



Social  
Research  
Centre

# **The 2023 Television & Media Survey— summary report**

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

June 2024

## Report details

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## Overview and methodology

### List of abbreviations and terms

Abbreviation	Full description
AI	Artificial Intelligence
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/legal guardians/carers of children aged 17 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 disadvantaged, and Quintile 5 is least disadvantaged)
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

### Definitions of terms

Term	Definition
Children	Children aged 0-17 years, except where a more specific age range is given
the Department	The Department of Infrastructure, Transport, Regional Development, Communications and the Arts
Net	Sum of results for two or more categories
Parents	Respondents who are parents/legal guardians/carers of a child/children aged 17 years and under
Respondents	People who responded to the quantitative survey
Screen content	Content watched on a screen, including things like television shows or programs, movies, documentaries and sports
the Survey	The Television and Media Survey 2023

Note: Where age is referenced throughout the report, this should be taken as a reference to respondents in those age ranges (e.g., Ages 18-24 refers to respondents aged between 18 and 24 years).

## Condensed code frames in report

Some code frames in charts and tables throughout the report have been condensed from the original codes shown in the survey in the interest of space and ease of reading. The original codes and the condensed codes are shown below.

Original (adult)	Original (children)	Condensed (adults and children)
Commercial free-to-air TV (e.g. Seven, Nine, 10, WIN, Imparja, NBN Television, GWN), including recorded content but excluding on-demand TV	Channels Seven, Nine, or 10 (sometimes called WIN, Imparja, NBN Television, or GWN) (Commercial free-to-air TV)	Commercial free-to-air TV, excluding on-demand
Publicly owned free-to-air TV (i.e. ABC, SBS), including recorded content but excluding on-demand TV	ABC or SBS channels (Publicly owned free-to-air TV)	Publicly owned free-to-air TV, excluding on-demand
Pay TV (e.g. Foxtel, Fetch TV), including recorded content but excluding streaming	Foxtel, Fetch TV (Pay TV)	Pay TV
Commercial free-to-air on-demand TV (e.g. 9Now, 10 play, 7plus)	9Now, 10 play, or 7plus (Commercial free-to-air on-demand TV)	Commercial free-to-air on-demand TV
Publicly owned free-to-air on-demand TV (e.g. ABC iview, SBS On Demand, ABC News, ABC Kids)	ABC iview, SBS On Demand, ABC News, or ABC Kids (Publicly owned free-to-air on-demand TV)	Publicly owned free-to-air on-demand TV
Free video streaming services (e.g. YouTube, Twitch, Tubi)	YouTube, YouTube Kids, Twitch, or Tubi (Free video streaming services)	Free video streaming services
Online subscription services (e.g. Netflix, Binge, YouTube Premium)	Netflix, Amazon Prime Video, Binge, YouTube Premium or Disney+ (Online subscription services)	Online subscription services
Pay-per-view services (e.g. Google Play)	Google Play (or pay-per-view services)	Pay-per-view services
Sports specific website or app (e.g. AFL Live, NRL Live, Cricket Australia Live, Kayo Sports, Stan Sport)	Sports specific website or app (e.g. AFL Live, NRL Live, Cricket Australia Live, Kayo Sports, Stan Sport)	Sports specific website or app

## Methodology

### Overview

- n = 4,892 adult respondents
- n = 884 children aged 0-17 (children aged 0-7 interviewed via parents/legal guardians/carers)
- Field dates: 25 September – 16 October 2023
- Sample: Australian general population aged 18+, parents/legal guardians/carers of children aged 0-17, children aged 0-17, and people living in regional Australia.
- Note that children aged 0-7 were asked via parents/legal guardians/carers, while those aged 8-17 were asked survey questions directly

## 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, parents/legal guardians/carers of children aged 0-17, and children aged 0-17 via the ORU non-probability panel
- Blended and weighted to increase accuracy and representativeness (refer to Appendix in this report, and Technical Report for further information on weighting)

## About the Survey

The Television and Media Survey 2023 collects information on the screen and media content viewing practices, habits, and expectations of Australian adults and children.

The Television and Media Survey 2023 combines questions from research previously commissioned by the department through the Media Content Consumption Survey (MCCS) since 2020 and the Television Consumer Survey (TVCS) in 2022. The Television and Media Survey 2023 maintains a core question set from these previous instruments and adds in a range of new questionnaire material to address the changing media environment.

### The survey focuses on:

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

- General screen content habits
- Screen viewing behaviour and content
- Audio content
- Television access, content and devices
- News content
- Sports content
- Advertising
- Parental perspective on children’s content
- Childrens’ content (children’s perspective)

## Reading 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 generally been used for analysis with reporting on netted agreement scales. These are indicated by ‘T2B’ (top two box), or ‘B2B’ (bottom 2 box) scores.

In reading quantitative findings based on the probability-based sample, reference is made to those who completed the survey throughout the report as ‘respondents’, ‘Australians’ or ‘adults’ as appropriate to the context in which the data are being discussed.

### Rounding of numbers

Percentages are rounded to 0 decimal places, unless the percentage is under 0.5%, which are rounded to 1 decimal place. As rounding has been used in producing data tables and nets in analysis, some scales may not sum 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.



Note that the definition of Generative Artificial Intelligence presented to respondents in the survey included Google Bard as an example. In February 2024, Google Bard was renamed Gemini, however, the name Google Bard was accurate at the time of the survey.

## Significance testing and confidence intervals

Data were 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

- Education
- Employment
- Disability status
- Country of birth
- Internet behaviours
- Content watched past 7 days
- Device usage
- Household access to online subscription steaming services
- Sport watchers
- SEIFA quintiles
- Household income
- Level of spend on subscription services
- Australian content perceptions
- Generative AI usage / trust in AI news articles
- Age of child
- Content watched past 7 days by child

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

Significance between 2023 and 2022 data points is indicated by a green arrow pointing up to indicate a significantly higher result or a red arrow pointing down to indicate a significantly lower result.



## Sample profile

Full methodological details can be found in the Appendix at the end of the report. In 2023, the survey was run as one survey instrument for a total of 4,892 people completing these questions.

Boosts were also conducted for parents/legal guardians/carers, children aged 0-17 (MCCS), and those in regional Australia (TVCS). Questions specific to media and television were asked of these boost streams. This page shows the unweighted profile of the final sample (i.e., those who completed the survey) for respondents in the survey across a range of key demographic characteristics.

The youngest age of children selected for the children's survey were those under 1 year old (infants whose parents/legal guardians/carers answered the survey on their behalf). Within the 0-7 year old age range, there were n=164 aged 0-2, n=155 aged 3-5, and n=94 age 6-7. Note that this adds to more than the total number of 0-7 year olds surveyed as parents/legal guardians/carers entered the ages for all their children and may have had more than one child in the 0-7 year old age range.

Profile	Total (n)	Total (%)	MCCS (n)	MCCS (%)	TVCS (n)	TVCS (%)
<b>Total (adults)</b>	<b>4882</b>	<b>100</b>	<b>3730</b>	<b>100</b>	<b>3861</b>	<b>100</b>
Male	2,168	44	1,643	44	1,680	44
Female	2,691	55	2,056	55	2,153	56
Non-binary / gender fluid / different identity	29	1	28	1	24	1
18-24 years old	392	8	315	8	376	10
25-34 years old	728	15	532	14	493	13
35-44 years old	1,298	27	1,104	30	868	22
45-54 years old	919	19	811	22	669	17
55-64 years old	576	12	392	11	494	13
65-74 years old	652	13	383	10	637	16
75+ years old	327	7	193	5	324	8
Capital city	2,816	58	2,633	71	1,999	52
Rest of state	2,065	42	1,092	29	1,855	48
Single or couple (no children)	1,606	33	887	24	1,606	42
Parents/legal guardians/carers (with dependent children)	2,666	54	2,427	65	1,711	44
Parents/legal guardians/carers (with non-dependent children)	369	8	255	7	293	8
Adults living in a share house	135	3	83	2	135	3
Other household type	109	2	72	2	109	3

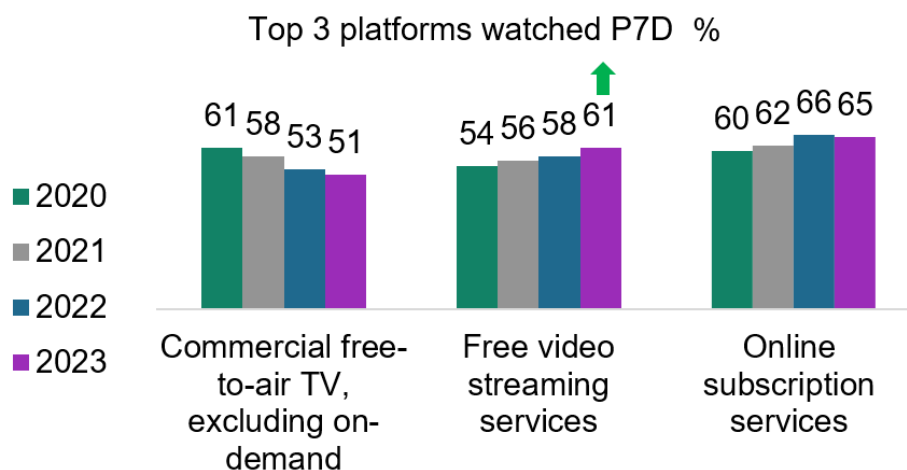
Profile	Total (n)	Total (%)	MCCS (n)	MCCS (%)	TVCS (n)	TVCS (%)
<b>Total (children)</b>	<b>884</b>	<b>100</b>	<b>884</b>	<b>100</b>	<b>3861</b>	<b>100</b>
<b>0-7 years old</b>	359	41	359	41	-	-
<b>8-10 years old</b>	197	22	197	22	-	-
<b>11-15 years old</b>	191	22	191	22	-	-
<b>16-17 years old</b>	137	15	137	15	-	-

## Executive summary

### Summary – General Screen Content Habits

Online subscription streaming services continue to dominate, though subscription service growth has slowed

**Online subscription services** have levelled off after several prior years of increasing, while free services continue to increase in 2023



TVs and mobile phones / smartphones are the most commonly used **devices** for viewing screen content

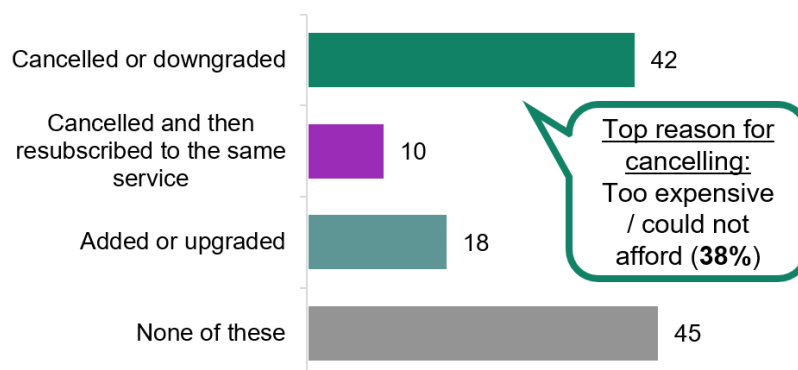
#### TV:

- 86% net use
- 48% once per day or more

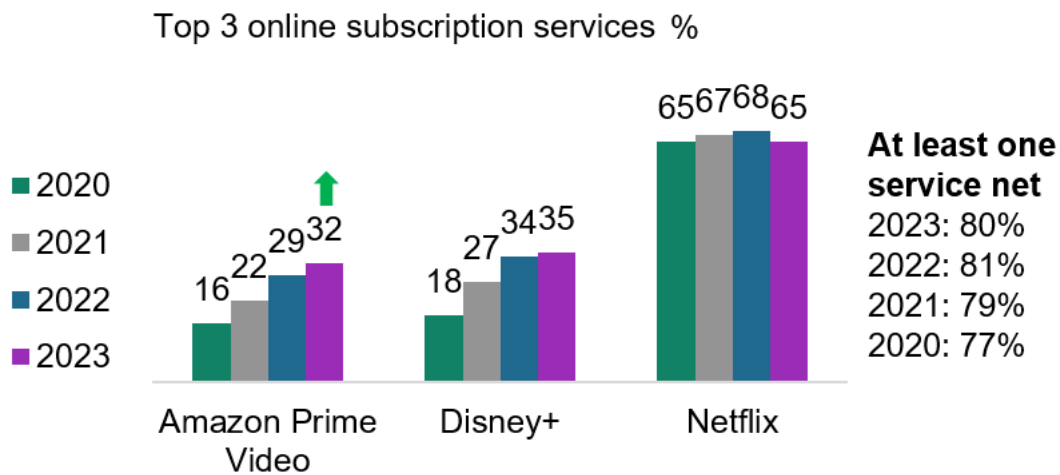
#### Mobile or smartphone:

- 74% net use
- 46% once per day or more

2023 saw high levels of online service cancellation and downgrading, especially among those aged 18-44, commonly due to their expense



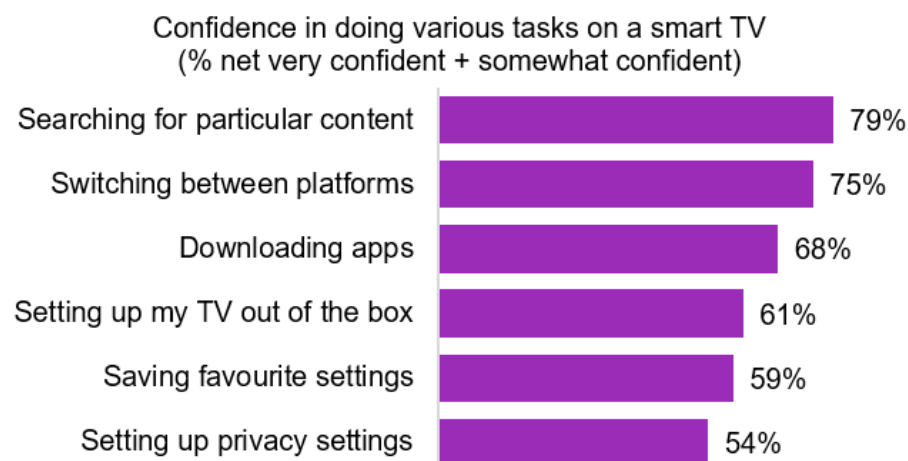
Some **online subscription streaming services** are experiencing a **plateau** this year in viewership



## Summary – Confidence

Australians generally have high confidence using smart TV functions, but lower confidence with other generalised screen content tasks

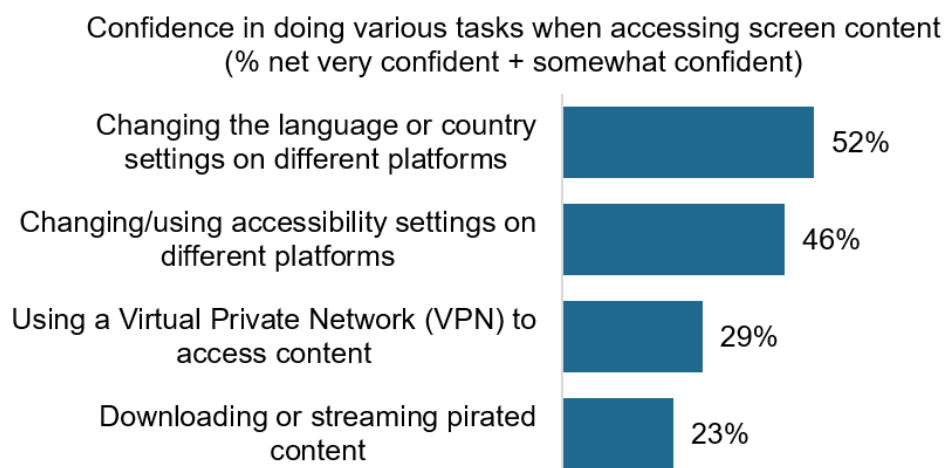
There is high confidence in performing tasks on smart TVs, especially content searching and switching between platforms



Certain cohorts are more likely to be **confident in content searching**

- Have dependent children in the household (84%)
- Employed full time or part time (83%)

## Relatively lower confidence with generalised tasks related to accessing screen content



Certain cohorts are more likely to be confident in **changing the language or country settings** on different platforms

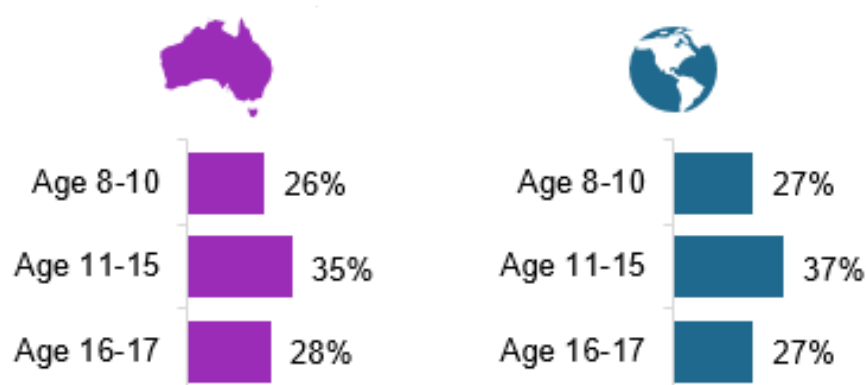
- Men (55%)
- Ages 18-24 (70%), 25-34 (60%), and 35-44 (62%)
- Have dependent children in the household (57%)
- Have non-dependent children (59%)
- Adults living in a share house (64%)

## Summary – Children

Children are watching user-generated content at high rates. They are also being exposed to gambling advertising and age-inappropriate material.

Children report high consumption of user-generated content, with especially high watch rates for children aged 11-15

Types of content children like watching most: “User-generated content”



Children aged 8-17 are being exposed to gambling advertising and age-inappropriate material

- 22% of children saw a gambling ad in the last week
- 6 in 10 or more children have watched age-inappropriate content

Have ever watched TV shows or online content meant for someone older:



User generated content is low on parents' list of importance.

Types of content most important to be available to children:

- Australian user-generated content (9%)
- International user-generated content (10%)

Australian content is commonly viewed by young children, especially animation and education.

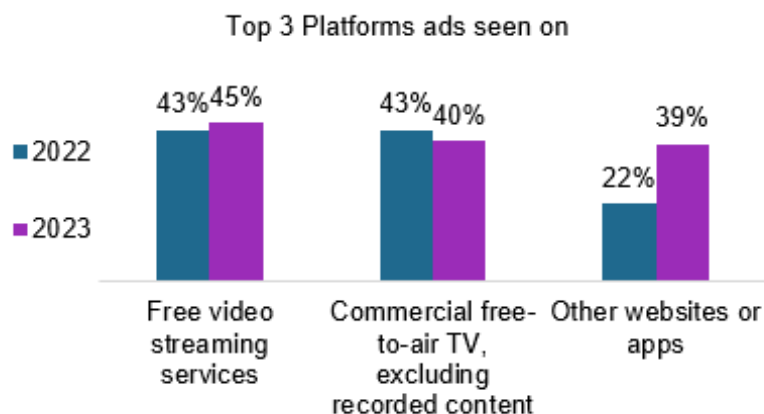
Most commonly reported type of content that children like watching most:

- Australian animation or cartoons (50%)
- Australian educational programs (33%)

## Summary – Advertising and Gambling

Advertising prevalence is increasing, with strong desire for restrictions on permitted advertising to protect children from inappropriate content and gambling, tobacco and alcohol.

Increasingly, advertisements are seen on **social media and online subscription** platforms.



Gambling advertising is seen as inappropriate by Australian adults.

Top reason for disagreeing that advertisements seen on commercial free-to-air TV were appropriate:

- The advertisements contained gambling or betting (84%)

There was an increase in tolerance of permitted advertisements this year, but **overall net level remains stable for advertising restrictions**

- 80% want restrictions applied on permitted advertising (net across platforms) (2022: 80% net)

Reasons for restrictions include protecting children from exposure to harmful or inappropriate content.

Reason for restriction	2023
Protecting children from exposure to harmful or inappropriate content	38%
Limiting content that may encourage bad habits, such as gambling, tobacco, or alcohol use	35%
Limiting the influence of advertising on consumer behaviour	19%

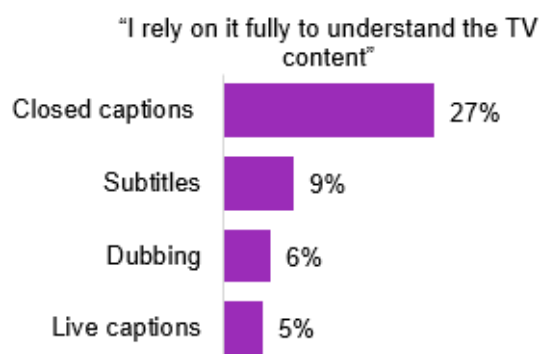
## Summary – Accessibility

Accessibility features are being used for access to screen content in Australia

People report experiencing vision impairment and / or hearing impairment in Australia:

- Vision impairment (14%)
- Both vision and hearing (5%)
- Hearing impairment (10%)

There is reliance on accessibility features to **fully understand content** by some



There is strong use of (and reliance on) accessibility features:

- Subtitles (54%)
- Live captions (29%)

Young people have high levels of using accessibility features:

- Use of **subtitles** when watching screen content was higher among ages 18-24 (**79%**) than all other age groups

## Summary – Generative AI

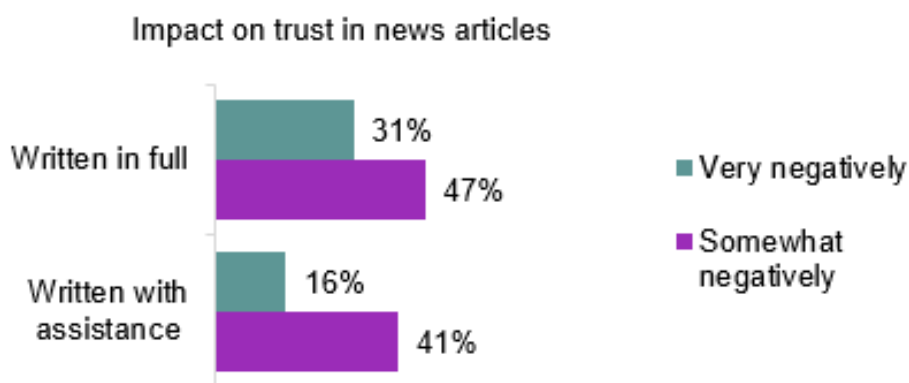
There is high awareness of Generative AI and moderate usage, but high distrust of AI-written news.

Many Australian adults were aware of Generative AI, and a moderate proportion of those who were aware had used it.

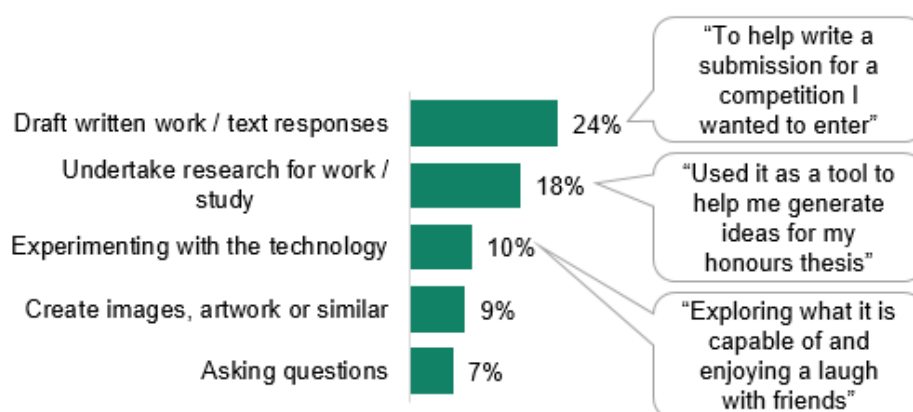
Prompted awareness:

- 61% aware of AI
- 41% ever used AI

There is distrust in news content that is written in full or with the assistance of Generative AI.



Reasons to use Generative AI include **drafting text and research**.



Children aged 0-7 who used Generative AI almost universally have a parent/legal guardian/carer who used AI:

- 98% of children aged 0-7 who had used Generative AI also had a parent/legal guardian/carer who had used it\*

\*children aged 0-7 interviewed via parent/legal guardian/carer.

## Summary – Sports Content

Sports continue to be a popular screen content choice for Australians, with importance placed on free access

Types of sport **watched include** Australian rules football, Australian Open tennis tournament, Australian soccer, International test cricket and rugby league.

Fifth one percent (51%) consumed sports content of some sort in the past 7 days.

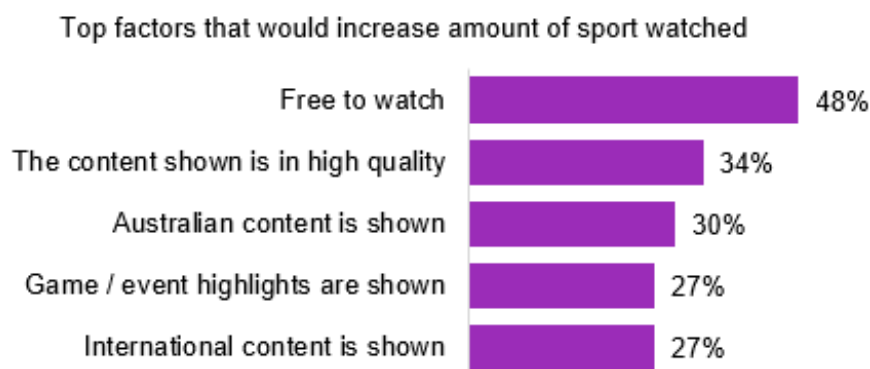
Top 5 sports respondents typically watch\*:

- Australian rules football (64%)
- Australian Open tennis tournament (58%)
- Australian soccer (FIFA) (53%)
- International test cricket matches (52%)
- Rugby league (61%)

\*Excluding Olympic Games and Commonwealth Games as these events were not held in 2023.



Motivators for watching sports content include free access, high quality, and showing Australian content



**Free-to-air TV** is the most common platform for watching sports content:

- 75% watched sports content on free-to-air TV (commercial or public) in past 7 days, while 47% watched sports content online

Gambling ads are a de-motivator for watching sports content:

- **43%** said **gambling advertising being shown** would **reduce** the amount of sports content they watched.

## Summary – News Content

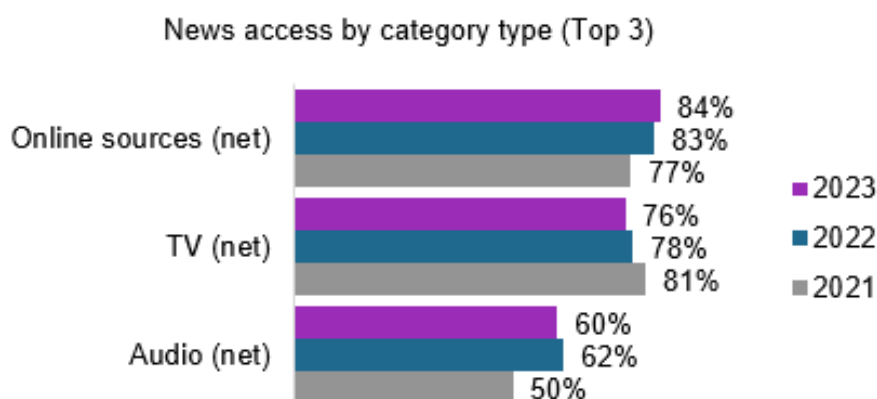
Commercial free-to-air TV is commonly used to access State or Territory news and Australian national news.

Commercial free-to-air TV is a common main source of news.

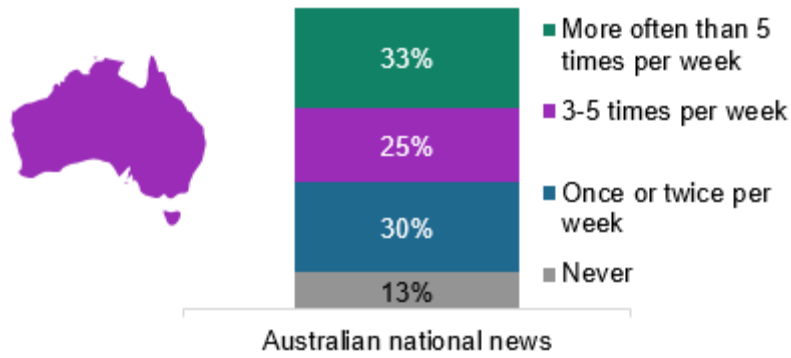
Commercial free-to-air TV news accessed for:

- State or Territory news (30%)
- Australian national news (28%)
- Local news (26%)
- International news (20%)

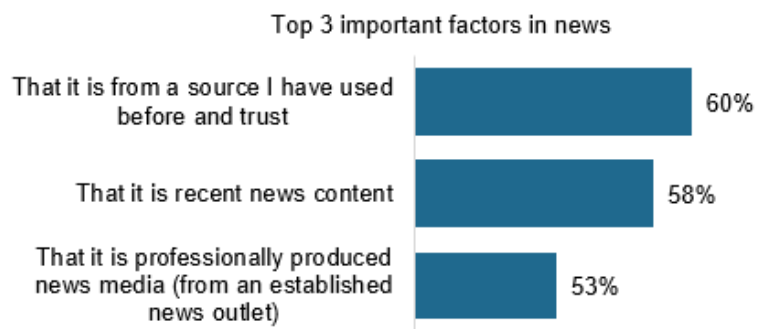
Consuming **news via online sources** continues to trend upwards year-on-year.



**Australian national news** is the most consumed news content type.



Trust in the source, recency and professionalism are important in news.



# General screen content habits

## Chapter Summary – General Screen Content Habits

### Online services continue to dominate in 2023. Online subscription services level off after several prior years of increasing, while free services increase in 2023

The most common platform used to watch screen content was online subscription services (65%), followed by free video streaming services (61%), and commercial free-to-air TV, excluding on-demand TV (51%).

Online subscription services were watched at a similar rate seen in 2022. However free video streaming services significantly increased, while pay TV declined in 2023.

### Some online subscription streaming services are experiencing a plateau this year in viewership

Netflix remained the most common online subscription streaming service that households have access to in 2023 (65%). The next most common services were Disney+ (35%), Amazon Prime Video (32%), and Stan (24%).

Several services appeared to plateau this year (Netflix, Disney+ and Binge), while Amazon Prime Video significantly increased (32%) in 2023.

### High online subscription service cancellation and downgrading in 2023 due to their expense

More than one-third (37%) had cancelled at least one service in 2023, while 9% had downgraded their subscriptions. The primary reason to cancel or downgrade their subscriptions was the expense (38%). While 18% reported upgrading or adding at least one service in 2023.

Just under half (net 42%) had cancelled or downgraded at least one online subscription streaming service in past 6 months.

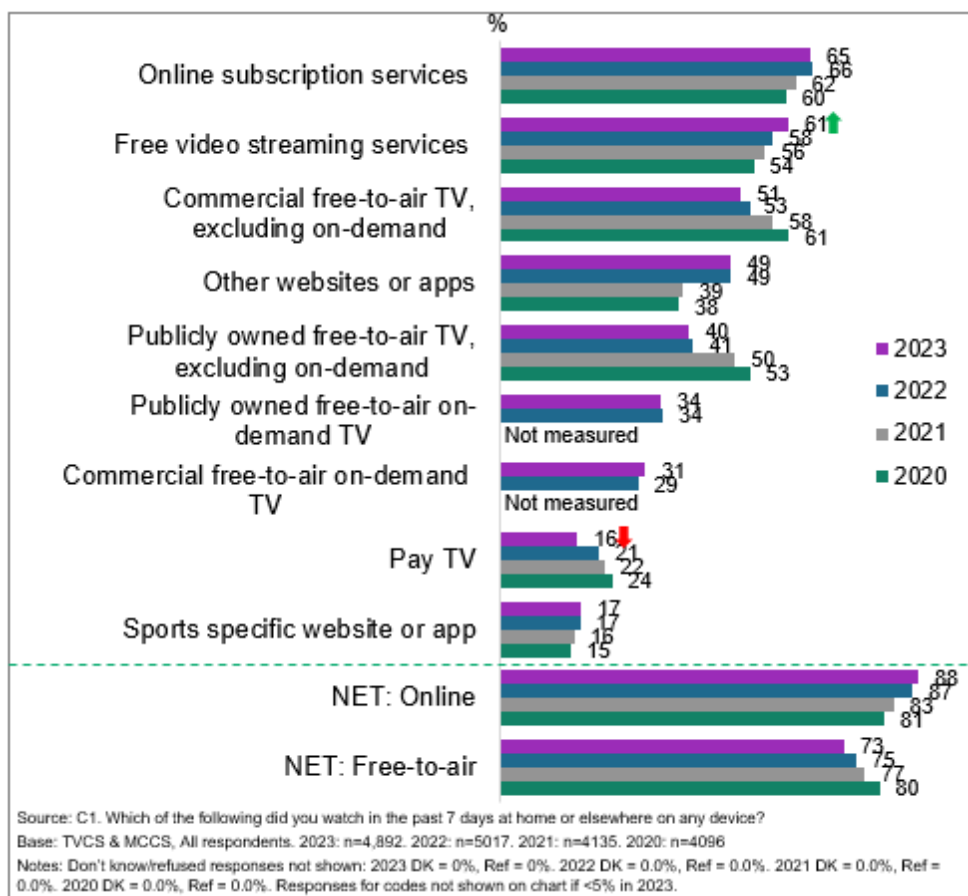
### TVs and mobile phones / smartphones are the most commonly used devices for viewing screen content

TVs had the highest device usage for watching screen content (86% net use) and frequency (48% net use once per day or more), followed by mobile phones (74% net use, 46% net use once per day or more).

TVs were the most comfortable devices for watching content and have good quality images / pictures / sound. While mobile phones were lower on these aspects, they were seen to be more convenient and easy to use.

### Platforms used to watch screen content in past 7 days

The most common platform used to watch screen content was online subscription services (65%), followed by free video streaming services (61%), and commercial free-to-air TV, excluding on-demand TV (51%).



### Callouts

- In 2023, use of free video streaming services increased from 2022, while use of Pay TV decreased.

