The 2022 Television Consumer Survey – Summary Report

Contents

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

Social Research Centre

www.srcentre.com.au

Report details.

Report prepared for: The Department of Infrastructure, Transport, Regional Development, Communications and the Arts

Report prepared by:

The Social Research Centre
Level 5, 350 Queen Street
MELBOURNE VIC. 3000
Tel: (613) 9236 8500
Fax: (613) 9602 5422
www.srcentre.com.au

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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 - TVCS

Overview

- n = 4016 respondents
- 12 September – 2 October 2022
- Sample: Australian general population aged 18+, and people living in regional Australia

Research methodology

- Quantitative online survey conducted via the Social Research Centre's national probability-based online panel, known as Life in Australia™
- Boost of people living in regional Australia 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 TVCS

The Future of Broadcasting: Television Consumer Survey collects intelligence on the attitudes, expectations, and behaviours of Australians in relation to accessing screen content via televisions and other devices (including on various platforms such as free-to-air, online subscription services, and on-demand television).

The survey focuses on:
Australians' behaviours in relation to TV, screen and media content consumption, specifically the:

- General screen content habits
- TV Access
- TV content and
- Free-to-air TV
- TV devices
- Sports content on TV

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 Future of Broadcasting: Television Consumer Survey (TVCS) collects intelligence on the attitudes, expectations, and behaviours of Australians in relation to accessing screen content via televisions and other devices (including on various platforms such as free-to-air, online subscription services, and on-demand television).

The survey involved an online probability-based survey with adults in Australia, and non-probability-based surveys to boost for those living in regional Australia. The TVCS was conducted concurrently with the 2022 Media Content Consumption Survey (MCCS) in a single survey instrument. The first section of this report, on general screen content habits, forms a foundation for both surveys. The results presented in the first section make comparisons to previous results from the MCCS where appropriate.

A total of 4016 surveys specific to the TVCS were completed during September and October 2022. The Television Consumer Survey is in its foundational year, with 2022 being the first year it has been undertaken.

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

TVCS
MCCS

General screen content habits

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.

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.

High frequency content consumption particularly on mobiles and smartphones

Televisions have the highest level of overall usage of devices to watch screen content (net 87%), however, mobile phones or smartphones were used more often than 5 times a day by 22% of respondents to watch screen content.

TVCS

TV Access

Broadcast signal / antennas are being used to access TV, as are on-demand apps via smart TVs

The majority of respondents who watched free-to-air TV in the past 7 days (59%) access free-to-air TV through a broadcast signal or antenna, however, a net of 53% are accessing via on-demand TV apps, with approximately one-third (32%) accessing it through on-demand TV apps on a smart TV.

While a traditional broadcast signal or antenna is still the primary means of accessing free-to-air TV, on-demand apps are also a common means of access (especially through smart TVs).

TV smart accessories are used for TV connectivity

The most commonly used TV smart accessory was Google Chromecast, which was used by 23% of respondents in the past 6 months. Having a TV that wasn't smart compatible was the main reason that respondents used a Google Chromecast (7%), followed by wanting to access particular shows or content (7%).

In general TV smart accessories do have free-to-air access or free-to-air apps, however some respondents reported not having free-to-air access via these types of accessories.

TVCS

TV Content and Services

People generally have an idea of the service and content they want to watch, prior to turning on devices

Almost half of respondents (44%) said that they always know which service, such as free-to-air TV or online subscription, they want to watch prior to turning on their device. A further 41% said they sometimes know. Prior to turning on their device, approximately one-third said that they either have a particular program or movie in mind (30%), or that they have a genre or type of program in mind (33%).

Most respondents always or sometimes know which service they want to watch when they go to watch screen content.

Most respondents have a sense of the program or the type of program they want to watch before they turn on their device. Two fifths of respondents say they typically browse.

The benefits of free-to-air TV

The features that were most commonly rated as an essential reason for watching free-to-air TV were that there are no ongoing subscription costs (32%), that it is easy to access (26%), and that it has national or international news content (26%).

The benefits of watching free-to-air TV focus on the lack of cost and ease of access. National and international news is also a reason.

Online subscription services offer convenience, lack of ads, ease of access

The feature most commonly ranked as an essential reason for watching online subscription services was that viewers can watch what they want, when they want (52%). Having no advertisements (40%) and being easy to access (23%) were other common features ranked as an essential reason for watching.

Convenience and lack of ads in online subscription services are essential reasons for watching.

On-demand benefits are similar to online subscription services

Being able to watch what they want, when they want was also the feature most commonly rated by respondents as an essential reason for watching on-demand TV services (31%).

The primary reason for watching on-demand TV is, similar to online subscription services, convenience. However, respondents ranked other features quite differently.

TVCS

Free-to-air TV

Televisions are primarily used to watch free-to-air

Most respondents used a television (including smart TV) to access free-to-air (87% net use), while mobile phones had the lowest usage overall (42% net use).

While free-to-air TV is watched mostly on a television, it is also accessed to a lesser extent by other means (e.g. tablets, games consoles, computers, mobile phones).

Free-to-air access by device

When asked whether it was easy or difficult to navigate to live free-to-air TV on a range of devices, generally respondents said that it was easy for television (net T2B 76%), followed by pay TV box (net T2B 63%).

On-demand free-to-air TV is less easy to access via TV devices (than linear TV), but more easy to access on TV smart accessories and other devices.

Respondents identified some issues with navigating to free-to-air TV

The main reasons that respondents gave for finding it difficult to navigate to free-to-air TV (either live or on-demand) were that they had problems with signing in, passwords, or creating accounts (16%).

For free-to-air TV, an issue in navigation is also due to it being 'not user friendly / difficult to access content'. Signing in with an account and password can be a pain point for free-to-air TV (e.g., signing in for free-to-air on-demand TV).

TV Devices

What kinds of TVs people have

On average, households have 2.0 TVs, 1.3 TVs have an external antenna, and 1.4 are connected to the internet.

Demographic differences show variations in the relevance of TV devices

On average, respondents have 2.0 TVs in the household, however younger age cohorts are less likely to have a TV in their household, with ‘zero TVs’ significantly higher for ages 18-34 (5% vs 2% ages 35-54, and 1% of ages 55+).

Those aged 18-34 are less likely to have a TV in their household.

Upgrades to TVs are due to people wanting to keep up with technology

Just under one-tenth of respondents (9%) said they had bought a new TV in the past 6 months. The most common reason for buying a new TV was to upgrade or keep up with new technology (39%).

The changing pace of technology drives most new purchases while replacing a broken device ranks second.

Internet connectivity is now crucial in new TVs

The primary feature that respondents ranked as most important to consider when buying a new TV was that it is internet-enabled (29%).

Internet connectivity capability is a feature sought out in new TV purchases.

TVCS

Sports Content on TV

Sport is a popular content type in Australia

The majority of respondents had watched sport in the past 6 months (67%). Just under half of respondents (46%) had watched or listened to sport in the past 7 days (net live sport, replayed sport, other sports-related programs). Live sport significantly increased since 2021 (42% in 2022, 37% in 2021).

The majority of respondents had watched sports online or on TV in the past 6 months.

Free-to-air remains the primary means of sports consumption, but is on the decline

Half of respondents (50%) had consumed sports content via commercial free-to-air TV. However, in 2022 commercial free-to-air TV, and publicly-owned free-to-air TV (15%) both declined significantly since 2021 (from 67% and 19%, respectively).

However, commercial free-to air on-demand TV (16%) and publicly owned on-demand TV have both significantly increased this year (10%).

The most important feature of sports content for respondents who have watched sports in the past 6 months was that it is freely available on broadcast TV (36%).

Free-to-air remains the main service that respondents prefer to access sports programming in Australia.

Diversity in sports content consumption

The majority of respondents who had consumed sports content indicated that they had watched or listened to men's sport (59%), while two-fifths (39%) had consumed both men's and women's sport.

Australian Rules Football was the most commonly watched men's sport (33%, steady since 2021 at 34%), followed by Rugby League (31%, decreasing from 36% in 2021), and international test cricket matches (28%, and 27% in 2021).

Audiences are increasingly interested in seeing both male and female representation in sports programs.

General Screen Content Habits

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Chapter Summary – General Screen Content Habits

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.

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

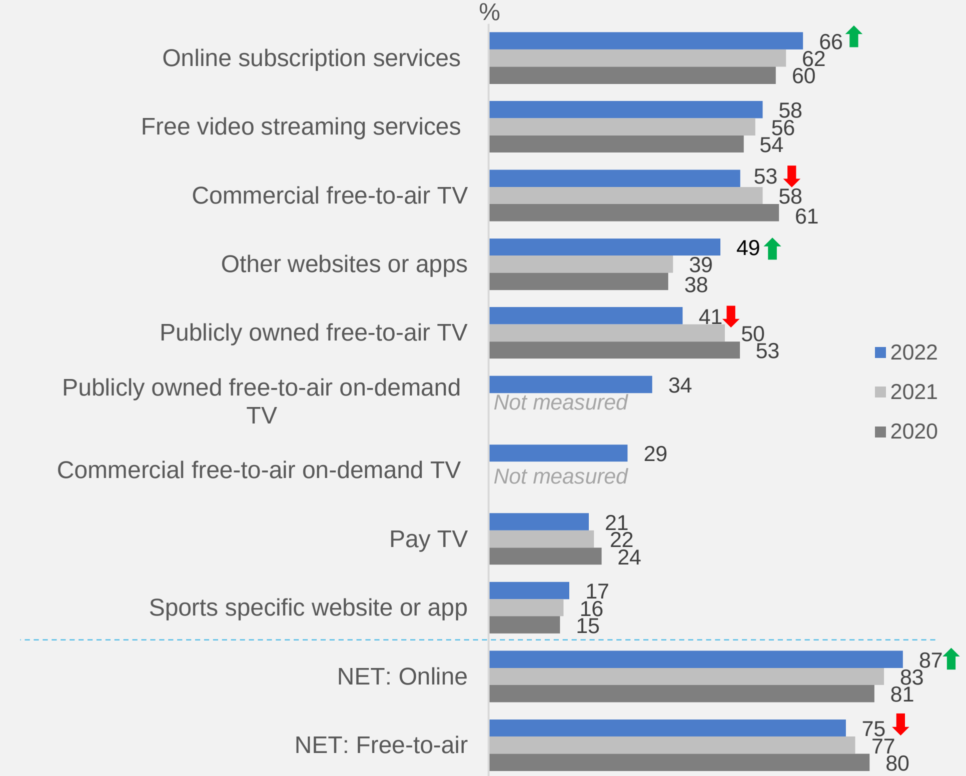
Pay TV and commercial free-to-air TV (excluding on-demand) platforms had the highest average weekly viewing time (9.51 and 9.08 hours, respectively). While an average of 8.16 hours was spent watching online subscription services.

High frequency content consumption particularly on mobile and smartphones

Televisions have the highest level of overall usage of devices to watch screen content (net 87%), however, mobile phones or smartphones were used more often than 5 times a day by 22% of respondents to watch screen content.

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

↑ **Net Free-to-air** was higher for:

- Ages 35-54 (79%), and ages 55+ (90% vs 52% of ages 18-34)
- Ages 55+ (90% vs 79% of ages 35-54)
- Those living outside a capital city (80% vs 73% of those living in a capital city)
- Those living alone or without children (79%) and parents with non-dependent children (81% vs 72% of parents with dependent children, 51% of adults living in a share house, and 64% of those living in another household type)
- Parents with dependent children (72% vs 51% of adults living in a share house)
- Those who watched sport P7D (86% vs 65% of those who did not watch sport)

Note for 'net' inclusions

"NET: Online' includes:

'Online subscription services', 'Free video streaming services', 'Other websites or apps', and 'Sports specific website or app'.

'NET: Free-to-air' includes:

'Commercial free-to-air TV', 'Publicly owned free-to-air TV', and 'Free-to-air catch-up TV'. *(In 2022 'Free to air' was split out by on-demand and live TV)*

Callouts

- In 2022, 'other websites or apps (e.g., Facebook, Tik Tok, 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.

TVCS MCCS

Frequency of watching screen content on various devices

Televisions had the highest level of overall usage of all devices canvassed to watch screen content (net 87%), however mobile phones or smartphones were used more often than 5 times a day by 22% of respondents to watch screen content. The majority of respondents said they never used a Pay TV box (75%), a games console connected to a television (83%), or a VAST satellite box (93%) to watch screen content.

	Net Use Device	More often than 5 times a day	3-5 times a day	Once or twice a day	More often than 5 times a week	3-5 times a week	Once or twice a week	Never	2021: NET use once per day +	2022: NET use once per day +
Television	87	8	10	28	15	13	12	13	53	47 ↓
Mobile phone or smartphone	74 ↓	22	12	11	7	8	15	26	49	44 ↓
Computer (desktop or laptop)	62 ↓	9	6	10	5	11	21	38	31	25 ↓
TV smart accessory / Digital media player	44 ↑	3	4	10	6	8	13	56	10	16 ↑
Tablet	38 ↓	3	4	6	4	7	14	62	17	13 ↓
Pay TV box	25	2	2	6	4	4	6	75	n/a	10
Games console connected to a television	17	0.7	1	2	1	4	9	83	6	4 ↓
VAST satellite box	6	0.4	0.7	0.8	0.8	1	2	93	n/a	2

Source: C4. On average per week, how often do you use the following devices to watch screen content?
Base: TVCS & MCCS, Respondents who watched screen content in past 7 days. 2022: n=4929. (2021: n=4065)
Notes: Don't know/refused responses not shown, % vary per statement.

Subgroup

↑ **Television (net use)** was higher for:

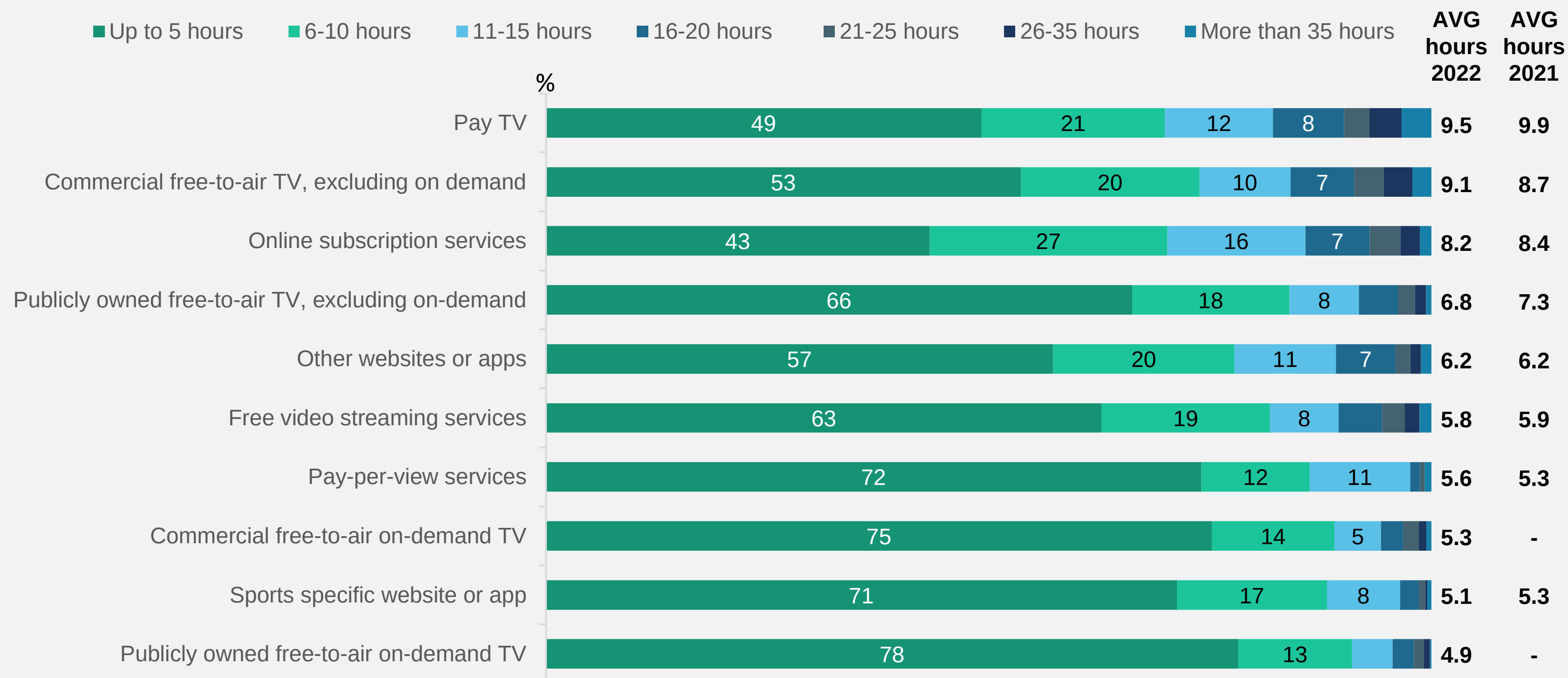
- Ages 35-54 (90%) and ages 55+ (90% vs 78% of ages 18-34)
- Those living outside a capital city (90% vs 85% of those living in a capital city)
- Those living alone or without children (86%), parents with non-dependent children (88%), and parents with dependent children (89% vs 72% of adults living in a share house)
- Those with a TV less than 2 years old (91%, vs those with a TV 2 or more years old 87%)
- Those who watched sport in P7D (91% vs 82% of did not watch sport)

Across devices, mobile phones or smartphones have the highest frequency viewing of screen content (more often than 5 times a day).

