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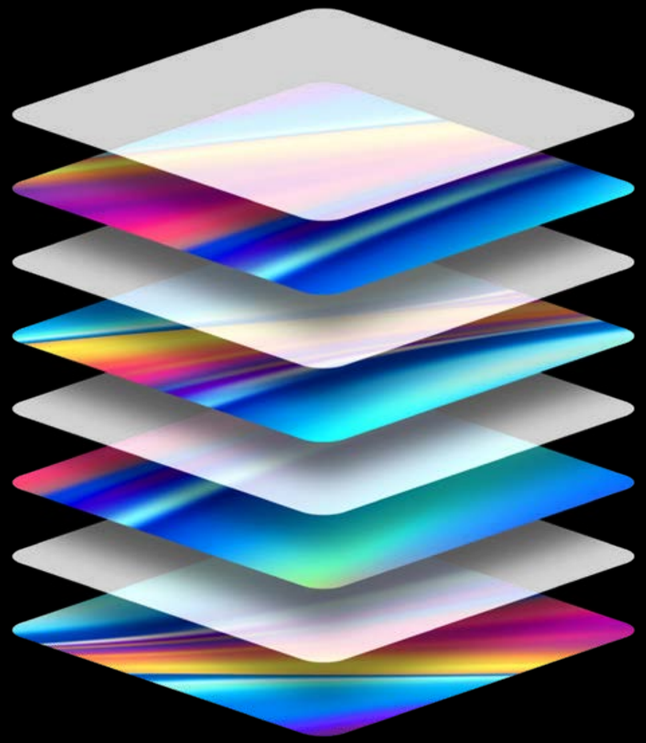
Together makes progress



Media & Entertainment Consumer Insights 2026

15th Edition

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About the Report

Our 15th edition of Media & Entertainment Consumer Insights explores the ever-changing consumer attitudes and perceptions of media and entertainment in Australia across the following areas:

- The size and composition of Australians' subscription stack, and the associated costs
- How Australians split their attention across different types of media and entertainment (incl. sport)
- The influence of advertisers and social media content creators on consumer purchasing behaviour
- Perceptions of trust across social media, news organisations, and artificial intelligence
- Where Australians are using AI in their personal life and the impact on click-through behaviour

We invite you to explore the shifting audience needs and behaviours that define the Australian Media and Entertainment Consumer landscape in 2026.

Know your jargon

SVOD	Subscription video on demand
BVOD	Broadcast video on demand
FTA	Free-to-air TV
UGC	User-generated content on social media platforms
Subscription stack	The portfolio of digital media subscriptions an individual or household subscribes to
OOH	Out-of-home (advertising)
AI search summary	AI-generated responses that appear within search engine results (i.e. automatic responses)
Standalone AI chatbot	Dedicated browser window or application that requires its own prompt

Our research comprises a nationally representative sample of more than 2,000 consumers, aged 16-91, weighted for demographics such as age, gender, location and working status. An independent research organisation conducted the survey in July-August 2026. Based on a survey, the report highlights attitudes and perceptions which may differ from reported data provided by other industry sources. Questions cited in this document may be simplified for the sake of visualisation.

To this end, it is important to remember that results mentioned across this report reflect self-reported statistics (i.e. what respondents think they do, not necessarily what they actually do).

Generation	Ages
Gen Z	16-29
Millennials	30-45
Gen X	46-61
Boomers	62-80
Matures	81+

As in previous years, survey results are grouped by generation. This year, we've continued to provide a generational view of Matures, however, they now represent a smaller share of the Australian population resulting in a smaller sample size within our report (n=22). All figures for Matures across this report should be interpreted with a degree of caution.

Key Takeaways

1

Discipline, not retreat: Subscription stacks are holding but Australian households are actively reducing spend, more conscious of their costs and demanding clearer value for money.

$73
average monthly household subscription spend, down 6% from $78 in 2025

- Average subscriptions are steady at 3.8 services in 2026 (vs. 3.7 in 2025)
- 75% worry about cumulative cost and 76% periodically review their subscriptions
- Australians have moved from subscription growth to subscription optimisation.

2

Total time Australians say they spend on media has stabilised, but attention is increasingly fragmented across formats, screens and genres including multitasking.

45h 20m
of media and entertainment consumed each week, the same amount as 2025

- Video remains the largest category at 16h 55m, but its share is falling as other categories like Audio (13h 30m) grow in attention share
- 42% of Australians say they regularly multitask across two different media/entertainment activities. Gen Z and Millennials do so more than other generations.

3

Creators influence purchases particularly among Gen Z and Millennials, with authenticity central to maintaining trust.

38%
made a purchase based on a creator recommendation in the last year

- 61% of Gen Z and 58% of Millennials purchased something based on a creator recommendation in the last year
- Food, beauty, fashion, entertainment and health are emerging as the most purchased categories based on creator influence
- 44% have stopped following a creator after finding recommendations inauthentic or overly commercial.

4

Traditional news sources remain the most trusted overall. The prevalence of AI content raises doubts about authenticity and strengthens demand for transparency.

75%
believe AI content makes it harder to know what is real online

- Australians trust AI content more when humans have reviewed or edited the outputs
- 49% of Gen Z at least moderately trust AI-generated news
- 84% want mandatory AI labelling. 71% say they would stop using platforms that fail to disclose AI content
- Boomers are three times as likely as Gen Z to be unsure of whether they have come across AI-generated or manipulated content online.

5

Free-to-air TV leads on advertising comfort and influence overall, while social media strongly influences younger consumers' purchase decisions.

65%
of Gen Z say social media advertising influences their purchases

- Gen Z (57%) and Millennials (56%) favour smartphone ads whereas Boomers (59%) and Matures (50%) favour ads on TV
- 77% of Australians reported noticing out-of-home advertising, with 38% saying out-of-home ads influence their buying decisions
- Gen X and Boomers are most likely to dislike personalised advertising (38% and 44%), while Millennials are most receptive (27% prefer it).