### Subgroups

Online subscription services was higher for:

- Women (68% vs 62% of men)
- Ages 18-24 (78%), 25-34 (80%), and 35-44 (75% vs 65% of ages 45-54, 60% of ages 55-64, 48% of ages 65-74, and 35% of ages 75+)
- Those with dependent children in the household (73% vs 59% of those with no children and 65% of those with non-dependent children only)
- Adults living in a share house (75% vs 59% of those with no children)
- Those with a Bachelor degree (72% vs 62% of those with education up to Year 12, and 64% of those with a TAFE qualification / Trade Certificate / Diploma)
- Those born in a mainly English speaking country (67% vs 61% of those born in a mainly non-English speaking country)

### Note for 'net' inclusions

'NET: Online' includes:

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

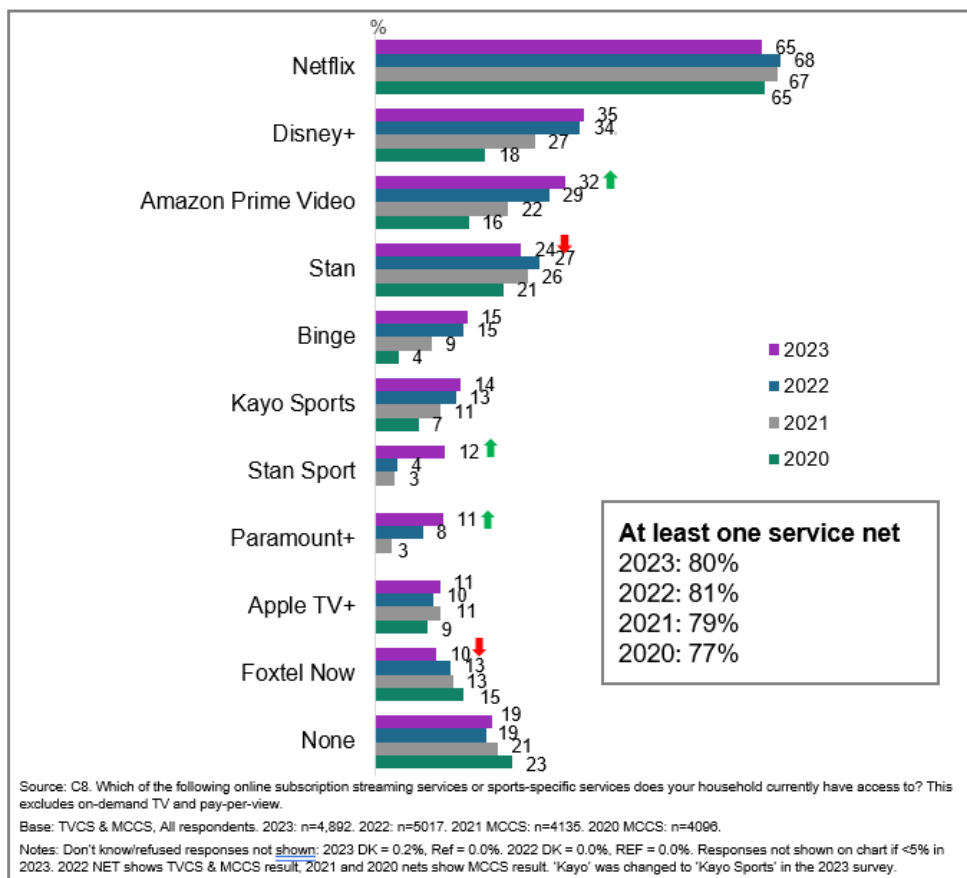
‘NET: Free-to-air’ includes:

- ‘Commercial free-to-air TV’, ‘Publicly owned free-to-air TV’, ‘Commercial free-to-air on-demand TV’, Publicly owned free-to-air on-demand TV’, and ‘Free-to-air catch-up TV’ and equivalent from prior years.

Online subscription services continue to be the leading platform for watching screen content in Australia, levelling off after several years of increasing. However, free video streaming services significantly increased, and pay TV declined in 2023.

## Online subscription streaming services households have access to

Netflix remains the most common online subscription streaming service that households had access to in 2023 (65%). The next most common services were Disney+ (35%), Amazon Prime Video (32%), and Stan (24%).



### Subgroups

**Disney+** was higher for:

- Women (39% vs 30% of men)
- Ages 18-24 (47%), 25-34 (53%), and 35-44 (45% vs 33% of ages 45-54, 22% of ages 55-64, 18% of ages 65-74, and 11% of ages 75+)
- Adults living in a share house (45%), those with non-dependent children only in the household (35%), and those with dependent children (46% vs 26% of those with no children)

**Stan** was higher for:

- Women (26% vs 22% of men)
- 18-24 (32%), 25-34 (32%), and 35-44 (26% vs 17% of ages 65-74 and 13% of ages 75+)

- Those employed full time or part time (30% vs 17% of those who are retired and 17% of those engaged in home duties)
- Those born in a mainly-English speaking country (27% vs 14% of those born in a mainly non-English speaking country)

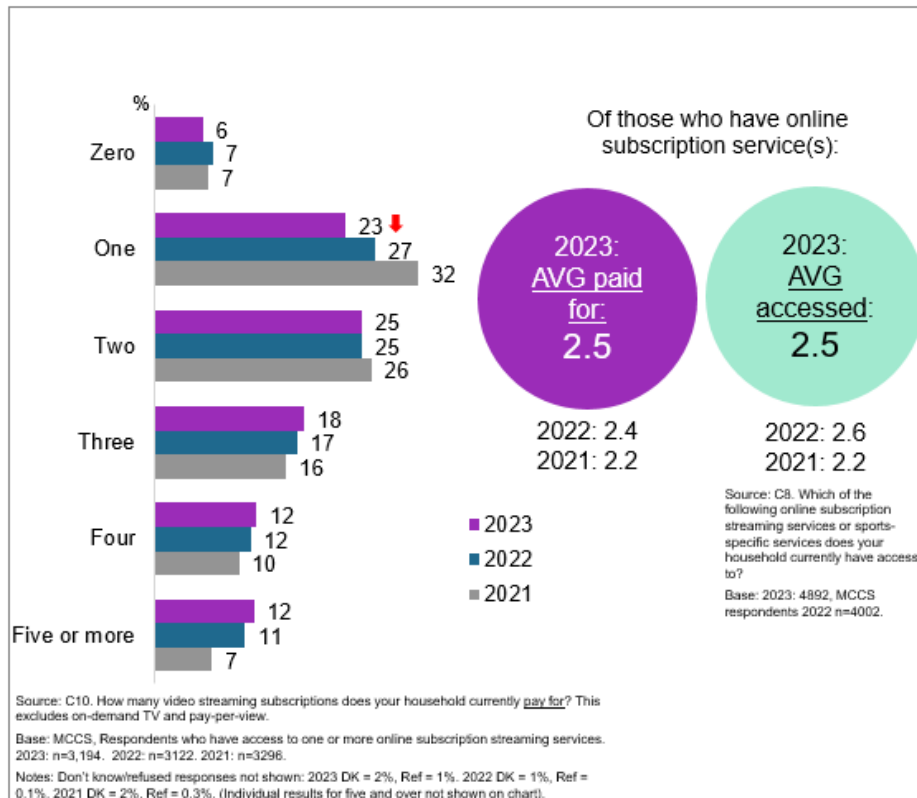
### Callouts

Access to Amazon Prime Video, Stan Sport, and Paramount+ have all increased in 2023, while Stan and Foxtel Now have decreased.

Several online services appeared to plateau in 2023 (such as Netflix, Disney+ and Binge). Netflix continues to be the dominant online subscription streaming service in Australian households, however Amazon Prime Video significantly increased this year.

### Number of online subscription streaming services households pay for

One-quarter of respondents (25%) who had access to at least one online subscription streaming service reported that their household pays for two online services, while a similar proportion only paid for one (23%), and slightly fewer paid for three (18%).



### Subgroups

Zero was higher for:

- Ages 75+ (17% vs 4% of ages 18-24, 4% of ages 25-34, 4% of ages 35-44, and 4% of ages 55-64)
- Those without children in the household (8%), those with dependent children (5%), and those with non-dependent children only (7% vs 1% of adults living in a share house)

One was higher for:

- Ages 55-64 (32%), 65-74 (29%), and 75+ (36% vs 18% of ages 25-34 and 18% of ages 35-44)
- Those who are retired (29% vs 20% of those employed full time or part time)

Of those who have zero online subscription services:



Source: C10B. Did you have a paid subscription in the last 6 months that you no longer have now?

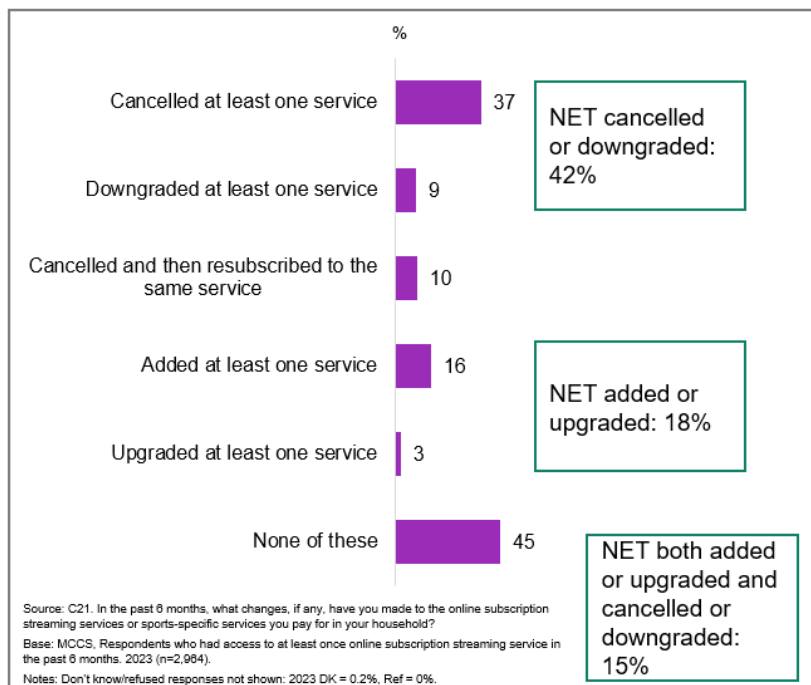
Base: MCCS, Respondents who reported that they pay for zero online subscription streaming services. 2023: n=177..

Notes: No/Don't know/refused responses not shown: No = 78%, DK = 1%, Ref = 0.2%

The average number of online subscription steaming services accessed by households overall declined in 2023, however more households are now paying for their services compared to last year.

### Changes made to online subscription streaming services in past 6 months

Just under half of respondents (45%) who had access to at least one online subscription streaming service in the past 6 months had **not made any changes** to their subscription during this period, while more than one-third (37%) had **cancelled** at least one service, and 9% had **downgraded** their subscriptions.



### Subgroups

Cancelled at least one service was higher for:

- Ages 18-24 (44%) and ages 25-34 (48% vs 30% of ages 55-64, 25% of ages 65-74, and 17% of ages 75+)

- Those employed full time or part time (40%) and those employed casually (50% vs 26% of those who are retired)
- Those who use a mobile phone to watch screen content (39% vs 26% of those who do not)
- Those who pay for 3-5 subscription streaming services (44% vs 30% of those who pay for 1-2 services)

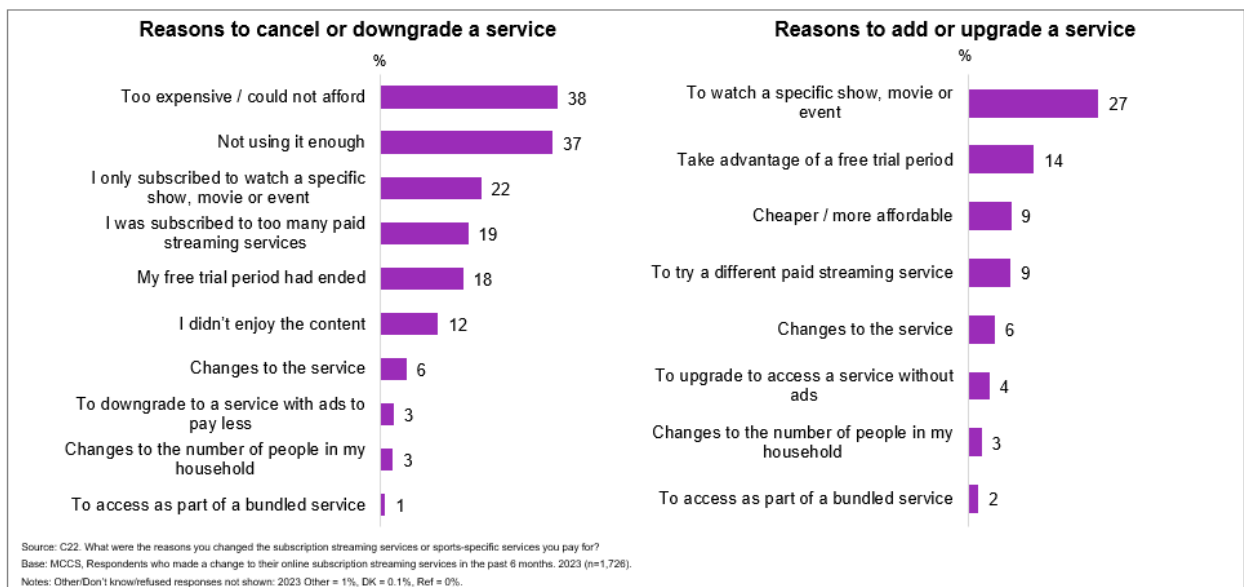
Added at least one service was higher for:

- Women (18% vs 14% of men)
- Those who watched online content only in P7D (16% vs 2% of those who watched offline content only)
- Those who pay for 3-5 subscription streaming services (21% vs 9% of those who pay for 1-2 services).

Just under half have cancelled or downgraded at least one online subscription streaming service in the past 6 months. Conversely, 18% added or upgraded a service.

### Reasons for changes to online subscription streaming services

Those who cancelled or downgraded at least one of their online subscription streaming services in the past 6 months most commonly reported that it was because the service was too expensive or they could not afford it (38%), or that they were not using the service enough (37%). The most common reason for adding a new online subscription streaming services or upgrading an existing subscription was to watch a specific show, movie or event (27%), followed by taking advantage of a free trial period (14%).



Cancelling or downgrading services is most commonly due to the expense or lack of use. The primary reason to add or upgrade services is to watch a specific show, movie or event.

### Ease of accessing Australian content on streaming services

Approximately half of respondents (52%) believed that online subscription streaming services had enough Australian content. Just over one-quarter (27%) of respondents thought that Australian content was easy to find on streaming services (net very easy and easy), while 16% thought it was difficult (net very difficult and difficult), and 18% didn't look for Australian content at all.

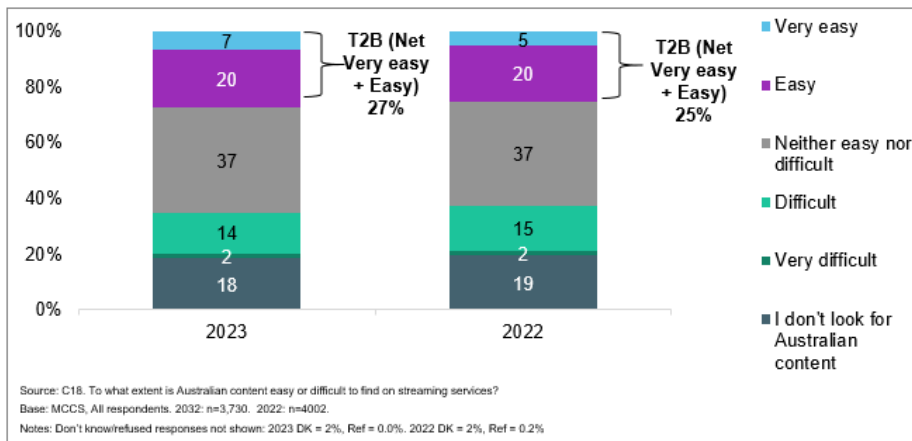




Source: C11. In your opinion, do online subscription streaming services (excluding on-demand TV services) have enough Australian content?

Base: M CCS, All respondents. 2023: n=3,730.

Notes: No/Don't know/refused responses not shown: No = 44%, DK = 4%, Ref = 0.2%



### Subgroups

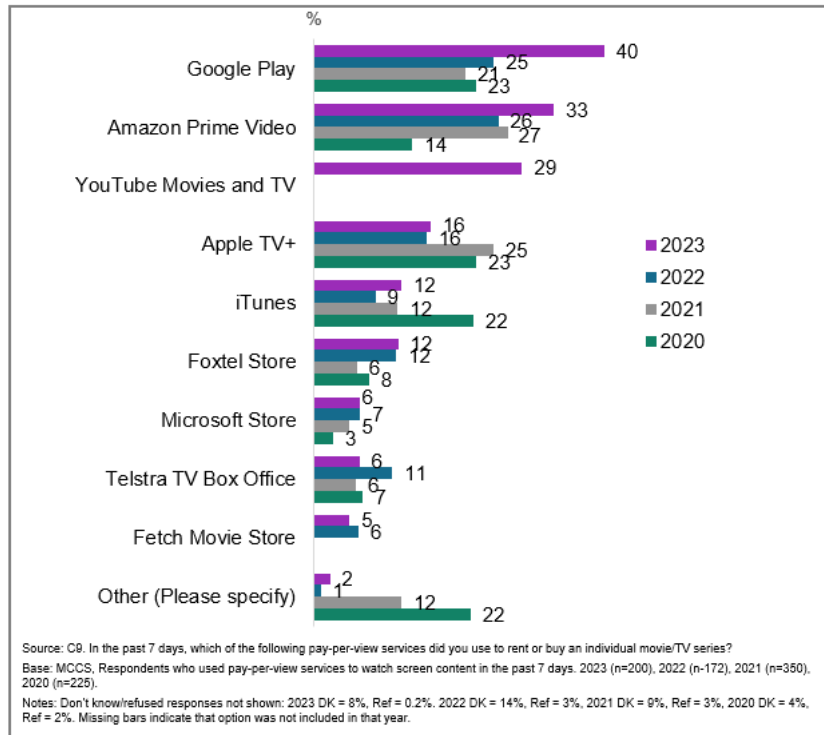
NET Very easy + Easy was higher for:

- Women (29% vs 24% of men)
- Ages 18-24 (29%), 25-34 (31%), 35-44 (34%), and 45-54 (28% vs 18% of ages 65-74 and 9% of ages 75+)

Approximately half of Australians agree that online subscription streaming services have enough Australian content, however a lower proportion indicated that this content is easy to find. Results are consistent with 2022.

## Pay-per-view services used to watch screen content

Google Play was the most commonly used pay-per-view service (40%), followed by Amazon Prime Video (33%), and YouTube Movies and TV (29%) – noting this was a new inclusion in the 2023 research.



### Subgroups

YouTube Movies and TV was higher for:

- Men (40% vs 15% of women)

iTunes was higher for:

- Those living outside of a capital city (27% vs 7% of those living in a capital city)

Foxtel Store was higher for:

- Those living in a capital city (15% vs 4% of those living outside of a capital city)

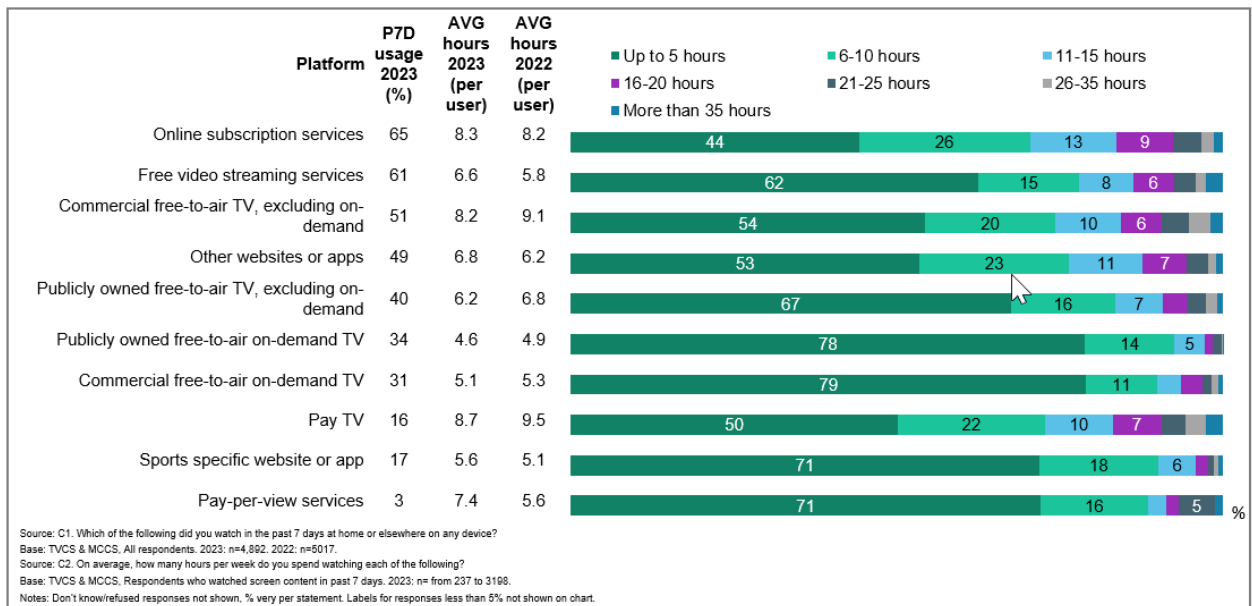
### Callouts

There are no significant differences between 2023 and 2022 results, possibly due to the small base sizes.

Pay-per-view services are most accessed through Google Play and Amazon Prime Video. YouTube Movies and TV is also commonly used for pay-per-view services.

## Hours per week spent watching content on various platforms

For the platforms with the highest usage in the past 7 days, the average number of ours spent watching content per week was 8.3 hours for online subscription services, 6.6 hours for free video streaming services, and 8.2 hours for commercial free-to-air TV excluding on-demand.



Pay TV and online subscription services record the highest average weekly viewing hours of all platform types in 2023.

### Frequency of watching screen content on various devices (%)

The device with the highest net use for watching screen content was a TV (86%), followed by mobile phones (74%), and computers (61%). Mobile phones were the most frequently used device, with 24% of respondents who watched screen content in the past 7 days reporting that they used their mobile phone to do so more than five times a day.

Device	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	2023: NET use once per day +	2022: NET use once per day +
Television	86	9	10	29	15	11	12	14	48	47
Mobile phone or smartphone	74	24	12	11	6	8	13	26	46	44
Computer (desktop or laptop)	61	9	6	12	5	10	20	39	27	25
TV smart accessory / Digital media player	44	4	3	10	6	7	13	56	17	16
Tablet	34	3	3	7	4	6	12	65	13	13
Pay TV box	21	2	2	6	4	3	5	78	10	10
Games console connected to a television	20	1	1	3	2	3	9	80	5	4
VAST satellite box	6	1	1	2	1	1	1	93	3	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. 2023: n=4,825. 2022: n=4929. 2021: n=4065.

Notes: Don't know/refused responses not shown, % vary per statement. 'NET use once per day +' includes 'Once or twice a day', '3-5 times a day', and 'More often than 5 times a day'.

## Subgroup

TV (net use) was higher for:

- Ages 35-44 (90%), 45-54 (87%), 55-64 (91%), 65-74 (91%) and 75+ (90% vs 74% of ages 18-24)
- Those without children in the household (87%), those with dependent children (88%), and those with non-dependent children only (83% vs 71% of adults living in a share house)
- Those with a TAFE qualification / Trade Certificate / Diploma (89% vs 84% of those with education up to Year 12 and 83% of those with a Bachelor degree)

TV has the highest usage of all devices for watching screen content, however mobile phones have the highest frequency.

## Reasons for using devices (%)

Among those who used TVs to watch screen content, the most common reasons for using that device type were that it is comfortable to use (57%), has good quality image, picture or sound (56%), and is convenient (51%). In contrast, the most common reasons to use mobile phones to watch screen content were that it's convenient (70%), easy to move the device around the house (53%), and that the device can be taken out of the house (52%).

Device	Base (n)	Comfortable to use / watch content on	Good quality image / picture / sound	Convenient	Easy to use / operate	Out of habit, it's what I usually do	Is the only device type that will play a certain content type	Easy to move the device around the house	To not disturb other members of the household	I can take it out of the house
Television	2186	57	56	51	49	38	6	2	2	1
Mobile phone or smartphone	2137	33	13	70	49	31	8	53	24	52
Computer (desktop or laptop)	2085	40	27	59	44	25	9	25	23	17
TV smart accessory / Digital media player	1759	35	33	46	39	15	28	6	4	4
Tablet	1552	40	21	62	46	12	4	54	22	32
Pay TV box	1264	29	29	35	33	20	26	4	4	4
Games console connected to a television	1092	25	31	33	34	15	26	7	8	5
VAST satellite box	486	11	11	19	22	12	19	6	7	7

Source: C19NEW. Why do you use the device, <insert from C4>?

Base: TVCS & MCCS, Respondents who use any device to watch screen content. 2023: n= from 486 to 2186.

Notes: Don't know/refused responses not shown, % vary per statement. Other reasons with a lower prevalence have been suppressed for brevity.

### Subgroup

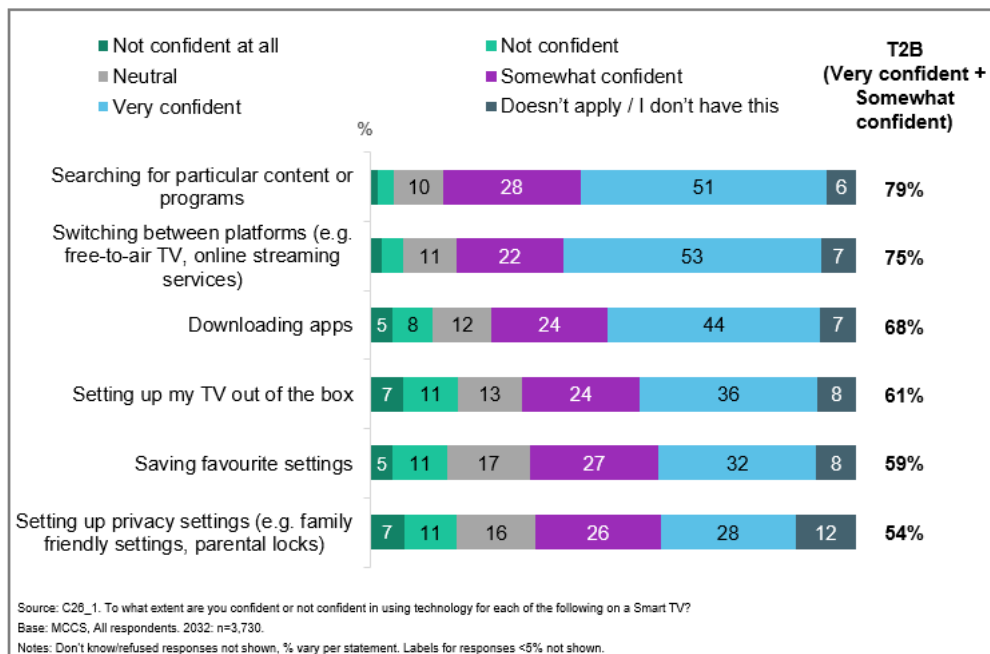
Convenient (Television) was higher for:

- Men (55% vs 47% of women)
- Ages 65-74 (60%) and 75+ (62% vs 42% of ages 25-34, 47% of ages 35-44 and 47% of ages 45-54)
- Those without children (55% vs 28% of adults living in a share house)
- Those born in a mainly English speaking country (52% vs 43% of those born in a mainly non-English speaking country)

TVs are considered the most comfortable device for watching screen content and have good quality images / pictures / sound. While mobile phones rate lower on these features, they are regarded as convenient and easy to use.

### Confidence in doing various tasks on a smart TV

More than half of respondents (51%) indicated they were very confident in searching for particular content or programs on a smart TV, while a further 28% said they were somewhat confident doing this. The tasks that respondents reported least confidence with were setting up their TV out of the box (7% not confident at all, 11% not confident) and setting up privacy settings such as parental locks (7% not confident at all, 11% not confident).



### Subgroups

NET Very confident + Somewhat confident was higher for:

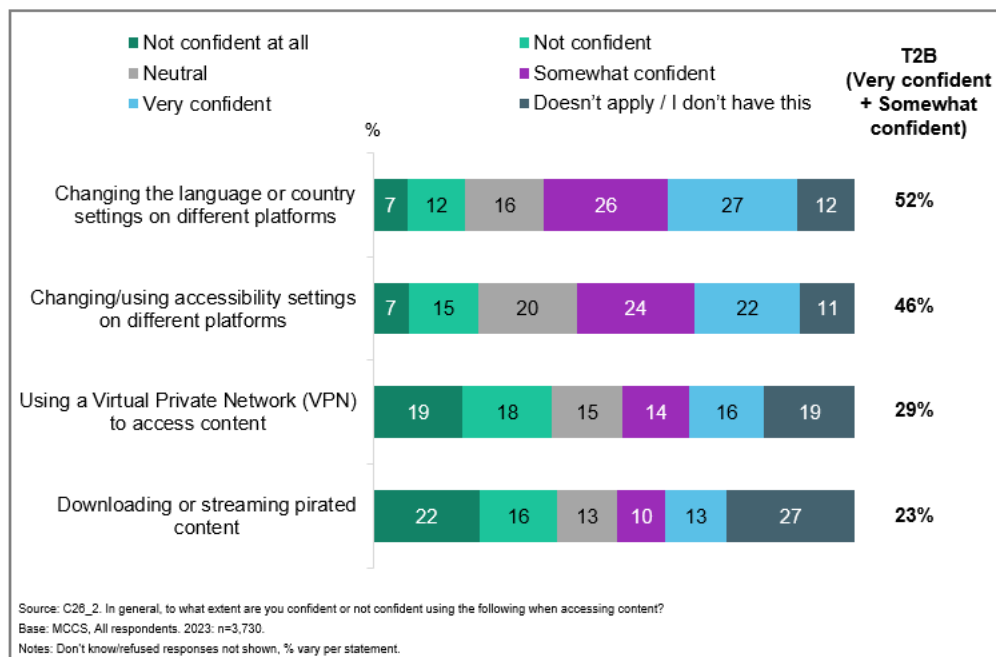
- Setting up my TV out of the box:

- Men (71% vs 50% of women)
- Ages 18-24 (59%), 25-34 (65%), 35-44 (69%), 45-54 (66%), and 55-64 (65% vs 44% of ages 65-74 and 36% of ages 75+)
- Those with dependent children in the household (66% vs 55% of those without children)
- Those with a TAFE qualification / Trade Certificate / Diploma (65%) and those with a Postgraduate degree (65% vs 54% of those with education up to Year 12)
- Searching for particular content or programs:
  - Ages 18-24 (82%), 35-44 (86%), 45-54 (80%), and 55-64 (82% vs 68% of ages 65-74 and 62% of ages 75+)
  - Those with dependent children in the household (84% vs 74% of those without children)
  - Those employed full time or part time (83% vs 69% of those who are retired)

Australians are most confident in searching for content and switching between platforms on their smart TV, but least confident with setting up their device out of the box and tailoring privacy settings.

## Confidence in various tasks when accessing screen content

Most respondents were very confident (27%) or somewhat confident (26%) in changing the language or country settings on different platforms when watching screen content. A similar proportion of respondents were very confident (22%) or somewhat confident (24%) in changing or using accessibility settings on different platforms.



### Subgroups

NET Very confident + Somewhat confident was higher for:

- Changing the language or country settings on different platforms:
  - Men (55% vs 49% of women)
  - Ages 18-24 (70%), 25-34 (60%), and 35-44 (62% vs 46% of ages 55-64, 29% of ages 65-74 and 21% of ages 75+)
  - Those with dependent children in the household (57%), those with non-dependent children only (59%), and adults living in a share house (64% vs 43% of those without children)

- Changing / using accessibility settings on different platforms:
  - Men (51% vs 41% of women)
  - Ages 18-24 (63%), 25-34 (52%), 35-44 (54%), 45-54 (44%) and 55-64 (42% vs 28% of ages 65-74 and 19% of ages 75+)

There is lower confidence overall in using a VPN and downloading or streaming pirated content.

## General screen content habits: Children aged 0-17

### Chapter Summary – General Screen Content Habits: Children aged 0-17

#### Children are watching online subscription services and free video streaming services at high levels

Free video streaming services was the most used platform by children aged 8-10 (72%) and 11-15 (73%). Among children aged 16-17 the most commonly used platform was online subscription services (68%).

The most common platforms that parents/legal guardians/carers reported their child aged 0-7 had used to watch screen content were free video streaming services (52%) and online subscription services (52%).

Children showed a similar trend to the adult population of viewing content via online platforms, although the rates were slightly higher among children.

#### Parents/legal guardians/carers report that children consume a wide range of content across platform types

Parents/legal guardians/carers most commonly reported that their child had watched screen content on free video streaming services (63%) and online subscription services (59%) in the past 7 days.

These two platforms increased in viewership by children in 2023.

#### Childrens' animation and cartoons remain popular

According to parents/legal guardians/carers, children's animation or cartoons was the most commonly reported type of content that children like watching most, for both Australian (50%) and international (42%) content. The next most commonly reported types were children's educational programs (33%, Australian; 25%, international), children's comedy (26%, Australian; 21% international).

However, user-generated content was also being consumed by children.

#### There is high exposure of children to content that is not age appropriate

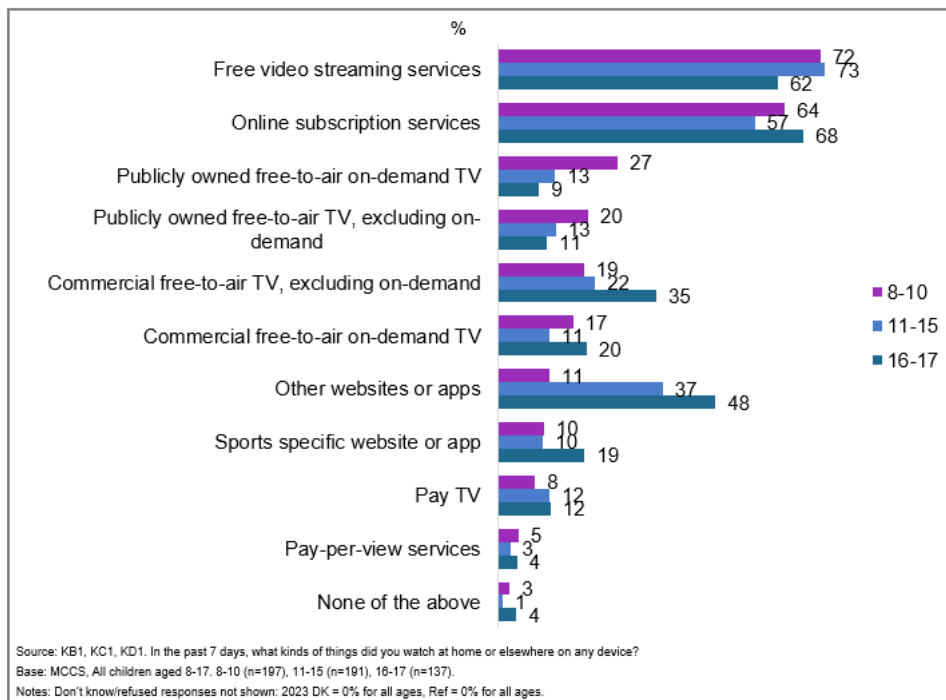
More than half of children aged 8-10 (60%), 11-15 (70%), and 16-17 (61%) had ever watched TV shows or online content that was meant for an older audience. 42% of children aged 0-7 had watched TV shows or online content that was meant for an older audience.

For children aged 0-7, age-inappropriate content was primarily accessed via free video streaming services such as YouTube and YouTube Kids (48%), while for older children it was via online subscription services such as Netflix and Amazon Prime Video (8-10, 53%; 11-15, 57%; 16-17, 69%).

#### Platforms used to watch screen content in past 7 days (children aged 8-17)

Free video streaming services was the most common platform used by children aged 8-10 (72%) and 11-15 (73%). Among children aged 16-17 the most commonly used platform was online subscription services (68%).