MCCS TVCS

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.

Television Consumer Survey Results

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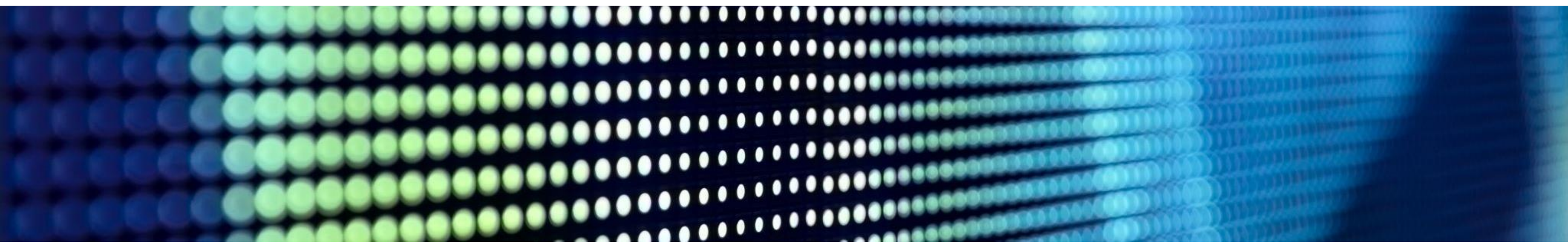
TV Access



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Chapter Summary – TV Access

TV Access:

Broadcast signal / antennas are being used to access TV, as are on-demand apps via smart TVs

The majority of respondents who watched free-to-air TV in the past 7 days (59%) access free-to-air TV through a broadcast signal or antenna, however, a net of 53% are accessing via on-demand TV apps, with approximately one-third (32%) accessing it through on-demand TV apps on a smart TV.

While a traditional broadcast signal or antenna is still the primary means of accessing free-to-air TV, on-demand apps are also a common means of access (especially through smart TVs).

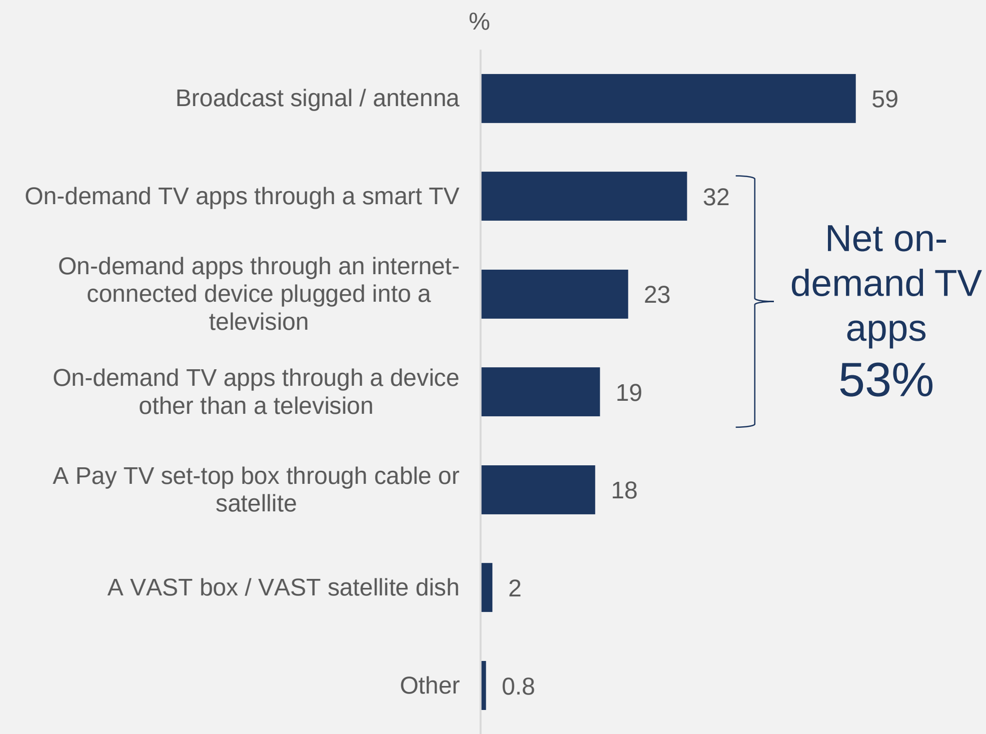
TV smart accessories are used for TV connectivity

The most commonly used TV smart accessory was Google Chromecast, which was used by 23% of respondents in the past 6 months. Having a TV that wasn’t smart compatible was the main reason that respondents used a Google Chromecast (7%), followed by wanting to access particular shows or content (7%).

In general TV smart accessories do have free-to-air access or free-to-air apps, however some respondents reported not having free-to-air access via these types of accessories.

How respondents access free-to-air television

The majority of respondents (59%) access free-to-air television through a broadcast signal or antenna, although approximately one-third (32%) access it through on-demand TV apps on a smart TV, and around one-quarter (23%) access it via on-demand apps through an internet-connected device plugged into their television.



Source: NEWC2b.How do you access free-to-air television?

Base: TVCS, Respondents who watched free-to-air TV in the past 7 days. 2022: n=2935.

Notes: Don't know/refused responses not shown: DK = 0.8%, Ref = 0.0%

Subgroups

↑ **Broadcast signal / antenna** was higher for:

- Men (66% vs 51% of women)
- Those living outside a capital city (65% vs 55% of those living in a capital city)
- Those living alone (64% vs 51% of parent with dependent children, and 53% of parents with non-dependent children)
- Those with HH income of $1 to $51,999 per year (64% vs 54% of those with HH income of $156,000 or more per year)

↑ **On-demand TV apps through a smart TV** was higher for:

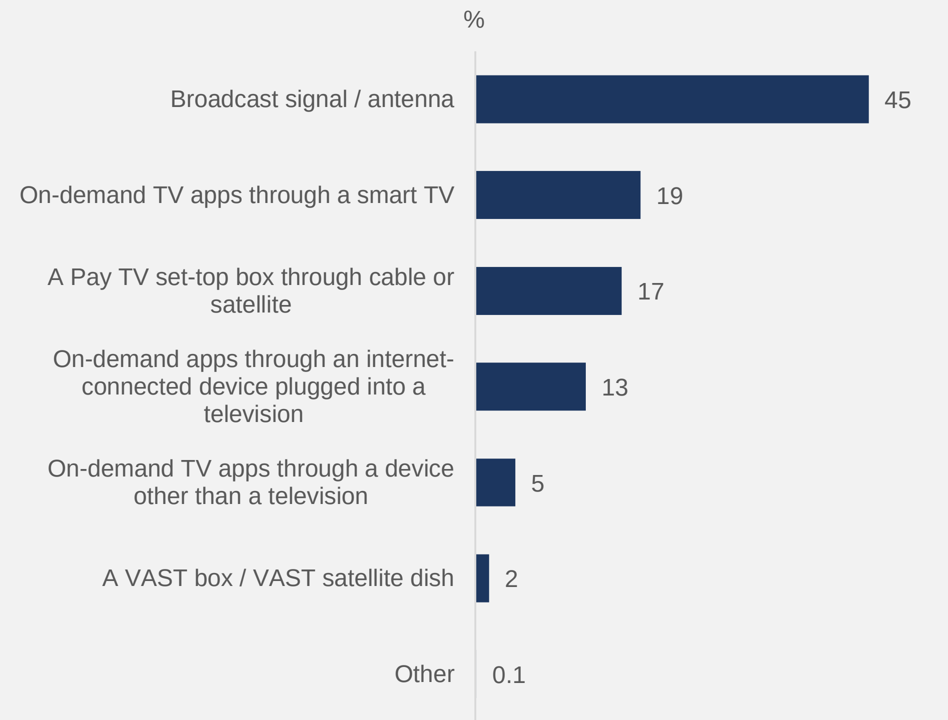
- Women (36% vs 28% of men)
- Those with a TV less than 2 years old (40%, vs 30% of those with a TV 2 or more years old)
- Those with HH income of $156,000 or more per year (38% vs 28% of those with HH income of $1 to $51,999 per year)
- Those who pay for 6+ subscription services (63% vs 29% of those who pay for 0, and 37% of those who pay for 1-2)

While a traditional broadcast signal or antenna is still the primary means of accessing free-to-air TV, on-demand apps are also a common means of access (especially through smart TVs).

TVCS

How respondents access free-to-air television **most often**

Respondents who indicated that they access free-to-air television via multiple methods were asked to select the method they use most often. The most commonly cited method was through a broadcast signal or antenna (45%).



Source: NEWC2c. How do you access free-to-air television most often?

Base: TVCS, Respondents who access free-to-air television via multiple methods. 2022: n=1048.

Notes: Don't know/refused responses not shown: DK = 0.2%, Ref = 0.0%

Subgroups

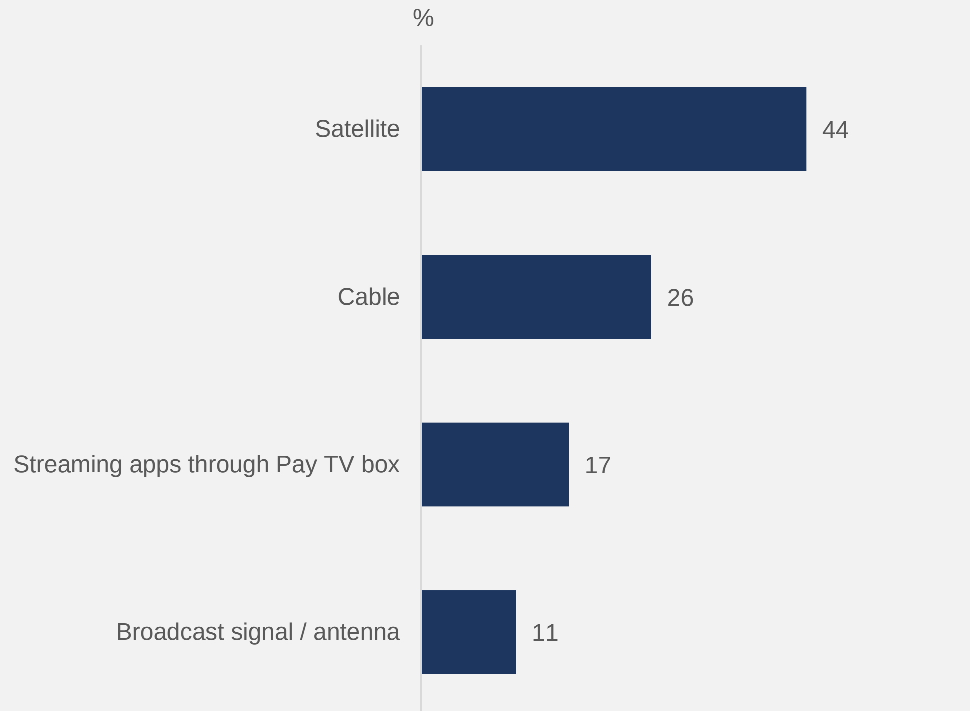
↑ **Broadcast signal / antenna** was higher for:

- Men (50% vs 40% of women)
- Those living outside a capital city (50% vs 42% of those living in a capital city)

Of those with multiple ways to access free-to-air television, access through a broadcast signal or antenna was the most common.

How Pay TV signal arrives

Respondents who access free-to-air television via Pay TV mostly report the Pay TV signal arrives via satellite (44%) or cable (26%).



Source: NEWC2d. How does that Pay TV signal arrive to your TV?
Base: TVCS, Respondents who access free-to-air TV via Pay TV and have watched Pay TV in the past 7 days. 2022: n=427.
Notes: Don't know/refused responses not shown: DK = 2%, Ref = 0.0%

Subgroups

↑ **Satellite** was higher for:

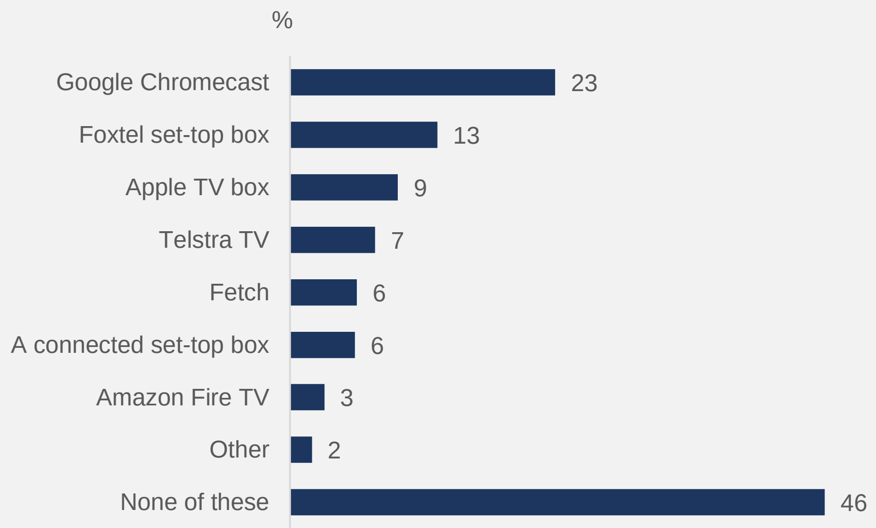
- Those living outside a capital city (54% vs 40% of those living in a capital city)
- Those who have watched sport in P7D (50%, vs 29% of those who have not watched sport P7D)

Satellite access was the most common method to access Pay TV services, especially for those in regional areas of Australia.

TVCS

TV smart accessories used in the past 6 months

The most commonly used TV smart accessory was Google Chromecast, which was used by 23% of respondents in the past 6 months. Nearly half of respondents (46%) said they have not used any TV smart accessories in the past 6 months.



Source: NEW12. Which, if any, of the following TV smart accessories have you used in your house in the past 6 months?
Base: TVCS, All respondents. 2022: n=4016.
Notes: Don't know/refused responses not shown: DK= 0.7%, Ref = 0.1%

Subgroups

↑ **Google Chromecast** was higher for:

- Ages 18-34 (31%), and ages 35-54 (25% vs 16% of ages 55+)
- Ages 18-34 (31% vs 25% of ages 35-54)
- Those living in a capital city (25% vs 19% of those living outside a capital city)
- Parents with dependent children (27% vs 20% of those living alone)
- Those with a TV less than 2 years old (27%, vs 22% of those with a TV 2 or more years old)
- Those with a HH income of $104,000 to $155,999 per year (29% vs 19% those with a HH income of $1 to $51,999 per year)
- Those who pay for 3-5 subscription services (35% vs 17% of those who pay for 0, and 25% of those who pay for 1-2)

↑ **None of these** was higher for:

- Ages 18-34 (47%), and ages 55+ (50% vs 40% of ages 35-54)
- Those living outside a capital city (52% vs 43% of those living in a capital city)
- Those living alone (51% vs 40% of parents with dependent children and 40% of parents with non-dependent children)
- Those who didn't watch sport P7D (49% vs 43% of those who watched sport P7D)
- Those with HH income of $1-$51,999 per year (54% vs 48% of those with HH income $52,000 to $103,999 per year, 38% of those with HH income $104,000 to $155,999, and 35% of those with HH income $156,000 or more)
- Those with HH income $52,000 to $103,999 per year (48% vs 38% of those with HH income $104,000 to $155,999, and 35% of those with HH income $156,000 or more)
- Those who pay for 0 subscription services (54% vs 40% of those who pay for 1-2, 29% of those who pay for 3-5, and 33% of those who pay for 6+)
- Those who pay for 1-2 subscription services (40% vs 29% of those who pay for 3-5)

Google Chromecast is the most used accessory for a TV. That said, almost half of people have not used any TV smart accessory in their house in the past 6 months.

Reasons for using TV smart accessories

Having a TV that wasn't smart compatible was the main reason that respondents used a Google Chromecast (7%), followed by wanting to access particular shows or content (7%), or wanting to access internet only content through their TV (5%).

	Base (n)	TV wasn't smart compatible	I wanted to access particular shows or content	I wanted to access internet only content through my TV	More convenient or easier-to-use than my TV	It was bundled with my service provision	The sound or picture quality is better than my TV	Other
Google Chromecast	*772*	7	7	5	5	0.6	1	1
Amazon Fire TV	*107*	1	1	0.6	0.7	0.1	0.1	0.1
A connected set-top box	*235*	1	2	0.6	1	0.9	0.4	0.3
Apple TV box	*348*	2	3	1	3	0.4	0.6	0.5
Telstra TV	*292*	2	1	0.7	1	2	0.4	0.2
Fetch	*230*	0.7	1	0.6	1	2	0.3	0.4
Foxtel set-top box	*569*	0.7	5	0.5	4	2	1	0.6
Other	*51*	0.2	0.5	0.2	0.3	0.1	0.1	0.2

Source: NEW12a. Why do you choose to access screen content via <INSERT RESPONSE SELECTED AT NEW12>?
Base: TVCS, Respondents who used a TV smart accessory in the past 6 months. 2022: n=2039.
Notes: Don't know/refused responses not shown, % vary per statement.