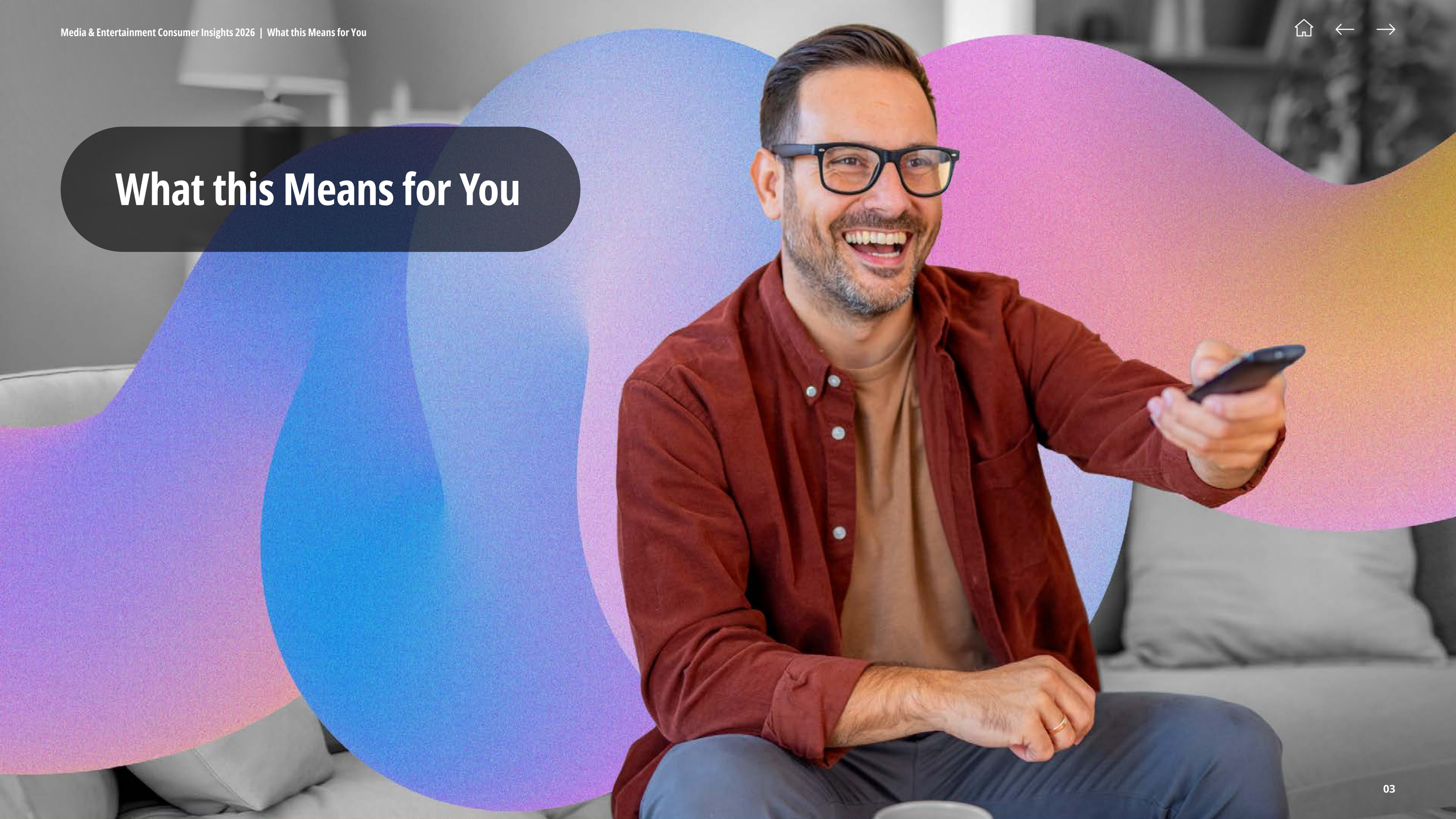
6

ChatGPT leads AI preferences, with younger users drawing on more models and older users favouring a single tool.

48%
regularly use standalone AI tools in their personal life

- 40% of regular standalone AI users prefer one model across all activities where they use AI
- 39% find standalone chatbots materially better than AI search summaries
- 57% say AI search summaries prompt more searches. Around one in ten no longer clicks through to sources.

What this Means for You



What the MECI 2026 Data Means for You?

LIFESTYLE EDITOR

A cross-platform editorial lead, shaping lifestyle content for metro audiences across print and digital. They're focused on the topics, formats and audience signals that drive engagement, subscriptions, advertiser appeal and ongoing relevance

KEY TAKEAWAYS

47% actively seek lifestyle content in the news because they enjoy it; rising to 57% of Millennials and 53% of Gen Z, but just 36% of Boomers and 9% of Matures

2h30m avg. weekly news/magazine consumption, up from 2h 05m in 2025; every generation is consuming more news, so the addressable audience is growing

40% actively seek pop culture and entertainment content, rising to 57% of Gen Z and 55% of Millennials; the natural bundle partner for a younger lifestyle slate

BOTTOM-LINE

- Which three lifestyle formats are actually acquiring under-35s, and what would you cut to fund more of them?
- Where does your lifestyle slate bundle with pop culture to lift engagement without diluting authority?
- What is your standard for creator-sourced content, so reach doesn't cost you trust?

AGENCY AD-BUYER

A multi-channel investment specialist buying and monitoring media across digital, television, social, print, audio and OOH for a portfolio of clients. They're driven by pricing, performance and proof, using data to optimise spend and demonstrate campaign value

KEY TAKEAWAYS

46% say free-to-air ads influence their buying; still ranked #1 for both influence and comfort

65% of Gen Z say social ads influence them (63% of Millennials) versus just 15% of Boomers; influence and comfort diverge sharply by age, so one plan cannot serve both

38% say OOH influences their buying decisions; but that is 50% for Gen Z versus 17% for Boomers, and 77% notice OOH at all

BOTTOM-LINE

- Where is your free-to-air budget going as its reach changes but its comfort advantage persists?
- Have you re-cut the OOH line by generation and metro vs. regional, rather than buying it as blanket reach?
- Is your client discoverable inside AI search, where 57% are now querying more (68% of Gen Z)?

DRAMA COMMISSIONER

A scripted programming executive responsible for identifying and developing film and television projects within a broader content strategy. They're focused on concepts with the right mix of audience appeal, brand fit and commercial upside in an increasingly crowded market

KEY TAKEAWAYS

2 in 3 say their strongest relationship with content brands is with the individual title they watch; not the platform or the studio, so churn is title-level

38% of SVOD subscribers would stay for no ads or restrictions, just ahead of access to first-run movies (37%, down from 39% in 2025)

45% feel no need for another paid video subscription because YouTube already satisfies them, rising to 54% of Gen Z

BOTTOM-LINE

- Which titles are demonstrably holding subscribers, and does your slate over-index on genres that are not?
- Would improving the ad-free tier retain more subscribers than your next acquisition, at lower cost?
- What is your answer to YouTube for under-35s; compete, commission from it, or concede the segment?

What the MECI 2026 Data Means for You?

SOCIAL MEDIA CONTENT CREATOR

An independent content creator publishing regularly across platforms such as Instagram and YouTube, with income tied to sponsorships, views and audience growth. They're guided by engagement trends, platform dynamics and brand alignment as they build trust, reach and commercial value

KEY TAKEAWAYS

42% consume most of their UGC through likes and shares from friends, rising to 58% of Gen Z and 56% of Millennials; distribution runs through trust, not reach alone

61% of Gen Z purchased a product or service on a creator recommendation in the last 12 months (38% of the population); eight times the Boomer rate

44% have stopped following a creator after finding their recommendations inauthentic or overly commercial, rising to 63% of Gen Z; trust is the revenue model

BOTTOM-LINE

- What rule governs which brands you take, and would your audience recognise it from your last ten posts?
- Are you disclosing paid partnerships prominently, given 41% act more readily on a disclosed recommendation (57% of Gen Z)?
- As audiences cut back on social time, what makes your content the thing they keep rather than cut?