Source: KB1, KC1, KD1. In the past 7 days, what kinds of things did you watch at home or elsewhere on any device?

Base: MCCS, All children aged 8-17. 8-10 (n=197), 11-15 (n=191), 16-17 (n=137).

Notes: Don't know/refused responses not shown: 2023 DK = 0% for all ages, Ref = 0% for all ages.

### Subgroups

Commercial free-to-air TV, excluding on-demand was higher for:

- Ages 16-17 (35% vs 22% of ages 11-15, and 19% of ages 8-10)

Publicly owned free-to-air on-demand TV was higher for:

- Ages 8-10 (27% vs 13% of ages 11-15, and 9% of ages 16-17)

Sports specific website or app was higher for:

- Ages 16-17 (19% vs 10% of ages 11-15, and 10% of ages 8-10)

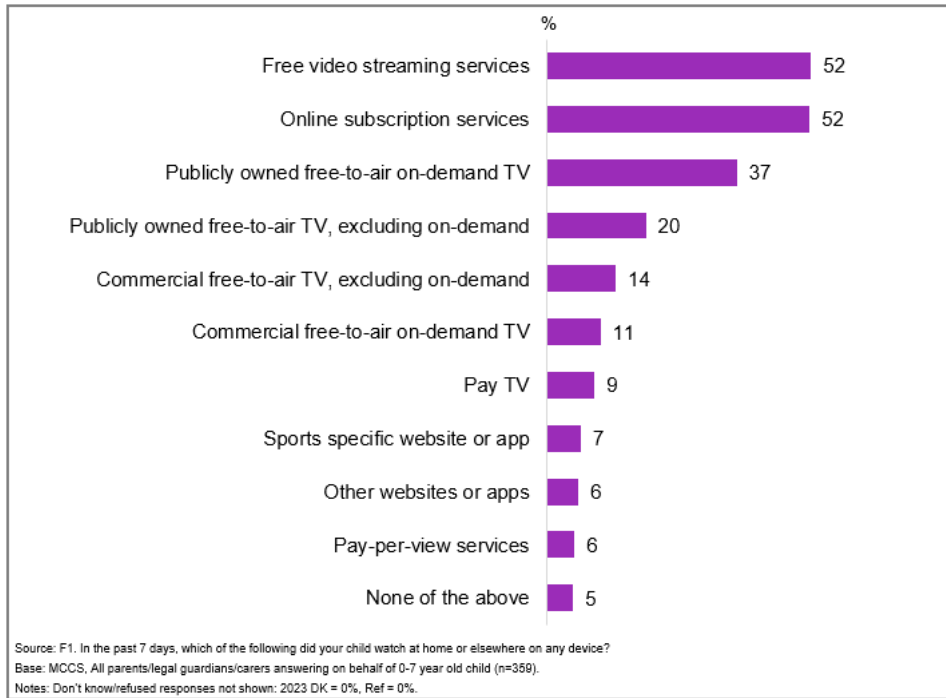
Other websites or apps was higher for:

- Ages 16-17 (48% vs 37% of ages 11-15, and 11% of ages 8-10)

There are high rates of consumption of free video streaming services and online subscription services by children aged 8-17.

## Platforms used to watch screen content in past 7 days (children aged 0-7)

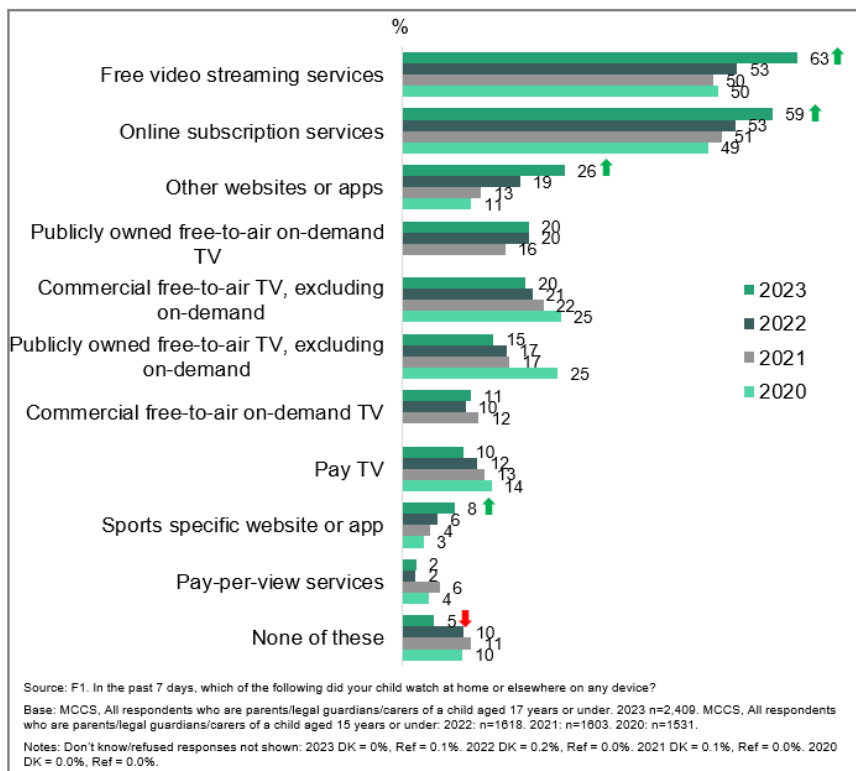
The most common platforms that parents/legal guardians/carers reported their child aged 0-7 had used to watch screen content were free video streaming services (52%) and online subscription services (52%). The next most commonly used platform was publicly owned free-to-air on-demand TV (37%).



Parents/legal guardians/carers report that free video streaming services and online subscription services are the platforms most watched by children aged 0-7.

## Platforms children used to watch screen content in past 7 days

All parents/legal guardians/carers were asked about their child’s screen content viewing habits. Parents/legal guardians/carers most commonly reported that their child had watched screen content on free video streaming services (63%) and online subscription services (59%) in the past 7 days, which is consistent with the most common responses from children, although a higher proportion of children aged 8-17 reported this.



### Subgroups

Free video streaming services was higher for:

- Ages 35-44 (65% vs 54% of ages 25-34)
- Those who watched online content only in P7D (63% vs 28% of those who watched offline content only)
- Those whose child is aged 8-10 (69%) or 11-15 (67% vs 56% of those whose child is aged 0-7)

Online subscription services was higher for:

- Those living outside a capital city (66% vs 57% of those living in a capital city)
- Those with a TAFE qualification / Trade Certificate / Diploma (65% vs 52% of those with a Bachelor degree)
- Those born in a mainly English-speaking country (64% vs 49% of those born in a mainly non-English speaking country)
- Those whose child is aged 16-17 (66% vs 53% of those whose child is aged 0-7)

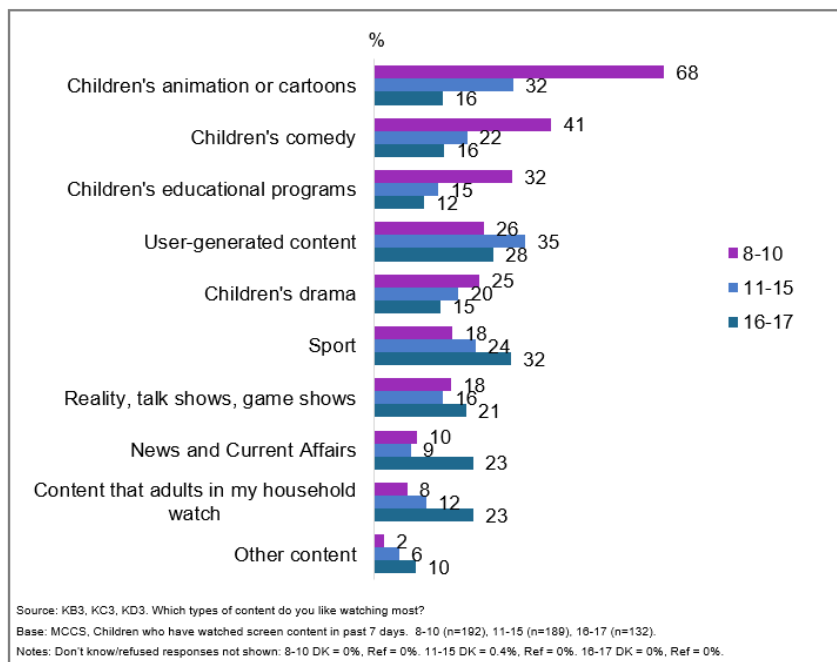
### Callouts

- Parents/legal guardians/carers reporting children watching screen content on free video streaming services, online subscription services, sports specific websites or apps, and other websites or apps has increased in 2023.

Parents/legal guardians/carers are increasingly reporting that their children are watching free video streaming services and online subscription services in 2023.

## Types of content children like watching most (Australian content, children aged 8-17)

Children were asked about the types of screen content they like to watch most. Responses varied by age. Children aged 8-10 most commonly reported that they like watching Australian children’s animation or cartoons most (68%), whereas for children aged 11-15 the most common response was Australian user-generated content (35%). Those aged 16-17 most commonly reported that they like to watch Australian sport most (32%). Overall Australian children’s animation or cartoons, comedy, and educational programs are more popular among children aged 8-17 than international equivalents.



### Subgroups

Australian children’s animation or cartoons was higher for children aged 8-10 who:

- Watched publicly owned free-to-air TV or publicly owned free-to-air on-demand in P7D (81% vs 63% of those who watched commercial free-to-air TV or commercial free-to-air on-demand)

Australian sport was higher for children aged 11-15 who:

- Watched commercial free-to-air TV or commercial free-to-air on-demand (45% vs 26% of those who watched publicly owned free-to-air TV or free-to-air on-demand)

Australian children’s educational programs was higher for:

- Ages 8-10 (32% vs 15% of ages 11-15 and 12% of ages 16-17)

Australian children’s comedy was higher for:

- Ages 8-10 (41% vs 22% of ages 11-15 and 16% of ages 16-17)

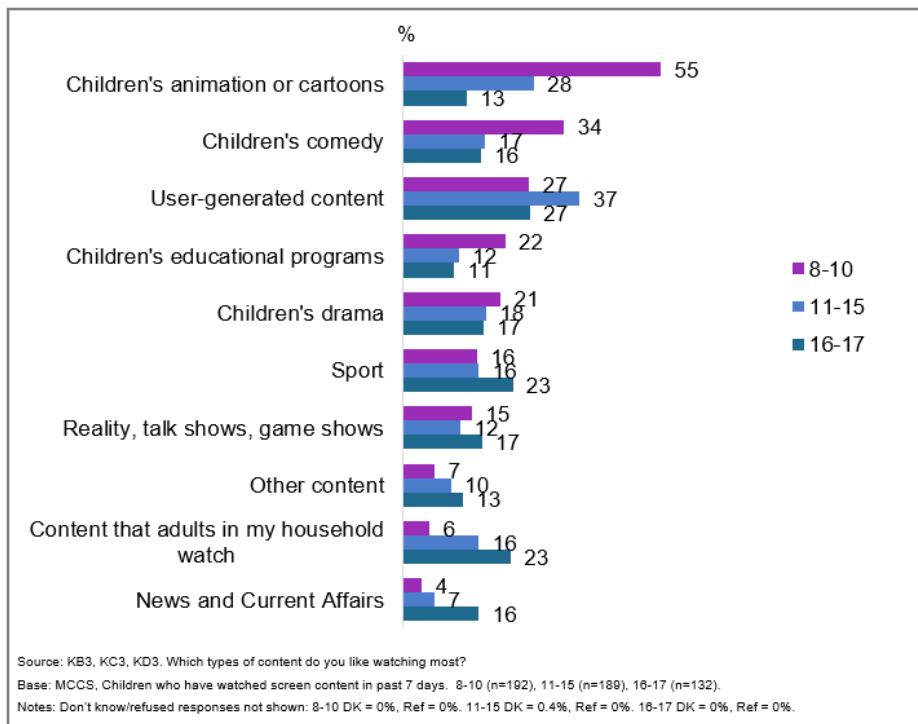
Australian News and Current Affairs was higher for:

- Ages 16-17 (23% vs 9% of ages 11-15 and 10% of ages 8-10)

Children aged 8-10 enjoy watching Australian animation or cartoons, but this tends to decline as age increases. Those aged 11-15 and 16-17 prefer to watch a broader range of content and genres.

## Types of content children like watching most (International content, children aged 8-17)

When considering international content, children’s animation or cartoons remained the most liked type of content for children aged 8-10. User-generated content was the most common response reported by children aged 11-15 (37%) and 16-17 (27%).



### Subgroups

International children’s educational programs was higher for:

- Ages 8-10 (22% vs 12% of ages 11-15 and 11% of ages 16-17)

International children’s comedy was higher for:

- Ages 8-10 (34% vs 17% of ages 11-15 and 16% of ages 16-17)

International children’s animation or cartoons was higher for:

- Ages 8-10 (55% vs 28% of ages 11-15 and 13% of ages 16-17)

International news and current affairs was higher for:

- Ages 16-17 (16% vs 7% of ages 11-15 and 4% of ages 8-10)

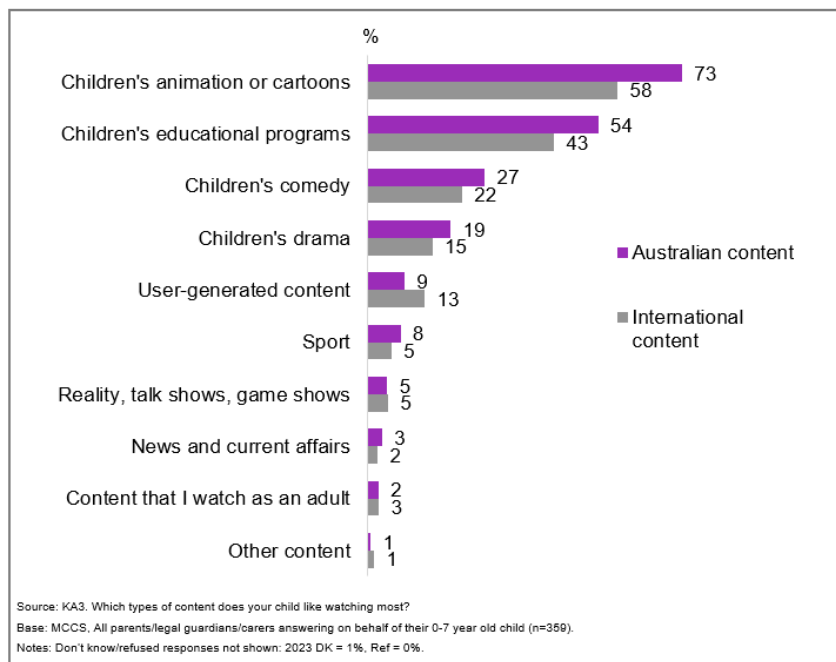
International content that adults in my household watch was higher for:

- Ages 16-17 (23%) and ages 11-15 (16% vs 6% of ages 8-10)

Children aged 8-10 enjoy watching International animation or cartoons, while user-generated content is most preferred by those aged 11-17.

## Types of content children like watching most (children aged 0-7)

Parents/legal guardians/carers most commonly reported that their 0-7 year old child most liked watching children's animation or cartoons (73%), followed by international children's animation or cartoons (58%), and Australian children's educational programs (54%).



### Subgroups

Australian children's animation or cartoons was higher for:

- Those not aware of Generative AI (79% vs 48% of those who are aware of Generative AI)
- Those who prefer using search engines to find information (74%) and those who have no preference (81% vs 43% of those who prefer to use Generative AI / chat bots)

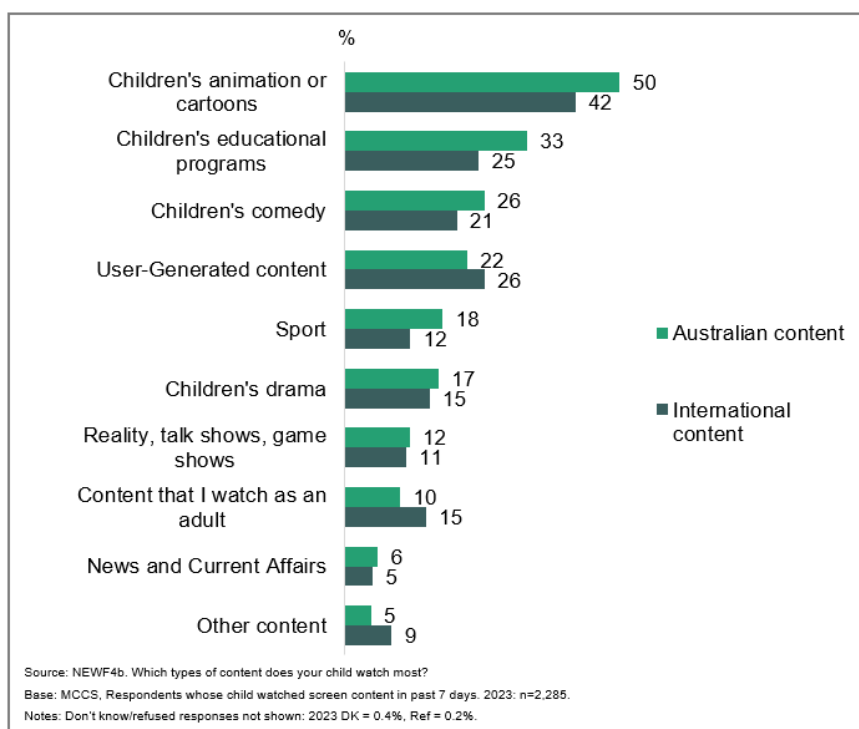
Australian children's educational programs was higher for:

- Those who watched publicly owned free-to-air TV or publicly owned free-to-air on-demand in P7D (61% vs 54% of those who watched commercial free-to-air TV or commercial free-to-air on-demand)

Parents/legal guardians/carers report that Australian and international animation or cartoons and Australian or international education content are the leading types of content consumed by children aged 0-7.

## Types of content children watch

Parents/legal guardians/carers were also asked what types of screen content their child watches most. Children's animation or cartoons were the most commonly reported type of content that children like watching most, for both Australian (50%) and international (42%) content. The next most commonly reported types were children's educational programs (33%, Australian; 25%, international), children's comedy (26%, Australian; 21% international), and user-generated content (22%, Australian; 26% international). Parents'/legal guardians'/carers' responses were most consistent with younger children, those aged 0-7 and 8-10, while older children tended to most commonly report enjoying content such as user-generated content and sport.



## Subgroups

Australian children's animation or cartoons was higher for:

- Those born in a mainly non-English speaking country (57% vs 47% of those born in a mainly English speaking country)
- Those whose child watched publicly owned free-to-air TV (live or on-demand) in P7D (72% vs 51% of those whose child watched commercial free-to-air TV (live or on-demand))
- Those whose child is aged 0-7 (77%), 8-10 (66%), or 11-15 (36% vs 12% of those whose child is aged 16-17)

International children's animation or cartoons was higher for:

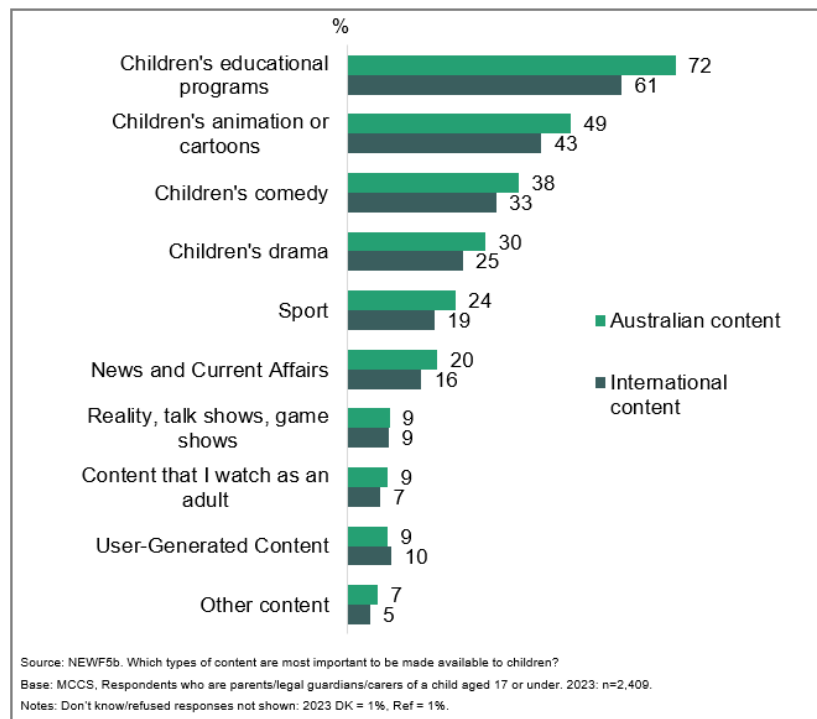
- Those born in a mainly non-English speaking country (48% vs 40% of those born in a mainly English speaking country)
- Those whose child watched publicly owned free-to-air TV (live or on-demand) in P7D (60% vs 41% of those whose child watched commercial free-to-air TV (live or on-demand))
- Those whose child is aged 0-7 (63%), 8-10 (60%), or 11-15 (28% vs 9% of those whose child is aged 16-17).

Parents/legal guardians/carers report children's animation or cartoons remain the primary type of content watched by children. This is consistent with the responses of younger children.

## Types of content most important to be available to children

Although parents/legal guardians/carers most commonly reported that their child likes watching children's animation or cartoon's most, children's educational programs (both Australian, 72% and international, 61%) were most commonly reported to be the type of content most important to be available to children. Almost three-quarters of parents/legal guardians/carers (72%) considered Australian children's educational programs to be the most important content to be made available to

children, followed by international children’s educational programs (61%), Australian children’s animation or cartoons (49%), and international children’s animation or cartoons (43%).



## Subgroups

Australian children’s educational programs was higher for:

- Those whose child watched publicly owned free-to-air TV (live or on-demand) in P7D (83% vs 70% of those whose child watched commercial free-to-air (live or on-demand))
- Those whose child is aged 0-7 (82%) or 8-10 (77% vs 67% of those whose child is aged 11-15 and 60% of those whose child is aged 16-17)

International children’s educational programs was higher for:

- Those whose child watched publicly owned free-to-air TV (live or on-demand) in P7D (69% vs 56% of those whose child watched commercial free-to-air TV (live or on-demand))
- Those born in a mainly non-English speaking country (65% vs 58% of those born in a mainly English speaking country)
- Those whose child is aged 0-7 (71%), 8-10 (64%), or 11-15 (57% vs 46% of those whose child is aged 16-17)

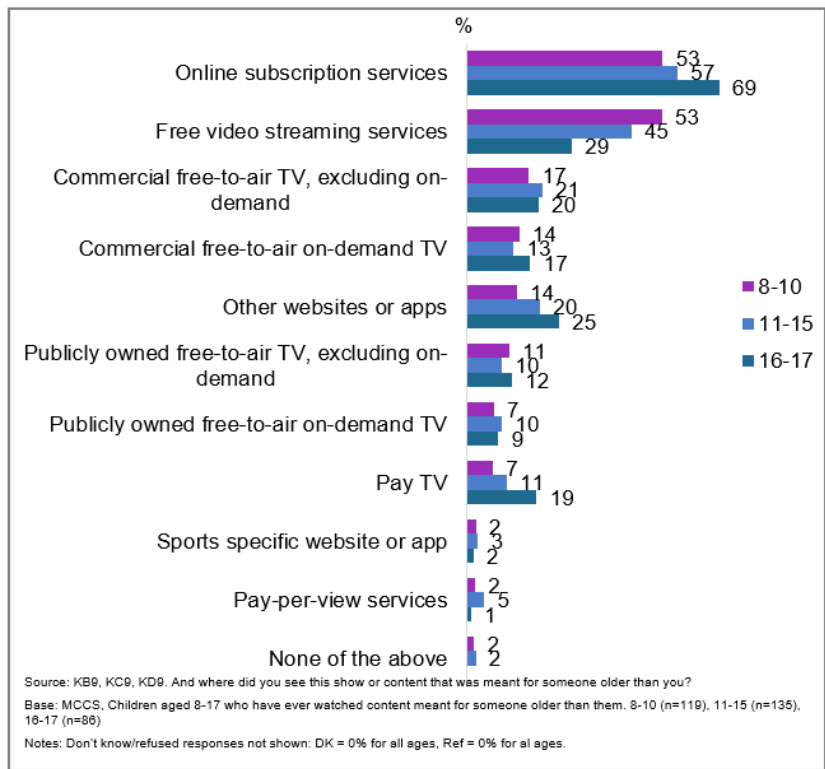
Parents/legal guardians/carers indicate that educational programs are the most important type of content to be available to children.

## Watching content meant for someone older (children aged 8-17)

Children were then asked whether they had ever watched screen content meant for an older audience, and if so where they had seen this content. More than half of children aged 8-10 (60%), 11-15 (70%), and 16-17 (61%) reported watching TV shows or online content that was meant for an older audience. Among all age groups, children who had seen content meant for someone older most often reported seeing this content on online subscription services (8-10, 53%; 11-15, 57%; 16-17, 69%), although those aged 8-10 also commonly mentioned that they watched it on free video streaming services (53%).



“Yes, I have watched TV shows or content online that was meant for or rated for someone older”  
**8-10 – 60%**  
**11-15 – 70%**  
**16-17 – 61%**



### Subgroups

Free video streaming services was higher for:

- Ages 8-10 (53%) and ages 11-15 (45% vs 29% of ages 16-17)

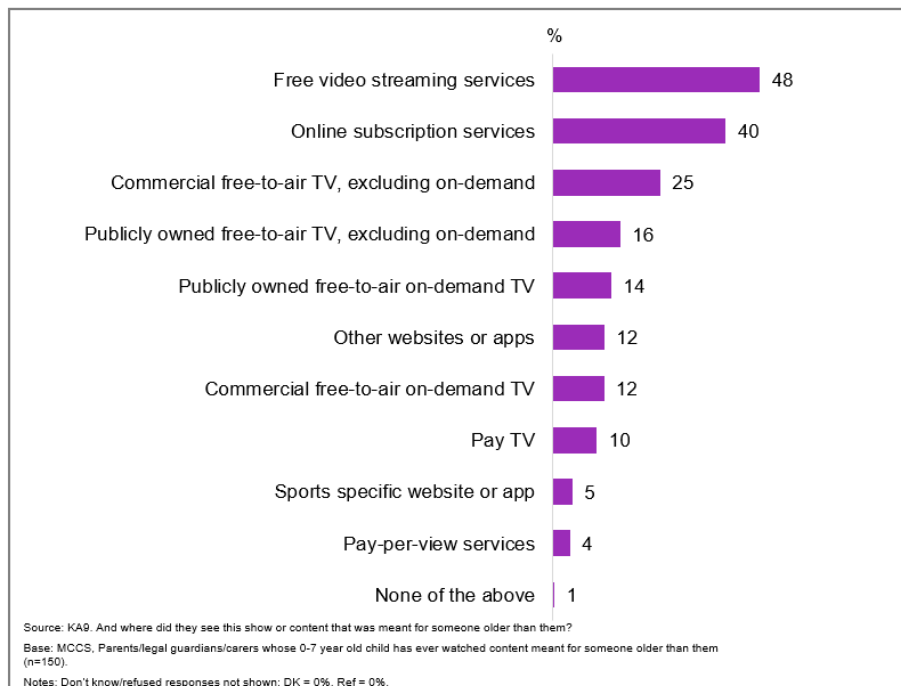
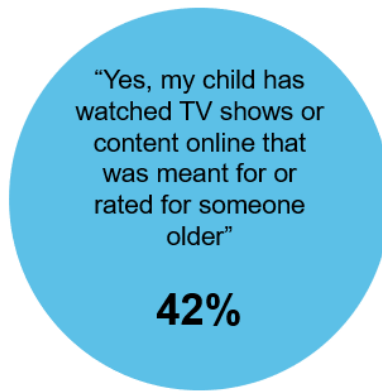
Pay TV was higher for:

- Ages 16-17 (19% vs 7% of ages 8-10)

Most children aged 8-17 say they have watched age-inappropriate content, in particular via online subscription services (e.g. Netflix, Amazon Prime Video, Bingee, etc.).

### Watching content meant for someone older (children aged 0-7)

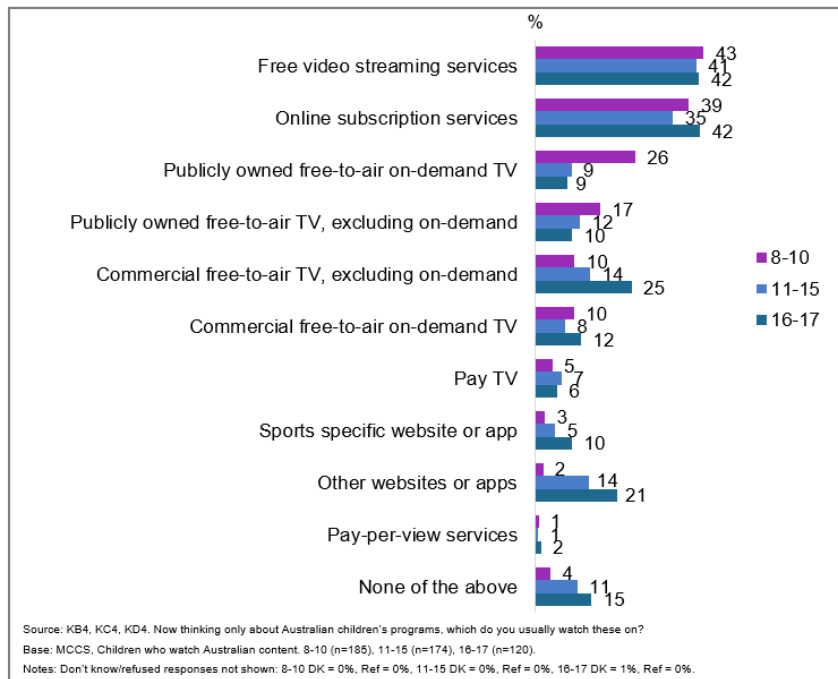
Just over two-fifths (42%) of children aged 0-7 had watched TV shows or online content that was meant for an older audience. Among children that had seen content meant for someone older, this content was most commonly watched via free video streaming services (48%), online subscription services (40%), and, less commonly, commercial free-to-air TV (25%).



Parents/legal guardians/carers report that children aged 0-7 are being exposed to age-inappropriate content, especially via free video streaming services and online subscription services.

## Platforms used to watch Australian screen content (children aged 8-17)

Children aged 8-10 most commonly reported using free video streaming services (43%), online subscription services (39%), and publicly owned free-to-air on-demand TV (26%) to watch Australian content. For older children, the three platforms most commonly used to watch Australian content were free video streaming services (11-15, 41%; 16-17, 42%), online subscription services (11-15, 35%; 16-17, 42%), and commercial free-to-air TV (11-15, 14%; 16-17, 25%).



## Subgroups

Commercial free-to-air TV, excluding on-demand was higher for:

- Ages 16-17 (25% vs 14% of ages 11-15 and 10% of ages 8-10)

Sports specific website or app was higher for:

- Ages 16-17 (10% vs 3% of ages 8-10)

Other websites or apps was higher for:

- Ages 16-17 (21%) and ages 11-15 (14% vs 2% of ages 8-10)

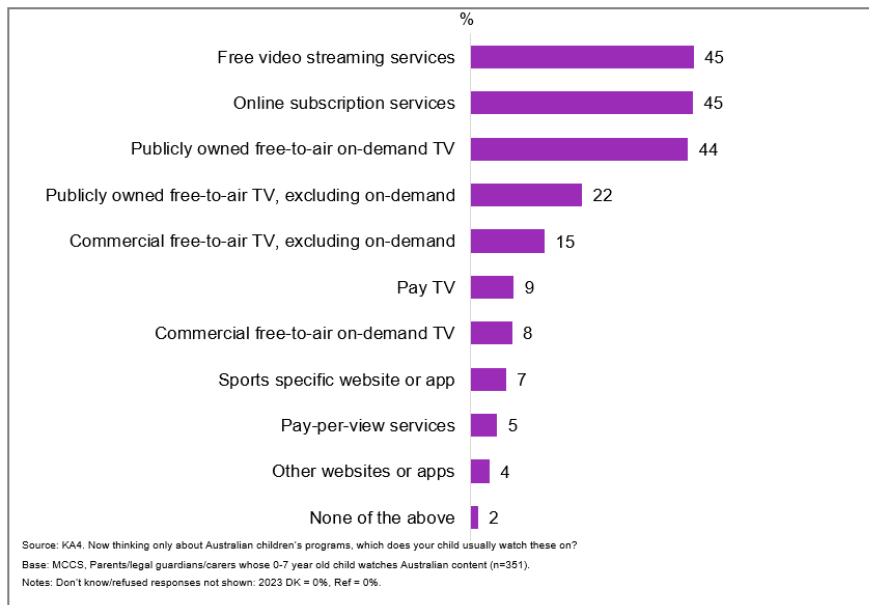
Publicly owned free-to-air on-demand TV was higher for:

- Ages 8-10 (26% vs 9% of ages 11-15 and 9% of ages 16-17)

The platforms most commonly used to watch Australian screen content are free video streaming services and online subscription services

## Platforms used to watch Australian screen content (children aged 0-7)

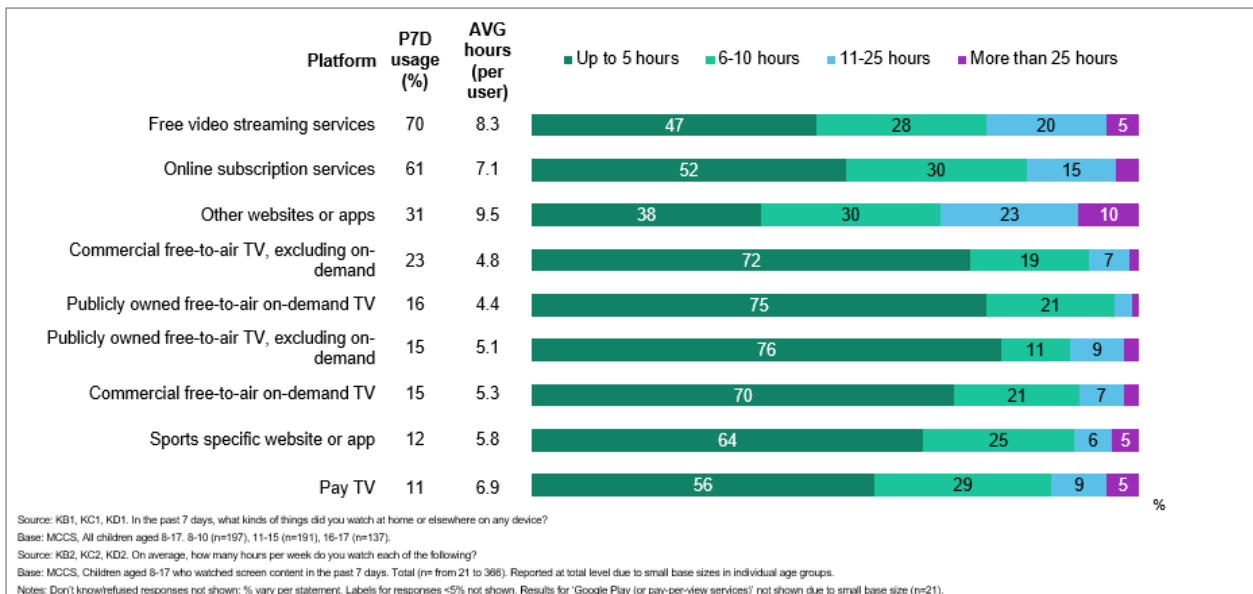
A similar proportion of children aged 0-7 watched Australian screen content on free video streaming services (45%), online subscription services (45%), and publicly owned free-to-air on-demand TV (44%).