Subgroups

↑ **TV wasn't smart compatible** was higher for:
- Google Chromecast:
  - Ages 18-34 (11% vs 7% of ages 35-54, and 5% of ages 55+)
  - Those with a TV 2 or more years old (10% vs 6% of those with a TV less than 2 years old
  - Those with a HH income of $104,000 to $155,999 per year (10%, vs 6% of those with a HH income of $1 to $51,999 per year)

Subgroups

↑ **I wanted to access particular shows or content** was higher for:
- Google Chromecast:
  - Ages 18-34 (10% vs 6% of ages 35-54, and 7% of ages 55+)
  - Those with a TV less than 2 years old (11% vs 8% of those with a TV 2 or more years old)

TV smart accessories are being used as a solution to connect to the internet, or to access particular shows or content.

Whether TV smart accessories have free-to-air access

Over two-thirds of respondents said that their Telstra TV (77%), Fetch (69%) or Apple TV box (67%) has free-to-air on-demand apps. Around one-quarter of respondents said that their Amazon Fire TV (24%), Apple TV box (28%) and Google Chromecast (30%) has no free-to-air access.

	Free-to-air on-demand apps	Other free-to-air access (e.g. external antenna / satellite)	No access to free-to-air
Telstra TV	77	12	7
Fetch	69	23	7
Apple TV box	67	2	28
Amazon Fire TV	64	8	24
Google Chromecast	60	8	30
A connected set-top box	57	29	12
Foxtel set-top box	52	36	10

Source: NEW12b. Does this device, <INSERT SELECTED AT NEW12>, have free-to-air TV on-demand apps or other free-to-air TV access?

Base: TVCS, Respondents who used a TV smart accessory in the past 6 months. 2022: n= from 76 to 772.

Notes: Don't know/refused responses not shown, % vary per statement. Responses not shown for 'other' TV smart accessory category.

In general TV smart accessories have free-to-air access or free-to-air apps, however some respondents reported not having free-to-air access via these types of accessories.

TV Content and Services

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Chapter Summary – TV Content and Services

TV Content and Services:

People generally have an idea of the service and content they want to watch, prior to turning on devices

Almost half of respondents (44%) said that they always know which service, such as free-to-air TV or online subscription, they want to watch prior to turning on their device. A further 41% said they sometimes know. Prior to turning on their device, approximately one-third said that they either have a particular program or movie in mind (30%), or that they have a genre or type of program in mind (33%).

Most respondents always or sometimes know which service they want to watch when they go to watch screen content.

Most respondents have a sense of the program or the type of program they want to watch before they turn on their device. Two fifths of respondents say they typically browse.

The benefits of free-to-air TV

The features that were most commonly rated as an essential reason for watching free-to-air TV were that there are no ongoing subscription costs (32%), that it is easy to access (26%), and that it has national or international news content (26%).

The benefits of watching free-to-air TV focus on the lack of cost and ease of access. National and international news is also a reason.

Online subscription services offer convenience, lack of ads, ease of access

The feature most commonly ranked as an essential reason for watching online subscription services was that viewers can watch what they want, when they want (52%). Having no advertisements (40%) and being easy to access (23%) were other common features ranked as an essential reason for watching.

Convenience and lack of ads in online subscription services are essential reasons for watching.

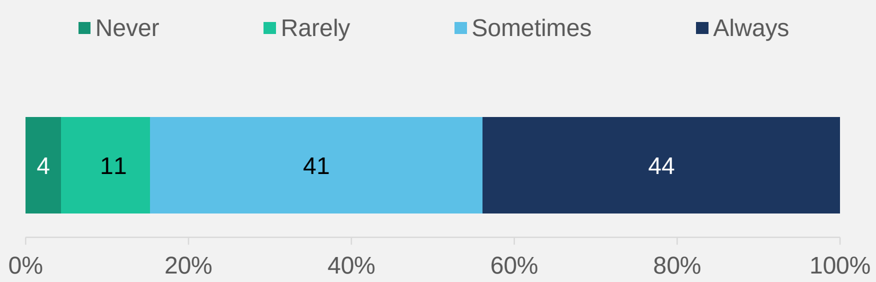
On-demand benefit is convenience.

Being able to watch what they want, when they want was also the feature most commonly rated by respondents as an essential reason for watching on-demand TV services (31%).

The primary reason for watching on-demand TV is, similar to online subscription services, convenience. However, respondents ranked other features quite differently.

Whether respondents know which **service** they want to watch prior to turning on their device

Almost half of respondents (44%) said that they always know which service, such as free-to-air TV or online subscription, they want to watch prior to turning on their device. A further 41% said they sometimes know, although 11% said they rarely know, and 4% that they never know.



Source: NEW8. When you watch screen content, how often do you typically know which service (e.g., free-to-air TV, online subscription) you want to use prior to turning on your device?

Base: TVCS, Respondents who watched screen content in the past 7 days. 2022: n=3952.

Notes: Don't know/refused responses not shown: DK = 0.2%, Ref = 0.0%

Subgroups

↑ **Always** was higher for:

- Men (47% vs 41% of women)
- Ages 55+ (54% vs 36% of ages 35-54, and 37% of ages 18-34)
- Those living outside a capital city (47% vs 42% of those living in a capital city)
- Those living alone (47% vs 37% of parents with dependent children)

↑ **Never** was higher for:

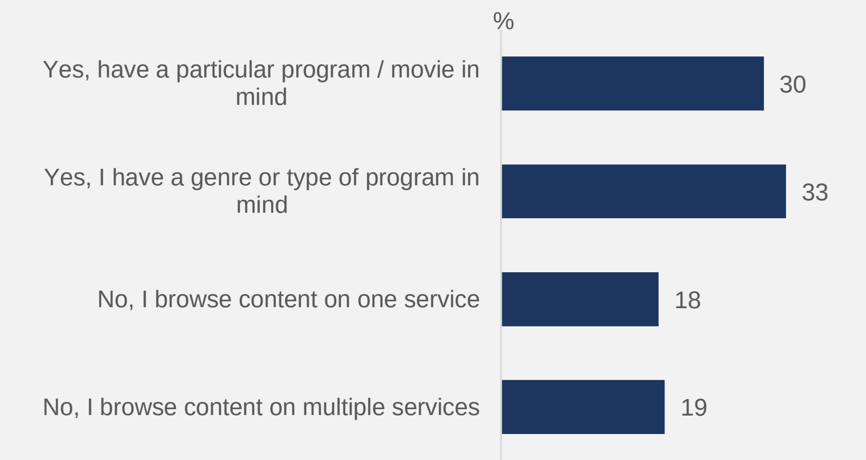
- Those living alone (6% vs 3% of parents with dependent children, and 2% of parents with non-dependent children)
- Those who pay for 0 subscription services (7% vs 2% of those who pay for 3-5)

Most respondents always or sometimes know which service they want to watch when they go to watch screen content.

TVCS

Whether respondents know which **content** they want to watch prior to turning on their device (%)

Respondents were then asked whether they know which screen content they want to watch prior to turning on their device. Approximately one-third said that they either have a particular program or movie in mind (30%), or that they have a genre or type of program in mind (33%). Just under one-fifth of respondents indicated that they do not typically know what they want to watch and either browse content on one service (18%) or across multiple services (19%).



Source: NEW9. When you watch screen content, do you typically know what you want to watch prior to turning on your device?

Base: TVCS, Respondents who watched screen content in the past 7 days. 2022: n=3952.

Notes: Don't know/refused responses not shown: DK = 0.3%, Ref = 0.1%.

Subgroups

↑ **Yes, I have a particular program / movie in mind** was higher for:
- Ages 55+ (37% vs 28% of ages 35-54, and 23% of ages 18-34)
- Those who watched sport in P7D (32% vs 28% of those who did not watch sport)
- Those with HH income of $1 to $51,999 (37% vs 31% of those with HH income of $52,000 to $103,999, 27% of $104,000 to $155,999, and 24% of $156,000 or more)
- Those with HH income of $52,000 to $103,999 (31% vs 24% of those with HH income of $156,000 or more)

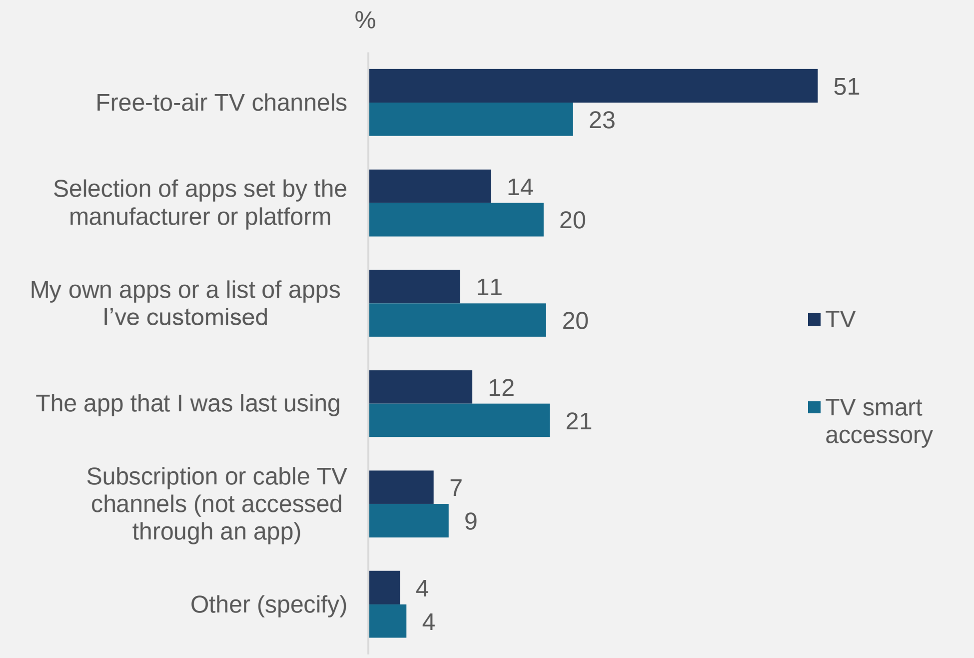
↑ **No, I browse content on one service** was higher for: Those who pay for 1-2 subscription services (20% vs 13% of those who pay for 3-5)

Most respondents have a sense of the program or the type of program they want to watch before they turn on their device. Two fifths of respondents say they typically browse.

TVCS

What is first displayed when device is turned on

More than half of respondents (51%) said that free-to-air TV channels are displayed when they first turn on their TV. Almost one-quarter of respondents (23%) also said that free-to-air TV channels are displayed when they first turn on their TV smart accessory.



Source: NEW11. When you first turn on your main <INSERT EITHER: 'television' OR 'TV smart accessory'>, what is first displayed?

Base: TVCS, Respondents who watch screen content on a TV or TV smart accessory. 2022: n= from 1460 to 3494.

Notes: Don't know/refused responses not shown. TV: DK = 0.9%, Ref = 0.0%. TV Smart accessory: DK = 1.7%, Ref = 0.0%

Subgroups

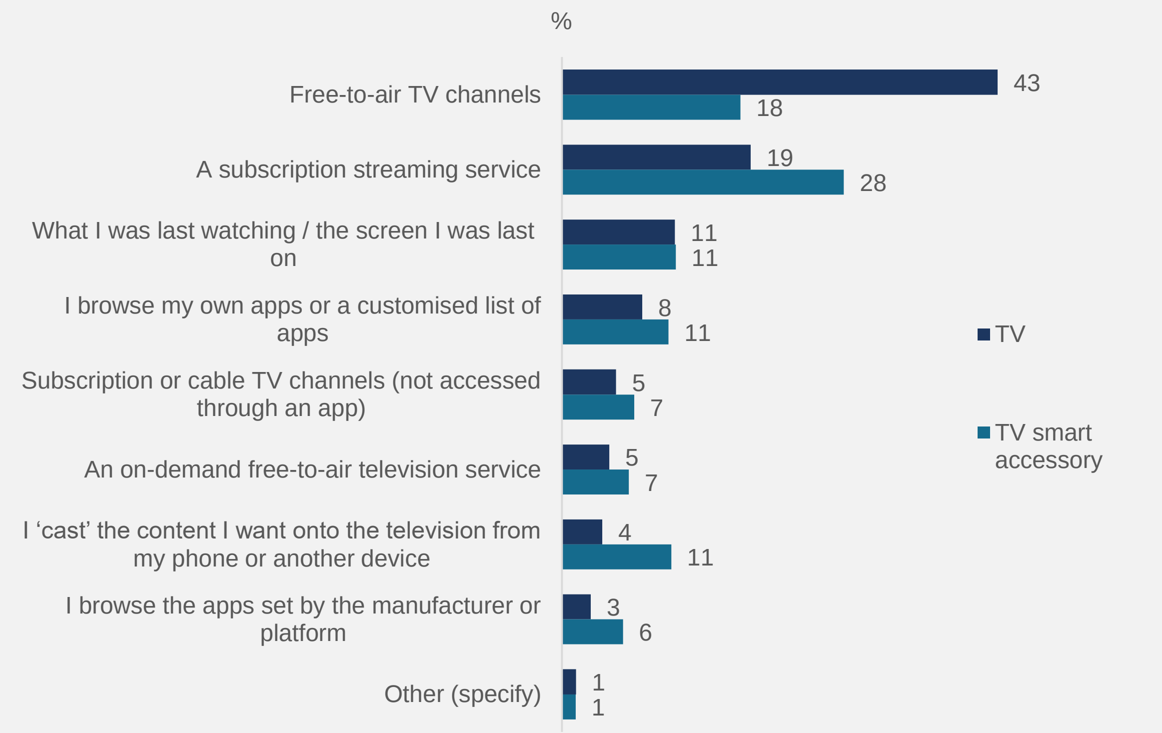
↑ **Free-to-air TV channels** was higher for:

- Television:
  - Ages 35-54 (49%), and ages 55+ (64% vs 35% of ages 18-34)
  - Ages 55+ (64% vs 49% of ages 35-54)
  - Those living outside a capital city (57% vs 48% of those living in a capital city)
  - Those living alone (57%), and parents with non-dependent children (57% vs 42% of parents with dependent children, 26% of adults living in a share house, and 42% of those living in another household type)
  - Parents with dependent children (42% vs 26% of adults living in a share house)
  - Those whose TV is 2 or more years old (57% vs 37% of those whose TV is less than 2 years old)
  - Those who watched sport in P7D (55% vs 48% of those who did not watch sport)
  - Those with HH income of $1 to $51,999 (60% vs 50% of those with HH income of $52,000 to $103,999, 49% of $104,000 to $155,999, and 44% of $156,000 or more)
  - Those who pay for 0 subscription services (62% vs 48% of those who pay for 1-2, 36% of those who pay for 3-5, and 29% of those who pay for 6+)
  - Those who pay for 1-2 subscription services (48% vs 36% of those who pay for 3-5, and 29% of those who pay for 6+)

TVs generally display free-to-air channels when they are turned on, however, apps are more likely to be displayed first on TV smart accessories.

What respondents first choose when they turn the device on

Under half of respondents (43%) said that they select free-to-air TV channels when they first turn on their TV. In contrast, the most common service selected when respondents first turn on their TV smart accessory was a subscription streaming service (28%).



Source: NEW11b. When you first start watching content on your <INSERT EITHER: 'television' OR 'TV smart accessory'>, which of the following do you most commonly select…

Base: TVCS, Respondents who watch screen content on a TV or TV smart accessory. 2022: n= from 1460 to 3494.