TOP END OF TOWN MARKETER

A head of marketing within a large enterprise, leading complex multi-channel campaigns designed to drive engagement within a set annual budget. They're focused on effectiveness, efficiency and measurable outcomes, using data to prioritise spend and optimise performance

KEY TAKEAWAYS

27% of Millennials actively prefer personalised ads, while 38% of Gen X and 44% of Boomers dislike it most; personalisation is a segment play, not a default

46% say free-to-air ads influence their buying; #1 for influence and comfort overall, while social leads only for under-45s (65% of Gen Z, 63% of Millennials vs. 15% of Boomers)

52% of women bought beauty and personal care on a creator recommendation versus 22% of men; consumer electronics and technology reverses it (35% of men vs. 16% of women)

BOTTOM-LINE

- Which categories should move through creators and which through paid media; and can you evidence the split?
- Where does personalisation add genuine relevance, and where does it start costing you trust?
- Is your mix built on where attention is, or where influence and comfort actually overlap?

SPORTS CODE EXECUTIVE

A commercial leader within the governing body or competition owner of a sporting code, responsible for driving growth through areas such as rights, partnerships and audience expansion. They're focused on the data points that strengthen revenue, increase reach and build long-term fan value

KEY TAKEAWAYS

46% would pay separately for sporting events; 65% of Gen Z and 60% of Millennials, versus 22% of Boomers and 14% of Matures

41% of those willing to pay say watching with friends or family is their top motivator – the product is a shared occasion, not just exclusive access

$24 per month average willingness to spend on sports subscriptions, up from $22 in 2025; a third successive annual rise, though the share willing to pay has flattened at 56%

BOTTOM-LINE

- Could your next rights deal price the marquee tier separately, where willingness concentrates (37% nominate major finals)?
- Is your pay-per-view product designed and priced for group viewing rather than a single sign-in?
- Are you splitting promotion by generation; urgency for under-45s, bundled value for over-55s?

1 The Entertainment Wallet

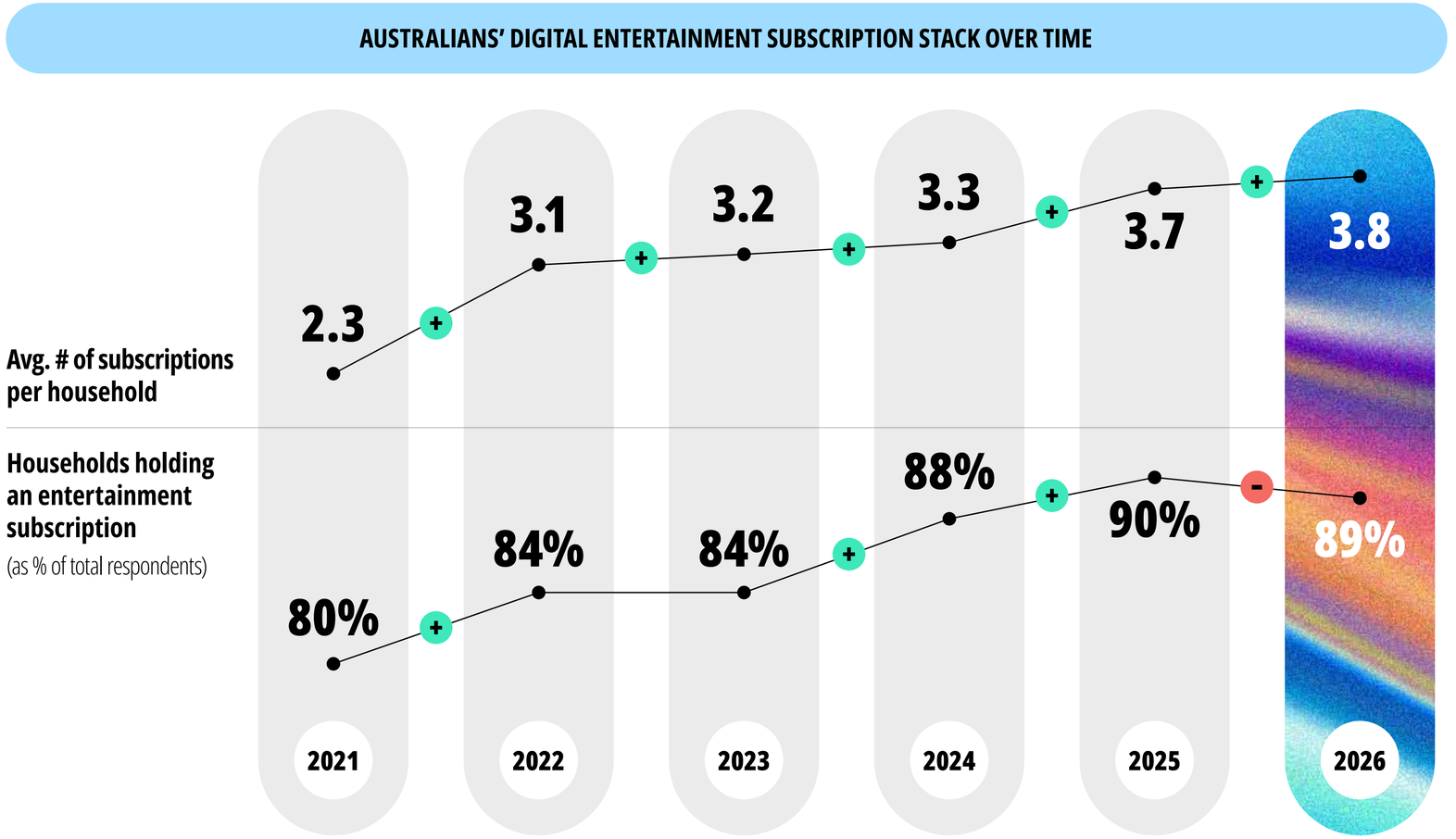


Subscription Holdings

Following a big jump in 2025, the average number of digital entertainment subscriptions per household has stabilised

The average number of subscriptions per household has increased marginally to 3.8 in 2026, following a 12% increase in 2025.

Despite persistent cost-of-living concerns and a slight decline in the number of households with a subscription, Australians continue to maintain a larger subscription portfolio than previous years.



Subscription Holdings (Cont.)

Households are maintaining subscription stacks but becoming more deliberate about where and how much they spend

The average number of subscriptions held has remained stable, despite declines in SVOD, music and sports subscribers.

SVOD and music continue to dominate subscription holdings, but household penetration softened across most categories in 2026. The proportion of households holding SVOD, music, sports, news and podcast subscriptions all declined marginally, while gaming was the only category to record meaningful growth.

At the same time, average subscriptions across most core categories remained flat or declined, suggesting subscribers are becoming more selective in how they allocate discretionary spending. This may indicate a greater focus on retaining a smaller number of high-value services and rotating subscriptions based on content, utility or perceived value.

64% **agree that they need more than one subscription in some categories to access all the content they want.**

This is consistent with 2025 sentiment, and again over-indexes for Gen Z (78% agree) and Millennials (75% agree).

	% OF HOUSEHOLDS WITH A SUBSCRIPTION	AVG. SUBS P/ HOUSEHOLD
SVOD	81% (83% in 2025 -)	2.2 (2.3 in 2025 -)
Music	50% (51% in 2025 -)	0.7 (0.7 in 2025)
Sports	23% (25% in 2025 -)	0.3 (0.3 in 2025)
Gaming	22% (7% in 2025 +)	0.4 (0.1 in 2025 +)
Pay TV[1]	14% (14% in 2025)	0.1 (0.1 in 2025)
News	3% (5% in 2025 -)	0.1 (0.1 in 2025)
Podcast[2]	2% (4% in 2025 -)	<0.1 (<0.1 in 2025)
Magazine	2% (2% in 2025)	<0.1 (<0.1 in 2025)

(1) Pay TV refers to traditional cable or satellite via set-top box (e.g., Foxtel); (2) Dedicated podcast subscriptions (e.g., Goalhanger). Most respondents access podcasts via their music subscription

Subscription Holdings (Cont.)