Parents/legal guardians/carers indicate that children aged 0-7 are also watching Australian content via free video streaming services and online subscription services, as well as publicly owned free to air TV (e.g. ABC iview, SBS On Demand, etc.).

## Hours per week spent watching content on various platforms (children aged 8-17)

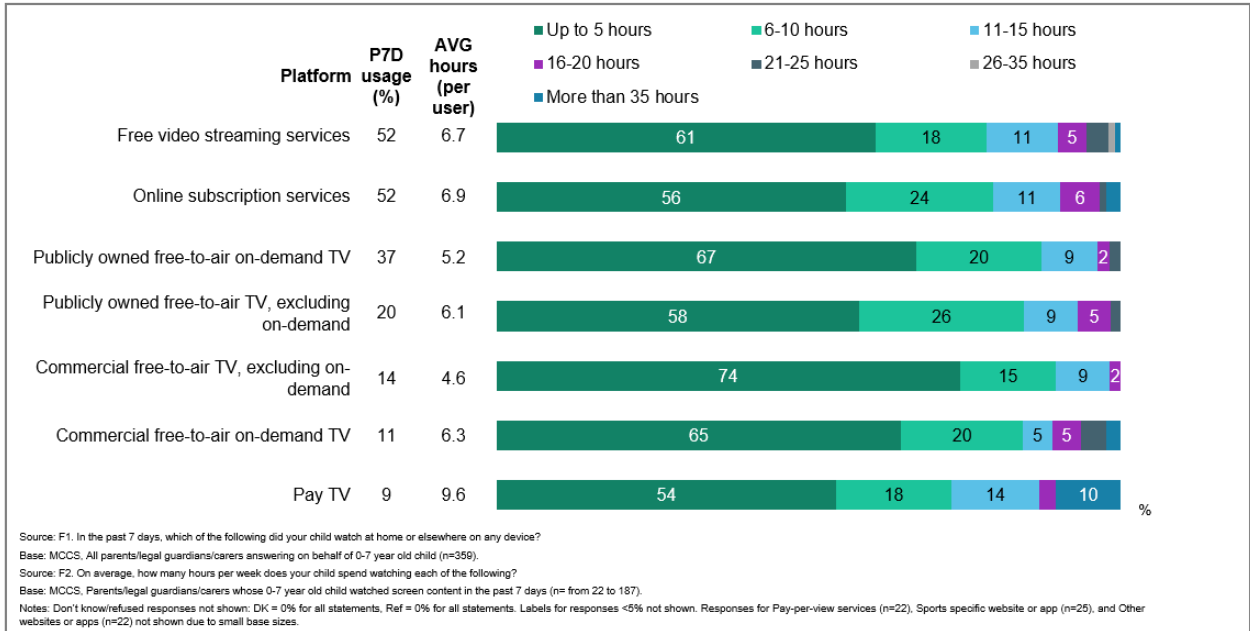
Among children aged 8-17, the platforms with the highest weekly average number of hours spent watching screen content were other websites or apps (9.5 hours), free video streaming services (8.3 hours), and online subscription service (7.1 hours). These platforms also had the highest reported usage by children in the past 7 days.



Other website or apps (e.g. Facebook, TikTok and Instagram) record the highest average weekly viewing hours by those children that use them.

## Hours per week spent watching content on various platforms (children aged 0-7)

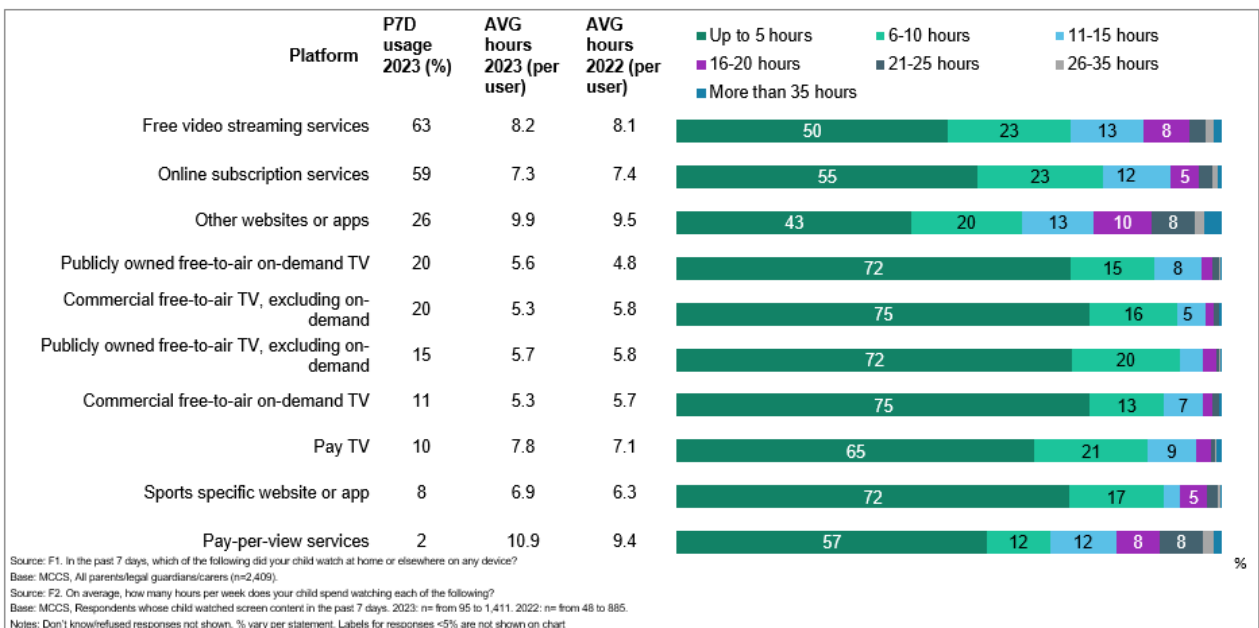
For children aged 0-7 who watched content on free video streaming services, the average number of hours spent watching content per week was 6.7 hours. The average number of hours per week was slightly higher for online subscription services at 6.9 hours.



Pay TV has the highest average weekly viewing hours for children aged 0-7.

## Hours spent by children watching screen content on various platforms

Parents/legal guardians/carers were also asked to indicate how much time their child spends watching various platforms per week. In 2023, the average number of hours children spent watching free video streaming services was 8.2 hours per week. For online subscription services the was slightly lower at 7.3 hours per week.



The average number of hours that children spend watching content increased across several platforms in 2023.

# Accessibility of screen content

## Chapter Summary – Accessibility of screen content

### Hearing loss and vision impairment are experienced by viewers in Australia

Hearing impairment was experienced by 10% of respondents. Fourteen percent (14%) of respondents reported experiencing vision impairment.

Hearing loss or partial deafness was the most common type of hearing impairment (78%), while Short-sightedness / Myopia / difficulty seeing objects in the distance was the most common type of vision impairment (58%).

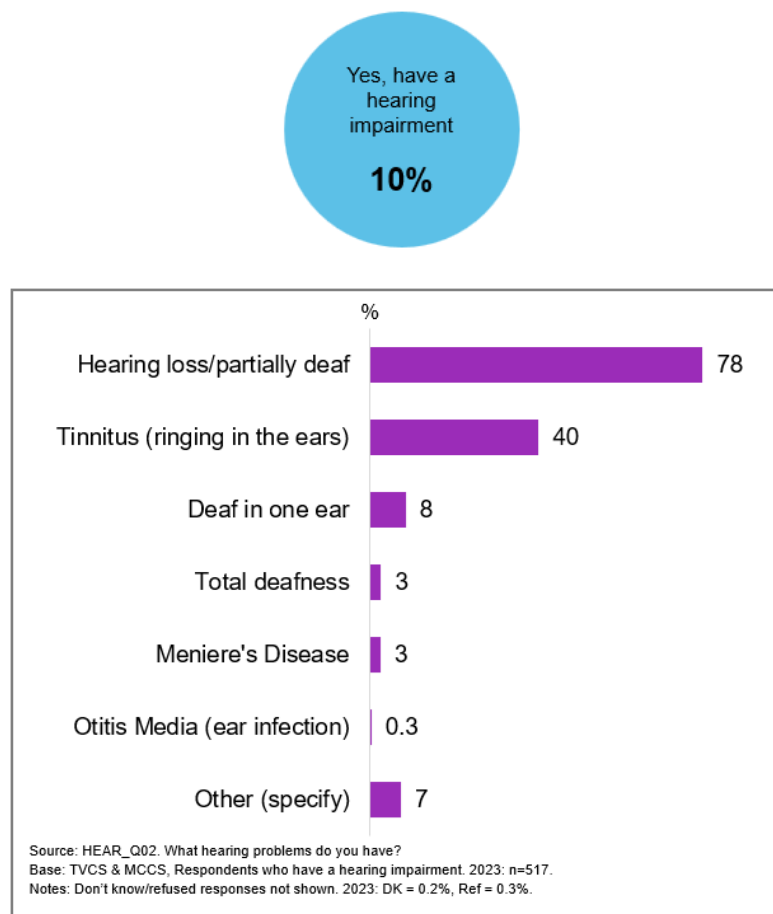
### Accessibility features are being used for access to content in Australia

Subtitles were used by 54% of respondents, while live captions were used by 29%.

Accessibility features enabled many to fully or partially understand the TV content they were watching, especially those from a non-English speaking background, or those who were aged 75+ (subtitles were higher for Ages 75+ to fully understand content (16% vs 5% of ages 18-24).

## Hearing impairment

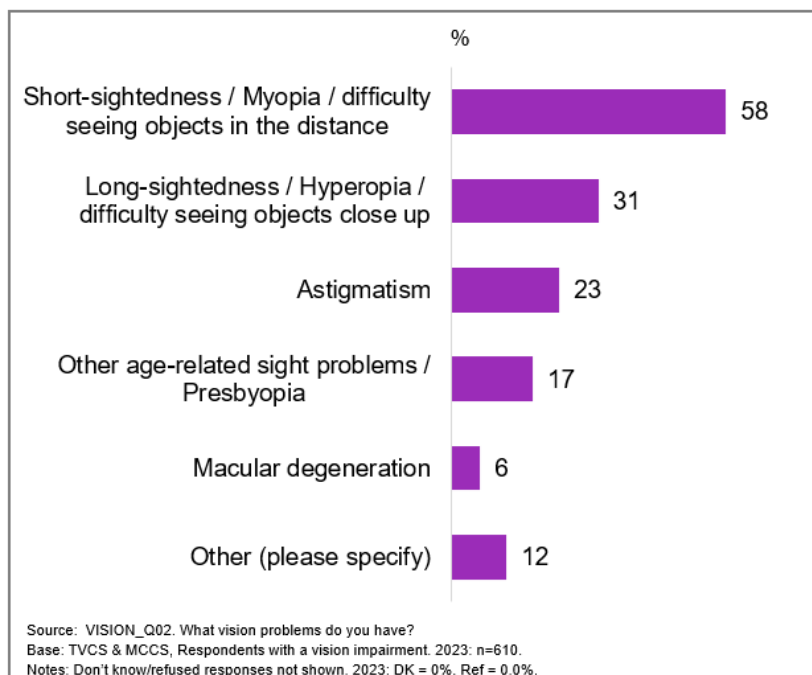
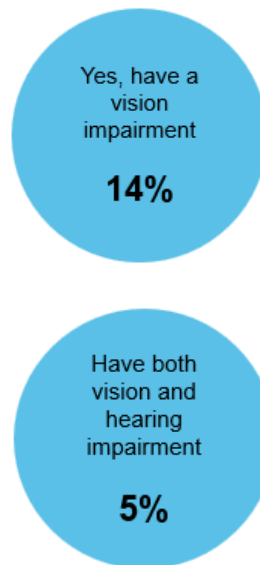
One-tenth (10%) of respondents reported that they have a hearing impairment, with the most common types of hearing problems being hearing loss or partial deafness (78%), followed by tinnitus (40%).



Hearing loss / partial deafness was the most commonly reported type of hearing problem.

## Vision impairment

Just over one-tenth (14%) of respondents reported a vision impairment. The most commonly reported types of vision problems were short-sightedness or Myopia (58%), followed by long-sightedness or Hyperopia (31%), and astigmatism (23%).

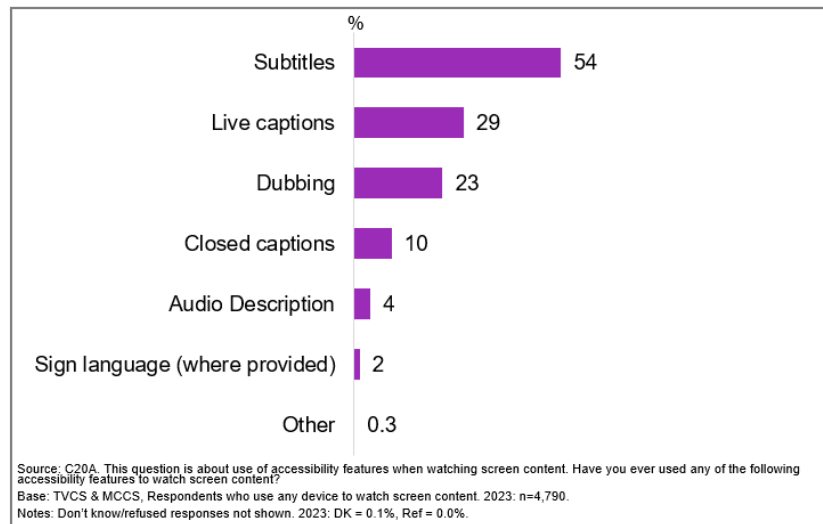


Short-sightedness / Myopia / difficulty seeing objects in the distance was the most commonly reported vision problem.

## Use of accessibility features when watching screen content

Over half of respondents (54%) who watched screen content reported that they use subtitles, while almost one-third (29%) used live captions, and 23% used dubbing.





## Definitions

- **Subtitles** - Language translations that appear in text at the bottom of the screen.
- **Live captions** - Captions placed over live TV in real-time. Captions show on-screen text to accompany speech and other sounds. Captions are broadcast as part of TV, do not include subtitles (which are language translations), and are not associated with any other assistive technology on your device.
- **Closed captions** - A pre-prepared transcription of spoken content on pre-recorded video content, such as a movie, documentary or TV program. Captions show on-screen text to accompany speech and other sounds. Captions are broadcast as part of TV, do not include subtitles (which are language translations), and are not associated with any other assistive technology on your device.
- **Dubbing** - Audio dubbing is when the original dialogue audio of a film or program is swapped with one of a different language.

## Subgroup

**Subtitles** was higher for:

- Ages 18-24 (79%), 25-34 (68%), and 35-44 (59% vs 43% of ages 45-54, 45% of ages 55-64, 38% of ages 65-74, and 40% of ages 75+)
- Those living in a capital city (59% vs 49% of those living outside a capital city)
- Adults living in a share house (71% vs 49% of those without children in the household, 55% of those with dependent children, and 55% of those with non-dependent children only)
- Those with a Bachelor degree (66%) or Postgraduate degree (64% vs 52% of those with education up to Year 12 and 46% of those with a TAFE qualification / Trade Certificate / Diploma)
- Those born in a mainly non-English speaking country (69% vs 51% of those born in a mainly English speaking country)

Subtitles are being used at high rates, particularly by young people, followed by live captions and dubbing.

## Reasons for using accessibility features (%)

For each type of accessibility feature used, respondents most commonly reported that while the features were nice to have, they were not relied upon to understand the content they watched. This sentiment was most expressed with reference to live captions (51%).

Accessibility feature	Base (n)	I rely on it fully to understand the TV content I am watching	I rely on it partially to understand the TV content I am watching	They are a nice feature to have but they don't stop me from understanding the TV content I am watching	I don't at all rely on it to understand the TV content I am watching
Subtitles	2,424	9	32	46	12
Dubbing	1,108	6	28	47	19
Live captions	1,339	5	29	51	15
Closed captions	418	27	29	31	12

Source: C20B. For each of the following accessibility features you have used, to what extent do you rely on it to understand the TV content you are watching ?

Base: TVCS & MCCS, Respondents who have used accessibility features when watching screen content. 2023: n= from 418 to 2,424.

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

### Subgroup

I rely on it fully to understand the TV content I am watching was higher for:

Subtitles:

- Ages 75+ (16% vs 5% of ages 18-24)
- Those living in a capital city (11% vs 6% of those living outside a capital city)

I rely on it partially to understand the TV content I am watching was higher for:

Subtitles:

- Those born in a mainly non-English speaking country (45% vs 28% of those born in a mainly English speaking country)

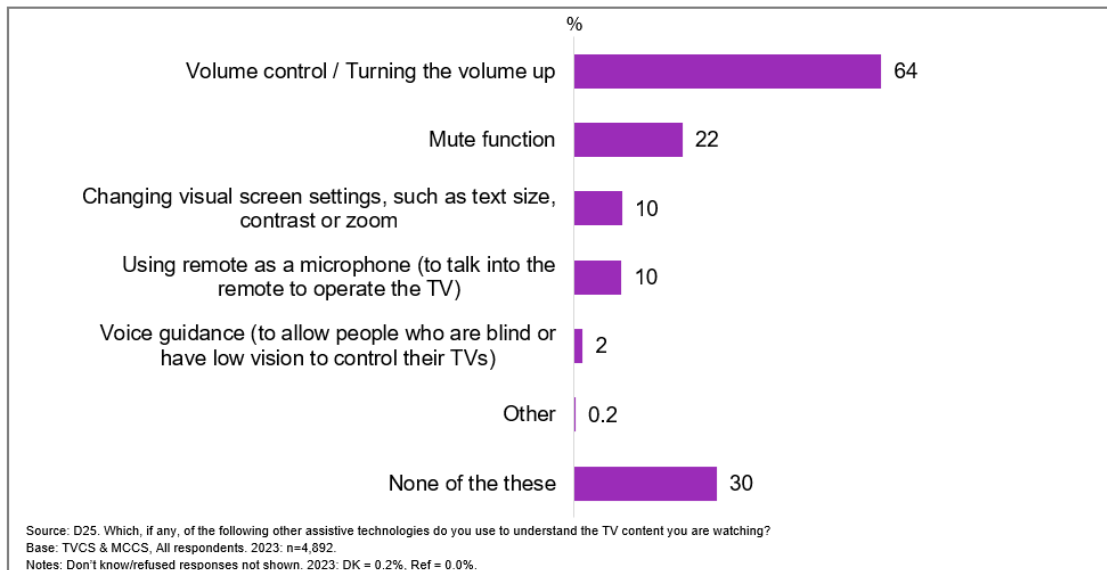
Dubbing:

- Those born in a mainly non-English speaking country (37% vs 25% of those born in a mainly English speaking country)

Accessibility features enable many to understand the TV content they are watching, especially those from a non-English speaking background, or those aged 75+. That said, people were reliant on different accessibility features to varying degrees.

## Use of assistive technologies when watching screen content

More than three-fifths (64%) of respondents used volume control or turned the volume up when watching screen content. Nearly one-third (30%) of respondents reported they didn't use any of the assistive technologies listed when watching screen content.



## Subgroup

Changing visual screen settings such as text size, contrast or zoom was higher for:

- Those with disability (17% vs 10% of those without disability)
- Those born in a mainly non-English speaking country (15% vs 9% of those born in a mainly English speaking country)
- Those who did not watch live free-to-air (commercial or publicly owned) in P7D (13% vs 8% of those who did watch live free-to-air in P7D)

Basic controls such as volume and mute are commonly used functions to assist in understanding TV content.

# Audio content

## Chapter Summary – Audio Content

### Listening to online music streaming increased in 2023

FM radio was the most commonly listened to type of audio (57%), followed closely by online music streaming services (55%).

However, listening to online music streaming services significantly increased in 2023, while FM radio was consistent with 2022.

### Smartphones are used to listen to online audio, while traditional radio is listened to in the car

Respondents most commonly reported listening to FM radio (87%) and AM radio (78%) in the car, while smartphones were more commonly used to listen to online music streaming services (84%) and podcasts (85%).

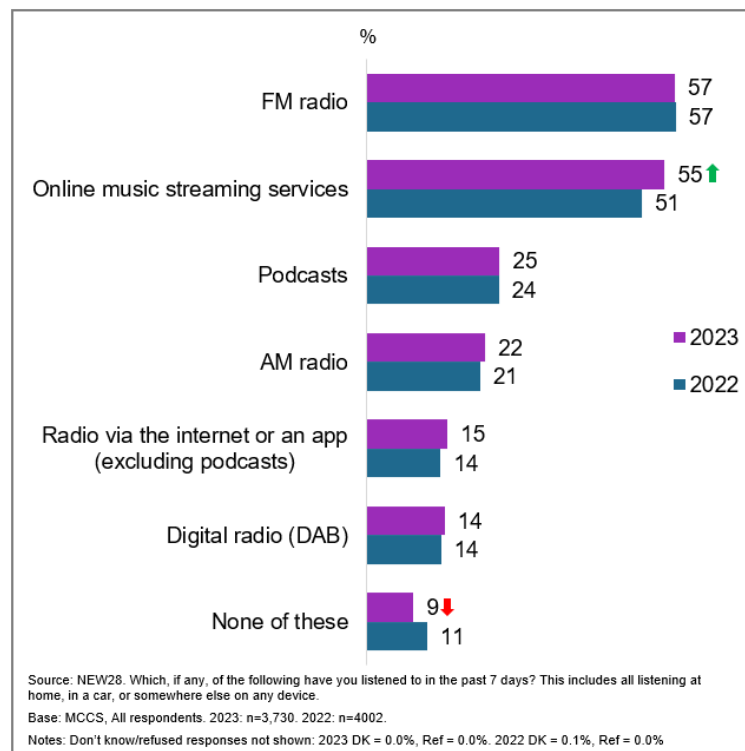
### Podcasts are listened to for entertainment, relaxation and enjoyment

The main genre of podcast that respondents reported they had listened to was society and culture (37%). A similar proportion of respondents had listened to lifestyle and health (30%), news and politics (28%), comedy (28%), or education (27%) podcasts.

However, a smaller proportion of respondents reported they had listened to podcasts (25%), vs other types of audio such as radio or online music streaming.

## Audio listened to in the past 7 days

FM radio was the most commonly listened to type of audio (57%), followed closely by online music streaming services (55%). Smaller proportions of respondents reported they had listened to podcasts (25%), AM radio (22%), radio via the internet or an app (15%), or digital radio (DAB) (14%) in the past 7 days.



### Subgroups

**FM radio** was higher for:

- Ages 35-44 (63%), 45-54 (67%), 55-64 (68%), and 65-74 (64% vs 51% of ages 25-34 and 30% of ages 18-24)
- Those living outside a capital city (64% vs 54% of those living in a capital city)
- Those without children in the household (56%), those with dependent children (62%), and those with non-dependent children only (56% vs 35% of adults living in a share house)
- Those with a TAFE qualification / Trade Certificate / Diploma (68% vs 50% of those with education up to Year 12, 48% of those with a Bachelor degree and 55% of those with a Postgraduate degree)

Online music streaming services was higher for:

- Women (59% vs 50% of men)
- Ages 18-24 (82%), 25-34 (70%), 35-44 (58%), and 45-54 (56% vs 41% of ages 55-64, 26% of ages 65-74, and 22% of ages 75+)

### Callouts

- Having listened to online music streaming services has increased since 2022, while not having listened to any audio has decreased.

Listening to online music streaming services increased in 2023, while levels of listening for FM radio are consistent with 2022.

## Devices used to listen to audio content (%)

In terms of devices, respondents most commonly reported listening to FM radio (87%) and AM radio (78%) in the car, while smartphones were more commonly used to listen to online music streaming services (84%) and podcasts (85%).

Audio content	Base (n)	Car audio system	Dedicated radio	Smartphone	Smart Speaker	Computer / Tablet / Laptop	Other
FM radio	1,881	87	23	12	5	4	1
Online music streaming services	1,854	30	2	84	23	31	2
Podcasts	979	19	2	85	7	25	2
AM radio	837	78	38	16	6	6	1
Radio via the internet or an app (excluding podcasts)	630	29	7	67	21	27	1
Digital radio (DAB)	587	66	34	19	11	4	1

Source: NEWG29. In general, what do you use to listen to [‘insert NEW28 Response of codes 1-6’]

Base: MCCS, Respondents who listened to audio content in the past 7 days. 2023 n= from 587 to 1,881.

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

Smart speaker NET: 9%

Car audio system NET: 84%

Note: NETs only include AM radio, FM radio, Digital radio (DAB), and Radio via the internet or an app

### Subgroups

Dedicated radio was higher for:

FM radio:

- Men (27% vs 19% of women)
- Ages 65-74 (38%) and 75+ (56% vs 10% of ages 18-24, 14% of ages 25-34, 14% of ages 35-44 and 23% of ages 45-54)
- Those with education up to Year 12 (25%), and those with a TAFE qualification / Trade Certificate / Diploma (27% vs 16% of those with a Bachelor degree and 13% of those with a Postgraduate degree)

Online music streaming services was higher for:

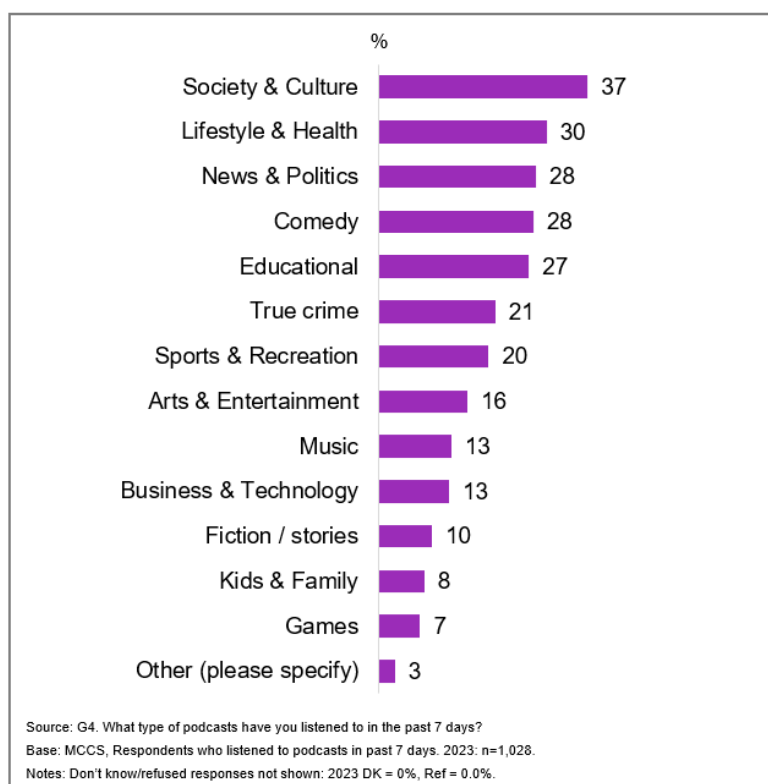
Smartphone:

- Ages 18-24 (94%), 25-34 (88%), and 35-44 (87% vs 74% of ages 55-64, 44% of ages 65-74 and 56% of ages 75+)
- Those employed full time or part time (87%), employed casually (89%), a student (91%), or a non-worker (95% vs 74% of those who are self-employed and 51% of those who are retired)

FM and AM radio are most commonly listened to in the car, while smartphones are used for online music streaming and podcasts.

## Type of podcast listened to in past 7 days

The main genre of podcasts that respondents reported they had listened to was society and culture (37%). A similar proportion of respondents had listened to lifestyle and health (30%), news and politics (28%), comedy (28%), or education (27%) podcasts.



### Subgroups

Lifestyle and health was higher for:

- Women (37% vs 24% of men)
- Those with a Postgraduate degree (39% vs 21% of those with education up to Year 12)
- Those who watched commercial free-to-air TV (live or on-demand) in P7D (34% vs 30% of those who watched publicly owned free-to-air TV (live or on-demand))

News and politics was higher for:

- Men (32% vs 23% of women)
- Ages 35-44 (28%), 45-54 (35%), 55-64 (28%), and 65-74 (55% vs 13% of ages 18-24)
- Those with a Postgraduate degree (37% vs 21% of those with education up to Year 12)
- Those who watched publicly owned free-to-air TV (live or on-demand) in P7D (33% vs 26% of those who watched commercial free-to-air TV (live or on-demand))

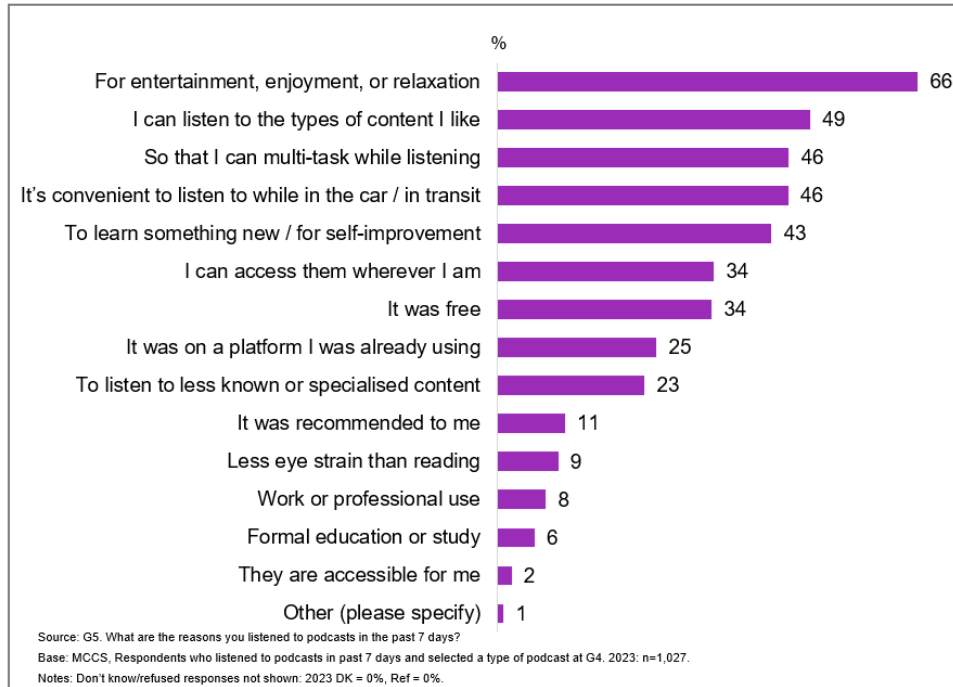
Sports and recreation was higher for:

- Men (34% vs 5% of women)
- Those with a TAFE qualification / Trade Certificate / Diploma (28% vs 13% of those with a Bachelor degree)

A broad range of podcast genres are listened to, with society & culture and lifestyle & health being the most common.

## Reasons for listening to podcasts

Two-thirds (66%) of respondents who had listened to a podcast in the past 7 days did so for entertainment, enjoyment, or relaxation. The next most common reasons were to listen to the types of content they like (49%), so that they can multi-task while listening (46%), because it's convenient to listen to while in the car / in transit (46%), and to learn something new or for self-improvement (43%).



## Subgroups

For entertainment, enjoyment or relaxation was higher for:

- Ages 25-34 (79% vs 55% of ages 45-54)
- Adults living in a share house (86% vs 65% of those without children in the household and 66% of those with dependent children)
- Those who comment or post images to social media sites less than once a day (70% vs 50% of those who comment or post once a day or more)

So that I can multitask while listening was higher for:

- Women (53% vs 39% of men)
- Those born in a mainly English speaking country (48% vs 36% of those born in a mainly non-English speaking country)

Podcasts are primarily listened to for entertainment, enjoyment or relaxation purposes.



## TV: access, devices, and free-to-air

### Chapter Summary – TV

#### **Access to TV via traditional means of broadcast signal or antennas is consistent with 2022, while on-demand apps increase in 2023**

Broadcast signal or antenna (61%) remained the most common method for accessing free-to-air TV, although on-demand TV apps (net) follow closely (58%).

Usage of traditional broadcast signal or antenna continued in 2023, however accessing TV via apps increased this year (up from 53% net in 2022).

#### **Numbers of TVs in Australian households has remained consistent**

Respondents most commonly reported having either one (35%) or two (34%) TVs in their house, while only a minority (3%) have none.

The average number of TVs in a household remained stable at 2.0 in 2023.

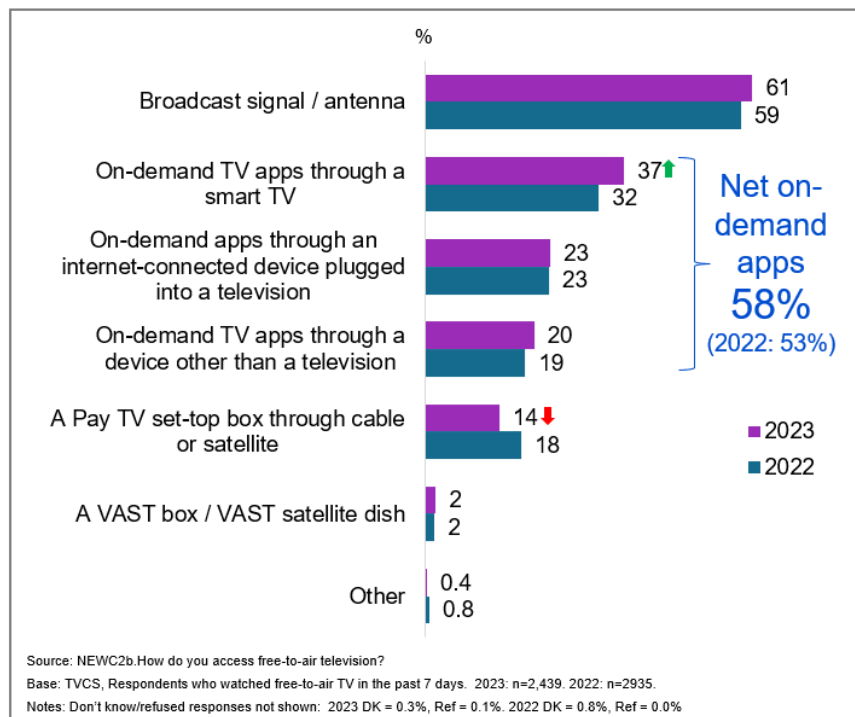
#### **TVs are increasingly connected to the internet**

Most commonly one TV was connected to the internet (46%), although some respondents reported two (26%), and 13% said none were connected to the internet. This slightly increased from 1.4 in 2022 to 1.5 in 2023 (not significant).

TV-internet connectivity increased, with a significant decrease from those saying no TVs were connected to the internet in 2022 (16%) to 13% in 2023.