Notes: Don't know/refused responses not shown. TV: DK = 0.2%, Ref = 0.3%. TV Smart accessory: DK = 0.3%, REF = 0.0%

Subgroups

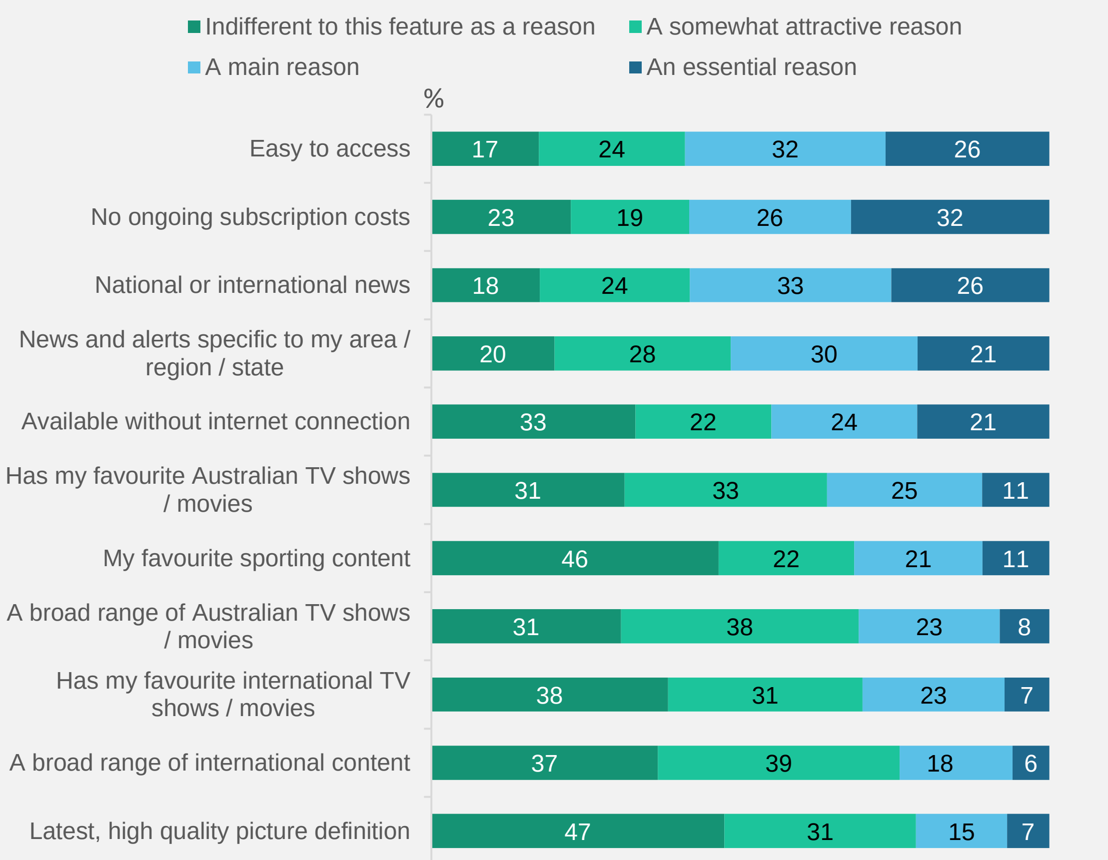
↑ **Free-to-air TV channels** was higher for:

- Television:
  - Men (47% vs 40% of women)
  - Ages 35-54 (40%) and ages 55+ (61% vs 19% of ages 18-34)
  - Ages 55+ (61% vs 40% of ages 35-54)
  - Living outside a capital city (51% vs 39% of those living in a capital city)
  - Living alone (51% vs 33% of parents with dependent children, 44% of parents with non-dependent children, 23% of adults living in a share house, and 31% of those living in another household type)
  - Parents with non-dependent children (44% vs 33% of parents with dependent children, and 23% of adults living in a share house)
  - TV is 2 or more years old (47% vs 33% of those whose TV is less than 2 years old)
  - Watched sport in P7D (48% vs 38% of those who did not watch sport)
  - HH income of $1 to $51,999 (53% vs 44% of those with HH income of $52,000 to $103,999, 34% of $104,000 to $155,999, and 36% of $156,000 or more)
  - HH income of $52,000 to $103,999 (44% vs 34% of those with HH income of $104,000 to $155,999, and 36% of $156,000 or more)
  - Pay for 0 subscription services (59% vs 37% of those who pay for 1-2, 28% of those who pay for 3-5, and 19% of those who pay for 6+)
  - Those who pay for 1-2 subscription services (37% vs 28% of those who pay for 3-5, and 19% of those who pay for 6+)

Free-to-air TV channels are a common starting point when a TV is first turned on.

Importance of various features as a reason for watching **free-to-air TV**

The features that were most commonly rated as an essential reason for watching free-to-air TV were that there are no ongoing subscription costs (32%), that it is easy to access (26%), and that it has national or international news content (26%). The features that were least considered an essential reason for watching were having the latest, high quality picture definition (7%), and having a broad range of international content (6%).



Source: C15. Thinking about the following features of free-to-air TV, please rate each in terms of how they play a part in your reason for watching free-to-air TV? Would you say it is…

Base: TVCS, Respondents who watched free-to-air tv (live or on-demand) in the past 7 days. 2022: n=3251.

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

Subgroups

↑ **Net main reason and essential reason** was higher for:

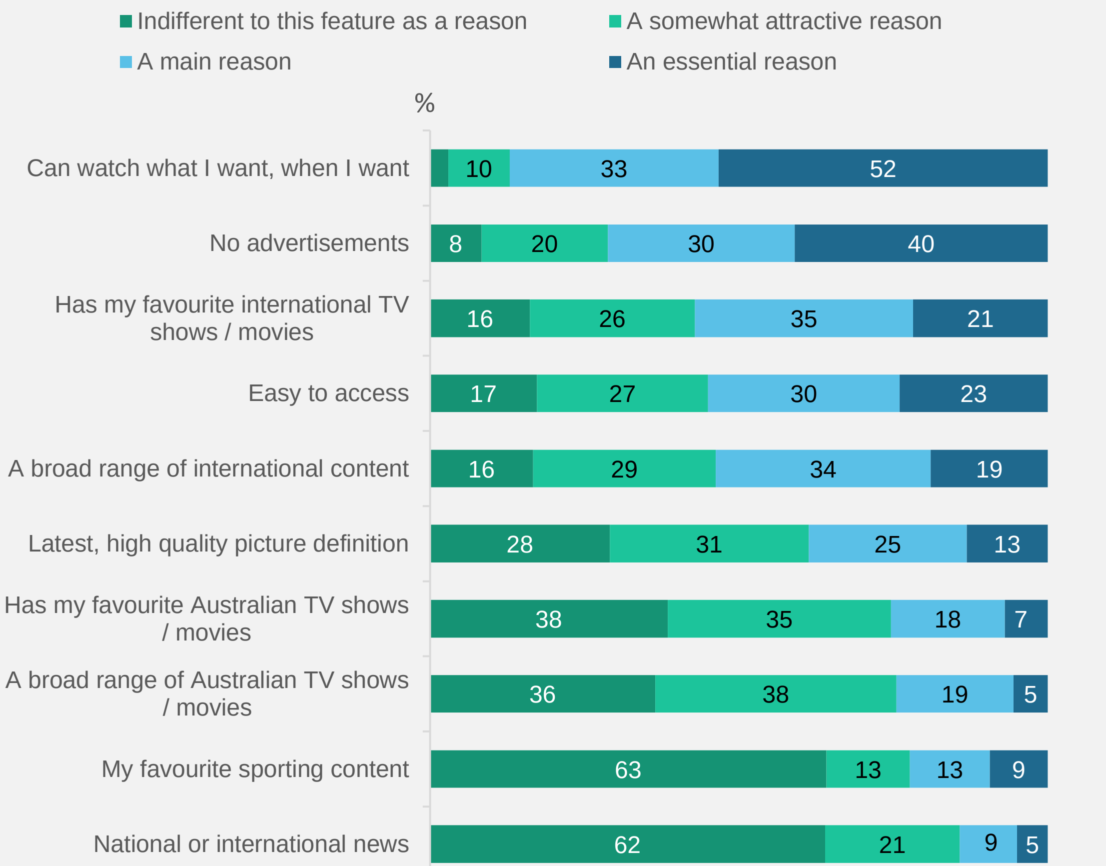
- Easy to access: Women (62% vs 56% of men)
- No ongoing subscription costs: Those whose TV is 2 or more years old (61% vs 52% of those whose TV is less than 2 years old)
- National or international news:
  - Men (63% vs 54% of women)
  - Ages 55+ (67% vs 51% of ages 35-54, and 49% of ages 18-34)
  - Those living alone (63% vs 52% of parents with dependent children, and 42% of adults living in a share house)
  - Those who watched sport in P7D (60% vs 55% of those who did not watch sport)

The benefits of watching free-to-air TV focus on the lack of cost and ease of access. News is also a reason for watching.

TVCS

Importance of various features as a reason for watching **online subscription services**

The feature most commonly ranked as an ‘essential’ reason for watching online subscription services was that viewers can watch what they want, when they want (52%). Having no advertisements (40%) and being easy to access (23%) were other features ranked as an essential reason for watching. The feature that the highest proportion of respondents said they were indifferent to was having their favourite sporting content (63%).



Source: C16. Think about the following features of online subscription services (e.g. Netflix, Binge, YouTube Premium, Stan), including sports-specific subscription services. Please rate each in terms of how they feature in your reason for watching online subscription services? Would you say it is…

Base: TVCS, Respondents who watched online subscription services in the past 7 days. 2022: n=2295.

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

Subgroups

↑ **Net main reason and essential reason** was higher for:

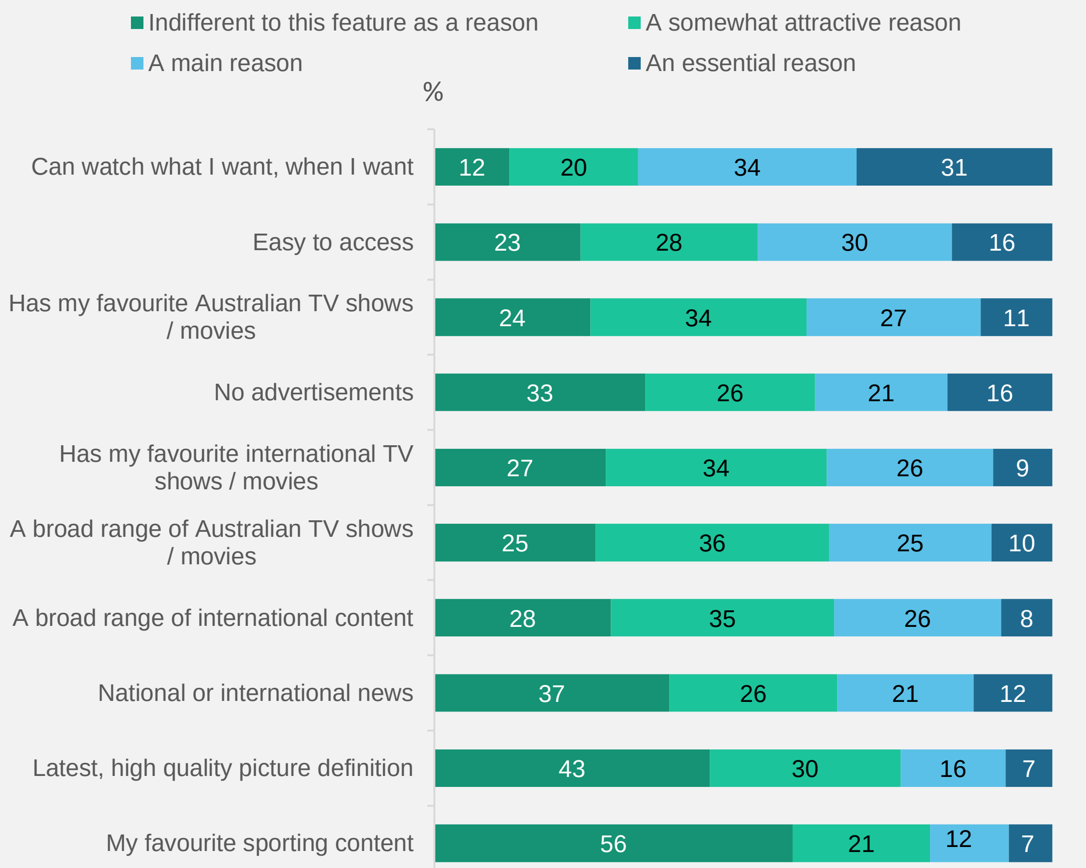
- Can watch what I want, when I want:
  - Women (88% vs 82% of men)
  - Ages 18-34 (89% vs 81% of ages 55+)
  - Those living in a capital city (87% vs 81% of those living outside a capital city)
  - Those who did not watch sport in P7D (87% vs 83% of those who watched sport)
- No advertisements:
  - Women (72% vs 66% of men)
  - Ages 18-34 (77%), and ages 35-54 (68% vs 62% of ages 55+)
  - Ages 18-34 (77% vs 68% of ages 35-54)
  - Those living in a capital city (73% vs 63% of those living outside a capital city)
  - Those who did not watch sport in P7D (73% vs 66% of those who watched sport)
- Easy to access:
  - Women (58% vs 50% of men)
  - Ages 18-34 (60% vs 51% of ages 35-54, and 49% of ages 55+)
  - Those living in a capital city (56% vs 48% of those living outside a capital city)
  - Parents with dependent children (61% vs 52% of those living alone, and 48% of those with dependent children)

Convenience and lack of ads in online subscription services are essential reasons for watching.

TVCS

Importance of various features as a reason for watching **on-demand TV services**

Being able to watch what they want, when they want was also the feature most commonly rated by respondents as an essential reason for watching on-demand TV services (31%).



Source: NEWC16b. Thinking about the following features of on-demand TV streaming services (e.g. 7plus, SBS On Demand, ABC iView, 10play, 9Now), please rate each in terms of how they feature in your reason for watching on-demand TV streaming services? Would you say it is…

Base: TVCS, Respondents on-demand TV streaming services in the past 7 days. 2022: n=2090.

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

Subgroups

↑ **Net main reason and essential reason** was higher for:

- Can watch what I want, when I want:
  - Women (68% vs 61% of men)
  - Those who pay for 1-2 subscription services (64% vs 45% of those who pay for 0)
  - Those who pay for 3-5 subscription services (74% vs 64% of those who pay for 1-2, and 45% of those who pay for 0)
- No advertisements: Women (40% vs 34% of men)
- Easy to access:
  - Women (51% vs 41% of men)
  - Those living in a capital city (49% vs 41% of those living outside a capital city)

The primary reason for watching on-demand TV is, similar to online subscription services, convenience. However, respondents ranked other features quite differently.

Free-to-air TV

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Chapter Summary – Free-to-air TV

Free-to-air TV:

Televisions are primarily used to watch free-to-air

Most respondents used a television (including smart TV) to access free-to-air (87% net use), while mobile phones had the lowest usage overall (42% net use).

While free-to-air TV is watched mostly on a television, it is also accessed to a lesser extent by other means (e.g. tablets, games consoles, computers, mobile phones).

Free-to-air access by device

When asked whether it was easy or difficult to navigate to live free-to-air TV on a range of devices, generally respondents said that it was easy for television (net T2B 76%), followed by pay TV box (net T2B 63%).

On-demand free-to-air TV is less easy to access via TV devices (than linear TV), but more easy to access on TV smart accessories and other devices.

Respondents identified some issues with navigating to free-to-air TV

The main reasons that respondents gave for finding it difficult to navigate to free-to-air TV (either live or on-demand) were that they had problems with signing in, passwords, or creating accounts (16%).

For free-to-air TV, an issue in navigation is also due to it being 'not user friendly / difficult to access content'. Signing in with an account and password can be a pain point for free-to-air TV (e.g., signing in for free-to-air on-demand TV).

Frequency of watching **free-to-air TV** on various devices (%)

Most respondents used a television (including smart TV) to access free-to-air (87% net use), while pay TV boxes (78%) or TV smart accessories / digital media players were also used by 63%. Approximately one-fifth of respondents (18%) watched free-to-air TV on a television more often than 5 times a week. Mobile phones had the lowest usage overall (42% net use).

	Net Use	More often than 5 times a day	3-5 times a day	Once or twice a day	More often than 5 times a week	3-5 times a week	Once or twice a week	Never
Television (including smart TV)	**74**	5	8	20	15	14	13	11
Mobile phone or smartphone	**30**	4	4	3	3	5	11	42
TV smart accessory / Digital media player	**27**	1	2	4	4	6	9	15
Computer (desktop or laptop)	**26**	2	1	3	2	5	12	35
Tablet	**19**	1	1	2	2	3	10	17
Pay TV box	**18**	1	2	4	4	3	4	5
Games console connected to a television	**8**	0.4	0.6	0.9	0.7	1	4	8
VAST satellite box	**3**	0.1	0.4	0.6	0.3	0.6	0.8	2

Source: NEW10. On average per week, how often do you use the following devices to watch free-to-air television (live or on-demand)?

Base: TVCS, Results have been rebased to a proportion of all TVCS survey respondents (n=4016).

Notes: Don't know/refused responses not shown, % vary per statement. Rows do not sum to 100%: due to rebasing to total respondents n/a figures are not shown in table.

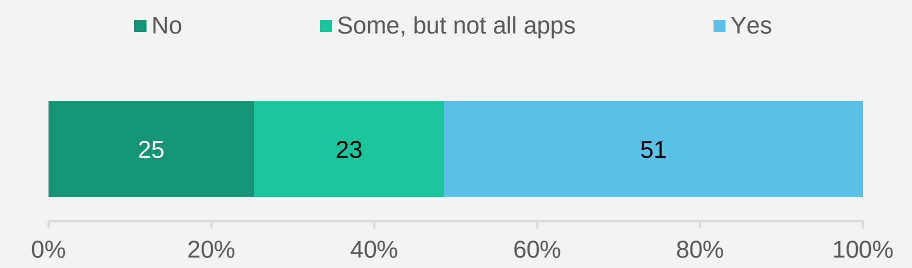
Subgroups

↑ **Television (net use**) was higher for:
- Ages 35-54 (89%), and ages 55+ (94% vs 74% of ages 18-34)
- Ages 55+ (94% vs 89% of ages 35-54)
- Those living outside a capital city (90% vs 85% of those living in a capital city)
- Those living alone (88%), parents with dependent children (86%), and parents with non-dependent children (91% vs 70% of adults living in a share house)
- Those who watched sport in P7D (93% vs 82% of those who did not watch sport)

While free-to-air TV is watched mostly on a television, it is also accessed to a lesser extent by other means (e.g., tablets, games consoles, computers, mobile phones).

Whether a TV has free-to-air on-demand apps

Approximately half of respondents said that their TV has free-to-air on-demand apps (51%), or that it has some but not all apps (23%). Approximately one-quarter (25%) of respondents said that they do not have free-to-air on-demand apps on their TV.



Source: NEW12c. Does your TV have free-to-air TV on-demand apps? (e.g. ABC iView, SBS On Demand, 9Now, 10 Play, 7plus)?

Base: TVCS, Respondents who watch screen content on a television. 2022: n=3193.