Fewer Gen Z and Millennials have SVOD and music subscriptions, while more Mature households are participating across all categories

Although subscription stacks remain stable, the number of people who subscribe has fluctuated for gaming, SVOD, sport and music.

The average number of subscriptions a subscriber to that category has remains broadly stable, despite declining participation in some. This suggests existing subscribers still value maintaining multiple services, even as fewer households subscribe overall.

Gen Z and Millennials continue to have the highest penetration and most subscriptions across SVOD, music and sport despite a marginal decline.

Gen Z SVOD penetration and number of subscriptions held has materially declined (95% and 3.3 in 2025).

SHARE OF RESPONDENTS WITH A SUBSCRIPTION AND AVERAGE NUMBER OF SUBSCRIPTIONS FOR SUBSCRIBERS IN THE CATEGORY

(Bold %: proportion who subscribe; Lower number: average subscriptions per subscriber household[1] (+) (-) Change vs. 2025 levels was >=5%/>=0.3 subscriptions. Overall 2025 retained for comparison.)

	Overall 26	Overall 25	Gen Z	Millennials	Gen X	Boomers	Matures
SVOD	**81%** 2.7	**83%** 2.8	**90%** (-) 3.0 (-)	**91%** (-) 2.7	**81%** 2.6	**64%** 2.2	**41%** (+) 2.3
Music	**50%** 1.5	**51%** 1.4	**75%** (-) 1.5	**66%** 1.6	**43%** 1.3	**21%** 1.3	**18%** (+) 1.0[3]
Sports	**23%** 1.2	**25%** 1.2	**30%** 1.3	**26%** 1.3	**19%** 1.2	**19%** 1.1	**9%** (+) 2.0[3] (+)
Gaming	**22%** (+) 1.7	**7%** 1.4	**38%** (+) 1.8 (+)	**33%** (+) 1.8 (+)	**15%** (+) 1.4	**5%** 1.0	**5%** (+) 1.0[3] (+)
Pay TV	**14%** N/A[2]	**14%** N/A[2]	**11%** N/A[2]	**12%** N/A[2]	**11%** N/A[2]	**22%** N/A[2]	**41%** (+) N/A[2]
News	**3%** 1.5	**5%** 1.5	**1%** N/A[3]	**0%** 1.5[3] (-)	**4%** 1.4	**8%** 1.4 (+)	**23%** (+) 2.6 (+)
Podcast	**2%** N/A[2]	**4%** N/A[2]	**2%** (-) N/A[2]	**4%** (-) N/A[2]	**1%** N/A[2]	**1%** N/A[2]	**0%** N/A
Magazine	**2%** 2.2 (+)	**2%** 1.5	**0%** N/A[3]	**1%** 2.0[3] (+)	**2%** 1.8	**4%** 2.4 (+)	***5%** 1.0[3]

(1) Excluding those with no subscription in that category e.g., average number of SVOD subscriptions for a SVOD subscriber; (2) Only one subscription type surveyed for the subscription category therefore average number = 1; (3) Subpopulation size does not meet the threshold for significance e.g., Gen Z news subscriber subpopulation is too low to draw conclusions

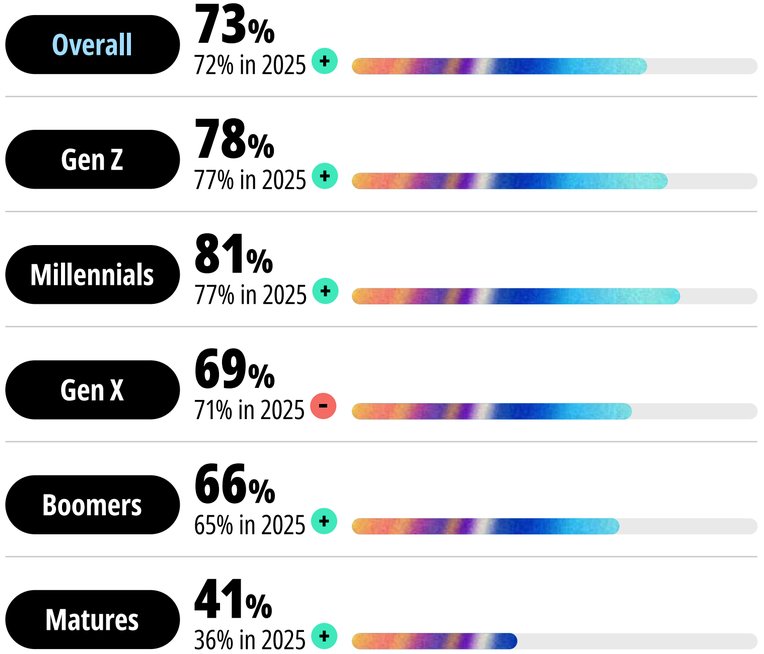
Aggregation Services

The use of aggregation services is steady at 73% and unlikely to grow substantially despite the perceived value of simpler content discovery and subscription management

Three in four Australians currently use an aggregation service

USE OF AGGREGATION SERVICES[1]

(% of respondents)



But among those who don't, there's limited appetite to pay for aggregation despite the perceived value

ATTITUDES OF THOSE WHO DO NOT USE AGGREGATION SERVICES

(% of respondents who do not currently use any aggregation service)

There's broad recognition for the value of aggregation services, especially among Gen Z...

63% overall	I would like to be able to search and discover content across all my TV/movie streaming services in one place	Gen Z	82%
		Boomers	44%
53%	I would like to be able to bundle multiple other subscriptions from the one account or service	Gen Z	81%
		Boomers	32%

...but despite over a third of non-users being interested in a bundling/aggregation service, most do not feel the need to buy one...

37%	I would be interested in a bundling/aggregation service but was not previously aware of such a service	Gen Z	50%
		Boomers	24%
78%	I do not feel a need to purchase a subscription bundling/aggregation solution	Gen Z	64%
		Boomers	81%

...this reluctance is largely driven by perceptions that the services don't offer sufficient value for money or an appealing user interface.

51%	I do not feel aggregation solutions are able to provide my desired content mix for a decent price point	Gen Z	54%
		Boomers	48%
44%	The interface of any bundling/aggregation solution I have considered is not sufficiently appealing to me (i.e. I want a master list, not a list of all the subscriptions)	Gen Z	51%
		Boomers	40%

(1) Aggregation services considers physical devices (e.g., a Smart TV)

Subscription Spend

Household subscription spending has fallen while cost concerns remain high

Households are not constrained by what they think is reasonable to spend. They are actively choosing to spend less.

2026 marks the first year that consumers are spending within their perception of a reasonable budget. Spend on digital entertainment subscriptions has decreased by 6% since 2025, with 75% of people still concerned about the cumulative cost of their subscriptions.