## How respondents access free-to-air TV

Broadcast signal or antenna (61%) remained the most common method for accessing free-to-air TV, although on-demand TV apps (NET) follow closely (58%).



### Subgroups

Broadcast signal / antenna was higher for:

- Men (69% vs 51% of women)
- Ages 55-64 (65% vs 46% of ages 18-24)
- Ages 75+ (72% vs 46% of ages 18-24, 54% of ages 25-34 and 57% of ages 45-54)
- Those who comment or post images to social media sites less than once a day (63% vs 51% of those who comment or post once a day or more)

NET on-demand apps was higher for:

- Women (62% vs 54% of men)
- Ages 18-24 (65%), 25-34 (64%), 35-44 (68%), and 45-54 (61% vs 44% of ages 75+)
- Those living in a capital city (62% vs 54% of those living outside a capital city)
- Those with dependent children in the household (67% vs 55% of those without children)

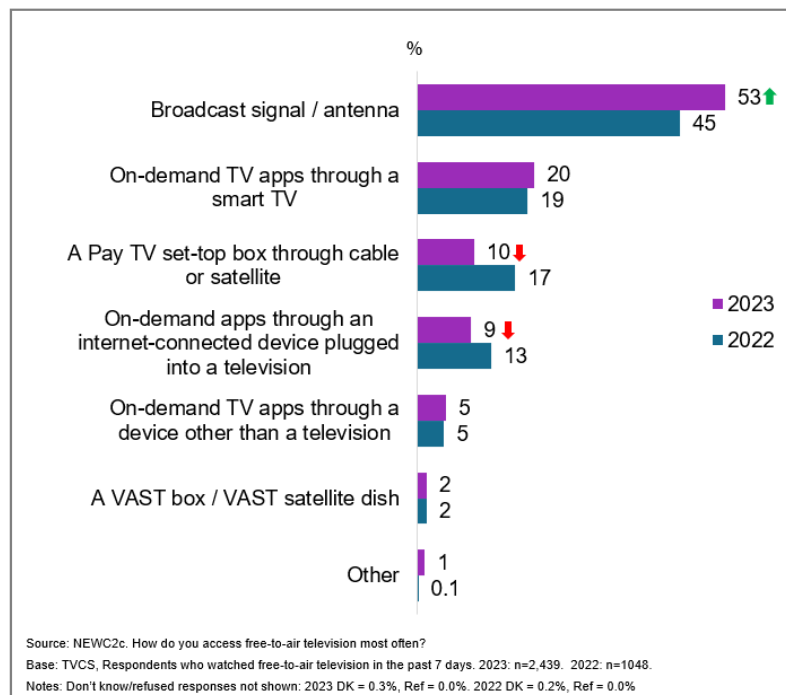
### Callouts

- Accessing free-to-air TV through on-demand TV apps on a smart TV has increased in 2023, while accessing via a Pay TV set-top box through cable or satellite has decreased.

The traditional method of accessing TV through a broadcast signal or antenna remains consistent with 2022, while access via on-demand apps increases in 2023.

## How respondents access free-to-air TV most often

More than half of respondents (53%) who watched free-to-air TV in the past 7 days reported that they most often watch through a broadcast signal or antenna. Approximately one fifth (20%) most often watched via on-demand TV apps on a smart TV.



### Subgroups

Broadcast signal / antenna was higher for:

- Men (60% vs 44% of women)
- Those without children in the household (56% vs 45% of those with dependent children)
- Those who comment or post images to social media sites less than once a day (55% vs 41% of those who comment or post once a day or more)
- Those who post to blogs, forums or interest groups less than once a day (54% vs 41% of those who post once a day or more)
- Those who do not have household access to online subscription streaming services (75% vs 47% of those who do have access)

### Callouts

- Use of a Pay TV set-top box through cable or satellite, and on-demand apps through an internet-connected device plugged into a TV have decreased in 2023 as ways that respondents access free-to-air TV most often. Accessing free-to-air TV most often through a broadcast signal or antenna has increased in 2023.

Broadcast signal or antenna remains the most common way to access free-to-air TV in 2023.

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

TV remained the most common device for watching free-to-air TV, with 74% of respondents (net use) indicating that they watched free-to-air on a TV in an average week.

Device	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	2022 NET use
Television (including smart TV)	<b>74</b>	6	7	18	14	15	14	11	<b>74</b>
Mobile phone or smartphone	<b>30</b>	5	3	3	3	4	11	41	<b>30</b>
TV smart accessory / Digital media player	<b>28</b>	2	2	5	5	5	10	14	<b>27</b>
Computer (desktop or laptop)	<b>25</b>	2	2	3	3	4	11	35	<b>26</b>
Tablet	<b>16</b>	1	1	2	2	3	8	16	<b>19</b>
Pay TV box	<b>15↓</b>	1	2	3	3	3	4	5	<b>18</b>
Games console connected to a television	<b>7</b>	0.3	0.3	1	1	2	3	11	<b>8</b>
VAST satellite box	<b>5↑</b>	0.3	0.1	1	1	1	2	2	<b>3</b>

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. 2023: n=3,861. 2022: 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. Note that this question reflects use of devices to watch free-to-air TV specifically, and has a different base to C4, which asks about use of devices to watch screen content more generally and was asked of all respondents who watched screen content in the past 7 days.

## Subgroups

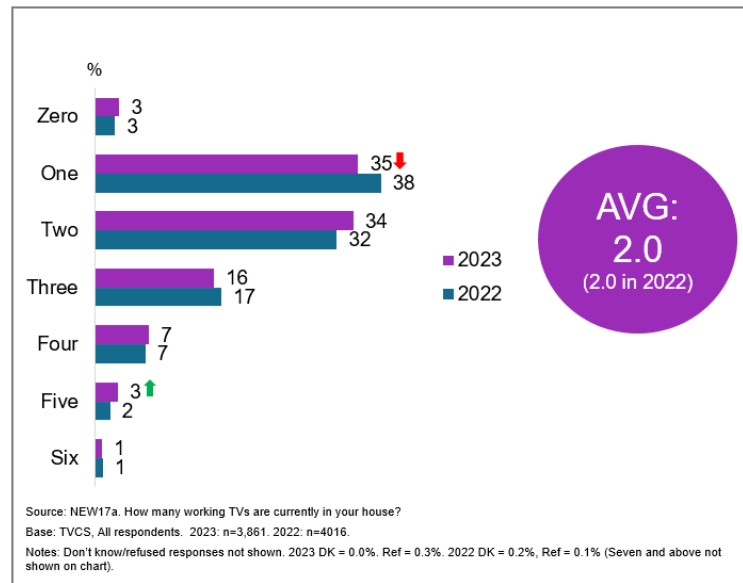
Television (net use) was higher for:

- Men (71% vs 63% of women)
- Ages 55-64 (80%), 65-74 (84%) and 75+ (87% vs 52% of ages 18-24, 58% of ages 25-34, 57% of ages 35-44, and 60% of ages 45-54)
- Those living outside a capital city (73% vs 62% of those living in a capital city)
- Those with education up to Year 12 (68%) or a TAFE qualification / Trade Certificate / Diploma (70% vs 59% of those with a Bachelor degree)

Free-to-air is most watched via TV, consistent with 2022.

## Number of TVs in respondents' houses

Respondents most commonly reported having either one (35%) or two (34%) TVs in their house, while only a minority (3%) had none.



## Subgroups

**One** was higher for:

- Those without children in the household (41% vs 30% of those with dependent children and 24% of those with non-dependent children only)
- Those with a Bachelor degree (40%) or Postgraduate degree (44% vs 31% of those with education up to Year 12 and 32% of those with a TAFE qualification / Trade Certificate / Diploma)
- Those born in a mainly non-English speaking country (48% vs 32% of those born in a mainly English speaking country)

**Three** was higher for:

- Ages 45-54 (20%) and ages 65-74 (18% vs 10% of ages 25-34)
- Those with dependent children in the household (21%) or non-dependent children only (22% vs 13% of those without children)
- Those born in a mainly English speaking country (17% vs 12% of those born in a mainly non-English speaking country)

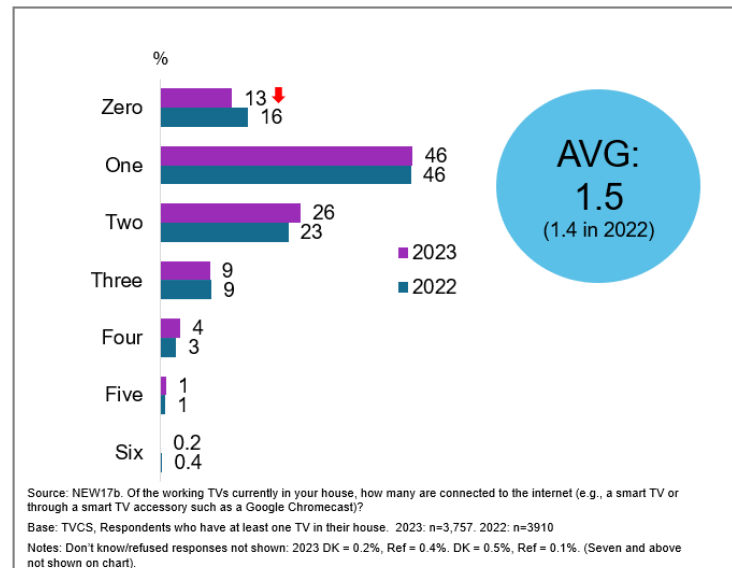
## Callouts

- Having one TV in the household has decreased in 2023.

The average number of TVs in households has remained stable in 2023.

## Number of TVs connected to the internet

Among respondents who had one or more TVs in their house, it was most common that one was connected to the internet (46%), although some respondents said two were connected to the internet (26%), while 13% said none were connected to the internet.



## Subgroups

**Zero** was higher for:

- Ages 75+ (32%), 65-74 (20%), and 55-64 (15% vs 6% of ages 18-24, 6% of ages 25-34, and 9% of ages 35-44)
- Those living outside a capital city (17% vs 10% of those living in a capital city)
- Those with education up to Year 12 (14%) or a TAFE qualification / Trade Certificate / Diploma (15% vs 9% of those with a Postgraduate degree)
- Those with a HH income of <\$41,599 (22%), or \$41,600-\$77,999 (16% vs 9% of those with a HH income of \$78,000-\$103,999, 8% of those with a HH income of \$104,000-\$155,999 and 4% of those with a HH income of \$156,000 or more)

**Three** was higher for:

- Ages 35-44 (12%) and 45-54 (12% vs 4% of ages 75+)
- Those with dependent children in the household (16%) or non-dependent children only (13% vs 5% of those without children)
- Those with a HH income of \$78,000-\$103,999 (11%), \$104,000-\$155,999 (10%), or \$156,000 or more (16% vs 6% of those with a HH income of <\$41,599)

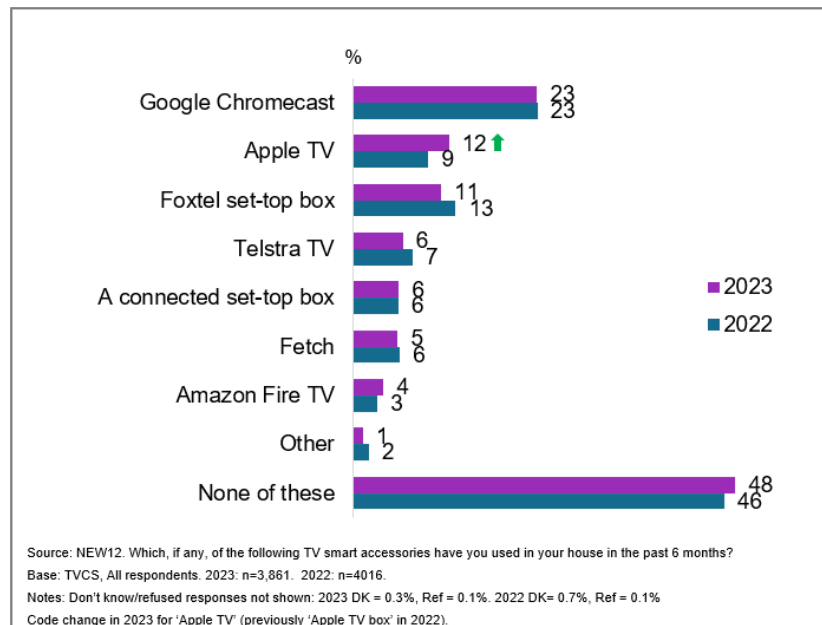
## Callouts

- Having zero TVs connected to the internet has decreased in 2023.

The average number of TVs in households connected to the internet is generally consistent with 2022.

## TV smart accessories used in the past 6 months

Almost half of respondents (48%) had not used any TV smart accessories in the past 6 months, while just under one quarter (23%) had used a Google Chromecast.



## Subgroups

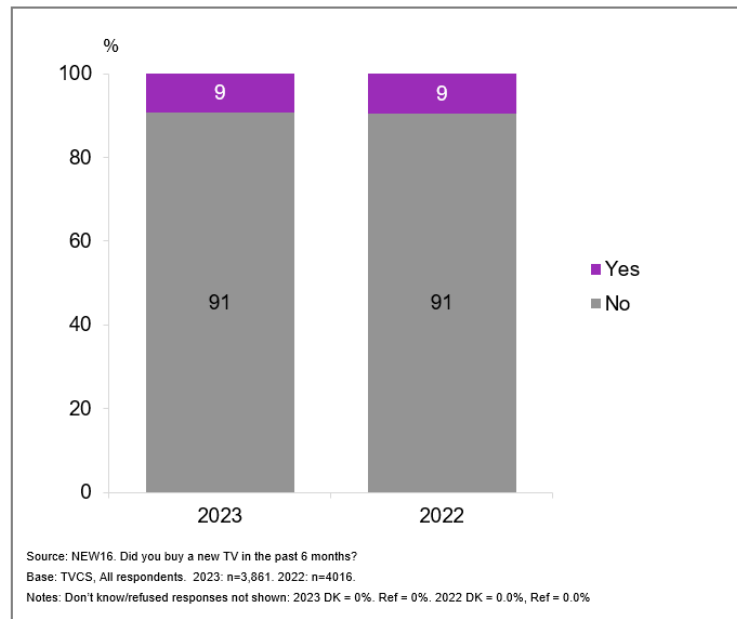
Google Chromecast was higher for:

- Ages 18-24 (23%), 25-34 (32%), 35-44 (27%), 45-54 (23%), and 55-64 (22% vs 15% of ages 65-74)
- Those living in a capital city (25% vs 20% of those living outside a capital city)
- Those with dependent children in the household (29% vs 20% of those without children)
- Those employed full time or part time (27% vs 16% of those who are retired)
- Those who look for information over the internet once a day or more (25% vs 16% of those who look for information less than once a day)
- Those who view posts, images, and videos on social media sites once a day or more (26% vs 18% of those who view posts less than once a day)
- Those who watched exclusively online content in P7D (26% vs 5% of those who watched exclusively offline content)
- Those who watched sports in P7D (26% vs 20% of those who did not watch sports)
- Those who pay for 3-5 (31%) or 6 or more online subscription streaming services (42% vs 24% of those who pay for 1-2 services)

Overall usage of TV smart accessories remains consistent with 2022, however Apple TV increased in 2023.

## Purchase of a new TV in past 6 months

Only a minority of respondents (9%) had bought a new TV in the past 6 months, which was consistent with 2022.



## Subgroups

**Yes** was higher for:

- Aboriginal and / or Torres Strait Islander respondents (18% vs 9% of non-Aboriginal or Torres Strait Islander respondents)
- Those who comment or post images to social media sites once a day or more (12% vs 8% of those who post less than once a day)
- Those who post to blogs, forums, or interest groups once a day or more (19% vs 9% of those who post less than once a day)
- Those who watched sports in P7D (11% vs 7% of those who did not watch sports)
- Those who pay for 3-5 online subscription streaming services (12% vs 6% of those who pay for 1-2 services)

Levels of purchasing new TVs in 2023 are consistent with those seen in 2022.



# News content

## Chapter Summary – News Content

### **Australian national news is the news content type that is most consumed**

More than half of respondents (58%) reported that they consume Australian national news content at least 3-5 times a week (net 3-5 times per week and more often than 5 times per week).

State / Territory news or International news were less frequently consumed, at 51% and 50% NET respectively (net 3-5 times per week and more often than 5 times per week).

### **Consuming news via online sources continues to trend upwards year-on-year**

When looking at news access by channel category type, online sources were most commonly used (net 84%), followed by TV (net 76%).

Australians report that accessing news via social media was important (with a net of 83% agreeing that is somewhat important or very important), and 61% had accessed news via social media in the past 7 days.

Online sources of news continued to trend upwards year-on-year, while TV continued to trend downwards in 2023.

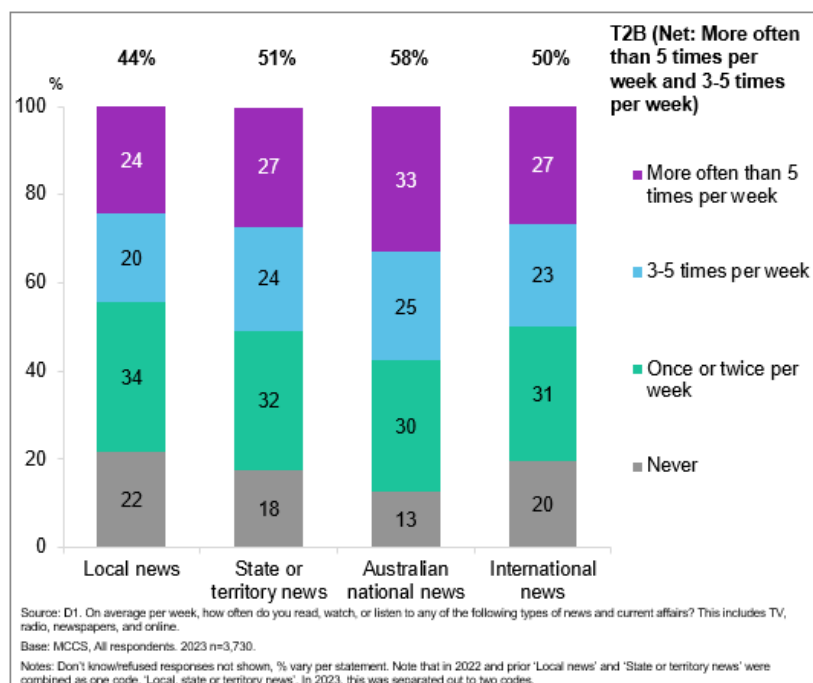
### **Trust in the source, recency and professionalism are important in news**

The factors that respondents most commonly indicated were important when choosing news and media content were that it is from a source they have used before and trust (60%), that it is recent (58%), and that it is professionally produced (53%).

News that has been widely shared online / through social media was of low importance, at 11%.

## Frequency of consuming news and current affairs content

More than half of respondents (58%) reported that they consumed Australian national news content at least 3 times a week (net more often than 5 times per week and 3-5 times per week). Local news was the least frequently consumed type of news; 44% of respondents consumed local news at least 3 times a week.



### Subgroups

Australian national news was higher for:

- Net consumption:
- Men (91% vs 84% of women)
- Ages 55-64 (94%), 65-74 (95%), and 75+ (94% vs 79% of ages 18-24, 82% of ages 25-34 and 85% of ages 35-44)

State or territory news was higher for:

- Net consumption:
- Men (85% vs 80% of women)
- Ages 45-54 (86%), 55-64 (88%), and 65-74 (93% vs 71% of ages 18-24 and 76% of ages 25-34)

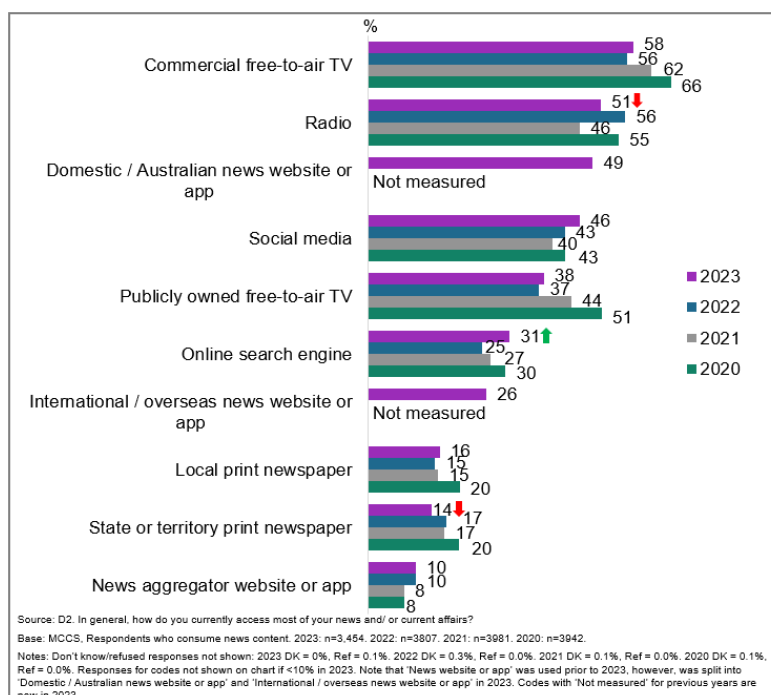
International news was higher for:

- Net consumption:
- Men (86% vs 75% of women)
- Ages 55-64 (90%) and 65-74 (87% vs 76% of ages 18-24, 74% of ages 25-34, and 76% of ages 35-44)
- Those born in a mainly non-English speaking country (88% vs 78% of those born in a mainly English speaking country)

Australian national news is the most frequently consumed type of news, followed by State / Territory news and International news.

## Sources of news

Commercial free-to-air TV was the most commonly reported source of news (58%), followed by radio (51%), domestic / Australian news websites or apps (49%), and social media (46%).



## Subgroups

Commercial free-to-air TV was higher for:

- Ages 45-54 (65%), 55-64 (66%), 65-74 (69%), and 75+ (75% vs 39% of ages 18-24, 45% of ages 25-34 and 53% of ages 35-44)

Radio was higher for:

- Ages 45-54 (58%), 55-64 (62%), 65-74 (59%), and 75+ (65% vs 27% of ages 18-24, 39% of ages 25-34, and 50% of ages 35-44)
- Those living outside a capital city (55% vs 49% of those living in a capital city)

Social media was higher for:

- Women (51% vs 41% of men)
- Ages 18-24 (74%), 25-34 (70%), and 35-44 (51% vs 38% of ages 45-54, 26% of ages 55-64, 27% of ages 65-74 and 21% of ages 75+)
- Those living in a capital city (48% vs 40% of those living outside a capital city)

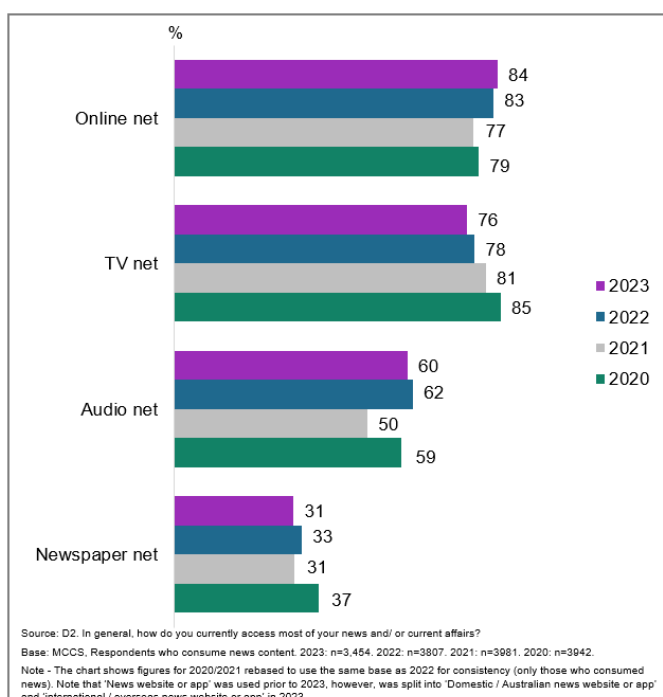
## Callouts

- Radio and state or territory print newspapers have declined as sources of news in 2023, while online search engines have increased.

Many sources of news continue to be used in 2023, with free-to-air TV, radio, domestic / Australian news websites or apps, and social media the dominant channels.

## Sources of news by category

When considering sources of news by access category, online was most commonly used (net 84%), followed by TV (net 76%).



### Note for 'net' inclusions

'NET: TV' includes:

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

'NET: Online' includes:

- 'Domestic / Australian news website or app' (2023 only), 'International / overseas news website or app' (2023 only), 'News website or app' (2020-2022), 'Social media', 'Online search engine', 'News aggregator website or app', and 'Other website or app'.

'NET: Audio' includes:

- 'Radio', 'Podcast', and 'Online radio station' (2023 only)

'NET: Newspaper' includes:

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

### Subgroups

**Online net** was higher for:

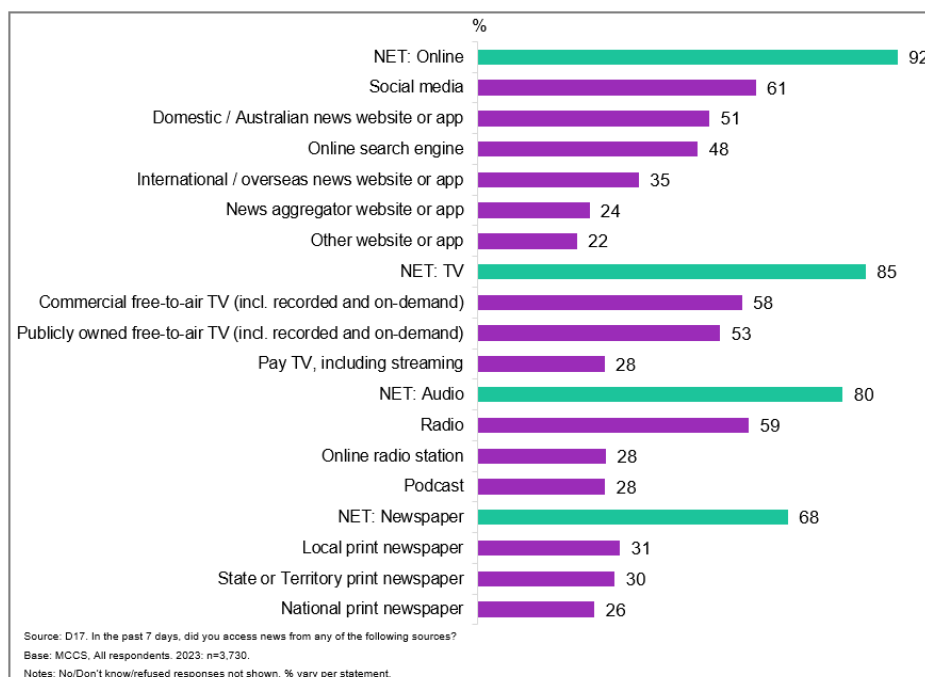
- Ages 18-24 (93%), 25-34 (96%), and 35-44 (89% vs 83% of ages 45-54, 76% of ages 55-64, 71% of ages 65-74 and 63% of ages 75+)
- Those living in a capital city (86% vs 77% of those living outside a capital city)
- Those with dependent children in the household (88%), those with non-dependent children only (88%), and adults living in a share house (93% vs 77% of those without children in the household)

- Those born in a mainly non-English speaking country (95% vs 80% of those born in a mainly English speaking country)

While not significant, online sources of news continue to strengthen, while TV continues to trend downwards in 2023.

## Sources of news in past 7 days

Approximately three-fifths of respondents had accessed news via social media (61%), radio (59%), or commercial free-to-air TV (58%) in the past 7 days.



Note: The methodology for D17 was a grid question with a forced yes/no choice for each option and an extended code frame for print newspaper.

## Subgroups

**Social media** was higher for:

- Women (64% vs 57% of men)
- Ages 18-24 (82%), 25-34 (70%), and 35-44 (66% vs 58% of ages 45-54, 47% of ages 55-64, 48% of ages 65-74 and 33% of ages 75+)
- Those living in a capital city (64% vs 53% of those living outside a capital city)
- Those with dependent children in the household (64%) and adults living in a share house (75% vs 54% of those without children in the household)

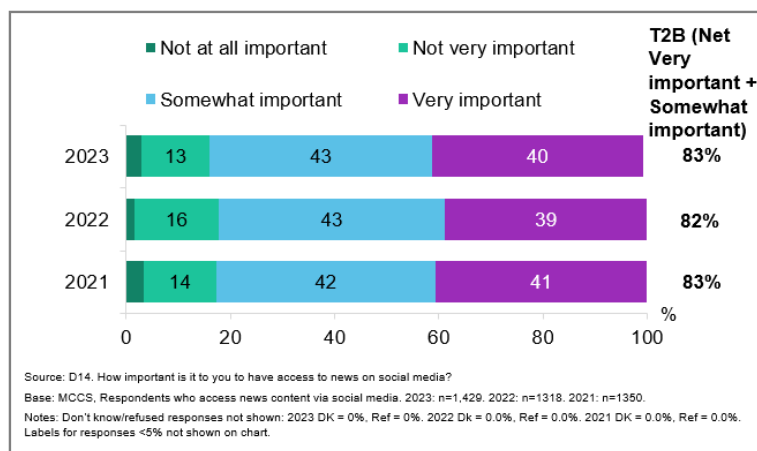
**Radio** was higher for:

- Ages 35-44 (63%), 45-54 (64%), 55-64 (66%), 65-74 (71%), and 75+ (68% vs 42% of ages 18-24 and 48% of ages 25-34)
- Those living outside a capital city (63% vs 58% of those living in a capital city)

Social media was the most used news source in the past 7 days.

## Importance of accessing news via social media

Those who accessed news via social media were asked the importance of access via that method. More than four-fifths (83%) of respondents who consumed news via social media said that it was important (net very important and somewhat important) to them to have access to news via this channel.



### Subgroups

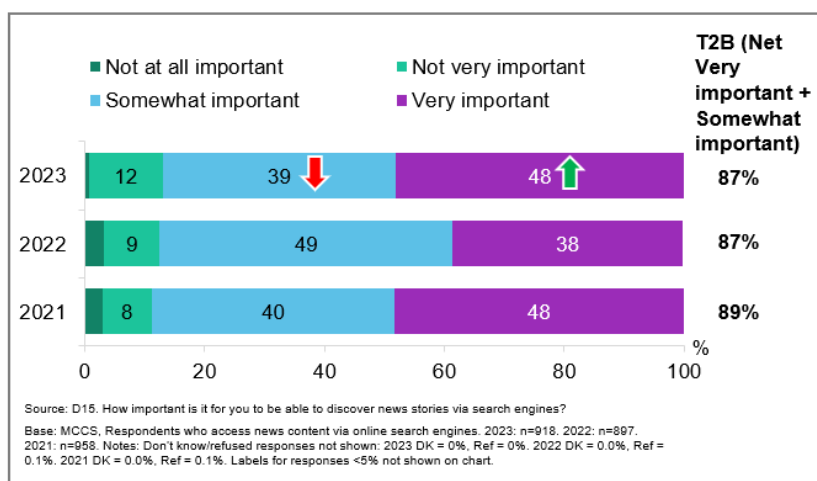
NET Very important + Somewhat important was higher for:

- Ages 18-24 (84%), 25-34 (87%), and 35-44 (90% vs 60% of ages 75+)
- Those living in a capital city (85% vs 78% of those living outside a capital city)
- Those born in a mainly non-English speaking country (92% vs 80% of those born in a mainly English speaking country)
- Those who comment or post images to social media sites once a day or more (88% vs 81% of those who comment or post less than once a day)
- Those who view posts, images and videos on social media sites once a day or more (85% vs 77% of those who view posts less than once a day)

Those who access news via social media continue to indicate that it is important to them.

## Importance of accessing news via online search engines

Of respondents who accessed news via online search engines, nearly nine in ten (87%) said that it was important (net very important and somewhat important) to them to be able to discover news stories that way.



## Subgroups

NET Very important + Somewhat important was higher for:

- Ages 18-24 (26% vs 16% of ages 25-34, 18% of ages 45-54, 12% of ages 55-64, 13% of ages 65-74 and 10% of ages 75+)
- Those living in a capital city (23% vs 9% of those living outside a capital city)
- Those with dependent children in the household (22%) and adults living in a share house (22% vs 12% of those without children in the household)
- Those born in a mainly non-English speaking country (31% vs 13% of those born in a mainly English speaking country)
- Those who look for information over the internet once a day or more (19% vs 11% of those who look for information less than once a day)

## Callouts

- The proportion of respondents who said it is very important to be able to access news stories via online search engines has increased in 2023, while the proportion who said it is somewhat important has decreased.

There has been an increase strength in sentiment for the importance of accessing news via search engines in 2023.

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

Commercial free-to-air TV was the most common main source of local (26%), state or territory (30%), Australian national (28%), and international news (20%).

News source	Local news	State or territory news	Australian national news	International news
<b>NET: Online</b>	44	43	45	55
Domestic / Australian news website or app	16	18	20	12
Social media	16	14	14	19
Online search engine	7	6	6	9
News aggregator website or app	2	2	2	3
International / overseas news website or app	2	1	2	10
Other website or app	1	1	1	2
<b>NET: TV</b>	37	42	42	35
Commercial free-to-air TV	26	30	28	20
Publicly owned free-to-air TV	9	11	13	12

News source	Local news	State or territory news	Australian national news	International news
Pay TV	1	1	2	2
<b>NET: Audio</b>	<b>13</b>	<b>10</b>	<b>9</b>	<b>6</b>
Radio	12	9	8	5
Podcast	0.3	0.5	1	1
<b>NET: Newspapers</b>	<b>6</b>	<b>4</b>	<b>4</b>	<b>3</b>
Local print newspaper	3	1	0.1	0.1
State or Territory print newspaper	2	3	2	2
National print newspaper	1	1	2	1
Other	0.3	0.5	0.4	1

Source: D3. In general, what is your main source for accessing news about each of the following?

Base: MCCS, Respondents who recall source/s of news they use. 2023: n= from 2958 to 3269.