Notes: Don't know/refused responses not shown: DK = 0.9%, Ref = 0.0%

Subgroups

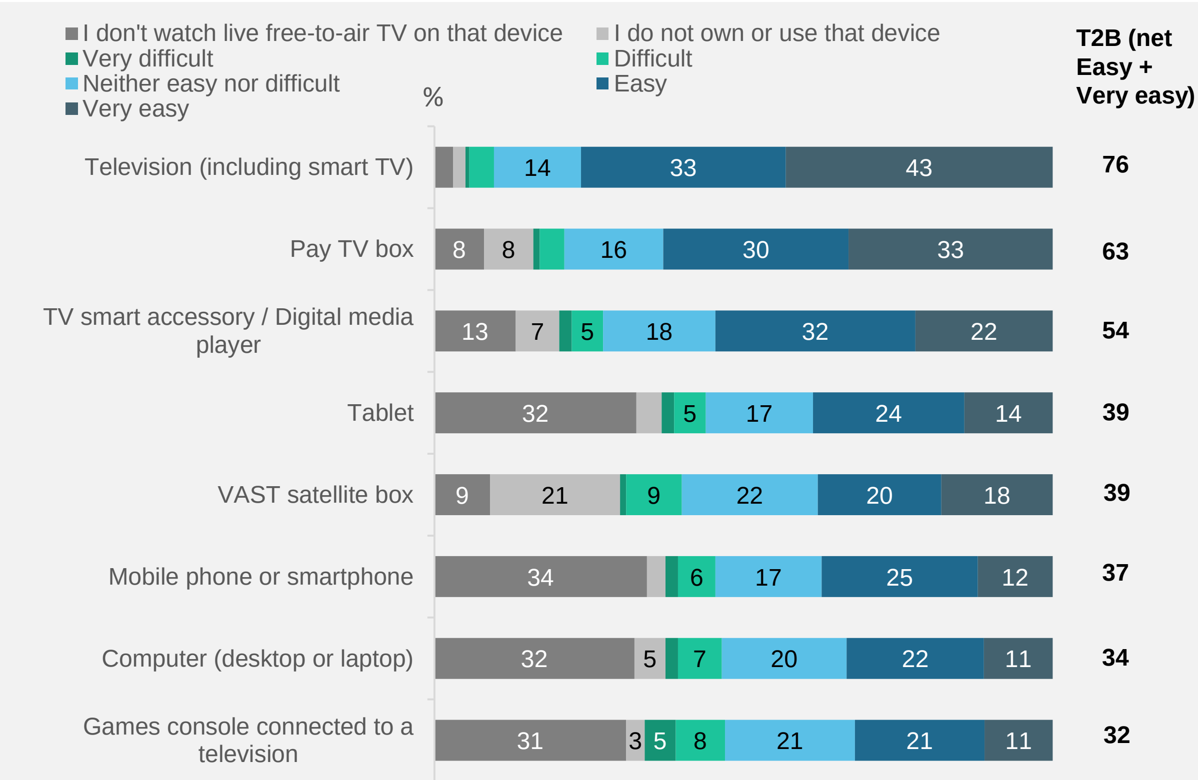
↑ **Yes** was higher for:

- Living in a capital city (53% vs 48% of those living outside a capital city)
- TV is less than 2 years old (63% vs 46% of those whose TV is 2 or more years old)
- Watched sport P7D (54% vs 48% of those who did not watch sport P7D)
- SEIFA Quintile 2 (54% vs 43% of those in Quintile 1)
- SEIFA Quintile 5 (58% vs 43% of those in Quintile 1, and 47% of those in Quintile 3)
- HH income of $52,000 to $103,999 (51%), and $104,000 to $155,999 (53% vs 43% of those with HH income of $1 to $51,999)
- HH income of $156,000 or more (63% vs 43% of those with HH income of $1 to $51,999, 51% of $52,000 to $103,999, and 53% of $104,000 to $155,999)

On-demand apps have relatively large coverage, but there are still some people that do not have access to this feature on their TV ('no, do not have free-to-air TV on demand apps', 25%).

Ease of navigating to **live free-to-air TV** on various devices

When asked whether it was easy or difficult to navigate to live free-to-air TV on a range of devices, generally respondents said that it was easy for certain devices (but not others). The easiest device was a television (net T2B 76%), followed by pay TV box (net T2B 63%). However, it was not as easy for respondents to navigate to live free-to-air TV on a computer (net T2B 34%) or a games console connected to a television (net T2B 32%).



Subgroups

↑ **Net Easy and Very easy** was higher for:

- Pay TV box: Ages 35-54 (66%), and ages 55+ (67% vs 47% of ages 18-34)

Source: NEW13. To what extent is it easy or difficult to navigate to free-to-air television (live broadcast TV, not on-demand) on each of the following types of devices?

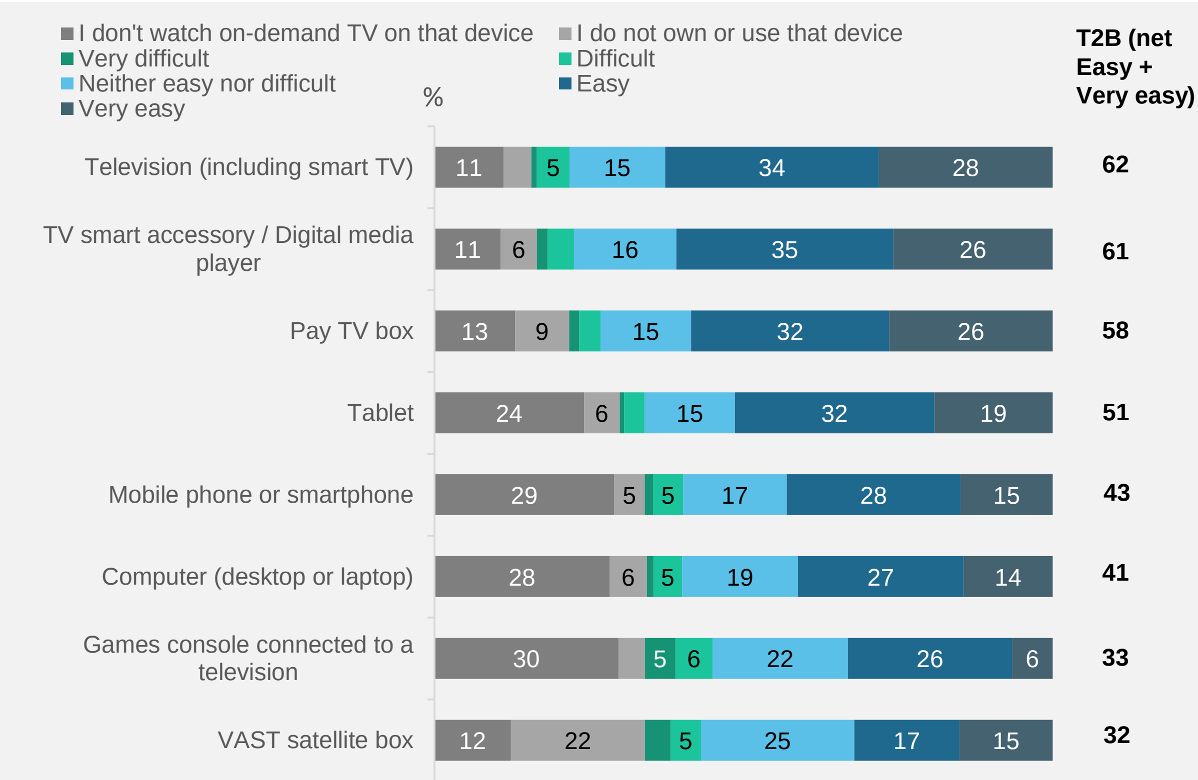
Base: TVCS, Respondents who watch free-to-air TV on a device.. 2022: n= from 180 to 3314.

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

Whilst TVs are generally easy to navigate to free-to-air TV, some devices such as mobile phones and tablets are not as easy to navigate for live free-to-air.

Ease of navigating to **on-demand free-to-air TV** on various devices

When considering the ease of navigating to on-demand free-to-air TV on a range of devices, most respondents said that it was easy (net ‘easy’ and ‘very easy’) to navigate to on-demand free-to-air TV on a television (62%), a TV smart accessory or digital media player (61%), and a Pay TV box (58%).



Subgroups

↑ **Net Easy and Very easy** was higher for:

- Television:
  - Those living in a capital city (65% vs 59% of those living outside a capital city)
  - Those whose TV is less than 2 years old (70% vs 60% of those whose TV is 2 or more years old)
  - Those with HH income of $156,000 or more (71% vs 59% of those with HH income of $1 to $51,999, 63% of $52,000 to $103,999, and 62% of $104,000 to $155,999)
- Mobile phone or smart phone:
  - Ages 18-34 (47%), and ages 35-54 (48% vs 32% of ages 55+)
  - Parents with dependent children (48% vs 34% of parents with non-dependent children)
  - Those who did not watch sport in P7D (46% vs 40% of those who watched sport)

Source: NEW13b To what extent is it easy or difficult to navigate to free-to-air television for on-demand TV on each of the following devices?

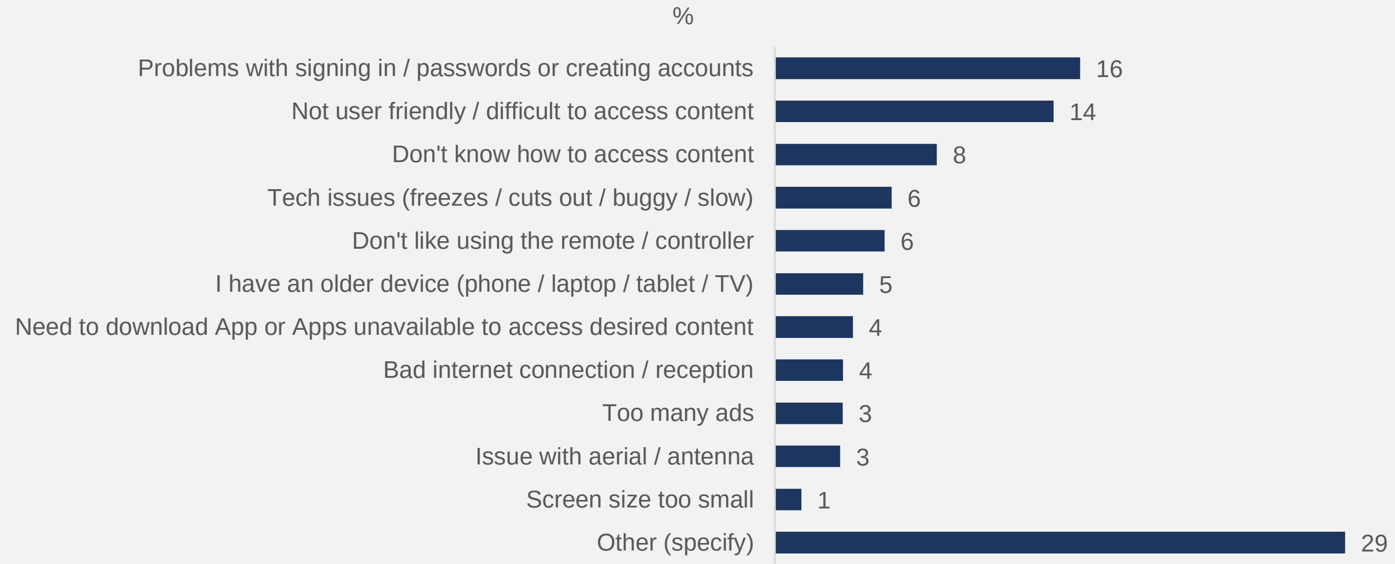
Base: TVCS, Respondents who watch free-to-air TV on a device.. 2022: n= from 180 to 3314.

Notes: Don’t know/refused responses not shown, % vary per statement. Labels for responses <5% not shown on chart.

On-demand free-to-air TV is less easy to access via TV devices (than linear TV), but more easy to access on TV smart accessories and other devices.

Reasons it is difficult to navigate to free-to-air TV

The main reasons that respondents gave for finding it difficult to navigate to free-to-air TV (either live or on-demand, across devices) were that they had problems with signing in, passwords, or creating accounts (16%), and that it is not a user-friendly process and is difficult to access content (14%). A smaller proportion of respondents indicated they don't know how to access content on certain devices (8%). Other respondents indicated that the difficulty was caused by technological issues such as the content freezing or cutting out (6%) or dislike of using the remote or controller (6%).



<u>NET 'any issues'</u> significantly higher for ages 35-54 (91%) (than ages 18-34, 79%).

Other:
"It required searching."

"Just too old for all this new stuff!"

"I don't use often enough, so I use TV."

"I don't have it set up on these devices."

"I'm not very tech savvy (or interested in learning) I'll grab a book if I am frustrated."

Source: NEW13a. Why do you find it difficult to access?

Base: TVCS, Respondents who find it difficult to navigate to free-to-air TV on one or more devices. 2022: n= 634. (Live free-to-air, via television n=147, On-demand free-to-air, via Television n=217).

Notes: Don't know/refused responses not shown: DK = 10%, Ref = 5%

Subgroups

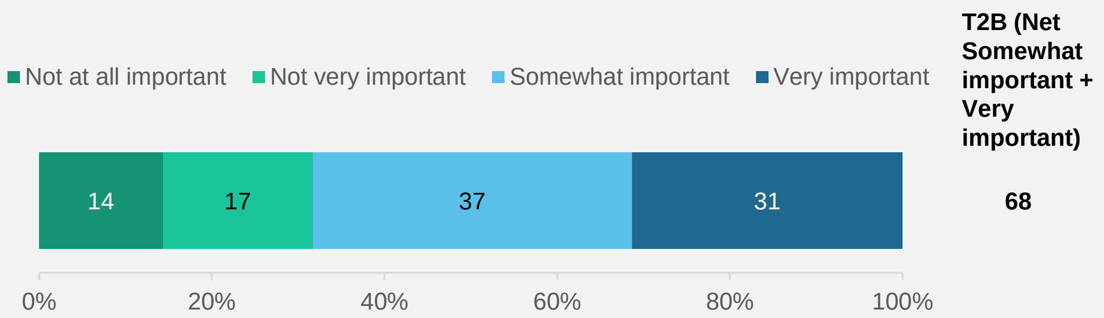
↑ **Problems with signing in / passwords or creating accounts** was higher for: Those living outside a capital city (23% vs 12% of those living in a capital city)

↑ **Don't know how to access content** was higher for:
- Women (12% vs 5% of men)
- Those living in a capital city (10% vs 4% of those living outside a capital city)
- Those whose TV is less than 2 years old (15% vs 5% of those whose TV is 2 or more years old)
- Those in SEIFA Quintile 5 (15% vs 3% of those in Quintile 2)

For free-to-air TV, navigation issues centered around problems with signing in, and user friendliness.

Importance of access to free-to-air TV to choice of television model or connected television device

The majority of respondents said that having access to free-to-air TV was either a somewhat (37%) or very important (31%) factor in their choice of television model or connected television device.



Source: NEW14. How important is the ease of accessing free-to-air television to your choice of television model or connected television device (e.g. Chromecast, Telstra TV, etc.)?

Base: TVCS, Respondents who watch screen content on a television. 2022: n=3494.

Notes: Don't know/refused responses not shown: DK = 0.3%, Ref = 0.1%

Subgroups

↑ **Net Somewhat important and Very important** was higher for:
- Ages 35-54 (70%), and ages 55+ (73% vs 59% of ages 18-34)
- Those who watched sport in P7D (72% vs 64% of those who did not watch sport)

↑ **Net Not very important and Not at all important** was higher for:
- Ages 18-34 (41% vs 29% of ages 35-54, and 27% of ages 55+)
- Those who did not watch sport in P7D (36% vs 27% of those who watched sport)

However, around a third indicated ease of access to free-to-air TV is not important in their choice of television model or connected television device.

TV Devices

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Chapter Summary – TV Devices

Summary:

What kinds of TVs people have

On average, households have 2.0 TVs, 1.3 TVs have an external antenna, and 1.4 are connected to the internet.

Demographic differences show variations in the relevance of TV devices

On average, respondents have 2.0 TVs in the household, however younger age cohorts are less likely to have a TV in their household, with ‘zero TVs’ significantly higher for ages 18-34 (5% vs 2% ages 35-54, and 1% of ages 55+).

Those aged 18-34 are less likely to have a TV in their household.

Upgrades to TVs are due to people wanting to keep up with technology

Just under one-tenth of respondents (9%) said they had bought a new TV in the past 6 months. The most common reason for buying a new TV was to upgrade or keep up with new technology (39%).

The changing pace of technology drives most new purchases while replacing a broken device ranks second.

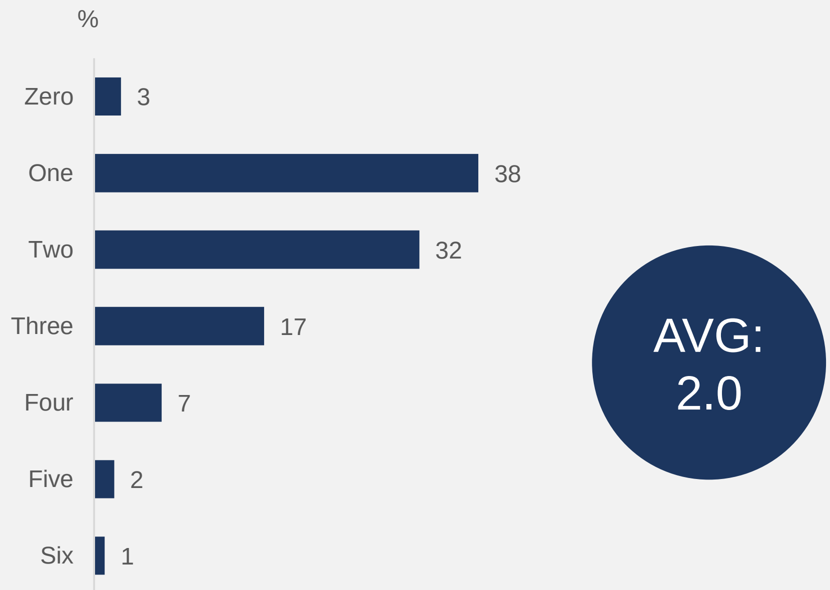
Internet connectivity is now crucial in new TVs

The primary feature that respondents ranked as most important to consider when buying a new TV was that it is internet-enabled (29%).