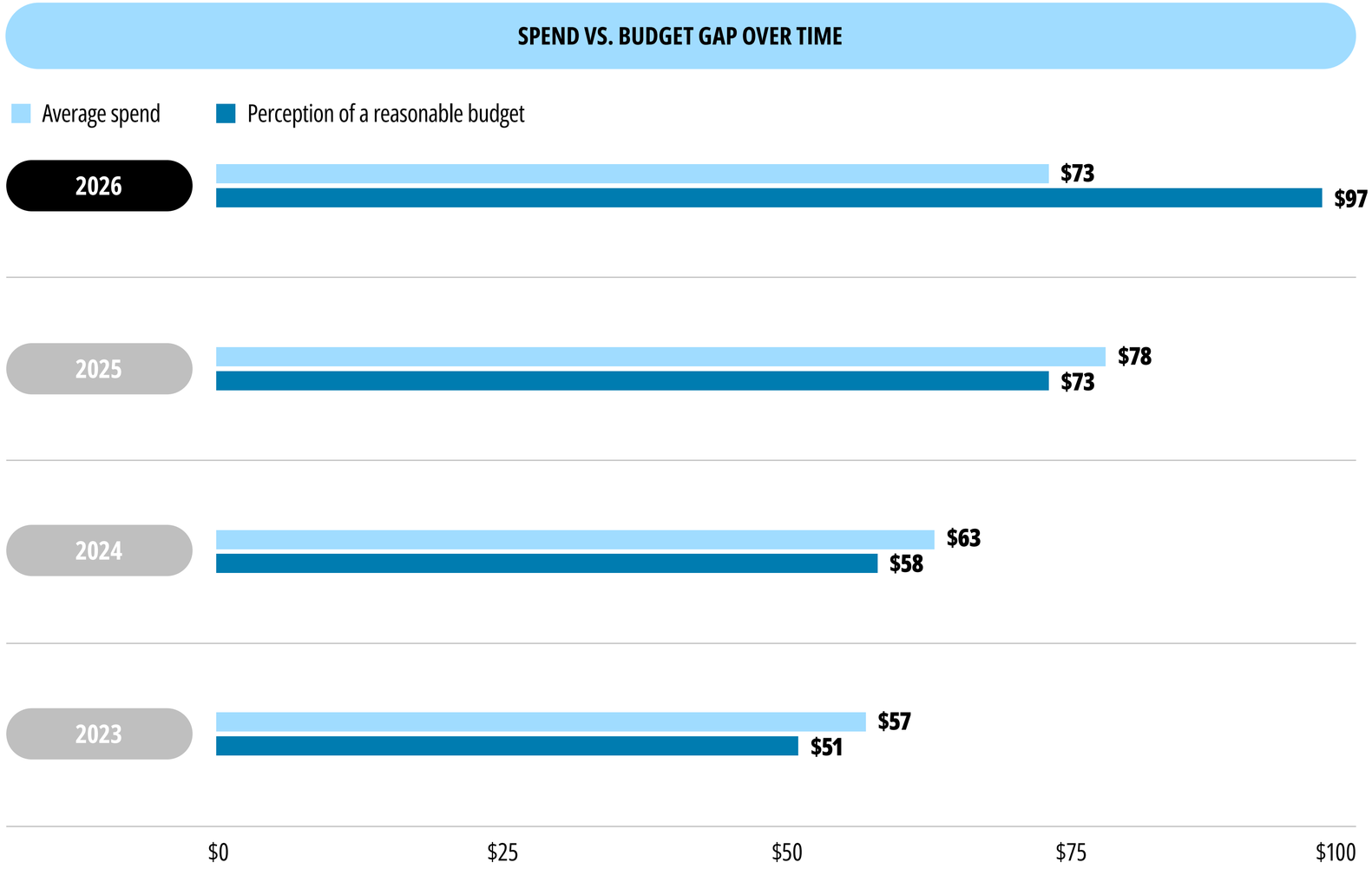
$73

average household media and entertainment subscription spend (per month)

- $78 in 2025
- $63 in 2024
- $57 in 2023
- $62 in 2022
- $55 in 2021

75%

are worried about the cumulative cost of their paid digital entertainment subscriptions



Subscription Spend (Cont.)

The material surplus of budget versus spend indicates that people are either expecting their subscriptions will cost more or that they will require a larger portfolio of subscriptions to meet their needs.

Gen Z recorded the largest decline in average monthly spending among generations, down $11 (11%), alongside lower participation in SVOD and music subscriptions.



MEDIA SPEND, BUDGETING AND CONCERNS BY GENERATION

	Average monthly household media spend	Overspending relative to their budget	Worried about cumulative cost of subscriptions
Overall	$73 $78 in 2025 -	26% 36% in 2025 -	75% 78% in 2025 -
Gen Z	$90 $101 in 2025 -	40% 53% in 2025 -	79% 79% in 2025
Millennials	$93 $97 in 2025 -	29% 44% in 2025 -	82% 82% in 2025
Gen X	$57 $64 in 2025 -	23% 31% in 2025 -	75% 80% in 2025 -
Boomers	$51 $55 in 2025 -	17% 20% in 2025 -	64% 70% in 2025 -
Matures	$70 $35 in 2025 +	23% 18% in 2025 +	68% 50% in 2025 +
Women	$69 $80 in 2025 -	28% 42% in 2025 -	77% 80% in 2025 -
Men	$77 $76 in 2025 +	24% 30% in 2025 -	73% 75% in 2025 -

Subscription Purchasing and Access

Most people still pay for and use their own accounts, with account sharing largely unchanged since 2025

Across subscription types, the majority of consumers use accounts they personally pay for, while relatively few rely exclusively on accounts paid for by friends or family. Piracy and VPN usage have remained consistent across subscription types.

12% of respondents who hold subscriptions say they still use piracy sites

11% of respondents who hold subscriptions use a VPN to access content not available in their region

WHO PAYS FOR ENTERTAINMENT SUBSCRIPTIONS (BY GENERATION)

(+) (-) Increase/decrease between 2025 & 2026 ≥ 5%

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
Pay entirely for own subscription(s)	68% 68% in 2025	44% (-)	71%	72%	73%	77% (+)
Partner pays	10% 11% in 2025 (-)	6%	11%	12%	10%	5% (+)
Family pays (incl. parents, grandparents, children, siblings)	10% 7% in 2025 (+)	29% (+)	6%	5%	6%	18% (+)
Combination of the above[1]	11% 12% in 2025 (-)	20%	10%	10%	8%	0% (-)

USING SELF-PAID ACCOUNTS, OR THOSE PAID FOR BY A FRIEND OR FAMILY MEMBER

	I only use an account I pay for	I only use an account paid for by friends/family	I use both my own paid account and friends/family accounts
SVOD	59% 59% in 2025	8% 7% in 2025 (+)	11% 12% in 2025 (-)
Sports	60% 58% in 2025 (+)	11% 12% in 2025 (-)	3% 2% in 2025 (+)
Music	65% 63% in 2025 (+)	9% 9% in 2025	4% 3% in 2025 (+)
Gaming	56% 62% in 2025 (-)	9% 7% in 2025 (+)	3% 3% in 2025