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

## Subgroups

Commercial free-to-air TV was higher for:

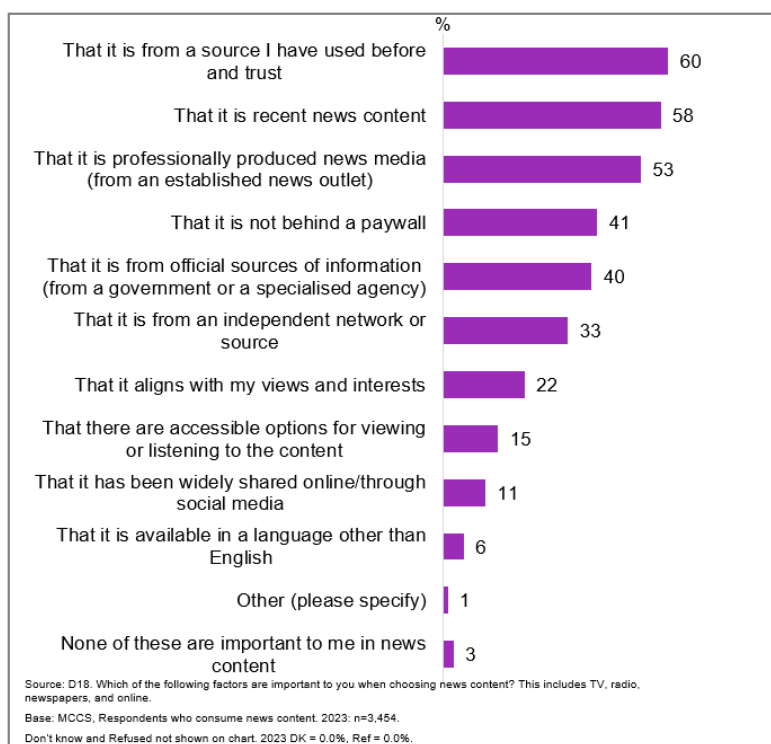
- Australian national news:
- Ages 45-54 (37%), 55-64 (33%), 65-74 (38%), and 75+ (39% vs 15% of ages 18-24, 16% of ages 25-34 and 21% of ages 35-44)
- Those living outside a capital city (33% vs 26% of those living in a capital city)
- Those without children in the household (31%), those with dependent children (27%), and those with non-dependent children only (30% vs 8% of adults living in a share house)
- Those with education up to Year 12 (31%) and those with a TAFE qualification / Trade Certificate / Diploma (35% vs 17% of those with a Bachelor degree and 19% of those with a Postgraduate degree)

Commercial free-to-air TV, domestic / Australian news websites or apps, and social media are the main sources across the different types of news.

## Factors that are important in choice of news content

The factors that respondents most commonly indicated were important when choosing news and media content were that the news was from a source they have used before and trust (60%), that it was recent (58%), and that it was professionally produced (53%).





## Subgroups

That it is from a source I have used before and trust was higher for:

- Men (65% vs 54% of women)
- Those with a Postgraduate degree (66% vs 56% of those with education up to Year 12)
- Those who watched publicly owned free-to-air TV (live or on-demand) in P7D (66% vs 62% of those who watched commercial free-to-air TV (live or on-demand) in P7D)
- Those whose trust in a news article would be impacted negatively if they knew it was written in full by Generative AI (68% vs 42% of those whose trust would be impacted positively and 48% of those whose trust would not be impacted)

That it is recent news content was higher for:

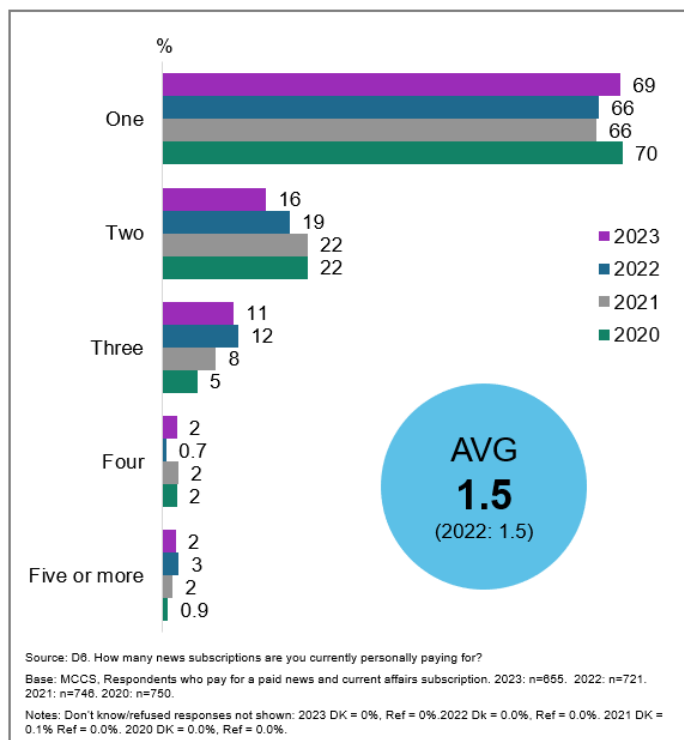
- Ages 65-74 (71%) and 75+ (75% vs 52% of ages 18-24, 51% of ages 25-34, 53% of ages 35-44, 58% of ages 45-54 and 60% of ages 55-64)
- Those without children in the household (63% vs 55% of those with dependent children and 45% of adults living in a share house)
- Those born in a mainly English speaking country (60% vs 53% of those born in a mainly non-English speaking country)

Trust in the source and recency are the two most important factors in choosing news content.

## Paid news subscriptions

Just over one-tenth (12%) of respondents indicated they currently paid for a paid news and current affairs subscription. Of these respondents who pay for a news and current affairs subscription, the majority (69%) only pay for one.

“Yes, I personally pay for a paid news and current affairs subscription”  
**12%**  
 (2022: 13%)



### Subgroups

**One** was higher for:

- Ages 35-44 (79%) and 45-54 (84% vs 44% of ages 25-34)

**Three** was higher for:

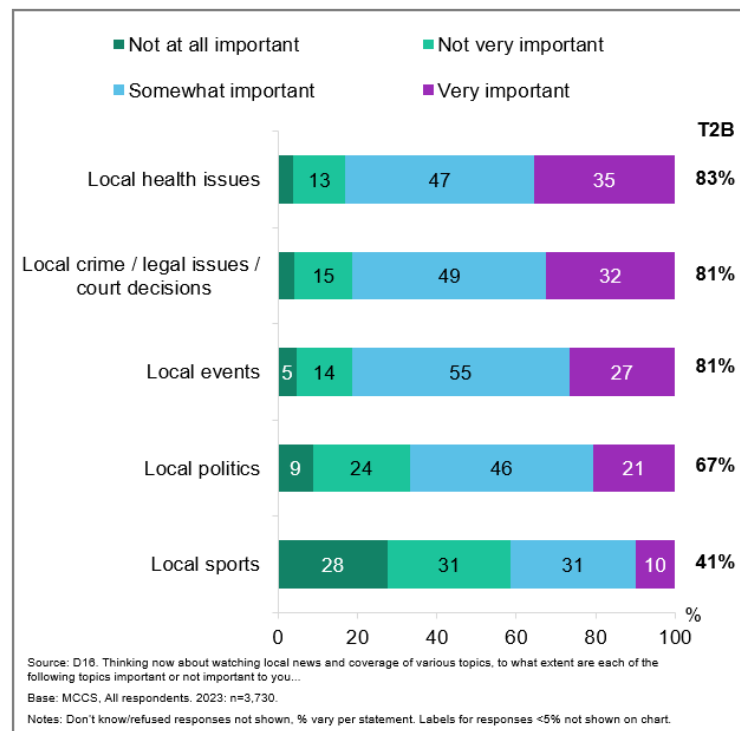
- Ages 25-34 (25% vs 3% of ages 35-44 and 3% of ages 45-54)
- Those with a Postgraduate degree (17% vs 3% of those with a TAFE qualification / Trade Certificate / Diploma)
- Those born in a mainly non-English speaking country (26% vs 7% of those born in a mainly English speaking country)

The proportion of those with a paid news subscription remains consistent with levels in 2022.

### Importance of local news content

Local health issues was the type of local news content most commonly considered important (83%, net very important and somewhat important), followed by local crime, legal issues, or court decisions (81%), and local events (81%).

"Yes, I have sufficient choice of news sources to inform [me] about local community"  
**68%**  
 (2022: 70%)



### Subgroups

NET Very important + Somewhat important was higher for:

- Local health issues:
- Women (86% vs 79% of men)
- Ages 45-54 (86%), 65-74 (87%), and 75+ (92% vs 76% of ages 18-24)
- Local crime / legal issues / court decisions:
- Women (85% vs 78% of men)
- Local events:
- Women (85% vs 78% of men)
- Ages 35-44 (84%), 45-54 (85%), 55-64 (84%), 65-74 (86%), and 75+ (85% vs 71% of ages 18-24)
- Those living outside a capital city (85% vs 80% of those living in a capital city)

Local health issues and crime are seen as highly important news topics.

# Generative AI

## Chapter Summary – Generative Artificial Intelligence (AI)

### High awareness of Generative AI and moderate usage

Many Australian adults were aware of Generative AI (61%). Age had an influence on awareness, those aged 18-24 (82%), 25-34 (76%), and 35-44 (73%) were most likely to be aware.

There were 41% who reported having ever used Generative AI, just over a third of this was for personal interest (32%).

### Generative AI assists in drafting blocks of text and written work, and also in research

Reasons for using Generative AI were to draft written work or text responses (24%), to undertake research to support work or study (18%), or to create or generate images or artwork (9%).

Some were experimenting with the technology (10%).

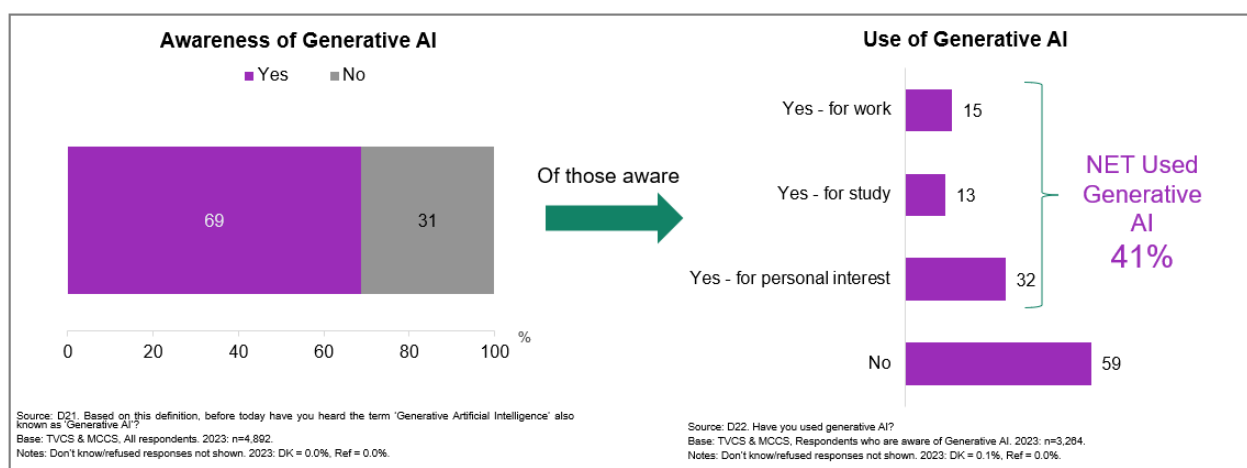
### There is negative sentiment towards news written in full by Generative AI

70% were aware that Generative AI is able to write news articles and news content. More than three-quarters (78%) of respondents who were aware of Generative AI said that their trust in a news article would be negatively impacted if they knew that the article had been written in full by Generative AI (net somewhat negatively and very negatively). The key concern driving this negative sentiment is that the information for the AI comes from untrustworthy sources (33%).

There is strong consensus that people should be made aware of how much news they consume is created by Generative AI (95% net strongly agree and agree).

## Awareness and use of Generative Artificial Intelligence (AI)

Approximately two-thirds of respondents (69%) reported they were aware of Generative AI. Of these respondents, around two-fifths (41%) had used Generative AI, most commonly for personal interest (32%).



### Subgroups

Yes was higher for:

- Men (73% vs 64% of women)

- Ages 18-24 (82%), 25-34 (76%), and 35-44 (73% vs 66% of ages 45-54, 65% of ages 55-64, 57% of ages 65-74 and 51% of ages 75+)
- Those living in a capital city (71% vs 65% of those living outside a capital city)

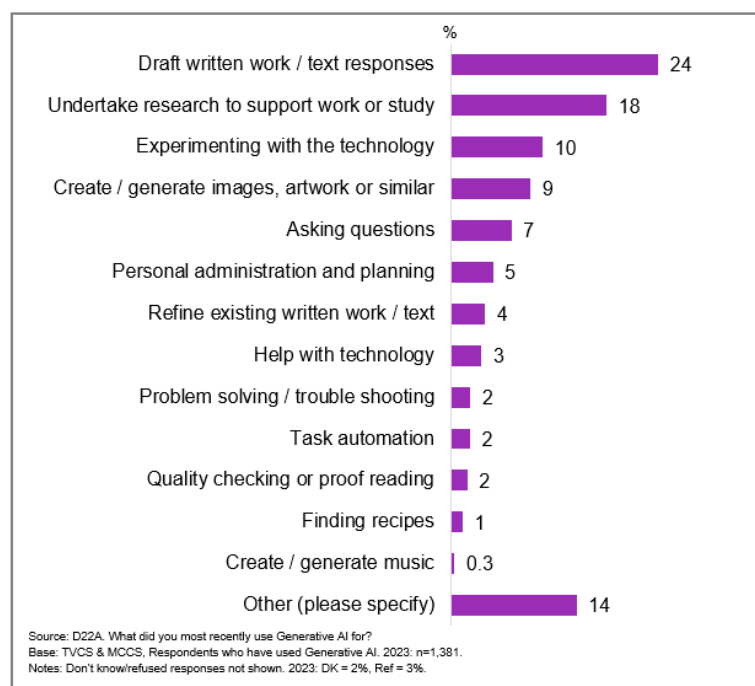
NET Used Generative AI was higher for:

- Men (44% vs 37% of women)
- Ages 18-24 (68%), 25-34 (54%), 35-44 (48%), and 45-54 (38% vs 21% of ages 55-64, 20% of ages 65-74 and 5% of ages 75+)
- Those living in a capital city (44% vs 36% of those living outside a capital city)

There is strong awareness of Generative AI among Australians, with a moderate proportion having also used it.

## Reasons for most recently using Generative AI

The most common reasons for using Generative AI most recently were to draft written work or text responses (24%), to undertake research to support work or study (18%), to experiment with the technology (10%), and to create or generate images or artwork (9%).



## Subgroup

Draft written work / text responses was higher for:

- Ages 35-44 (32%) and 45-54 (32% vs 16% of ages 18-24)
- Those with a Bachelor degree (33%) or Postgraduate degree (27% vs 14% of those with education up to Year 12)

Undertake research to support work or study was higher for:

- Women (22% vs 15% of men)
- Ages 18-24 (31% vs 5% of ages 25-34, 16% of ages 35-44, 16% of ages 45-54, and 12% of ages 55-64)
- Those who are a student (42% vs 14% of those employed full time or part time, 14% of those employed casually and 10% of those who are self-employed)

Experimenting with the technology was higher for:

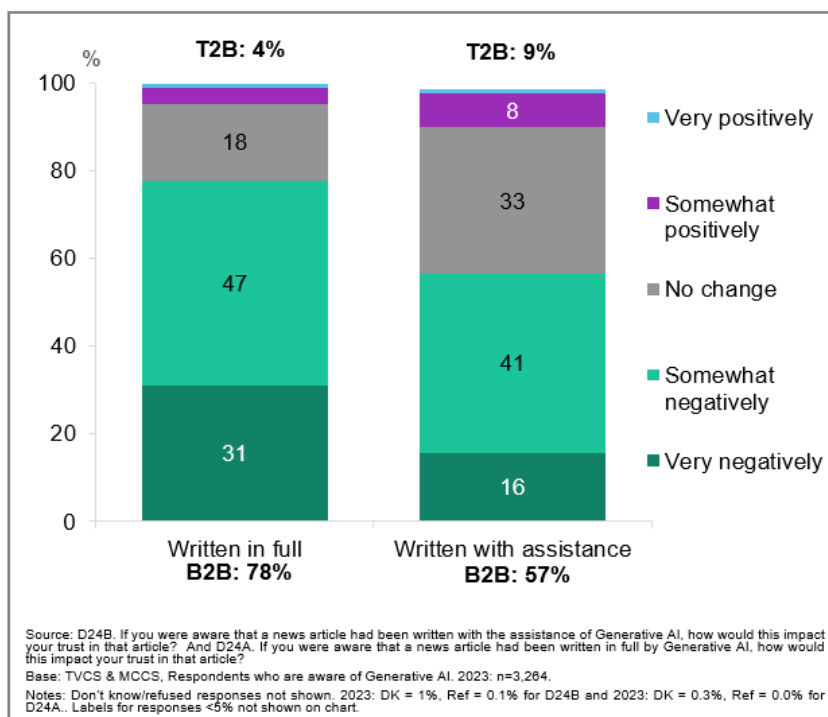
- Those employed full time or part time (11%), those employed casually (18%), those who are self-employed (12%), those who are unemployed (15%), and those who are retired (11% vs 2% of those who are a student)

Typically, respondents have most recently used Generative AI for drafting written work or text.

## Impact on trust in news articles written using Generative AI

More than three-quarters (78%) of respondents who were aware of Generative AI said that their trust in a news article would be negatively impacted if they knew that the article had been written **in full** by this technology (trust being net very negatively and somewhat negatively impacted). Negative sentiment dropped to 57%, however, if Generative AI was used to only **assist** in writing the article.

“Yes, I was aware before today that Generative AI is able to write news articles and news content”  
**70%**



### Subgroup

NET Very negatively + Somewhat negatively was higher for:

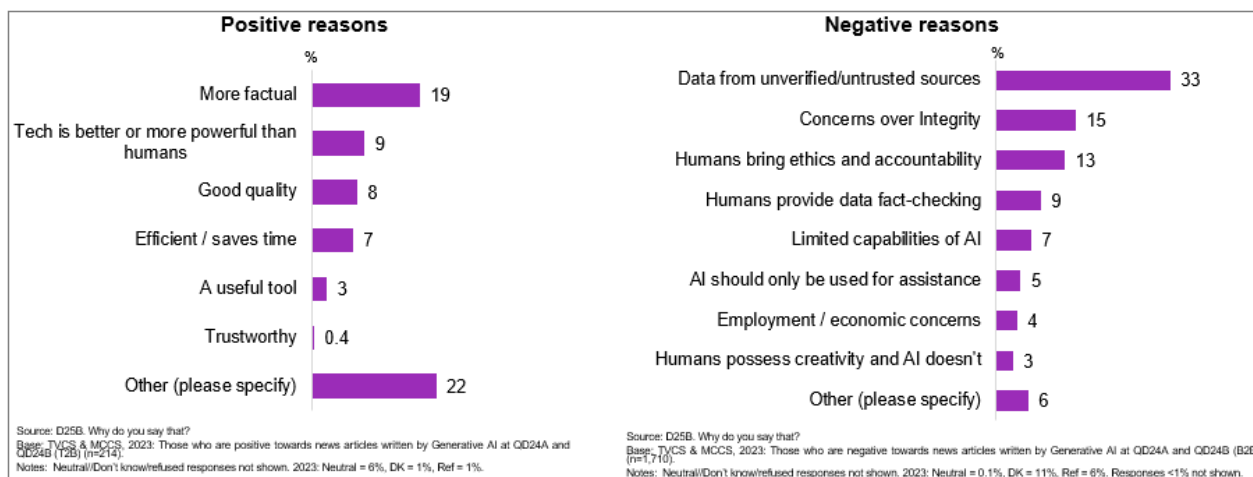
- Written in full:
- Ages 55-64 (86% vs 73% of ages 25-34, 72% of ages 35-44 and 76% of ages 45-54)
- Those living without children in the household (80% vs 73% of those with dependent children)
- Those who have not used Generative AI (81% vs 73% of those who have used Generative AI)
- Written with assistance:

- Ages 55-64 (71%), 65-74 (65%), and 75+ (65% vs 49% of ages 18-24, 49% of ages 25-34 and 51% of ages 35-44)
- Those living outside a capital city (60% vs 54% of those living in a capital city)
- Those with a TAFE qualification / Trade Certificate / Diploma (60% vs 51% of those with a Bachelor degree)

Using Generative AI to fully write news articles results in a very negative impact on people's trust in those articles. Negative sentiment is also expressed towards news that is partially written by Generative AI, but not to the same extent as content written in full by this technology.

## Why use of Generative AI would impact trust in news articles

Among respondents who indicated that their trust in a news article would be positively impacted if they knew it was written in full or with the assistance of Generative AI, the most common reason was they believed it would be more factual (19%). Of respondents who indicated their trust would be negatively impacted, data being obtained from unverified or untrustworthy sources (33%) was the most common reason.



## Subgroup

**More factual** was higher for:

- Those born in a mainly English speaking country (29% vs 3% of those born in a mainly non-English speaking country)

Tech is better or more powerful than humans was higher for:

- Those with a TAFE qualification / Trade Certificate / Diploma (11% vs 2% of those with a Bachelor degree and 1% of those with a Postgraduate degree)

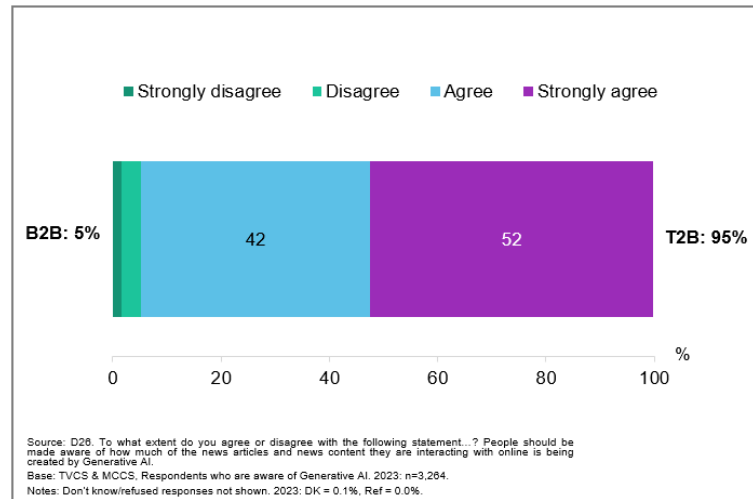
Data obtained from unverified / untrustworthy sources was higher for:

- Those with HH income of \$78,000-\$103,999 (40%), \$104,000-\$155,999 (37%), or \$156,000 or more (38% vs 25% of those with HH income of \$41,600-\$77,999)

While some believe Generative AI could make news articles more factual, others highlight the risk that news is created based on data obtained from unverified or untrustworthy sources.

## Level of agreement that people should be made aware of how much of the news they consume is created by Generative AI

The vast majority of respondents (95%) agreed that people should be made aware of how much of the news they consume is created by Generative AI (net strongly agree and agree).



### Subgroup

NET Strongly agree + Agree was higher for:

- Those whose trust would be negatively impacted if they knew a news article was written in full by Generative AI (96% vs 88% of those whose trust would not be impacted)
- Those whose trust would be negatively impacted if they knew a news article was written with the assistance of Generative AI (97% vs 91% of those whose trust would not be impacted)

There is strong consensus that people should be made aware of how much of the news articles and content they interact with is created by Generative AI.



# Generative AI: Children aged 0-17

## Chapter Summary – Generative AI (Children aged 0-17)

### **Awareness of Generative AI increases with age**

Around one-third (34%) of children aged 8-10 were aware of Generative AI, while a larger proportion of children aged 11-15 (65%) and 16-17 (62%) were aware. Only a minority of children aged 0-7 (15%) were aware of Generative AI.

For those who were aware, usage is mainly for study or personal interest.

### **There is usage of Generative AI / chat bots by children, although there is preference for search engines**

Of children who were aware of Generative AI, 39% of children aged 8-10, 44% of those aged 11-15, and 32% of those aged 16-17 have talked to Generative AI / chat bots online.

Most children would prefer to use a search engine rather than Generative AI / chat bots to learn about something new, (8-10, 59%; 11-15, 58%; 16-17, 58%).

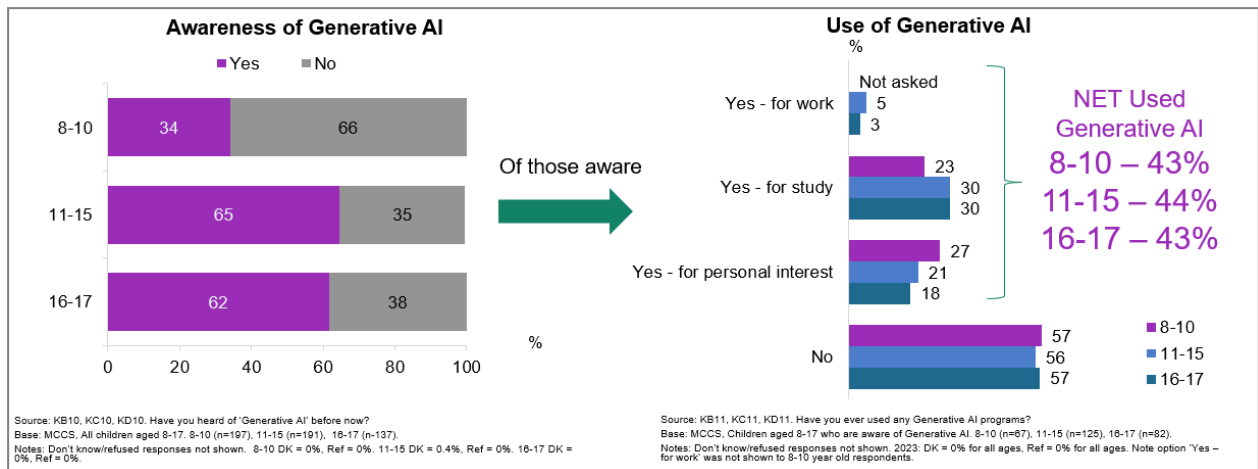
### **There are mixed comfort levels amongst children in terms of talking to Generative AI / chat bots**

Similar proportions of children across the 8-17 age range (approximately one third) were comfortable talking to Generative AI / chat bots, although a higher proportion of children aged 8-10 (12%) said they were very uncomfortable compared to those aged 16-17 (8%).

There were mixed comfort levels amongst children aged 8-17 about talking to Generative AI / chat bots, with similar proportions saying comfortable (net) or uncomfortable (net).

## Awareness and use of Generative AI (children aged 8-17)

Around one-third (34%) of children aged 8-10 were aware of Generative AI, while a larger proportion of children aged 11-15 (65%) and 16-17 (62%) were aware. Among children who were aware, similar proportions across each age group had used Generative AI (8-10, 43%; 11-15, 44%; 16-17, 43%).



### Subgroups

Yes was higher for:

- Ages 11-15 (65%) and 16-17 (62% vs 34% of ages 8-10)
- Those who look for information over the internet once a day or more (62% vs 46% of those who look for information less than once a day)\*
- Those who comment or post images to social media sites once a day or more (66% vs 51% of those who comment or post less than once a day)\*

### Subgroups

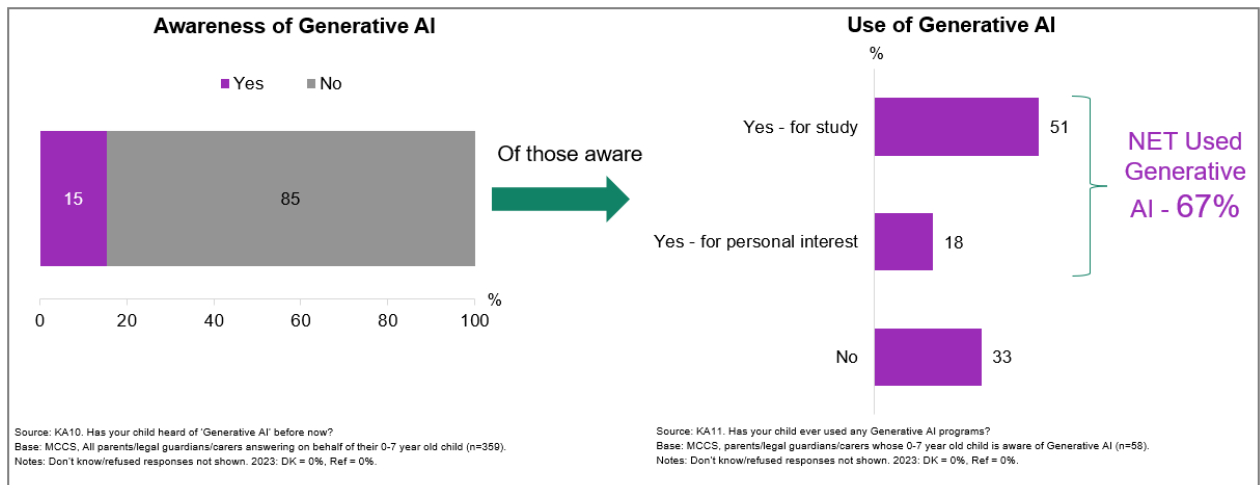
Base sizes too small to note subgroup differences.

\* Subgroup differences noted with an asterisk refer to the total level results across all age groups of children.

Amongst children, awareness of Generative AI generally increases with age. The main reasons for usage are for study or personal interest.

## Awareness and use of Generative AI (children aged 0-7)

A minority of children aged 0-7 (15%) were aware of Generative AI. Of these children who were aware, two-thirds (67%) had used Generative AI, most commonly for study.



### Subgroups

Yes was higher for:

- Those who look for information over the internet once a day or more (38% vs 12% of those who look for information less than once a day)
- Those whose parent has used Generative AI (27% vs 7% of those whose parent has not used Generative AI)

### Subgroups

Base size too small to note any subgroup differences.

Children aged 0-7 generally have low awareness of Generative AI. Of those who are aware and use it, it is mainly for study.

## Use of Generative AI (comparison of children aged 0-7 and their parents/legal guardians/carers) (%)

For the vast majority (98%) of children aged 0-7 who had used Generative AI (net use), their parent also reported having used this technology. Given the young age of these children, it is possible that the children have used Generative AI with their parents'/legal guardians'/carers' help or supervision. The higher reported net use of Generative AI among children aged 0-7, compared to those aged 8-17, could also be partially attributed to the fact that parents/legal guardians/carers of 0-7 year olds answered on their child's behalf and may have had a greater awareness of Generative AI than children who answered the survey for themselves.

Row %	Parents / legal guardians / carers: Yes – for work	Parents / legal guardians / carers: Yes – for study	Parents / legal guardians / carers: Yes – for personal interest	Parents / legal guardians / carers: NET Used Generative AI	Parents / legal guardians / carers: No
Children 0-7: Yes – for study	57	41	25	97	3
Children 0-7: Yes – for personal interest	44	35	65	100	0
Children 0-7: NET Used Generative AI	<b>51</b>	<b>37</b>	<b>32</b>	<b>98</b>	<b>2</b>
Children 0-7: No	27	0	27	54	46

Source: KA11. Has your child ever used any Generative AI programs? And D22. Have you used Generative AI?

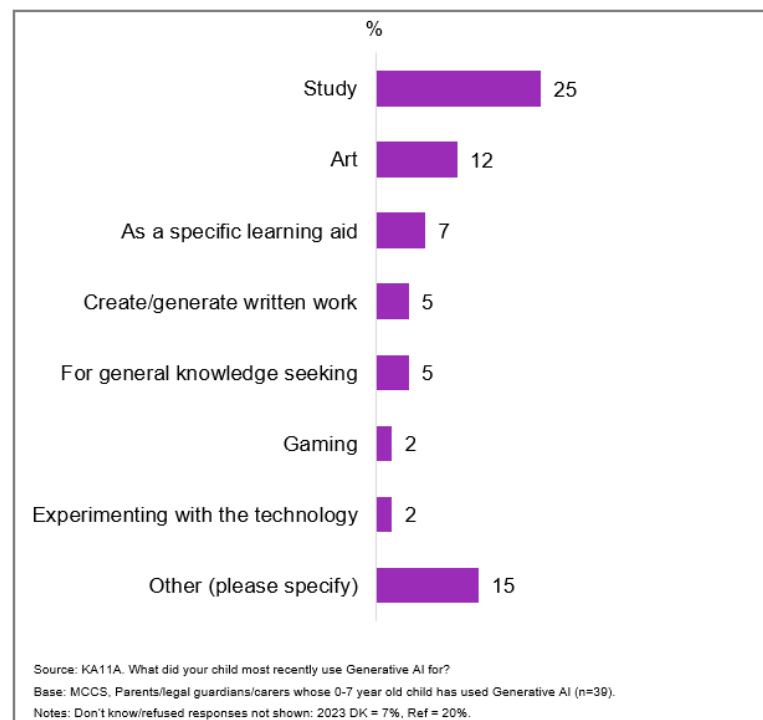
Base: MCCS, Parents/legal guardians/carers whose 0-7 year old child is aware of Generative AI and who are aware of Generative AI themselves (n=56).

Notes: Don't know/refused responses not shown. 2023: DK = 0%, Ref = 0%.

Of children aged 0-7 who use Generative AI, almost all their parents/legal guardians/carers also use this technology themselves.

## Reasons for using Generative AI (children aged 0-7)

Among children aged 0-7 who had used Generative AI (net use), study (25%) was the most common reason, followed by art (12%), and using a specific learning aid (7%).



### Subgroups

Base size too small to note subgroup differences.

### Verbatim responses

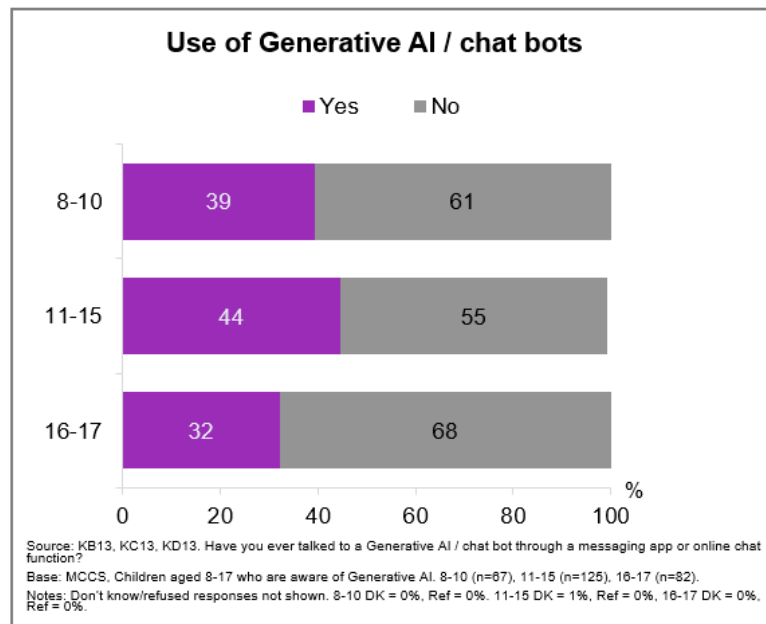
Some examples of verbatim responses for the reasons for using Generative AI are:

- “Study”
- “To draw”
- “To make a cover image for a song they wrote”
- “He was playing around with it”
- “Making alphabets from mid journey for our YouTube channel”

Study is the primary reason that children aged 0-7 use Generative AI.

## Generative AI / chat bots (children aged 8-17)

Of children who were aware of Generative AI, 39% of those aged 8-10, 44% of those aged 11-15, and 32% of those aged 16-17 had talked to Generative AI / chat bots online. That said, most children preferred to use a search engine to learn about something new (8-10, 59%; 11-15, 58%; 16-17, 58%).

