).

Corporate Governance

All research was undertaken in compliance with the International Standard of ISO 20252 Market, opinion and social research, the Research Society code of practice standards, the Market and Social Research Privacy Principles, and the Australian Privacy Principles.

The Social Research Centre is an accredited Company Partner of The Research Society with all senior staff as full members and several senior staff QPR accredited. The Social Research Centre is also a member of the Australian Data and Insights Association (ADIA formerly known as AMSRO) and bound by the Market and Social Research Privacy Principles / Code.

Questionnaire

The survey instrument was delivered to the Department (named ‘Attachment 1 - 2853 TV Consumer and Media Content Consumption Survey 2022 - 14 Sept 2022’).