(1) Also includes subscription paid by an employer; (2) For those with subscriptions in this media category (categories where subpopulation size >70)

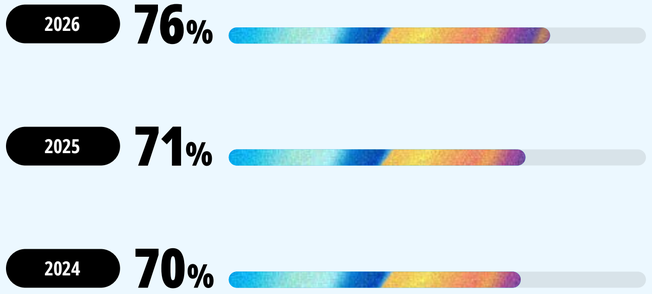
Switching Behaviour

All generations are more actively reviewing their subscription stack with greater openness to cheaper alternatives

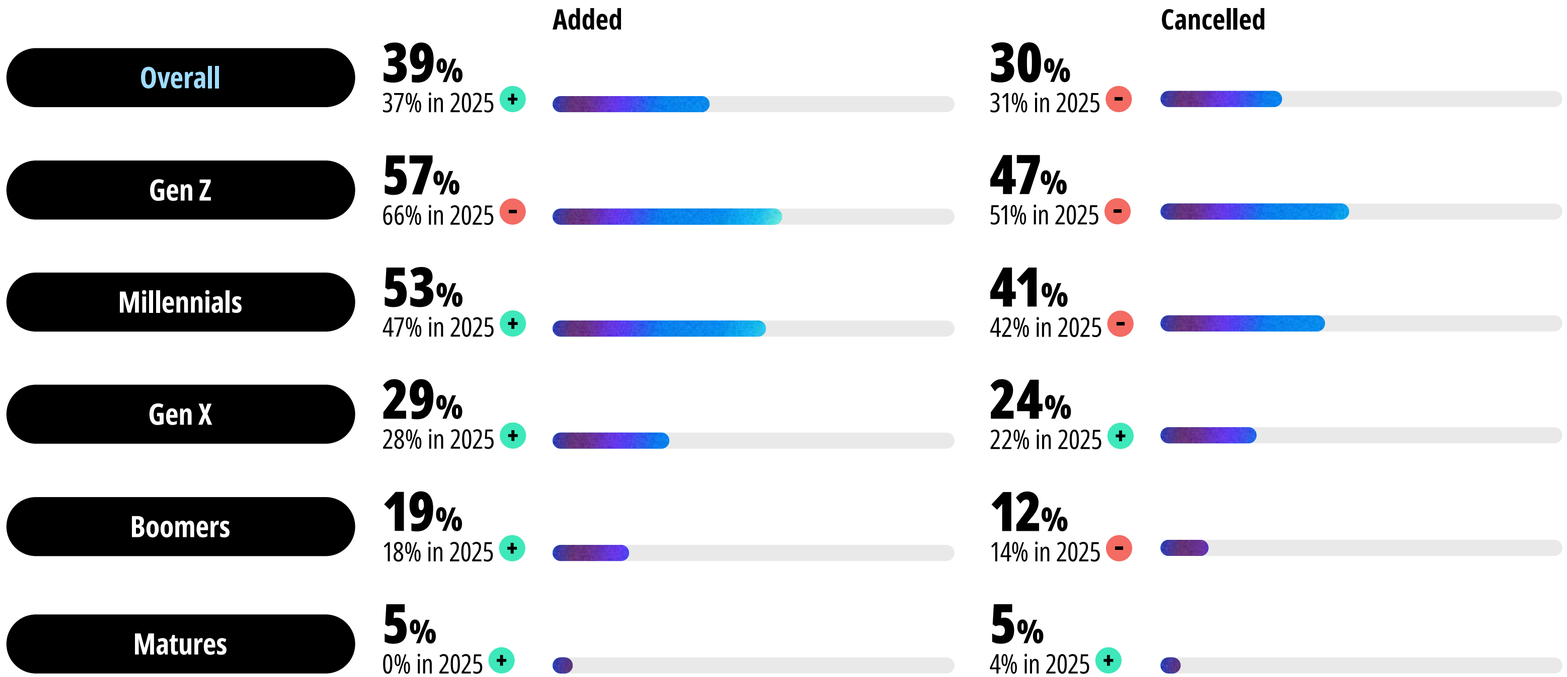
Consumers are reviewing more, exploring alternatives and being more intentional about their subscription choices as cost pressure remains high.

Gen Z is switching the most, but fewer are adding subscriptions than in 2025.

Share of respondents periodically reviewing their subscription stack to determine if they want to make any changes



SHARE OF RESPONDENTS CANCELLING AND/OR ADDING A SUBSCRIPTION IN THE LAST SIX MONTHS



TOP REASONS FOR CANCELLING PAID VIDEO SUBSCRIPTION(S)

(% who ranked reason in top three)

65% To reduce overall spend on video subscriptions

64% in 2025 +

Gen Z **60%** Boomers **64%**

38% The price for the service increased and there were similar, cheaper alternatives