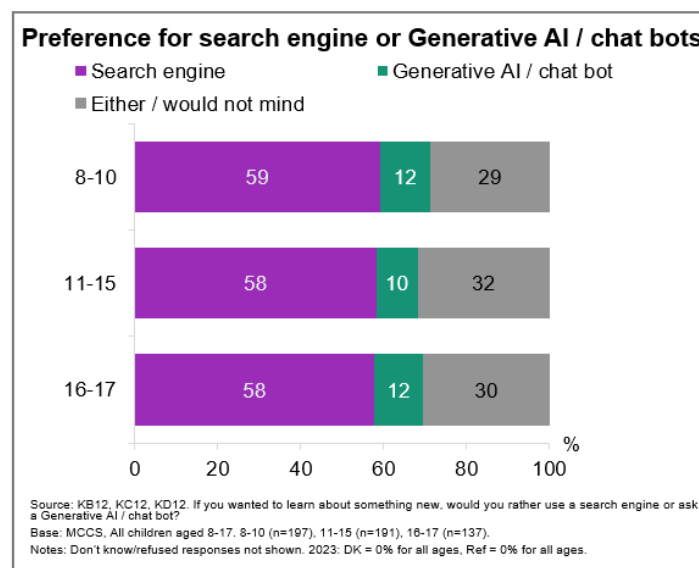


### Subgroups

Yes was higher for:

- Those who comment or post images to social media sites once a day or more (60% vs 32% of those who comment or post less than once a day)\*

\* Subgroup differences marked with an asterisk refer to the total level result for all age groups of children.



### Subgroups

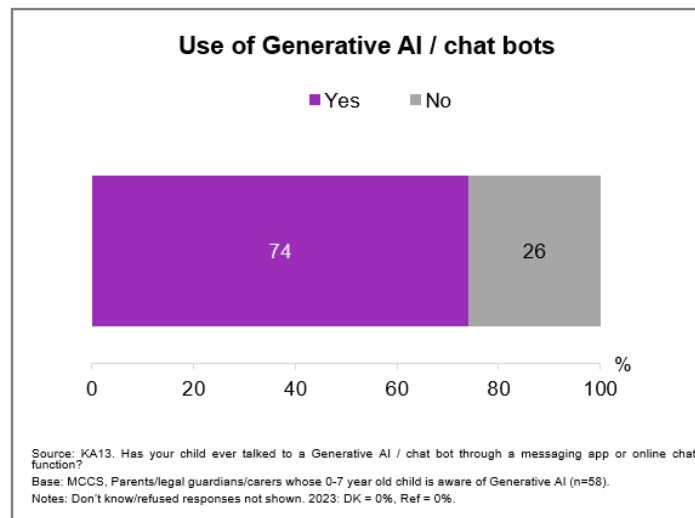
Search engine was higher for:

- Those who have not used Generative AI (60% vs 44% of those who have used Generative AI)\*
- Those who are uncomfortable talking to AI (72% vs 49% of those who are comfortable and 57% of those who are neutral)\*

Moderate proportions of children aged 8-17 are using Generative AI / chat bots. However, their preference for learning is via search engines.

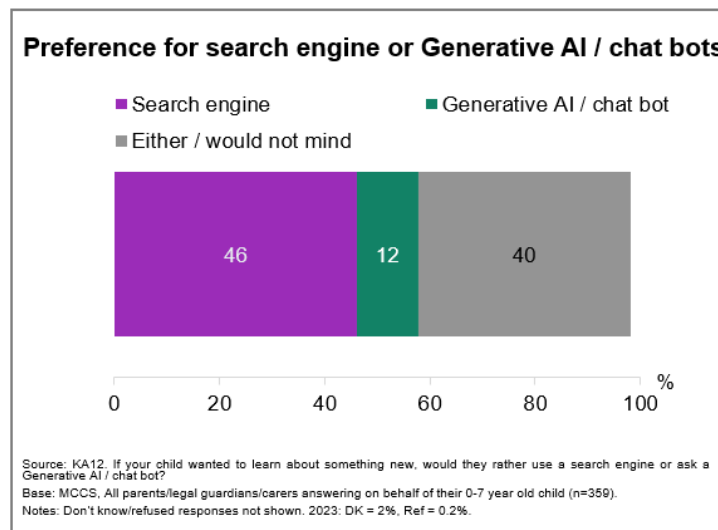
## Generative AI / chat bots (children aged 0-7)

Most children aged 0-7 preferred to use a search engine to learn about something new (46%) or did not have a preference (40%), while only a minority (12%) preferred to ask Generative AI / chat bots. Approximately three-quarters (74%) of children aged 0-7 who were aware of Generative AI had ever talked to Generative AI / chat bots online.



### Subgroups

Base size too small to note subgroup differences.



### Subgroups

Search engine was higher for:

- Those whose parent has not used Generative AI (56% vs 37% of those whose parent has used Generative AI)

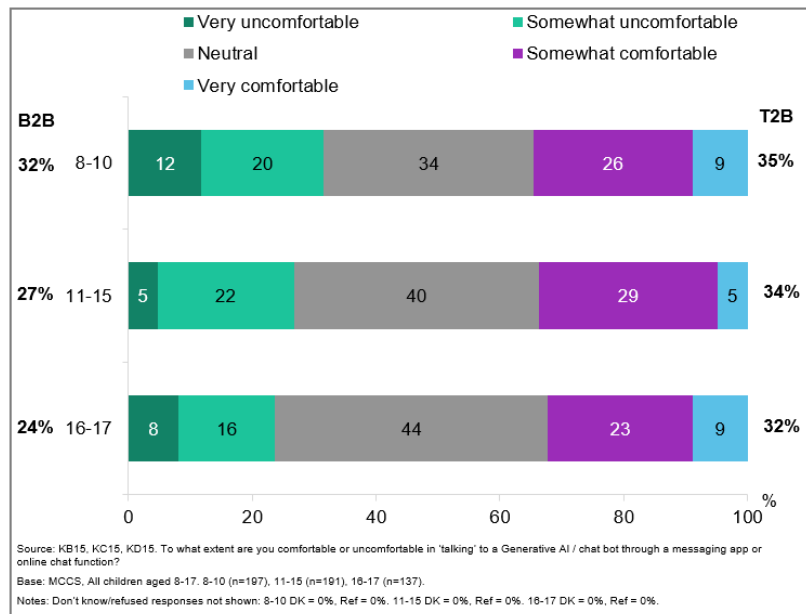
Generative AI / chat bot was higher for:

- Those who look for information over the internet once a day or more (27% vs 9% of those who look for information less than once a day)

Parents/legal guardians/carers report that children aged 0-7 also show similar preferences for search engines to learn new things, rather than asking Generative AI / chat bots.

## Level of comfort talking to Generative AI / chat bots (children aged 8-17)

Similar proportions of children across all age groups were comfortable talking to Generative AI / chat bots, although a higher proportion of children aged 8-10 (12%) said they were very uncomfortable compared to children aged 11-15 (5%).



### Subgroups

NET Very comfortable + Somewhat comfortable was higher for:

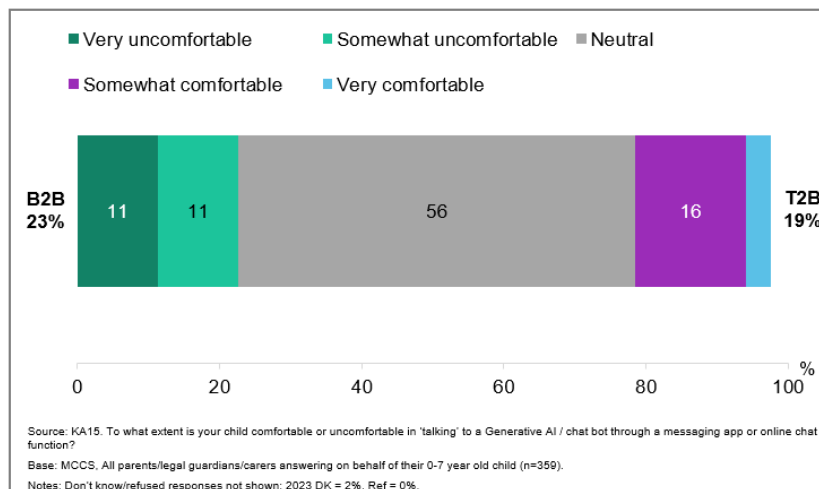
- Those who have used Generative AI (51% vs 27% of those who have not used Generative AI)\*
- Those who prefer to use Generative AI / a chat bot to learn about new things (57% vs 28% of those who prefer a search engine and 35% of those who have no preference)\*
- Those who comment or post images to social media sites once a day or more (48% vs 29% of those who comment or post less than once a day)\*
- Those who post to blogs, forums, or interest groups once a day or more (64% vs 31% of those who post less than once a day)\*

\* Subgroup differences marked with an asterisk refer to the total level result across all age groups of children.

There are mixed comfort levels amongst children aged 8-17 in talking to Generative AI / chat bots, with similar proportions saying they are comfortable (net) or uncomfortable (net).

## Level of comfort talking to Generative AI / chat bots (children aged 0-7)

Just over half (56%) of children aged 0-7 were neither comfortable nor uncomfortable in talking to Generative AI / chat bots. A similar proportion were uncomfortable (23%, net very uncomfortable and somewhat uncomfortable) as comfortable (19%, net very comfortable and somewhat comfortable).



### Subgroups

NET Very uncomfortable + Somewhat uncomfortable was higher for:

- Those who prefer to use a search engine to learn about new things (29% vs 16% of those who have no preference)

NET Very comfortable + Somewhat comfortable was higher for:

- Those who look for information over the internet once a day or more (41% vs 16% of those who look for information less than once a day)
- Those who prefer to use Generative AI / a chat bot to learn about new things (40% vs 16% of those who prefer a search engine and 17% of those who have no preference)

Parents/legal guardians/carers report general ambivalence among children aged 0-7 regarding their level of comfort in talking to Generative AI / chat bots.



# Sports content

## Chapter Summary – Sports Content

### **Sport remains a popular type of content in Australia**

Just over a half of respondents (51% net) stated that they consumed sports content of some sort in the past 7 days, while slightly fewer (49%) did not consume sports content at all. Live sport (42%) was the most common way in which respondents consumed sports content.

The proportion of those reporting to have watched no sport in the past 7 days had declined in 2023.

### **There are increasingly varied methods of consuming sports content**

Sports content consumption via commercial free-to-air TV remained at a similar level in 2023 to 2022, while commercial free-to-air on demand TV, free video streaming services, and other websites or apps had increased.

Of note, commercial free-to-air remained at levels seen in 2022 after a decline between 2021 and 2022.

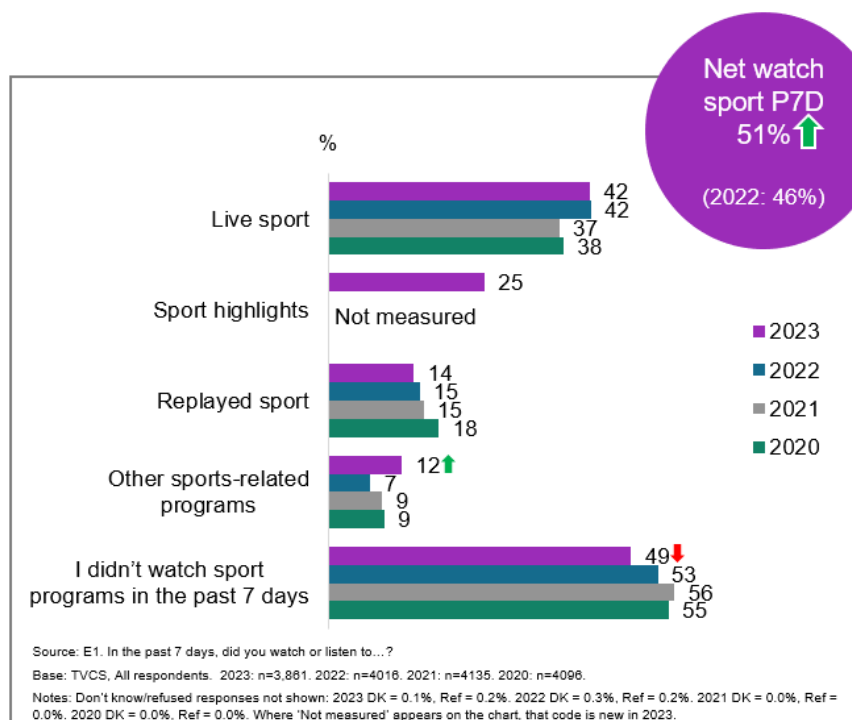
### **Access to sports content via free-to-air TV is important**

The feature of sports content that was most commonly reported as being the most important was that it is freely available on broadcast TV (20%).

Sports content being freely available either online or on broadcast TV was also important.

## Sports content consumed in the past 7 days

Just over half of respondents (51% net) indicated they consumed sports content of some sort in the past 7 days, while slightly fewer (49%) did not consume sports content at all. Live sport (42%) was the most common type of sports content consumed.



### Subgroups

**Live sport** was higher for:

- Men (52% vs 33% of women)
- Ages 45-54 (48%), 55-64 (46%), 65-74 (50%) and 75+ (55% vs 32% of ages 18-24 and 32% of ages 25-34)
- Those born in a mainly English speaking country (45% vs 30% of those born in a mainly non-English speaking country)
- Those who watched live free-to-air TV (commercial or publicly owned) in P7D (52% vs 26% of those who did not watch live free-to-air TV)
- Those who watched on-demand TV (commercial or publicly owned) in P7D (49% vs 36% of those who did not watch on-demand TV)

**Sport highlights** was higher for:

- Men (35% vs 16% of women)
- Those living in a capital city (28% vs 22% of those living outside a capital city)
- Those who watched live free-to-air TV (commercial or publicly owned) in P7D (30% vs 18% of those who did not watch live free-to-air TV)
- Those who watched on-demand TV (commercial or publicly owned) in P7D (29% vs 21% of those who did not watch on-demand TV)

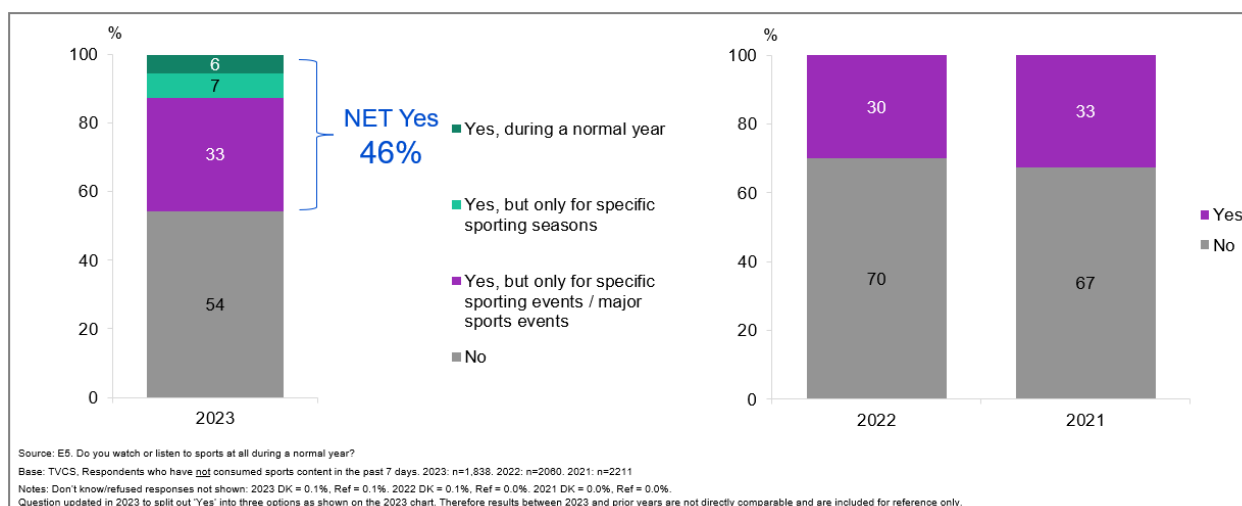
### Callouts

- Consumption of other sports-related programs has increased in 2023, while there has been a decrease in those that didn't watch any sports content.

The proportion of those reporting to have watched no sport in the past 7 days has declined in 2023. Live and replayed sports remain steady, while other sports-related programs increased.

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

While close to half (46%) of those who had not consumed sports content in the past 7 days said that they would watch or listen to sports in a normal year, this was mostly for specific or major sporting events (33%).



### Subgroups

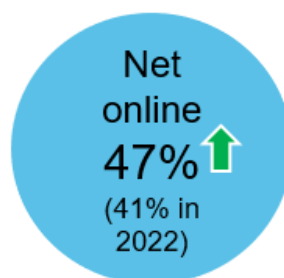
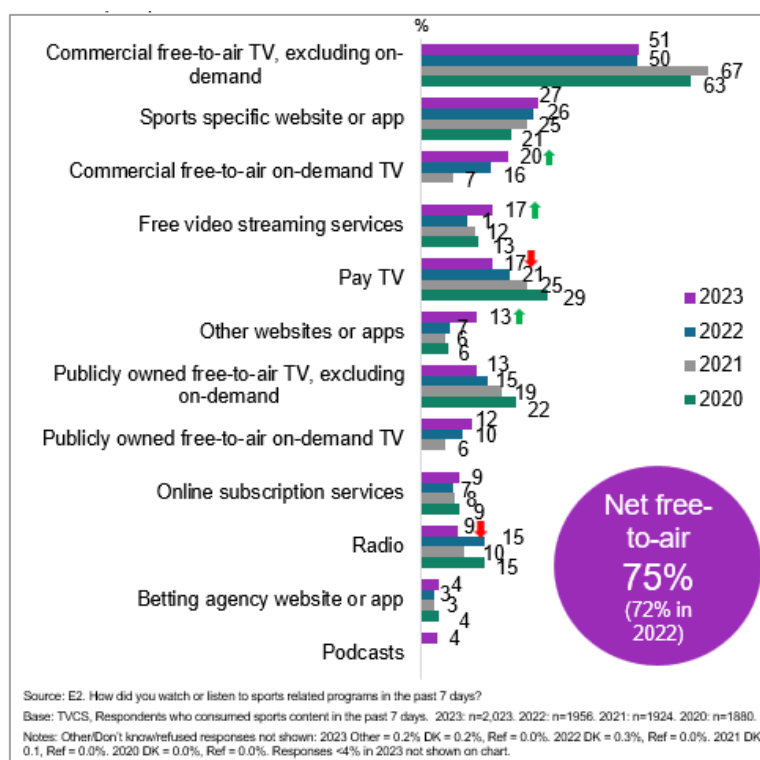
Yes, but only for specific sporting events / major sports events was higher for:

- Those who live in a capital city (36% vs 30% of those who live outside a capital city)
- Those with a Bachelor degree (45%) or Postgraduate degree (47% vs 23% of those with education up to Year 12 and 31% of those with a TAFE qualification / Trade Certificate / Diploma)

Of those who hadn't consumed sports content in the past 7 days, around half do watch or listen to sport in a normal year.

### How respondents consumed sports content

Commercial free-to-air TV, excluding on-demand, remained the most common way that respondents accessed sports content (51%). Around one-quarter (27%) used a sports specific website or app, while a slightly smaller proportion watched on commercial free-to-air on-demand TV (20%) or free video streaming services (17%).



## Subgroups

Commercial free-to-air TV, excluding on-demand was higher for:

- Ages 45-54 (58%), 55-64 (60%), 65-74 (59%), and 75+ (78% vs 30% of ages 18-24, 34% of ages 25-34 and 36% of ages 35-44)
- Those living outside a capital city (56% vs 47% of those living in a capital city)
- Those without children in the household (58% vs 42% of those with dependent children, 42% of those with non-dependent children only and 32% of adults living in a share house)
- Those born in a mainly English speaking country (54% vs 31% of those born in a mainly non-English speaking country)

Sports specific website or app was higher for:

- Ages 18-24 (40%), 25-34 (34%), and 35-44 (29% vs 16% of ages 75+)
- Those living in a capital city (30% vs 23% of those living outside a capital city)
- Those with dependent children in the household (33% vs 22% of those without children)

## Callouts

- Commercial free-to-air on-demand TV, free video streaming services, and other websites or apps (e.g. Facebook, TikTok, Instagram) have all increased as sources of sports content in 2023, while Pay TV and radio have decreased.

Sports content consumption via commercial free-to-air remains at a similar level to 2022, while commercial free-to-air on demand TV, free video streaming services, and other websites or apps increased in 2023.

## Importance of various features of sports content (%)

The feature of sports content that was most commonly listed as the most important to respondents was that it was freely available on broadcast TV (20%). The next most common feature was that it was freely available either online or on broadcast TV (16%).

Feature	2022	2023
That it is freely available on broadcast TV	24	20
That it is freely available either online or on broadcast TV	20	16
That it is freely available online	-	8
That the game/event is shown in full	-	8
That it is available on-demand so I can watch matches/events when I want to watch them	8	6
That it is easily accessible, even if I have to pay for it	7	4
That the sports season or series is shown in full	-	3
Other (specify)	1	0.2
I don't watch sports	-	35

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

Base: TVCS, All respondents. 2023: n=3,861. 2022: n=4,016.

Notes: Don't know/refused responses not shown: 2023 DK = 0.1%, Ref = 0.0%. 2022 Dk=1%, Ref=0.2%  
Note that in 2023, the base for NEW20 was changed to 'All TVCS respondents'. The 2022 data on this slide has been rebased to all TVCS respondents to be comparable with 2023 data, and is different to what is reported in the 2022 report.

Note: Significance testing not conducted between 2022 and 2023 due to code frame additions / differences in 2023.

### Subgroups

That it is freely available on broadcast TV was higher for:

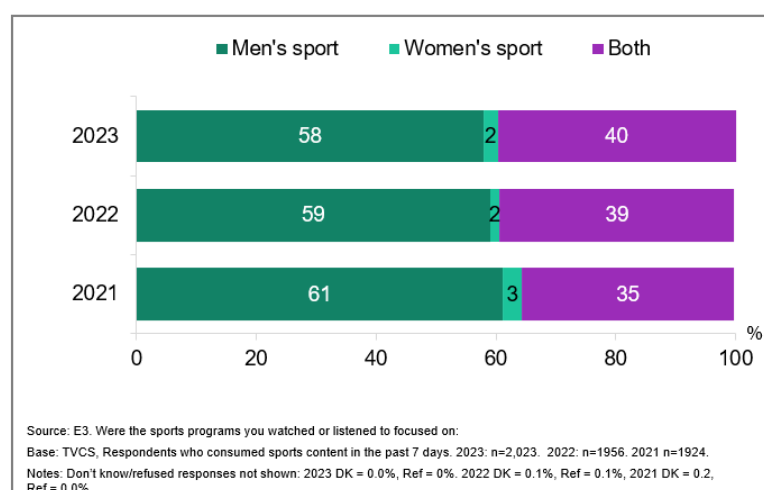
- Men (20% vs 16% of women)
- Ages 55-64 (27%), 65-74 (27%), and 75+ (32% vs 6% of ages 18-24, 12% of ages 25-34, 12% of ages 35-44 and 18% of ages 45-54)
- Those living outside a capital city (21% vs 16% of those living in a capital city)
- Those without children in the household (23% vs 12% of those with dependent children and 10% of adults living in a share house)

- Those born in a mainly English speaking country (19% vs 13% of those born in a mainly non-English speaking country)
- Those who look for information over the internet less than once a day (24% vs 17% of those who look for information once a day or more)
- Those who watched live free-to-air TV (commercial or publicly owned) in P7D (25% vs 8% of those who did not watch live free-to-air TV)

The most important aspect of free-to-air TV is that it is freely available on broadcast TV (with online access to sports content also being important).

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

More than half (58%) of respondents who had consumed sport in the past 7 days watched or listened to men's sport, while around two-fifths (40%) consumed both men's and women's sport.



### Subgroups

**Men's sport** was higher for:

- Ages 18-24 (63%), 25-34 (70%), and 35-44 (64% vs 44% of ages 75+)
- Those living in a capital city (62% vs 53% of those living outside a capital city)
- Those who did not watch live free-to-air TV (commercial or publicly owned) in P7D (65% vs 55% of those who watched live free-to-air TV)

**Women's sport** was higher for:

- Women (3% vs 1% of men)
- Those living outside a capital city (4% vs 1% of those living in a capital city)

**Both** was higher for:

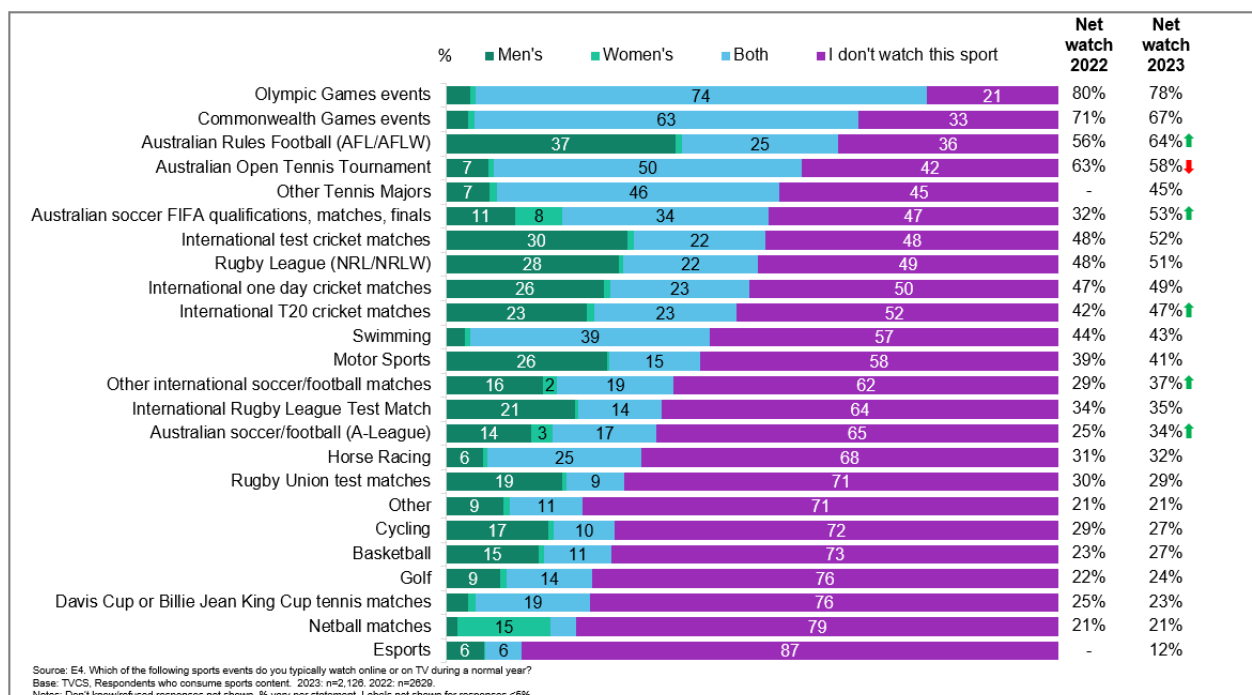
- Ages 65-74 (48%) and 75+ (54% vs 34% of ages 18-24 and 25% of ages 25-34)
- Those living outside a capital city (43% vs 37% of those living in a capital city)

Levels of men's and women's sport watched in 2023 remain consistent with 2022.

## Types of sports content consumed

The most commonly consumed sport types overall (net men's, women's, and both) were Olympic Games events (78%), Commonwealth Games events (67%), and Australian Rules Football (64%). The most commonly consumed women's sports were netball (15%) and Australian soccer/football (8%), while the

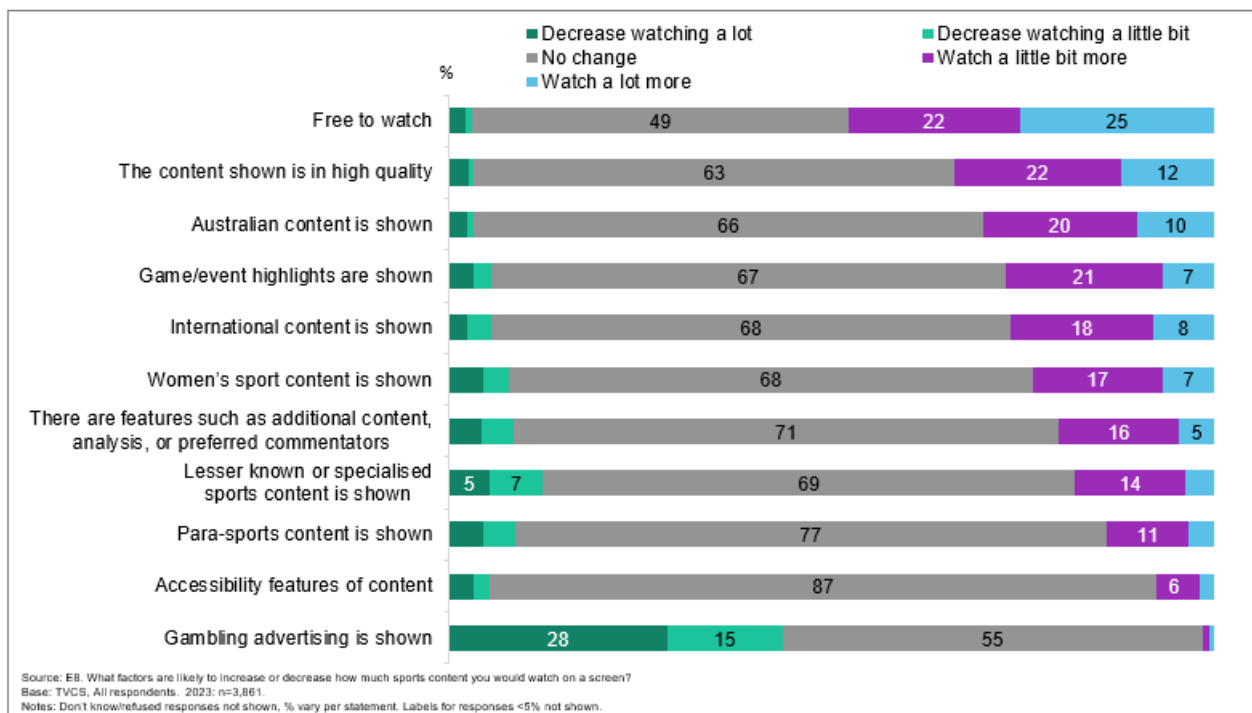
most commonly consumed men’s sports were Australian Rules Football (37%) and international test cricket matches (30%).



A variety of sports are watched in 2023, with notable increases in women's soccer, and men's cricket (potentially due to their respective world cups in 2023).

### Impact of various factors on amount of sports content consumption

The features most likely to increase amount of sports content consumed (net watch a little bit more and watch a lot more) were that it is free to watch (48%) and that the content shown is in high quality (34%). The factor most commonly reported to decrease consumption of sports (net decrease watching a little bit and decrease watching a lot) was that gambling advertising is shown (43%).



Being 'free to watch' likely increases sports viewership, while showing gambling advertising is likely to decrease how much sports content is watched.



# Advertising

## Chapter Summary – Advertising

### **Increasingly, advertisements are seen on social media and online subscription platforms**

The most common platforms on which respondents saw advertisements were free video streaming services (45%), commercial free-to-air TV, excluding on-demand (40%), and other websites or apps (e.g. Facebook, TikTok, Instagram) (39%, significantly higher than 2022 (22%)).

Advertisements were increasingly being seen on online subscription services in 2023 (20%).

However, the levels of advertisements seen on commercial free-to-air TV (excluding on-demand) and free video streaming services remained consistent with last year.

### **Gambling advertising is seen as inappropriate**

The most common reasons for disagreeing that advertisements seen on commercial free-to-air TV were appropriate were that the advertisements contained gambling or betting (84%), the frequency and / or repetition of the ads (71%), and that they encouraged unhealthy eating habits (39%).

Frequency and repetition were also mentioned by 71% for commercial free-to-air TV.

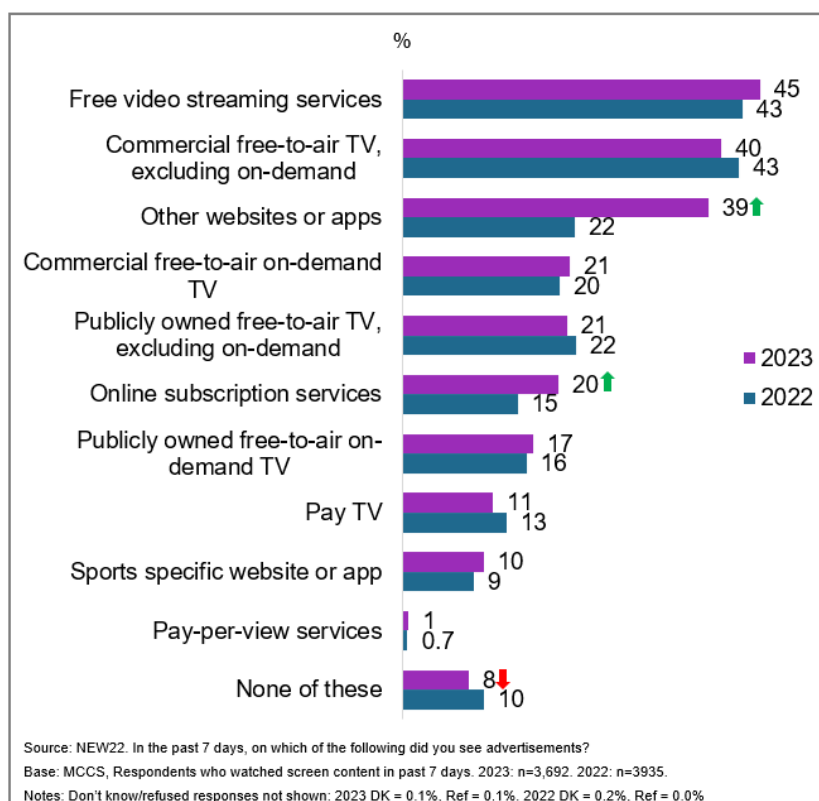
### **There are a variety of reasons for wanting restrictions**

Protecting children from exposure to harmful or inappropriate content was most frequently nominated as the most important reason for restricting permitted advertisements (38%), followed by limiting content that may encourage bad habits, such as gambling, tobacco, or alcohol use (35%).

Overall, most people supported restrictions on advertising for one or more platforms.

## Platforms that respondents saw advertisements on in the past 7 days

The platforms that respondents most commonly saw advertisements on were free video streaming services (45%), commercial free-to-air TV, excluding on-demand (40%), and other websites or apps (39%).