Internet connectivity capability is a feature sought out in new TV purchases.

Number of TVs in respondents' houses

On average, respondents have 2.0 TVs in the household. Most respondents reported having one (38%) or two (32%) TVs in their house, although some had three (17%) or four (7%). Ages 18-34 were more likely to say they had zero TVs in their household (5%).



Source: NEW17a. How many working TVs are currently in your house?

Base: TVCS, All respondents. 2022: n=4016.

Notes: Don't know/refused responses not shown: DK = 0.2%, Ref = 0.1% (Seven and above not shown on chart).

Subgroups

↑ **Zero** was higher for:

- Ages 18-34 (5% vs 2% ages 35-54, and 1% of ages 55+)
- Adults living in a share house (7% vs 1% of parents with dependent children, and 1% of parents with non-dependent children)
- Those who did not watch sport in P7D (4% vs 1% of those who watched sport)
- Those in SEIFA Quintile 5 (4% vs 2% of those in Quintile 1)
- Those who pay for 0 subscription services (5% vs 0.7% of those who pay for 3-5)

↑ **One** was higher for:

- Ages 18-34 (49% vs 34% of ages 35-54, and 33% of ages 55+)
- Those living alone (47%), and adults living in a share house (52% vs 34% of parents with dependent children, 24% of parents with non-dependent children, and 22% of those living in another household type)
- Parents with dependent children (34% vs 24% of parents with non-dependent children)
- Those who did not watch sport in P7D (43% vs 32% of those who watched sport)
- Those with HH income of $1 to $51,999 (42% vs 33% of those with HH income of $156,000 or more)
- Those who pay for 0 (45%), and 1-2 subscription services (41% vs 29% of those who pay for 3-5, and 24% of those who pay for 6+)

↑ **Two** was higher for:

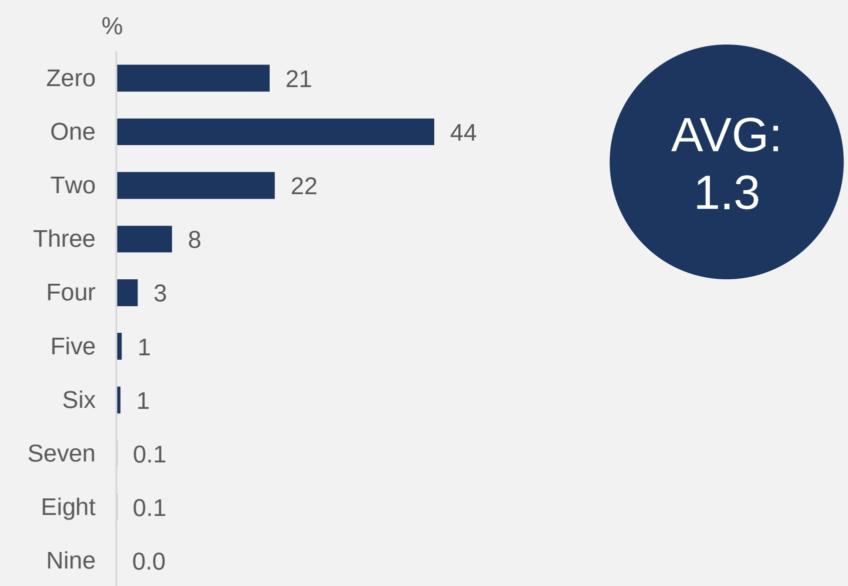
- Ages 35-54 (33%) and ages 55+ (36% vs 26% of ages 18-34)
- Those who pay for 1-2 (32%), and 3-5 subscription services (35% vs 14% of those who pay for 6+)

Those aged 18-34 are less likely to have a TV in their household than any other age group.

TVCS

Number of TVs that have external aerials or antennas connected to them

On average, 1.3 TVs in households have external aerials or antennas connected to them. Around one-fifth of respondents (21%) said that none of the TVs in their house have external aerials or antennas connected to them, while almost half (44%) said that one of the TVs in their house does.



Source: NEW17bb. Of the working TVs in your house, how many have external aerials or antennas connected to them?
Base: TVCS, Respondents have at least one TV in their house. 2022: n=3910.
Notes: Don't know/refused responses not shown: DK = 1%, Ref = 0.1%

Subgroups

↑ **Zero** was higher for:

- Women (24% vs 17% of men)
- Ages 18-34 (38%), and ages 35-54 (18% vs 10% of ages 55+)
- Ages 18-34 (38% vs 18% of ages 35-54)
- Those living in a capital city (26% vs 13% of those living outside a capital city)
- Parents with dependent children (23% vs 16% of parents with non-dependent children),
- Adults living in a share house (47% vs 20% of those living alone, 23% of parents with dependent children, 16% of parents with non-dependent children, and 28% of those living in another household type)
- Those living in another household type (28% vs 16% of parents with non-dependent children)
- Those whose TV is less than 2 years old (25% vs 20% of those whose TV is 2 or more years old)
- Those who did not watch sport in P7D (25% vs 16% of those who watched sport)
- Those in SEIFA Quintile 3 (23%), and Quintile 5 (26% vs 15% of Quintile 1)
- Those with HH income of $52,000 to $103,999 (24% vs 17% of those with HH income of $1 to $51,999)

↑ **One** was higher for:

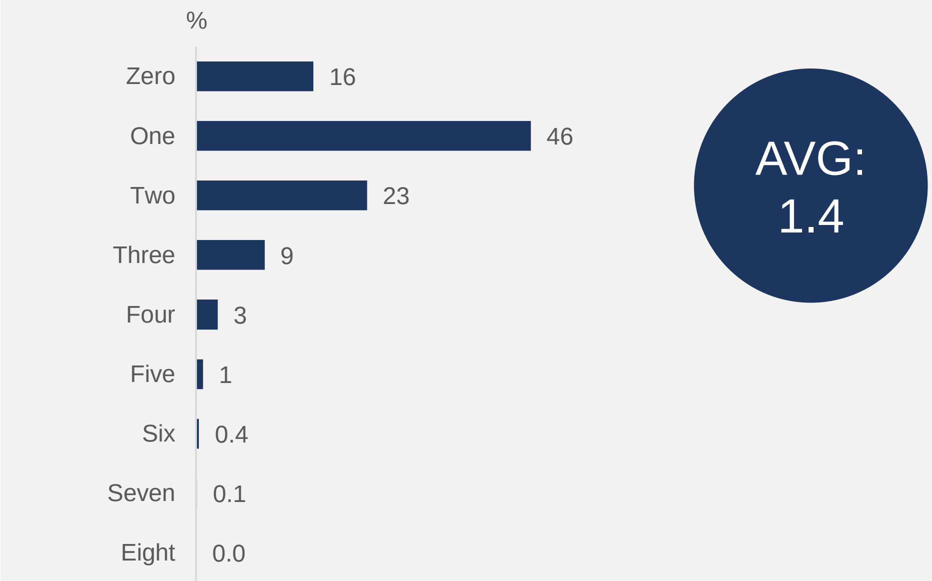
- Those living outside a capital city (48% vs 41% of those living in a capital city)
- Those living alone (48% vs 37% of parents with non-dependent children)
- Those who did not watch sport in P7D (46% vs 41% of those who watched sport)
- Those with HH income of $1 to $51,999 (50% vs 41% of those with HH income of $52,000 to $103,999, and 36% of $156,000 or more)

The average number of TVs with aerial connected to them is lower than the number of actual TVs in the house.

TVCS

Number of TVs connected to the internet

On average, 1.4 TVs in households are connected to the internet. Nearly half of respondents (46%) said that only one TV in their household connects to the internet and nearly one-quarter indicated two (23%). Less than one-fifth of respondents said that none of the TVs in their house are connected to the internet (16%).



Source: NEW17b. Of the working TVs currently in your house, how many are connected to the internet (e.g., a smart TV or through a smart TV accessory such as a Google Chromecast)?

Base: TVCS, Respondents who have at least one TV in their house. 2022: n=3910

Notes: Don't know/refused responses not shown: DK = 0.5%, Ref = 0.1%

Subgroups

↑ **Zero** was higher for:

- Ages 55+ (24% vs 11% of ages 35-54, and 11% of ages 18-34)
- Living outside a capital city (21% vs 14% of those living in a capital city)
- Living alone (22% vs 10% of parents with dependent children, 11% of parents with non-dependent children, and 8% of adults living in a share house)
- TV is 2 or more years old (20% vs 6% of those whose TV is less than 2 years old)
- Those who did not watch sport P7D (18% vs 14% of those who watched sport P7D)
- Those in SEIFA Quintile 1 (19%), Quintile 2 (19%), and Quintile 3 (18% vs 12% of Quintile 4, and 13% of Quintile 5)
- Those with HH income of $1 to $51,999 (30% vs 13% of those with HH income of $52,000 to $103,999, 8% of $104,000 to $155,999, and 6% of $156,000 or more)
- Those with HH income of $52,000 to $103,999 (13% vs 8% of $104,000 to $155,999, and 6% of $156,000 or more)
- Those who pay for 0 (15%), and 1-2 subscription services (11% vs 4% of those who pay for 3-5)

↑ **One** was higher for:

- Ages 18-34 (56% vs 42% of ages 35-54, and 41% of ages 55+)
- Those living in a capital city (47% vs 43% of those living outside a capital city)
- Those living alone (52%) and adults living in a share house (64% vs 40% of parents with dependent children, and 38% of parents with non-dependent children)
- Adults living in a share house (64% vs 39% of those living in another household type)
- Those who did not watch sport P7D (48% vs 43% of those who watched sport P7D)
- Those who pay for 1-2 subscription services (51% vs 43% of those who pay for 3-5, and 33% of those who pay for 6+)

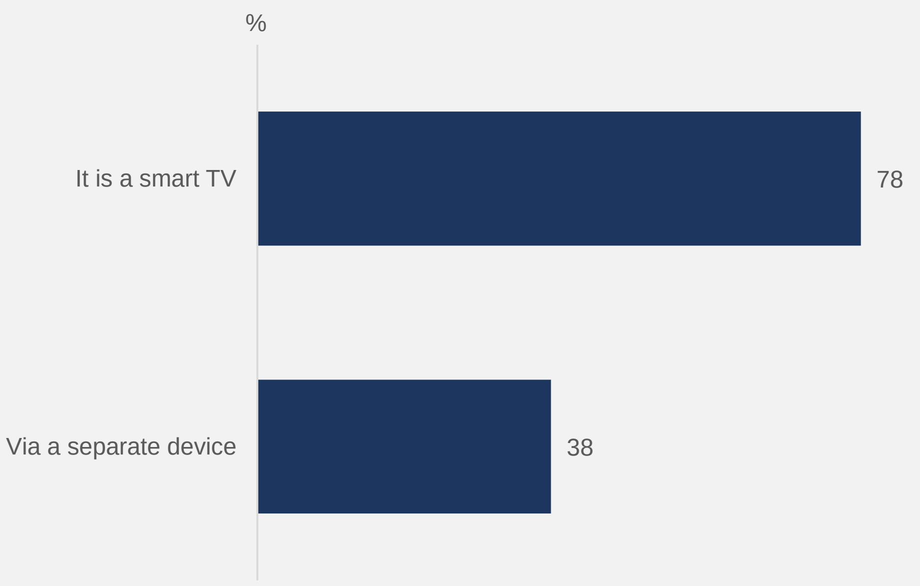
↑ **Two** was higher for:

- Parents with dependent children (30%) and parents with non-dependent children (26% vs 19% of those living alone, and 13% of adults living in a share house)
- Those who watched sport P7D (26% vs 21% of those who did not watch sport P7D)
- Those with HH income of $52,000 to $103,999 (27%), and $156,000 or more (26% vs 18% of those with HH income of $1 to $51,999)

The average number of TVs connected to the internet is slightly higher than the number of TVs that use external antennas.

How TVs are connected to the internet

For those that do have at least one TV connected to the internet, most respondents (78%) said that their TV connects to the internet because it is a smart TV, although just over one-third (38%) said that their TV is connected to the internet through a separate device.



Source: NEW17c. How do the TVs in your house connect to the internet?
Base: TVCS, Respondents who have at least one TV connected to the internet in their house. 2022: n=3085.
Notes: Don't know/refused responses not shown: DK = 0.6%, Ref = 0.0%

Subgroups

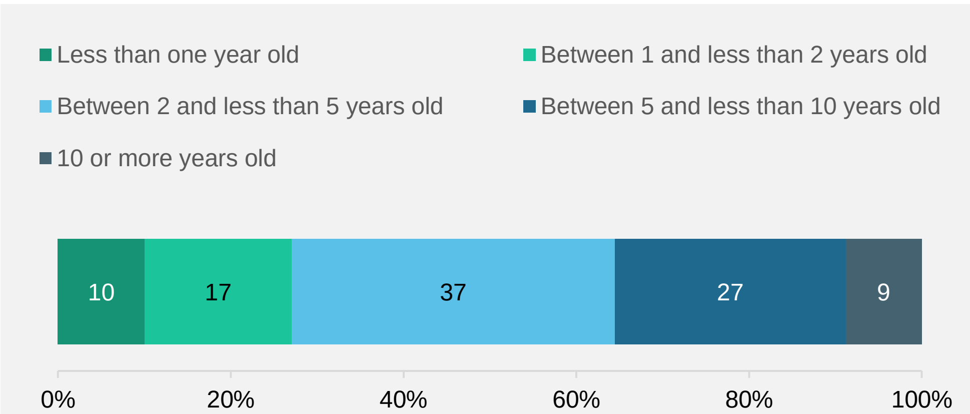
↑ **It is a smart TV** was higher for:
- Men (80% vs 75% of women)
- Ages 55+ (81% vs 74% of ages 18-34)
- Those whose TV is less than 2 years old (92% vs 71% of those whose TV is 2 or more years old)
- Those who watched sport P7D (81% vs 74% of those who did not watch sport P7D)
- Those with HH income of $156,000 or more (84% vs 77% of those with HH income of $1 to $51,999, 77% of $52,000 to $103,999, and 73% of $104,000 to $155,999)

↑ **Via a separate device** was higher for:
- Ages 18-34 (43%) and ages 35-54 (43% vs 29% of ages 55+)
- Those whose TV is 2 or more years old (43% vs 26% of those whose TV is less than 2 years old)

The most common way a TV connects to the internet is without a separate device.

Age of current main TV

The average age of the current main TV in households is 4.5 years. Over one-third of respondents (37%) said the main TV in their house is between 2 and less than 5 years old. Approximately one-in-ten respondents said their TV was less than one year old (10%), or 10 or more years old (9%).



Source: NEW17d. How old is your current main TV?
Base: TVCS, Respondents have at least one TV in their house. 2022: n=3910.
Notes: Don't know/refused responses not shown: dk = 0.2%, Ref = 0.1%

AVG: 4.5 years

Subgroups

↑ **Less than 1 year old was higher for:**
- Men (12%, vs 8% of women)
- Those who watched sport P7D (12% vs 9% of those who did not watch sport P7D)

↑ **Between 1 and less than 2 years old** was higher for:
- Ages 18-34 (20% vs 14% of ages 55+)
- Those who pay for 6+ subscription services (38% vs 16% of those who pay for 1-2, and 19% of those who pay for 3-5)

↑ **Between 5 and less than 10 years old** was higher for: Those with HH income of $52,000 to $103,999 (29% vs 21% of those with HH income of $156,000 or more)

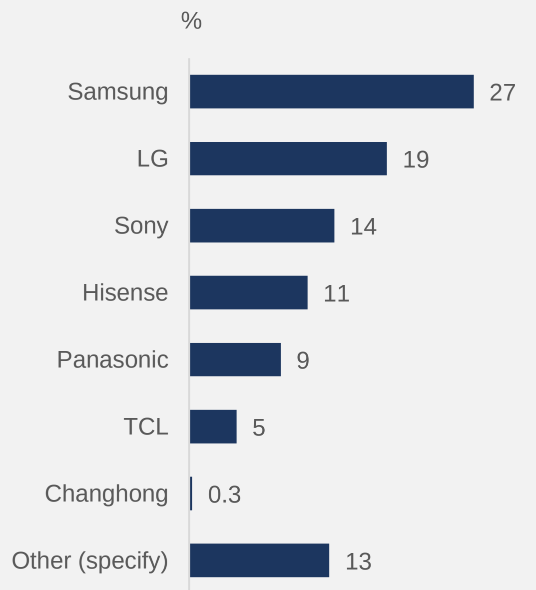
↑ **10 or more years old** was higher for:
- Ages 35-54 (10%), and ages 55+ (11% vs 5% of ages 18-34)
- Those who did not watch sport in the P7D (10% vs 7% of those who watched sport P7D)
- Those with HH income of $1 to $51,999 (12% vs 7% of those with HH income of $52,000 to $103,999, and 7% of $156,000 or more)

Younger age cohorts (ages 18-34) are more likely to have a newer TV in their household.