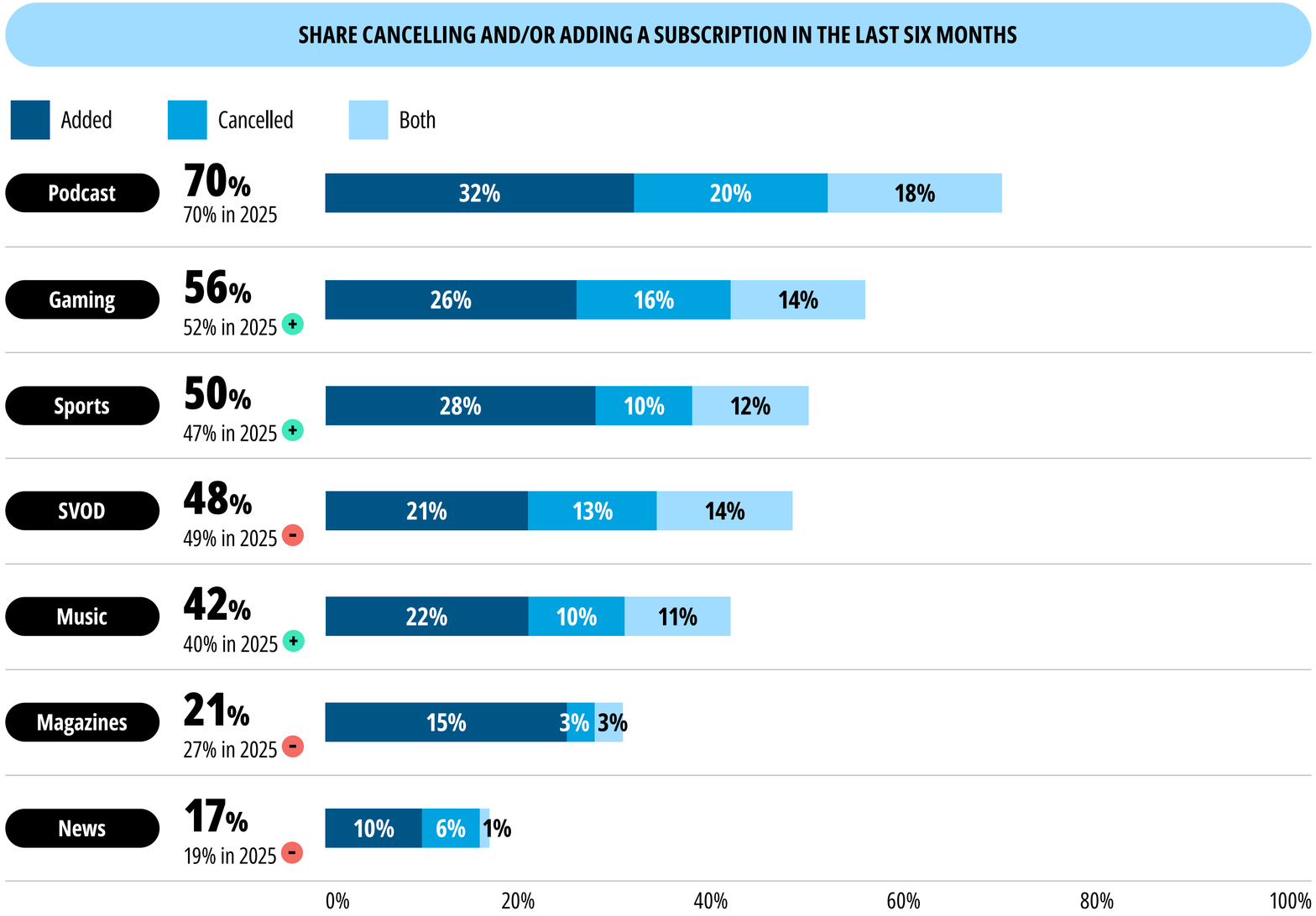
34% in 2025 +

Gen Z **42%** Boomers **24%**

Switching Behaviour (Cont.)

Switching behaviour has marginally increased across music, sports and gaming categories, contrasting with last year's decrease across all three.

Most who cancelled their paid video subscriptions did so to reduce spending, while younger generations are more likely to cancel in favour of similar, cheaper alternatives.



Retention

No ads or restrictions and access to first-run movies are the features most likely to encourage SVOD subscribers to stay

PROPORTION OF SUBSCRIBERS WHO WOULD RECONSIDER CANCELLING IF OFFERED FEATURES THAT ADDED MORE VALUE[1]

Overall	Gen Z	Millennials	Gen X	Boomers	Matures
84%	94%	92%	83%	68%	50%

FEATURES THAT WOULD CONVINCE SVOD SUBSCRIBERS TO KEEP THEIR SUBSCRIPTION

38%	38% in 2025	No ads or restrictions
37%	39% in 2025 -	Access to first-run movies (e.g., recent releases)
30%	29% in 2025 +	Access to loyalty programs with discounts on other offerings
17%	18% in 2025 -	Access to another gaming, music, or video streaming service

No ads or restrictions broken down by generation

Gen Z	49%
Millennials	38%
Gen X	36%
Boomers	32%
Matures	23%

(1) Retention plays include: access to first-run movies; access to another gaming, music or video streaming service; access to a loyalty program that offers discounts on other services and products; greater personalisation; or no ads or restrictions

Retention (Cont.)

77% of respondents describe their broader subscription stack as largely paid. Across all respondents, 36% say they would accept more advertising to offset costs. Conversely, 16% of all respondents say they are willing to pay more to reduce their level of ad-exposure.

EXTENT TO WHICH RESPONDENTS CURRENTLY PAY TO AVOID ADS ACROSS THEIR SVOD SUBSCRIPTIONS[1]

(% of all respondents)

Current model	And...	
53% Pay for ad-free	**32%**	Do not wish to consider any ad-supported models
	21%	Are willing to be exposed to some ads to offset their current cost
24% Pay for ad-supported	**9%**	Are willing to pay more to reduce their current level of ads (but do not want to go completely ad-free)
	15%	Are willing to be exposed to even more ads to offset their current cost
12% Only have free ad-supported	**7%**	Are willing to consider reasonably priced ad-supported models
	6%	Are not interested in paying to access content
11% Other and N/A[2]	**11%**	Other & N/A[2]

(1) Respondents were asked to choose a single statement that best reflects their overall SVOD subscription stack; (2) 'N/A' considers those who largely do not pay for the access they have to their SVOD subscriptions

2 Attention



Consumption Totals | Overview

Australians say they spend over 45 hours a week consuming media and entertainment content

Total[1]

WEEKLY MEDIA AND ENTERTAINMENT CONSUMPTION PER CATEGORY

(+) (-) Increase/decrease by 10 minutes or more

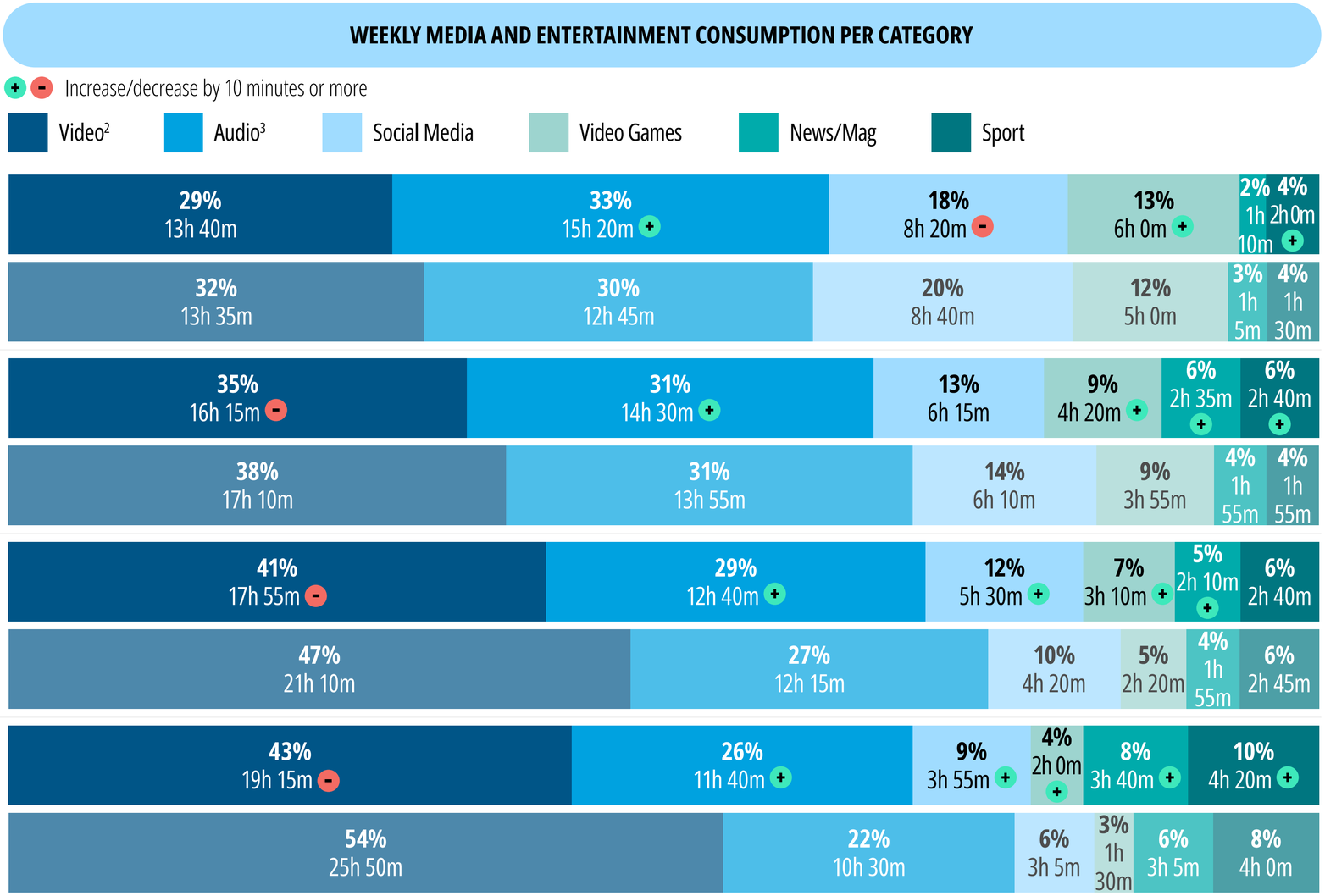
Video[2] | Audio[3] | Social Media | Video Games | News/Mag | Sport