### Subgroups

Free video streaming services was higher for:

- Men (51% vs 39% of women)
- Ages 18-24 (68%), 25-34 (56%), and 35-44 (50% vs 41% of ages 45-54, 35% of ages 55-64, 25% of ages 65-74 and 20% of ages 75+)
- Those who live in a capital city (49% vs 36% of those who live outside a capital city)
- Those with dependent children in the household (48% vs 37% of those without children)

Commercial free-to-air TV, excluding on-demand was higher for:

- Men (43% vs 38% of women)
- Ages 45-54 (48%), 55-64 (59%), 65-74 (61%), and 75+ (69% vs 15% of ages 18-24, 22% of ages 25-34 and 34% of ages 35-44)
- Those living outside a capital city (47% vs 38% of those living in a capital city)
- Those without children in the household (49%), those with dependent children (35%), and those with non-dependent children only (41% vs 14% of adults living in a share house)

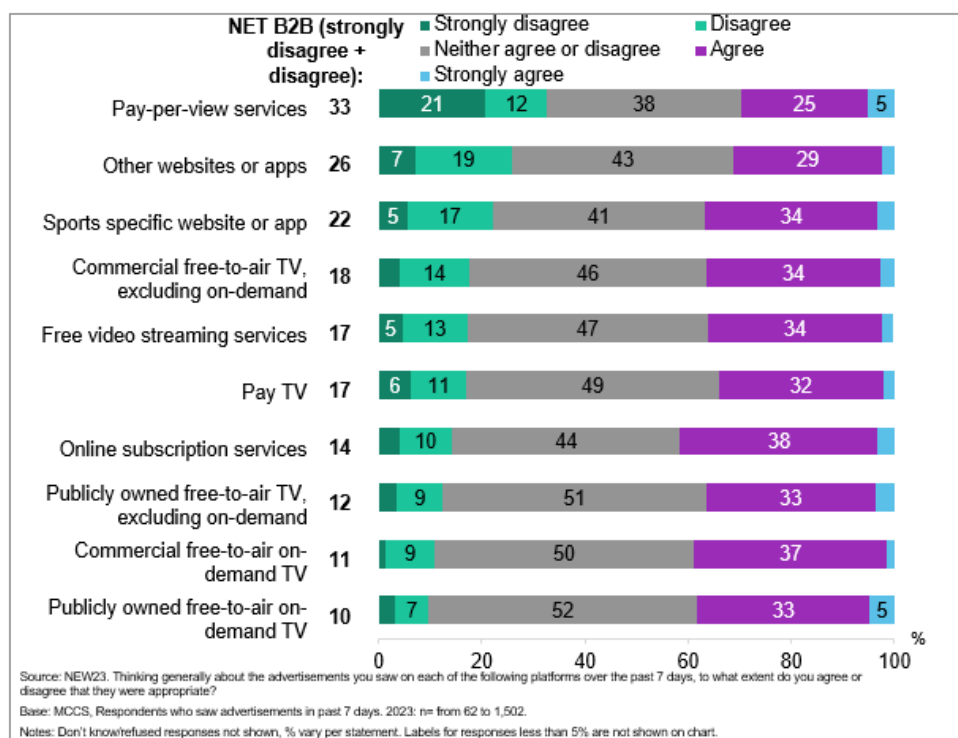
### Callouts

- Having seen advertisements on other websites or apps and online subscription services increased in 2023, while not having seen advertisements has decreased.

Advertising is most seen on free video streaming services, commercial free-to-air TV (excluding on demand) and websites or apps such as Facebook, TikTok and Instagram.

## Appropriateness of advertisements

Large proportions of respondents disagreed (net strongly disagree and disagree) that advertisements were appropriate to include on pay-per-view services (33%), other websites or apps (26%), and sports specific website or apps (22%).



### Subgroups

NET Strongly disagree + Disagree was higher for:

- Other websites or apps:
- Men (31% vs 21% of women)
- Publicly owned free-to-air TV, excluding on-demand:
- Men (16% vs 8% of women)
- Ages 45-54 (10%), 55-64 (19%), 65-74 (13%), and 75+ (13% vs 1% of ages 25-34)
- Non-Aboriginal or Torres Strait Islander respondents (13% vs 3% of Aboriginal and / or Torres Strait Islander respondents)

Pay-per-view services are most seen as an inappropriate platform for advertisements.

### Reasons for disagreeing that advertisements were appropriate (%)

The most common reasons for disagreeing that advertisements seen on commercial free-to-air TV were appropriate were that the advertisements contained gambling or betting (84%), the frequency and / or repetition of the ads (71%), and that they encouraged unhealthy eating habits (39%).

Platform	Gambling or betting	Frequency and / or repetition	Encouraging unhealthy eating habits	Pressure to buy goods or services	Inappropriate for children	Alcohol	Depiction of harmful behaviour	Sex / nudity / sexually suggestive content	Depiction of violence	Other (specify)
Commercial free-to-air TV	84	71	39	32	30	24	11	10	8	5
Publicly owned free-to-air TV	55	64	29	36	20	21	15	8	9	16
Pay TV	66	45	16	25	17	26	16	14	5	19
Commercial free-to-air on-demand TV	81	55	40	29	31	25	12	14	6	6
Publicly owned free-to-air on-demand TV	52	65	37	44	29	28	18	17	16	15
Free video streaming services	53	71	29	49	34	18	11	26	9	9
Online subscription services	38	56	25	34	32	22	11	25	12	10
Sports specific website or app	78	49	17	16	24	14	1	4	4	5
Other websites or apps	42	75	23	62	29	9	12	27	6	10

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

Base: MCCS, Respondents who disagree that the advertisements they saw in past 7 days were appropriate. 2023: n= from 13 to 290.

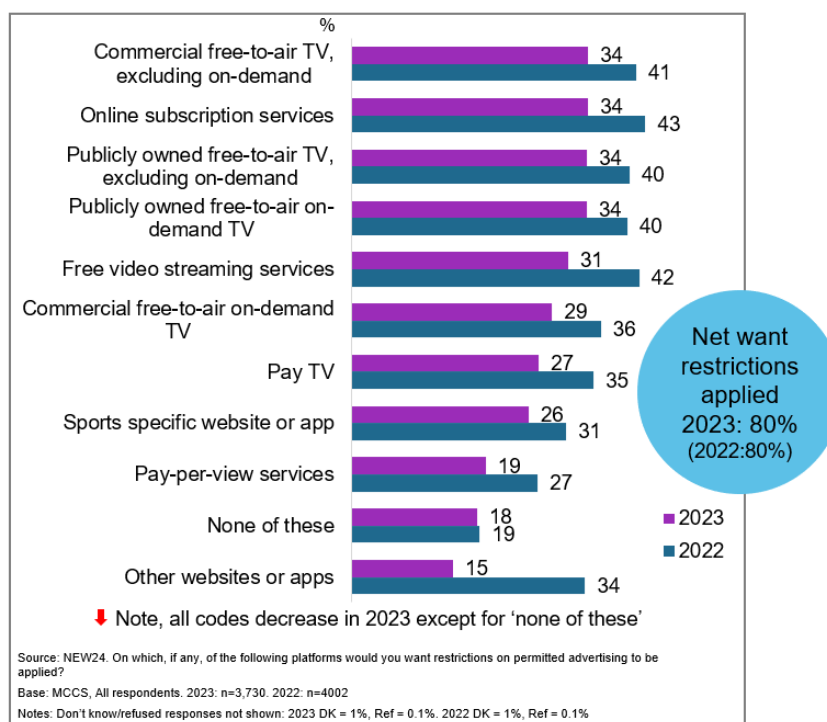
Notes: Don't know/refused responses not shown, % vary per statement. Results for 'Pay-per-view' not shown on chart due to small base size (n=13).

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

Showing gambling or betting related content is the main reason Australians disagree that advertising is appropriate.

## Platforms respondents want restrictions on permitted advertising

Similar proportions of respondents wanted restrictions on permitted advertising to be applied to commercial free-to-air TV excluding on-demand (34%), online subscription services (34%), publicly owned free-to-air TV excluding on-demand (34%), and publicly owned free-to-air on-demand TV (34%).



### Subgroups

Commercial free-to-air TV, excluding on-demand was higher for:

- Ages 45-54 (39%), 55-64 (42%), 65-74 (37%), and 75+ (54% vs 26% of ages 18-24 and 26% of ages 25-34)
- Those born in a mainly English speaking country (38% vs 24% of those born in a mainly non-English speaking country)

Online subscription services was higher for:

- Ages 18-24 (40%) and 45-54 (39% vs 26% of ages 65-74)
- Those who look for information over the internet once a day or more (37% vs 24% of those who look for information less than once a day)
- Those who view posts, images, and videos on social media sites once a day or more (37% vs 31% of those who view posts less than once a day)

### Callouts

- Wanting restrictions on permitted advertising to be applied has decreased across all platforms in 2023, although the net proportion of those who want restrictions to apply has not changed.

Overall, the proportion of people who want restrictions remained consistent in 2023, however, respondents were more targeted in identifying where they want restrictions to apply.

## Most important reason for restricting permitted advertisements (%)

Protecting children from exposure to harmful or inappropriate content remained the most important reason for restricting permitted advertisements (38%), followed by limiting content that may encourage bad habits, such as gambling, tobacco, or alcohol use (35%).

Reason for restricting permitted advertisements	2022	2023
Protecting children from exposure to harmful or inappropriate content	38	38
Limiting content that may encourage bad habits, such as gambling, tobacco, or alcohol use	33	35
Limiting the influence of advertising on consumer behaviour	20	19
Other	4	4
None of these	3	3

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

Base: MCCS, Respondents who want restrictions to apply to permitted advertisements. 2023: n=3,013. 2022: n=3272.

Notes: Don't know/refused responses not shown: 2023 DK = 0.0%, Ref = 0.1%. 2022 DK = 0.1%, Ref = 0.8%

### Subgroups

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

- Women (44% vs 31% of men)
- Ages 25-34 (42%), 35-44 (49%), and 45-54 (43% vs 29% of ages 18-24 and 24% of ages 75+)
- Those with dependent children in the household (51% vs 27% of those without children and 36% of those with dependent children only)
- Those born in a mainly non-English speaking country (47% vs 34% of those born in a mainly English speaking country)

Limiting content that may encourage bad habits was higher for:

- Men (39% vs 31% of women)
- Ages 75+ (56% vs 39% of ages 18-24, 28% of ages 25-34, 30% of ages 35-44, 30% of ages 45-54, 39% of ages 55-64 and 40% of ages 65-74)
- Those without dependent children in the household (41% vs 29% of those with dependent children)

- Those born in a mainly English speaking country (38% vs 28% of those born in a mainly non-English speaking country)

Protecting children from exposure to harmful or inappropriate content remains the primary reason to restrict permitted advertising.

## Advertising: Children aged 0-17

### Chapter Summary – Advertising (Children aged 0-17)

#### Children are being exposed to advertisements on a range of platforms

More than half of children aged 8-10 (56%) and 11-15 (56%) reported seeing advertisements on free video streaming services in the past 7 days.

Among children aged 16-17, the most common platform to have seen advertisements on was social media websites and apps (53%).

Online sources in particular are a source of advertisement exposure for children.

#### Children are being exposed to gambling or betting advertising

Approximately one third of children aged 8-10 reported they had seen advertisements for gambling or betting in the past 7 days, while a larger proportion of children aged 11-15 (43%), and 16-17 (40%) reported this.

The most common platforms to have seen gambling or betting advertising on were commercial free-to-air TV for children aged 8-10 (37%) and 16-17 (34%), and free video streaming services for children aged 11-15 (31%).

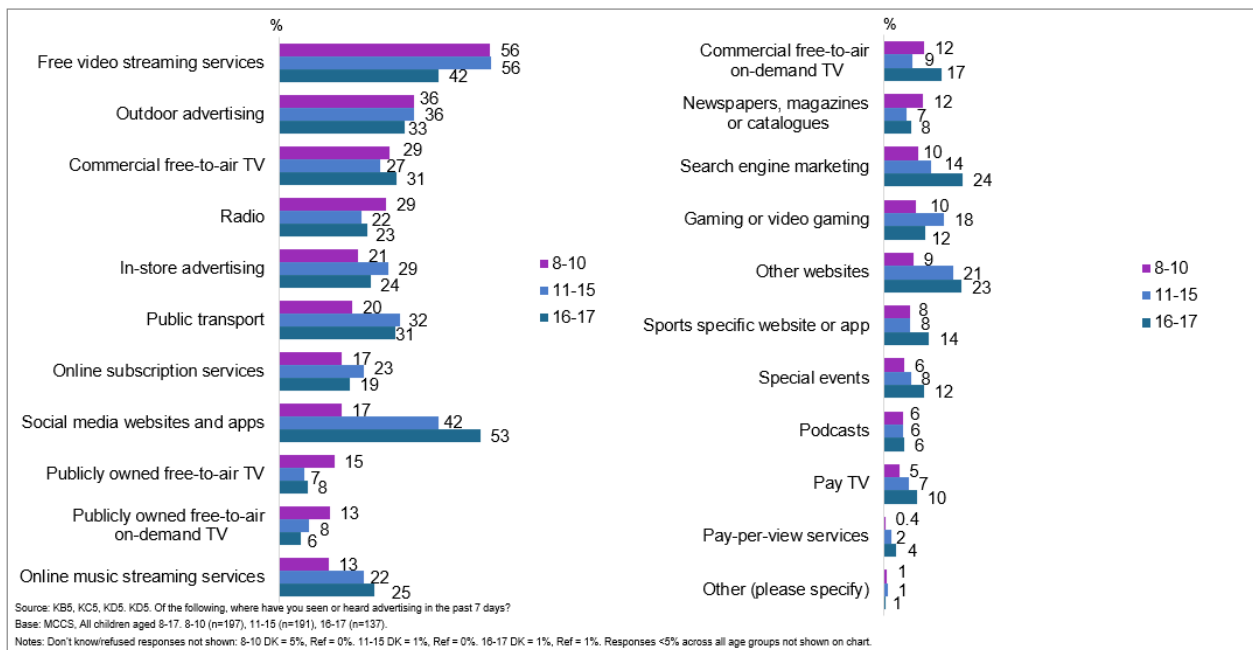
Just over one-fifth (22%) of children aged 0-7 had seen advertisements for gambling or betting in the past 7 days. The most common platform these advertisements were seen on was commercial free-to-air TV (Channel Seven, Nine, 10) (36%).

There were a wide range of platforms where children are being exposed to gambling advertising.



## Platforms children saw advertisements on in the past 7 days (children aged 8-17)

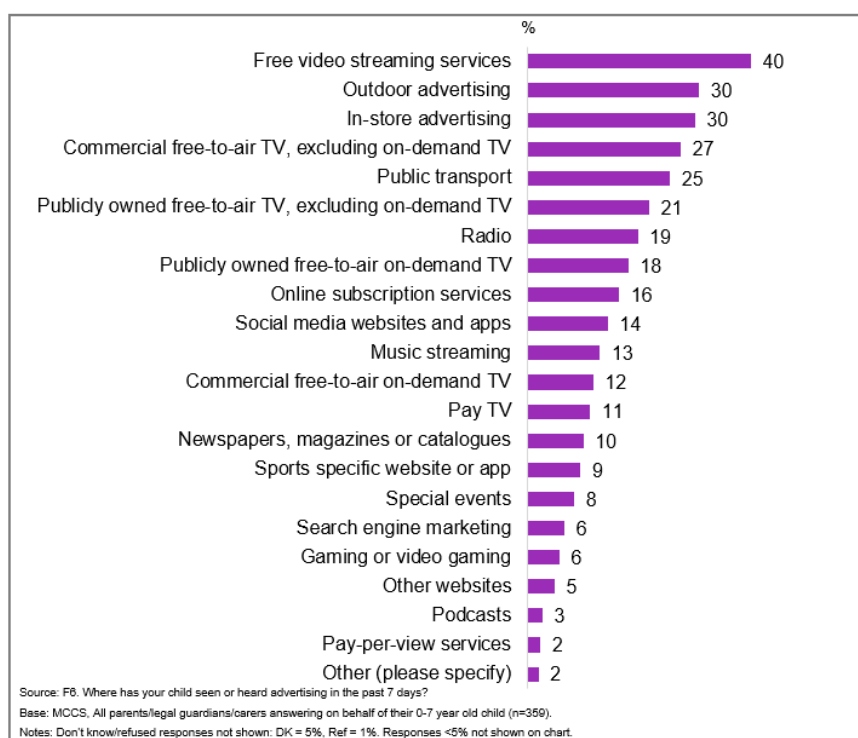
More than half of children aged 8-10 (56%) and 11-15 (56%) reported seeing advertisements on free video streaming services in the past 7 days. Among those aged 16-17, social media websites and apps (53%) was the most common platform on which advertisements were seen.



Children aged 8-17 most commonly report being exposed to advertising via free video streaming services.

## Platforms children saw advertisements on in the past 7 days (children aged 0-7)

The platforms on which advertising was most commonly seen by children aged 0-7 were free video streaming services (40%), outdoor advertising such as posters or billboards (30%), in-store advertising (30%), and commercial free-to-air TV excluding on-demand (27%).



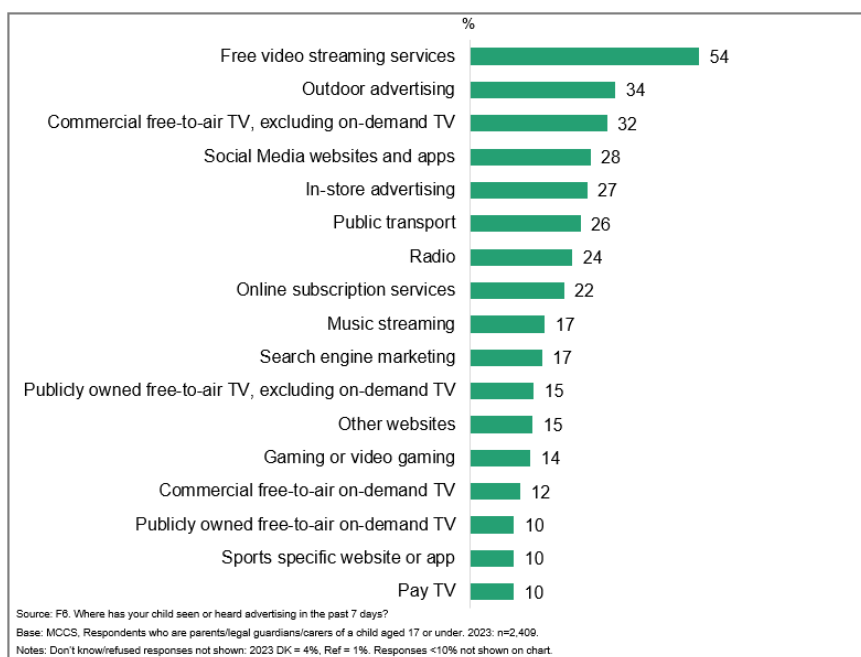
## Subgroups

- No subgroup differences of note.

Parents/legal guardians/carers report that children aged 0-7 most commonly see or hear advertising on free video streaming services.

## Where children saw advertising in past 7 days

Parents/legal guardians/carers were also asked about their child's exposure to advertising. The most common places that parents/legal guardians/carers reported their child had seen advertising were free video streaming services (54%), outdoor advertising (34%), and commercial free-to-air TV, excluding on-demand (32%). Parents'/legal guardians'/carers' responses were largely consistent with children's responses, although older children reported seeing advertising on social media at a higher level than parents/legal guardians/carers reported.



## Subgroups

Free video streaming services was higher for:

- Those with a TAFE qualification / Trade Certificate / Diploma (59% vs 49% of those with a Postgraduate degree)

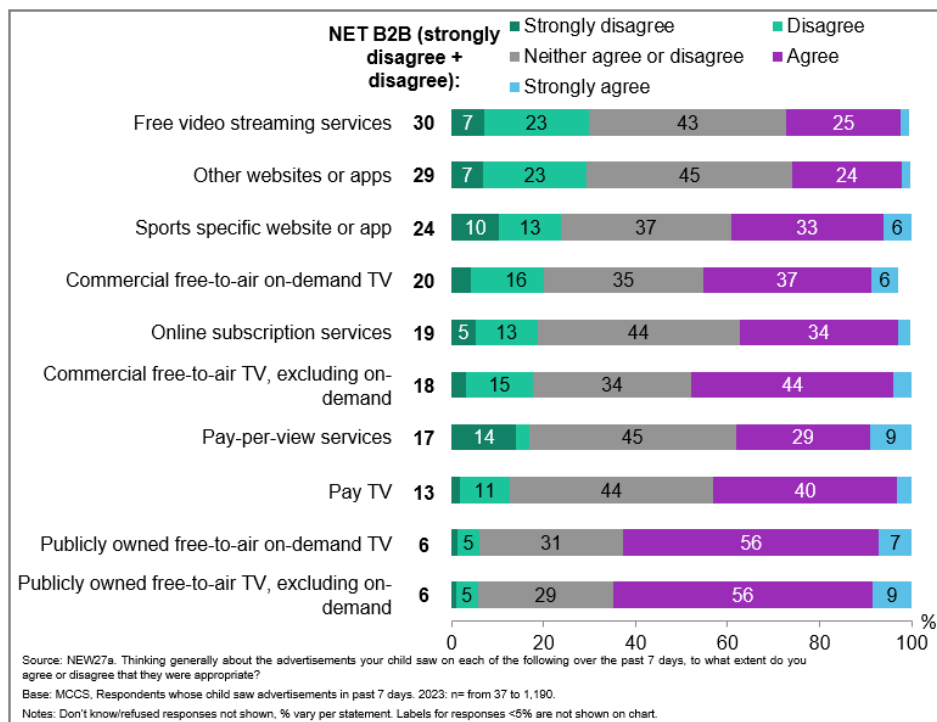
Public transport was higher for:

- Those living in a capital city (28% vs 17% of those living outside a capital city)
- Those aged 18-24 (51% vs 23% of those aged 25-34 and 22% of those aged 35-44)
- Those with a Postgraduate degree (32% vs 23% of those with a TAFE qualification / Trade Certificate / Diploma)
- Those whose child is aged 16-17 (35% vs 22% of those whose child is aged 0-7, 23% of those whose child is aged 8-10 and 25% of those whose child is aged 11-15)

Parents/legal guardians/carers report that children see advertising on free video streaming services, followed by outdoor advertising.

## Appropriateness of advertisements child saw

Parents/legal guardians/carers were asked the extent to which they agreed or disagreed that the advertisements their child saw were appropriate. Parents/legal guardians/carers most commonly reported that they disagreed (net strongly disagree and disagree) that the advertisements their child saw on free video streaming services (30%), other websites or apps (29%), and sports specific websites or apps (24%) were appropriate.



## Subgroups

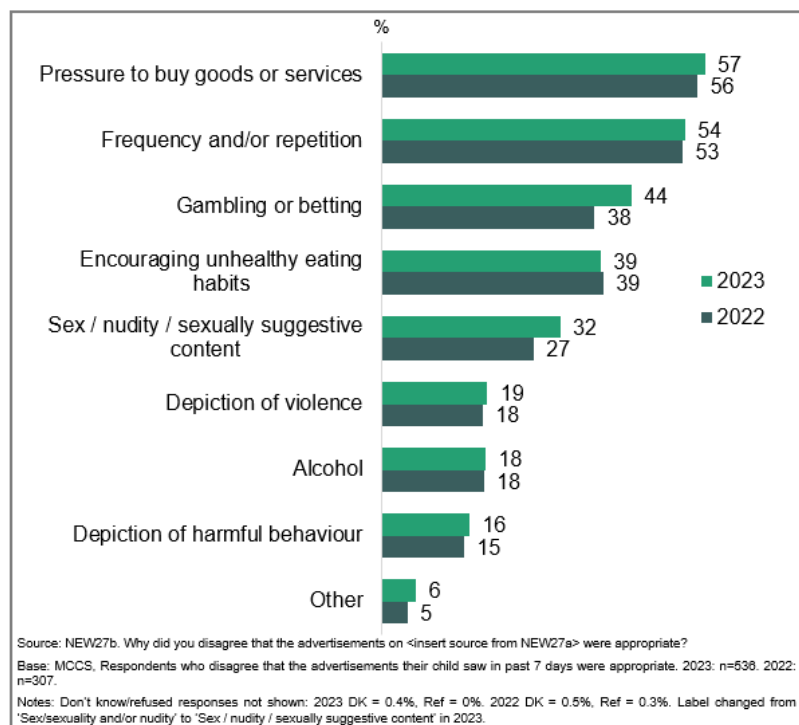
NET Strongly disagree + Disagree was higher for:

- Free video streaming services:
- Those who look for information over the internet once a day or more (31% vs 20% of those who look for information less than once a day)
- Other websites or apps:
- Those with a Postgraduate degree (29% vs 11% of those with education up to Year 12)

Parents/legal guardians/carers indicate that publicly owned TV has the most appropriate advertisements seen by children.

## Reasons for disagreeing that advertisements child saw were appropriate

The main reasons that parents/legal guardians/carers disagreed that the advertisements their child saw were appropriate were pressure to buy goods or services (57%), frequency and / or repetition (54%), and gambling or betting (44%).



## Subgroups

Frequency and / or repetition was higher for:

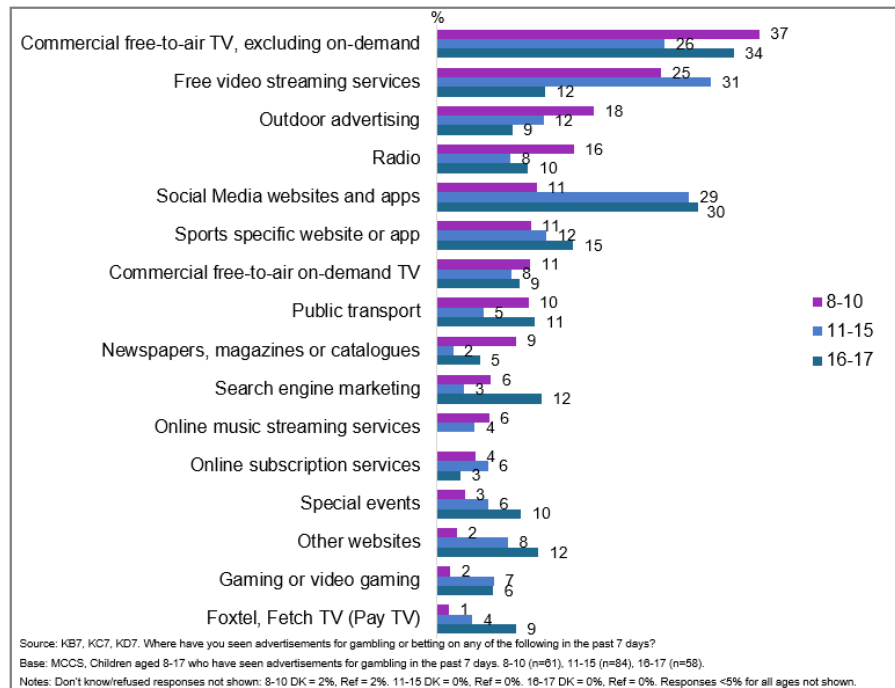
- Those whose child watched online content in P7D (54% vs 50% of those whose child watched offline content)
- **Gambling or betting** was higher for:
- Those whose child watched offline content in P7D (58% vs 44% of those whose child watched online content)

Parents/legal guardians/carers report that pressure to buy, frequency / repetition, and gambling or betting are reasons for disagreeing that advertisements were appropriate for children.

## Advertisements for gambling or betting in P7D (children aged 8-17)

Children were then asked specifically about exposure to advertising for gambling or betting. Approximately one third of children aged 8-10 reported they had seen advertisements for gambling in the past 7 days, while a larger proportion of children aged 11-15 (43%) and 16-17 (40%) reported this. Among children who had seen gambling advertising in the past 7 days, it was most seen on commercial free-to-air TV for children aged 8-10 (37%) and 16-17 (34%), and free video streaming services for children aged 11-15 (31%).



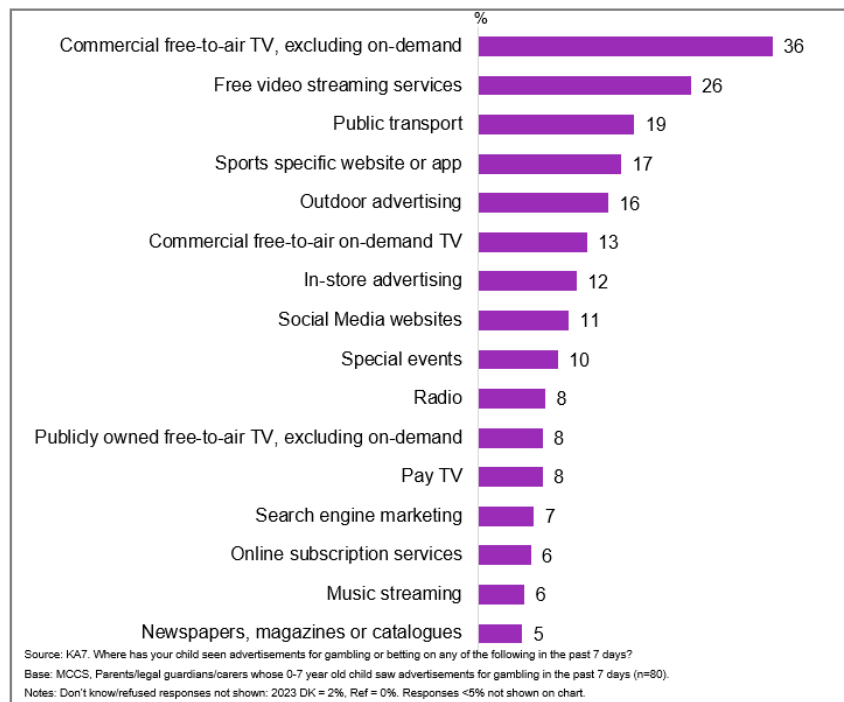


Children aged 8-17 are being exposed to gambling or betting advertising across a range of platforms.

## Advertisements for gambling or betting in P7D (children aged 0-7)

- Just over one-fifth (22%) of children aged 0-7 had seen advertisements for gambling or betting in the past 7 days. The most common platforms these advertisements were seen on were commercial free-to-air TV (36%), free video streaming services (26%), public transport (19%), sports specific websites or apps (17%), and outdoor advertising (16%).





Parents/legal guardians/carers report that commercial-free-to air TV channels are the primary platform on which children aged 0-7 see advertisements for gambling or betting.

## Appendix

### Methodology Summary

For the Television and Media survey 2023 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/legal guardians/carers, children, and those in regional Australia.

An opt-in online panel, Online Research Unit (ORU), was used to source a non-probability sample boost of parents/legal guardians/carers of children aged 0 to 17, children aged 0-17 and regional Australians.

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

The Television and Media survey 2023 conducted via Life in Australia™ had a combined average completion length of 33.8 minutes.

More details on the survey methodology can be found in the Technical Report delivered to the Department (named 'Attachment 2 - 3042 Television and Media Survey 2023 Technical Report').

### Survey design

The instrument and questions for the Television and Media Survey 2023 were developed off the basis of the 2022 Television Consumer Survey and Media Content Consumption Survey questionnaires. Approximately half of the questions in 2023 are new or revised since 2022. This new content was designed to reflect the changing media environment, new technologies, and areas of contemporary policy significance.

The 2023 survey also included a new set of questions asked of children across ages 0-17, with parents/legal guardians/carers of children aged 0-7 surveyed on their child's behalf. These questions provide information about the media usage and habits of Australian children, as well as complementary information to the questions asked of parents/legal guardians/carers about the media use and habits of their children.

### Cognitive Testing

Cognitive testing was undertaken prior to questionnaire finalisation to inform the development of new survey questions for the 2023 TV and Media Survey instrument. A selection of items including new questions and questions with changes to terminology previously used in the 2022 survey were tested through this process to ensure respondents were able to comprehend and accurately answer the questions. Questions from the children's survey were also tested with parents/legal guardians/carers to get feedback on whether the adapted language in the survey was age appropriate and would be easily understood by children. Cognitive testing ensured that the questions as phrased would be well-understood by survey participants and provide consistent and quantifiable results.

Generally, participants found that the questions were straightforward and easy to answer, however, the volume of content was problematic for some participants as several questions had long and complex response frames that required them to consider their answers, with some measurement error and/or respondent drop out identified due to cognitive burden. This was especially the case for the children's content tested with parents/legal guardians/carers.

In response to this feedback, several questions were updated to streamline the response frame by reducing the number of options, combining similar options, and in some cases displaying the responses in two columns. Other feedback from the cognitive testing interviews included lack of clarity on some terms,



such as the difference between ‘subtitles’, ‘live captions’, and ‘closed captions’. Additional definitions and statements were added throughout the survey in various places to provide further clarity.

The testing was conducted through eight cognitive interviews with adults that were undertaken via video-conference.

## Questionnaire

The survey instrument was delivered to the Department (named ‘Attachment 1 - 3042 TV and Media Survey 2023 - Final\_20230921’).

## Ethics Approval and 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.

The Department supported ethics approval as a crucial element of the survey in 2023 and is aware of its obligations and responsibilities for child safety.

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. As the survey in 2023 contain a high proportion of new content in the instrument and new content was included for children, formal ethics approval was undertaken. This was conducted via Bellberry Limited, and the approval number was 2023-07-875 on 21 August 2023.

## Weighting

Weights for 18+ respondents

The Television and Media Content Consumption Survey consisted of two components that were combined for weighting purposes:

1. A random (probability) sample of adults from Life in Australia™.
2. A convenience (non-probability) sample to support extended reporting and analysis.

The usual approach to weighting random (probability) samples is a two-step process that aims to reduce biases caused by non-coverage and non-response and to align weighted sample estimates with external data about the target population (Kalton and Flores-Cervantes, 2003). First, base weights are calculated to account for each respondent’s initial chance of selection and for the survey’s response rate. Next, the base weights are adjusted to align respondents with the population on key socio-demographic characteristics. Refer to Särndal et al. (1992) for detailed information about model-assisted survey sampling and estimation, and to Valliant et al. (2018) for a contemporary treatment of weighting and estimation for sample surveys.

The convenience (non-probability) sample used a non-random mechanism to recruit participants to the survey, which means that the design-based approach just described does not apply. Refer to Elliott and Valliant (2017) for a discussion and further references about the challenges of making inferences from non-random samples. There are several methods for weighting such samples and making estimates from them, however (refer to Valliant, 2020). One of these methods, used here, is “quasi-randomisation” which requires a reference sample chosen at random from the target population. The reference sample is used to estimate pseudo-selection probabilities for the convenience sample, to adjust for selection bias. For this survey, the reference sample were the probability cases from Life in Australia™.

The combined sample then had base weights for the two groups – a probability-based one for Life in Australia™ cases and an estimated one for convenience cases. To derive the adjusted weights, consideration then had to be given to the characteristics on which to align the base weights with the population. The choice of characteristics was guided by three factors:

- Which characteristics are most different between the probability and convenience samples?
- Which characteristics are most associated with the survey’s key questionnaire items?
- Which characteristics are most different between the combined sample and the population?

With these factors in mind, the set of characteristics used to adjust the weights are those are provided in the Technical Report. This also includes the population counts and percentages, obtained from Census 2021 TableBuilder (Australian Bureau of Statistics, 2021) and from Life in Australia™. All population counts refer to the Australian adult population aged 18+ years.

The method used to adjust the base weights was regression calibration (Deville et al., 1993), implemented in R (R Core Team, 2023) using the survey package (Lumley, 2020). For more information on weighting of sample surveys, refer to Valliant et al. (2018).

#### Weights for child respondents

A second weight for respondents who completed the child section of the questionnaire was also calculated. This weight reflects the child in the context of the population of Australian 0–17-year-old children. Like the non-probability sample, the design-based approach to weighting does not apply to child respondents, as there is a non-random mechanism of recruitment. Unlike the adult weighting, there is no probability-based reference sample with which the quasi-randomisation approach can be applied. Instead, a super-population approach is taken, in which all respondents are assigned the same base weight of 1, and regression calibration is used to adjust base weights. More information on the super-population approach can be found in Elliott and Valliant (2017).

The set of characteristics used to adjust the child weights are those shown in the Technical Report. This table also includes the population counts and percentages, obtained from Census 2021 TableBuilder (Australian Bureau of Statistics, 2021). All population counts refer to the Australian 0-17-year-old population.

## 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.