TVCS

Brand of main TV

The most common brand of TV used as the main TV by respondents was Samsung (27%), followed by LG (19%), and Sony (14%).



Source: NEW17f. What brand is your current main TV?
Base: TVCS, Respondents have at least one TV in their house. 2022: n=3910.
Notes: Don't know/refused responses not shown: DK = 1%, Ref = 0.1%

Subgroups

↑ **Samsung** was higher for:
- Those living in a capital city (31% vs 21% of those living outside a capital city)
- Those who watched sport P7D (30% vs 24% of those who did not watch sport P7D)
- Those in SEIFA Quintile 4 (33% vs 22% in Quintile 1, 22% in Quintile 2, and 26% in Quintile 3)
- Those in SEIFA Quintile 5 (30% vs 22% in Quintile 1, and 22% in Quintile 2)
- Those with HH income of $104,000 to $155,999 (29%), and $156,000 or more (34% vs 22% of those with HH income of $1 to $51,999)

↑ **LG** was higher for:
- Ages 18-34 (23% vs 17% of ages 55+)
- Those living outside a capital city (21% vs 18% of those living in a capital city)

↑ **Sony** was higher for:
- Those living in a capital city (15% vs 12% of those living outside a capital city)
- Those in SEIFA Quintile 5 (18% vs 10% of those in Quintile 1)

Samsung is the most common brand of TV, especially for those living in capital cities, and parents.

TVCS

Reasons for buying a new TV

Just under one-tenth of respondents (9%) said they had bought a new TV in the past 6 months. The most common reason for buying a new TV was to upgrade or keep up with new technology (39%). Around three in ten respondents (30%) bought a new TV because their existing one broke or malfunctioned, while others saw a good deal (17%).

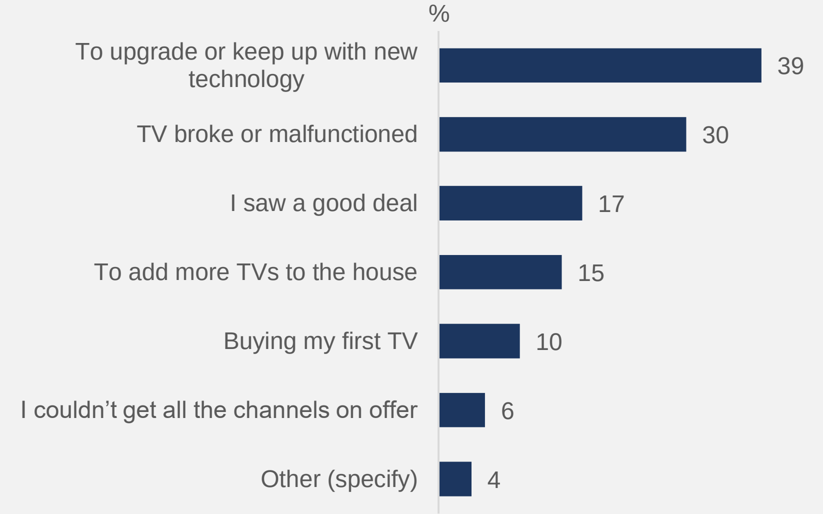
"Yes, I bought a new TV in the past 6 months"

9%

Source: NEW16. Did you buy a new TV in the past 6 months?

Base: TVCS, All respondents. 2022: n=4016.

Notes: No/Don't know/refused responses not shown: No = 90.51, DK = 0.0%, Ref = 0.0%



Source: NEW16b. What were the reason(s) you bought a new TV?

Base: TVCS, Respondents who bought a new TV in the past 6 months. 2022: n=366.

Notes: Don't know/refused responses not shown: DK = 0.3%, Ref = 0.0%

Subgroups

↑ **To upgrade or keep up with new technology** was higher for:
- Women (47% vs 33% of men)
- Those whose TV is less than 2 years old (43% vs 21% of those whose TV is 2 or more years old)

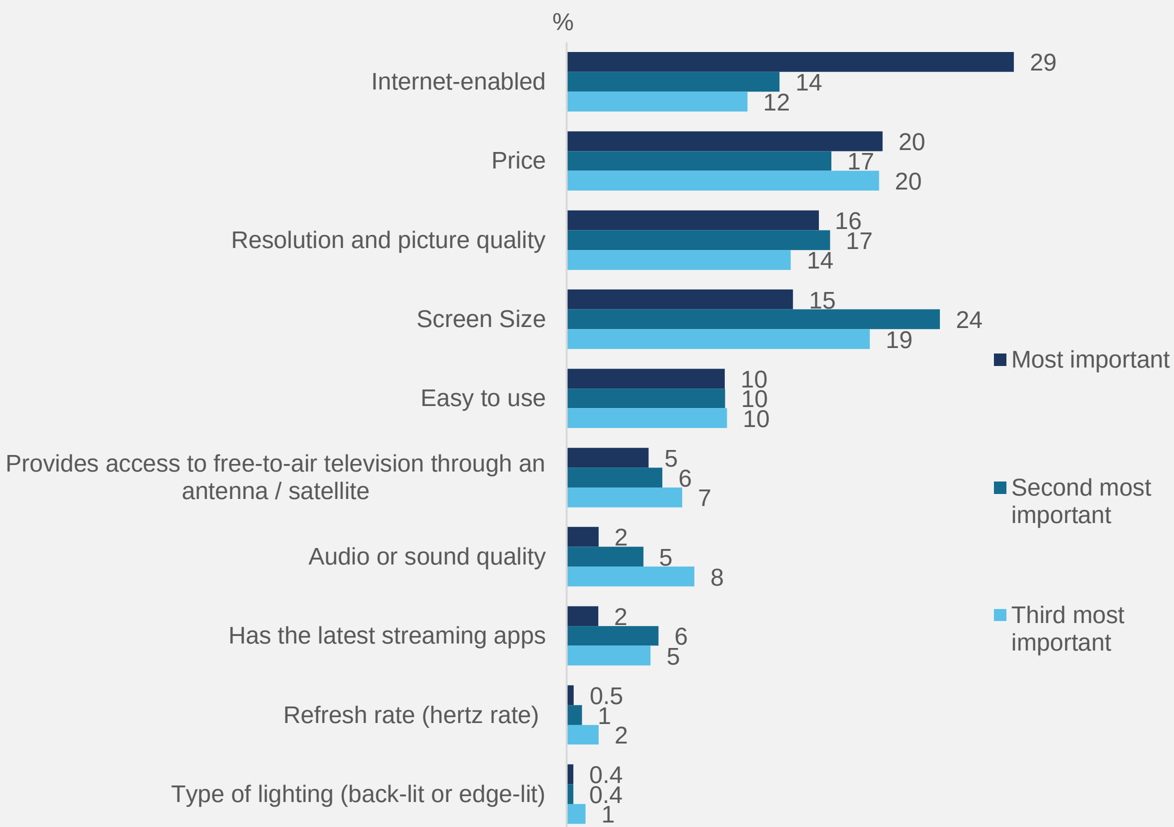
Subgroups

↑ **TV broke or malfunctioned** was higher for:
- Those living outside a capital city (40% vs 24% of those living in a capital city)
- Those with HH income of $104,000 to $155,999 (45% vs 16% of those with HH income of $156,000 or more)

The changing pace of technology drives most new purchases while replacing a broken device ranks second.

Importance of various features when buying a new TV

The primary feature that respondents ranked as most important to consider when buying a new TV was that it is internet-enabled (29%). Screen size was most commonly ranked as the second most important feature (24%), while price was the primary feature ranked as third most important (20%).



Source: NEW18. When buying a new TV, which of the following features are important to you? Please order your top three features from 1 to 3 (where 1 is the most important, 2 is the next most important, and 3 is your third most important).

Base: TVCS, All respondents. 2022: n=4016.

Subgroups

↑ **Internet-enabled** was higher for:

- Most important feature:
  - Women (32% vs 26% of men)
  - Those living in a capital city (31% vs 25% of those living outside a capital city)
  - Parents with dependent children (34% vs 28% of those living alone, and 25% of parents with non-dependent children)
  - Those whose TV is less than 2 years old (33% vs 27% of those whose TV is 2 or more years old)

↑ **Price** was higher for:

- Most important feature:
  - Those living outside a capital city (23% vs 19% of those living in a capital city)
  - Those in SEIFA Quintile 2 (24%), and Quintile 3 (25% vs 17% of those in Quintile 4, and 16% in Quintile 5)
  - Those with HH income of $1 to $51,999 (24% vs 18% of those with HH income of $104,000 to $155,999, and 13% of $156,000 or more)
  - Those with HH income of $52,000 to $103,999 (24% vs 13% of those with HH income of $156,000 or more)

Internet connectivity capability is a feature sought out in new TV purchases.

Sports Content on TV

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Chapter Summary – Sports Content on TV

Sports content:

Sport is a popular content type in Australia

The majority of respondents had watched sport in the past 6 months (67%). Just under half of respondents (46%) had watched or listened to sport in the past 7 days (net live sport, replayed sport, other sports-related programs). Live sport significantly increased since 2021 (42% in 2022, 37% in 2021).

The majority of respondents had watched sports online or on TV in the past 6 months.

Live free-to-air remains the primary means of sports consumption, but is on the decline

Half of respondents (50%) had consumed sports content via commercial free-to-air TV. However, in 2022 commercial free-to-air TV, and publicly-owned free-to-air TV (15%) both declined significantly since 2021 (from 67% and 19%, respectively). However, commercial free-to air on-demand TV (16%) and publicly owned on-demand TV have both significantly increased this year (10%).

The most important feature of sports content for respondents who have watched sports in the past 6 months was that it is freely available on broadcast TV (36%).

Free-to-air remains the main service that respondents prefer to access sports programming in Australia.

Diversity in sports content consumption

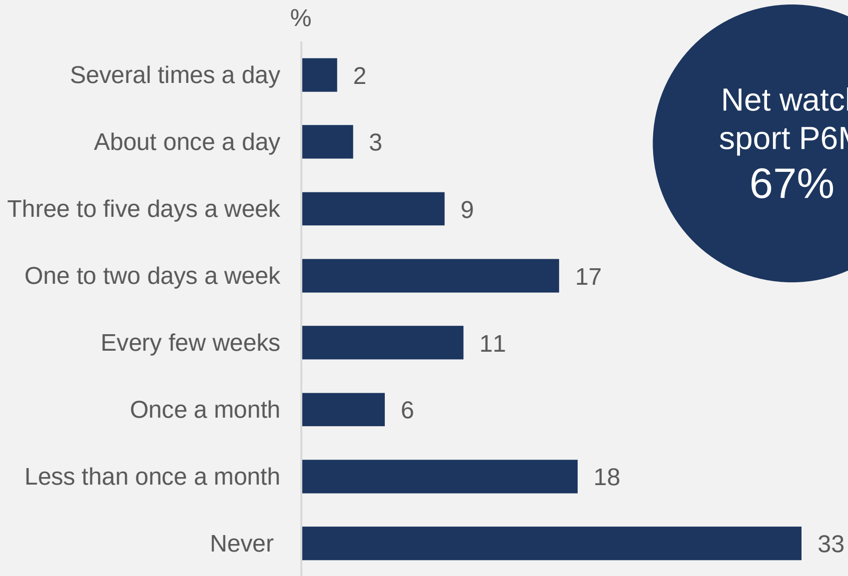
The majority of respondents who had consumed sports content indicated that they had watched or listened to men’s sport (59%), while two-fifths (39%) had consumed both men’s and women’s sport.

Australian Rules Football was the most commonly watched men’s sport (33%, steady since 2021 at 34%), followed by Rugby League (31%, decreasing from 36% in 2021), and international test cricket matches (28%, and 27% in 2021).

Audiences are increasingly interested in seeing both male and female representation in sports programs.

Frequency of watching sports in past 6 months

The majority of respondents had watched sport in the past 6 months (67%). Approximately one-third (33%) of respondents said they have not watched sports in the past 6 months, while just under one-fifth said they have watched sports less than once a month (18%). A similar proportion (17%) indicated they have typically watched sports one to two days a week over the past 6 months.



Net watch sport P6M
67%

Source: NEW19. Over the past 6 months, how often have you typically watched sports online or on TV?
Base: TVCS, All respondents. 2022: n=4016.
Notes: Don't know/refused responses not shown: DK= 0.0%, Ref = 0.0%

Subgroups

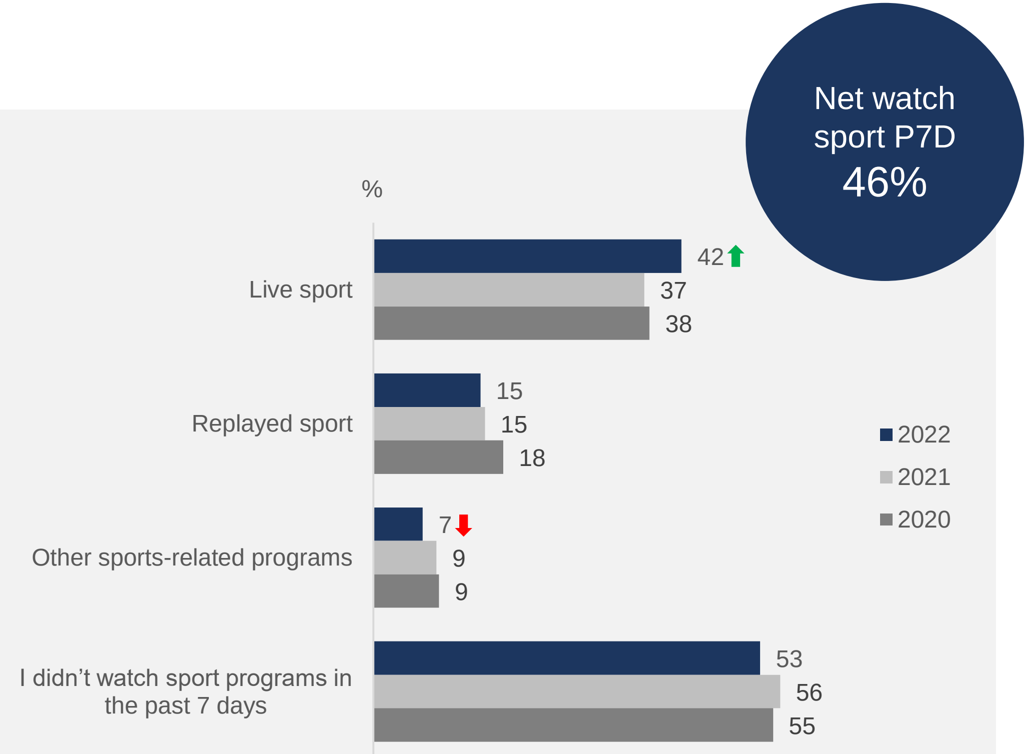
↑ **One to two days a week** was higher for:
- Men (20% vs 14% of women)
- Ages 35-54 (16%), and ages 55+ (22% vs 11% of ages 18-34)
- Ages 55+ (22% vs 16% of ages 35-54)
- Those whose TV is 2 or more years old (18% vs 14% of those whose TV is less than 2 years old)

↑ **Never** was higher for:
- Women (40% vs 25% of men)
- Ages 18-34 (44%), and ages 35-54 (33% vs 25% of ages 55+)
- Ages 18-34 (44% vs 33% of ages 35-54)
- Adults living in a share house (57% vs 32% of those living alone, 32% of parents with dependent children, and 31% of parents with non-dependent children)
- Those with HH income of $1 to $51,999 (36%), $52,000 to $103,999 (35%), and $104,000 to $155,999 (33% vs 25% of those with HH income of $156,000 or more)

The majority of respondents had watched sports online or on TV in the past 6 months.

Sports content consumed in the past 7 days

Just under half of respondents (46%) had consumed sport in the past 7 days (net live sport, replayed sport, other sports-related programs), although 53% had not watched or listened to any sports content in this period.



Source: E1. In the past 7 days, did you watch or listen to…?

Base: TVCS, All respondents. 2022: n=4016. 2021: n=4135. 2020: n=4096.

Notes: Don't know/refused responses not shown: 2022 DK=0.3%, Ref = 0.2%. 2021 DK = 0.0%, Ref = 0.0%. 2020 DK = 0.0%, Ref = 0.0%.

Subgroups

↑ **Net Live sport, replayed sport, and other sports-related programs** was higher for:

- Men (57% vs 36% of women)
- Ages 35-54 (46%), and ages 55+ (54% vs 36% of ages 18-34)
- Ages 55+ (54% vs 46% of ages 35-54)
- Those living alone (48%), and parents with non-dependent children (50% vs 33% of adults living in a share house, and 33% of those living in another household type)
- Parents with dependent children (46% vs 33% of adults living in a share house)
- Those with HH income of $156,000 or more (56% vs 43% of those with HH income of $1 to $51,999, and 44% of $52,000 to $103,999)

↑ **I didn't watch sports programs P7D** was higher for:

- Women (63% vs 42% of men)
- Ages 18-34 (64%), and ages 35-54 (54% vs 45% of ages 55+)
- Ages 18-34 (64% vs 54% of ages 35-54)
- Adults living in a share house (67% vs 52% of those living alone, 54% of parents with dependent children, and 49% of parents with non-dependent children)
- Those living in another household type (67% vs 52% of those living alone, and 49% of parents with non-dependent children)
- Those with HH income of $1 to $51,999 (56%), and $52,000 to $103,999 (55% vs 44% of those with HH income of $156,000 or more)

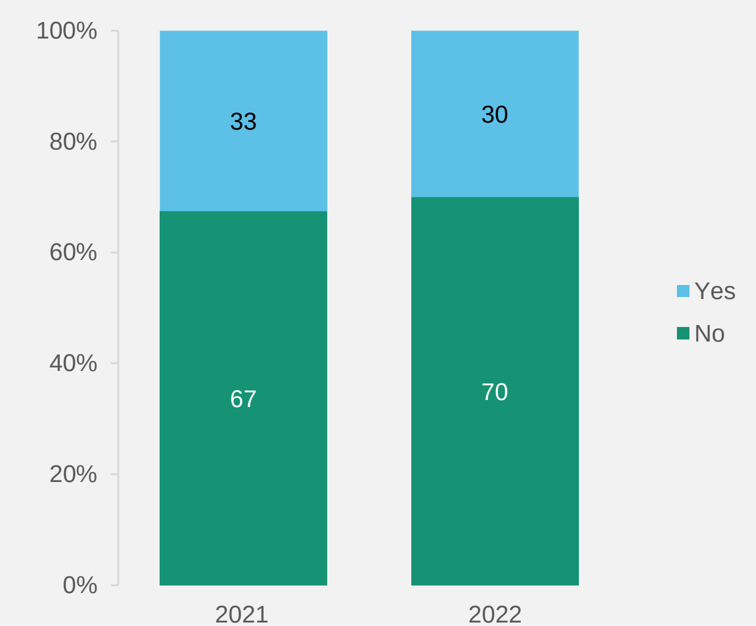
Callouts

- In 2022, live sport has increased significantly, while other sports related programs has decreased.

Around half of respondents reported watching or listening to sport in the past 7 days.

Whether respondents who had not consumed sport in past 7 days consume sports in a normal year

Respondents who had not consumed any sports content in the week prior to completing the survey were asked whether they watch or listen to sports at all during a normal year. Approximately seven in ten (70%) said they did not usually consume sport, and three in ten (30%) said they did.



Source: E5. Do you watch or listen to sports at all during a normal year?

Base: TVCS, Respondents who have not consumed sports content in the past 7 days. 2022: n=2060. 2021: n=2211

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

Subgroups

↑ **Yes** was higher for:
- Men (35% vs 27% of women)
- Ages 35-54 (31%), and ages 55+ (38% vs 22% of ages 18-34)
- Ages 55+ (38% vs 31% of ages 35-54)
- Those living alone (34% vs 15% of adults living in a share house)

↑ **No** was higher for:
- Women (73% vs 65% of men)
- Ages 18-34 (78%), and ages 35-54 (69% vs 62% of ages 55+)
- Ages 18-34 (78% vs 69% of ages 35-54)

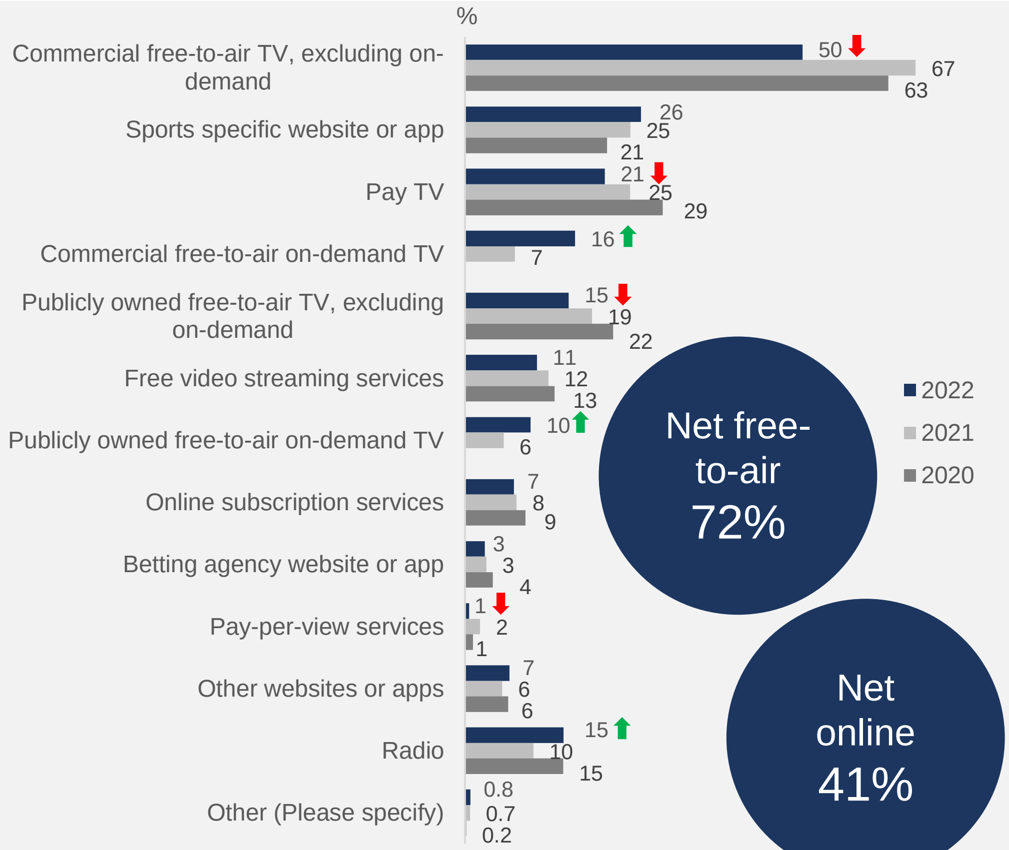
Callouts

- No significant differences observed between 2022 and 2021.

About a third of those who didn't watch sport in the past 7 days still report watching some sports in a normal year.

How respondents consumed sports content

Half of respondents (50%) had consumed sports content via commercial free-to-air TV, however this has declined since 2021. More than one-quarter (26%) used a sports-specific website or app, and one-fifth (21%) used Pay TV. However, commercial free-to air on-demand TV (16%) and publicly owned on-demand TV have both significantly increased this year (10%).



Source: E2. How did you watch or listen to sports related programs in the past 7 days?

Base: TVCS, Respondents who consumed sports content in the past 7 days. 2022: n=1956. 2021: n=1924. 2020: n=1880.

Notes: Don't know/refused responses not shown: 2022 DK = 0.3%, Ref = 0.0%. 2021 DK = 0.1, Ref = 0.0%. 2020 DK = 0.0%, Ref = 0.0%.

Subgroups

↑ **Commercial free-to-air TV** was higher for:
- Ages 35-54 (48%), and ages 55+ (62% vs 30% of ages 18-34)
- Ages 55+ (62% vs 48% of ages 35-54)
- Those living outside a capital city (56% vs 47% of those living in a capital city)

↑ **Sports specific website or app** was higher for:
- Ages 18-34 (33%), and ages 35-54 (29% vs 21% of ages 55+)
- Parents with dependent children (32% vs 22% of those living alone)
- Those with HH income of $156,000 or more (35% vs 21% of those with HH income of $1 to $51,999, and 22% of $52,000 to $103,999)
- Those who pay for 3-5 (41%), and 6+ subscription services (67% vs 17% of those who pay for 0 subscriptions services, and 21% of those who pay for 1-2)
- Those who pay for 6+ subscription services (67% vs 41% of those who pay for 3-5 subscription service)
- Those whose TV is less than 2 years old (31% vs 25% of those whose TV is 2 or more years old)

Callouts

- In 2022, commercial free-to-air TV, publicly owned TV, pay TV and pay-per-view has declined since 2021.
- Radio has significantly increased for sports content consumption in 2022.

Free-to-air remains the main service that respondents prefer to access sports programming in Australia.

TVCS

Importance of various features of sports content (%)

The most important feature of sports content for respondents who have watched sports in the past 6 months was that it is freely available on broadcast TV (36%). The next most important features were that it is freely available either online or on broadcast TV (30%), and that it is available on-demand so that matches and events can be watched at any time (13%).

Feature	Total
That it is freely available on broadcast TV	36
That it is freely available either online or on broadcast TV	30
That it is available on-demand so I can watch matches / events when I want to watch them	13
That it is easily accessible, even if I have to pay for it	10
That it is high quality, even if I have to pay for it	6
That it has features such as additional content, analysis or preferred commentators, even if I have to pay for it	3
Other (specify)	1

Source: NEW20. Thinking about access to watching sports, which of the following features is the MOST important to you?

Base: TVCS, Respondents who have watched sports in the past 6 months. 2022: n=2772.

Notes: Don't know/refused responses not shown: Dk=1%, Ref=0.2%

Subgroups

↑ **That it is freely available on broadcast TV** was higher for:
- Ages 35-54 (33%), and ages 55+ (48% vs 19% of ages 18-34)
- Ages 55+ (48% vs 33% of ages 35-54)
- Those living outside a capital city (41% vs 34% of those living in a capital city)
- Those living alone (42% vs 28% of parents with dependent children, and 23% of adults living in a share house)
- Those in SEIFA Quintile 1 (42%), and Quintile 2 (43% vs 30% of those in Quintile 4)
- Those in SEIFA Quintile 2 (43% vs 33% of those in Quintile 5)
- Those with HH income of $1 to $51,999 (45% vs 35% of those with HH income of $52,000 to $103,999, 32% of $104,000 to $155,999, and 30% of $156,000 or more)
- Those who pay for 0 subscription services (48% vs 35% of those who pay for 1-2, 27% of those who pay for 3-5, and 13% of those who pay for 6+)
- Those who pay for 1-2 subscription services (35% vs 27% of those who pay for 3-5, and 13% of those who pay for 6+)

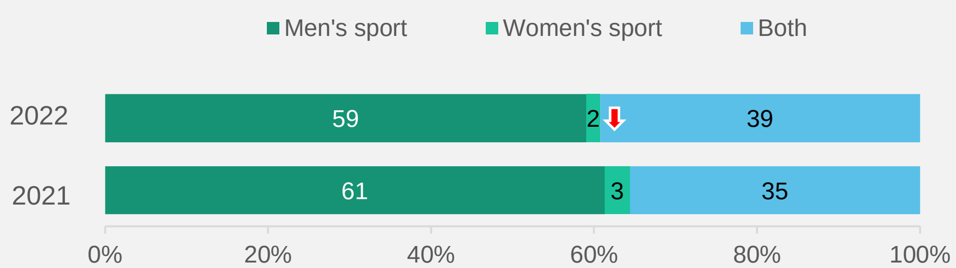
↑ **That it is freely available either online or on broadcast TV** was higher for:
- Ages 18-34 (37%), and ages 35-54 (31% vs 26% of ages 55+)

Consumers have a strong preference for free availability of sports programming and content production in Australia.

TVCS

Whether sports content consumed was men's, women's, or both

The majority of respondents (59%) who had consumed sports content indicated that they had watched or listened to men's sport, while two-fifths (39%) had consumed both men's and women's sport.



Source: E3. Were the sports programs you watched or listened to focused on:
Base: TVCS, Respondents who consumed sports content in the past 7 days. 2022: n=1956. 2021 n=1924.
Notes: Don't know/refused responses not shown: 2022 DK = 0.1%, Ref = 0.1%, 2021 DK = 0.2, Ref = 0.0%.

Subgroups

↑ **Men's sport** was higher for:
- Ages 18-34 (64%), and ages 35-54 (67% vs 52% of ages 55+)
- Those in SEIFA Quintile 3 (66), and Quintile 5 (66% vs 55% of those in Quintile 1, 52% of those in Quintile 2, and 53% of those in Quintile 4)
- Those with HH income of $52,000 to $103,999 (62%), and $156,000 or more (65% vs 51% of those with HH income of $1 to $51,999)

↑ **Women's sport** was higher for:
- Those in SEIFA Quintile 2 (3%), and Quintile 3 (3% vs 0.5% of those in Quintile 5)
- Women (3% vs 0.5% of men)
- Ages 18-34 (4% vs 1% of ages 55+)

↑ **Both** was higher for:
- Ages 55+ (47% vs 32% of ages 35-54, and 32% of ages 18-34)
- Those in SEIFA Quintile 1 (44%), Quintile 2 (44%), and Quintile 4 (46% vs 31% of those in Quintile 3, and 34% of those in Quintile 5)
- Those with HH income of $1 to $51,999 (47% vs 37% of those with HH income of $52,000 to $103,999, and 32% of $156,000 or more)

Callouts

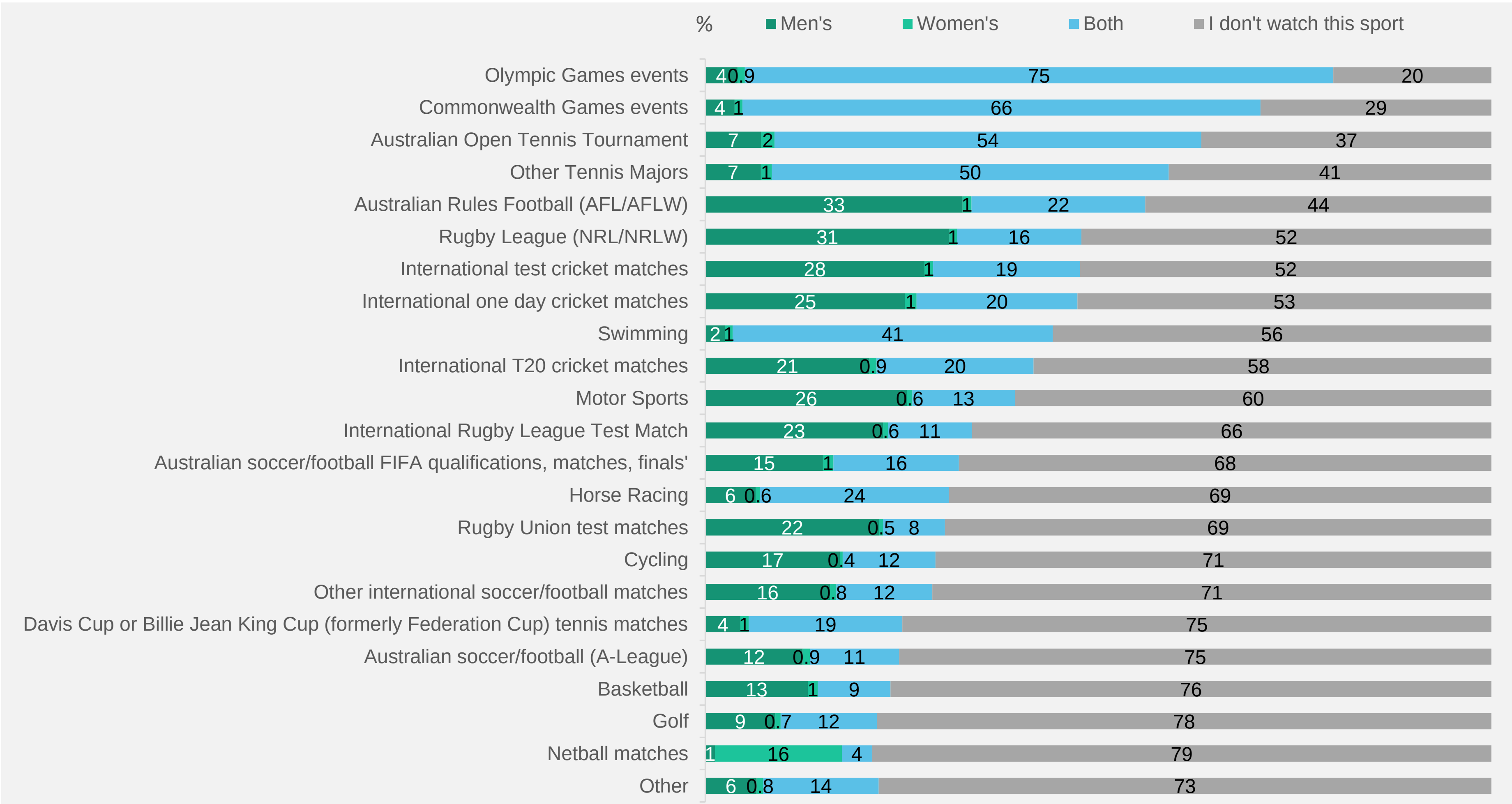
- In 2022, women's sport significantly decreased compared to 2021.

Audiences are increasingly interested in seeing both male and female representation in sports programs.

TVCS

Types of sports content consumed (%)

Australian Rules Football was the most commonly watched men’s sport (33%, steady since 2021 at 34%), followed by Rugby League (31%, decreasing from 36% in 2021), and international test cricket matches (28%, and 27% in 2021). The most commonly watched sports overall (net ‘men’s’, ‘women’s’, and ‘both’), were Olympic Games events (75%), and Commonwealth Games events (66%). The most commonly watched women’s sport was netball matches (16%).



Source: E4. Which of the following sports events do you typically watch online or on TV during a normal year?
Base: TVCS, Respondents who consume sports content. 2022: n=2629.
Notes: Don’t know/refused responses not shown, % vary per statement.

There is a wide array of sports types being watched on TV.

Social Research Centre

Thank you

PO Box 13328
Law Courts Victoria 8010

03 9236 8500

A subsidiary of: Australian National University

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’).