	Total[1]	Video[2]	Audio[3]	Social Media	Video Games	News/Mag	Sport
2026	45h 20m	37% 16h 55m (-)	30% 13h 30m (+)	13% 5h 50m (+)	8% 3h 45m (+)	6% 2h 30m (+)	7% 3h 0m (+)
2025	45h 20m (-)	44% 19h 55m (-)	27% 12h 25m (+)	12% 5h 20m (-)	7% 3h 5m	5% 2h 5m (-)	6% 2h 35m (-)
2024	47h 10m (-)	48% 22h 45m (-)	20% 9h 20m	13% 6h 20m (-)	6% 3h 0m (-)	6% 2h 50m (+)	6% 2h 55m
2023	51h 45m	52% 27h 10m	18% 9h 15m	13% 6h 30m	7% 3h 50m	4% 2h 10m	5% 2h 50m

(1) Totals may not reconcile with the sum of categories as each are rounded to the nearest 5 minute interval; (2) Video considers time spent watching paid video subscription services (e.g., Netflix), free-to-air television, free video platforms (e.g., YouTube) and vodcasts; (3) Audio considers time spent listening to music, radio, audiobooks and podcasts

Consumption Totals | Generational View

All generations say they are shifting their attention away from video



(1) Totals may not reconcile with the sum of categories as each are rounded to the nearest 5 minute interval; (2) Video considers time spent watching paid video subscription services (e.g., Netflix), free-to-air television, free video platforms (e.g., YouTube) and vodcasts; (3) Audio considers time spent listening to music, radio, audiobooks and podcasts

Multitasking

Gen Z and Millennials are the most regular multitaskers in their media and entertainment activities, a learned behaviour for the digitally native generations

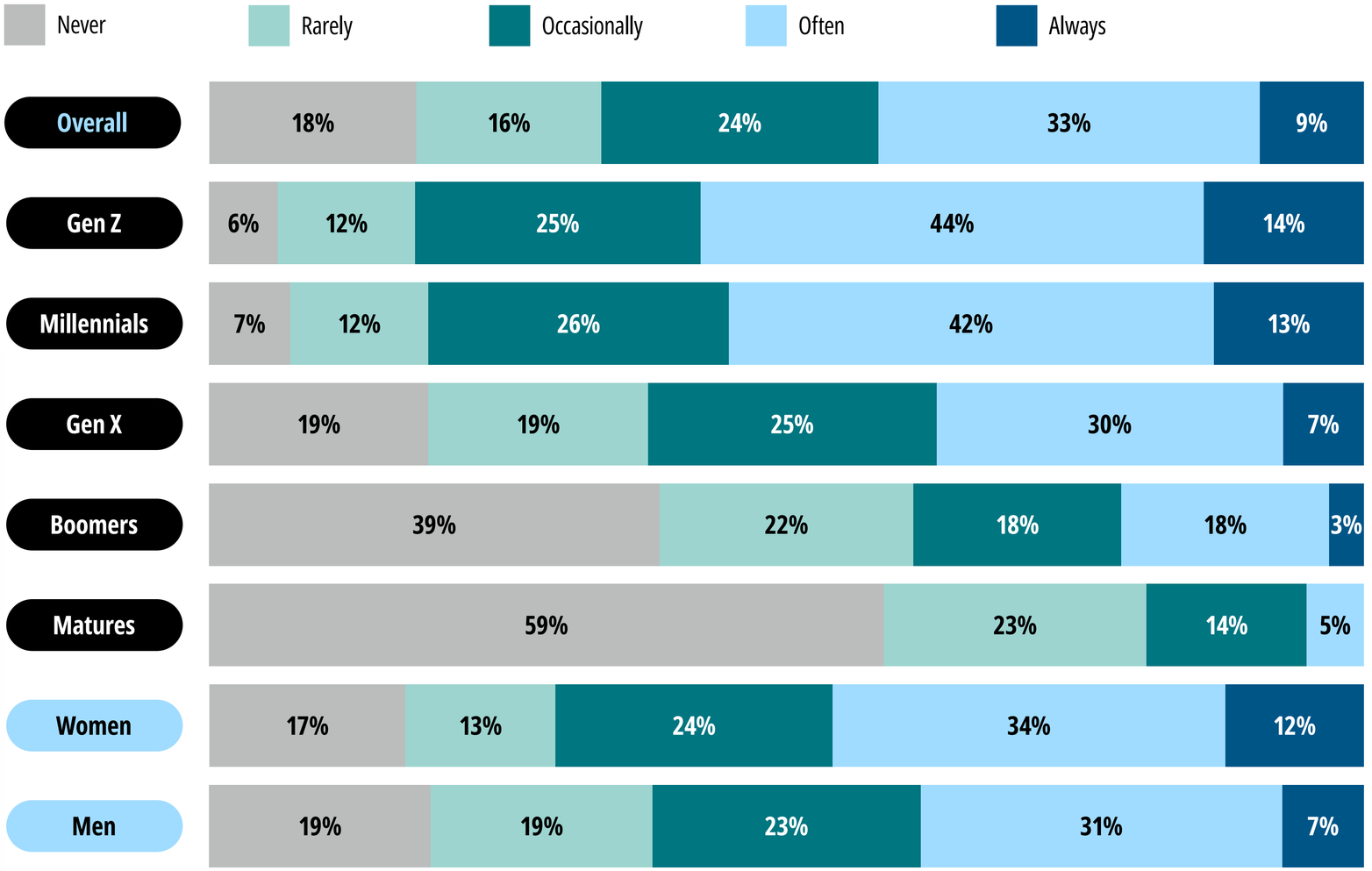
42% **of Australians regularly multitask across at least two different media and/or entertainment activities.**

For example, watching Netflix while using social media apps.



EXTENT RESPONDENTS REGULARLY MULTITASK AT LEAST TWO DIFFERENT MEDIA AND/OR ENTERTAINMENT ACTIVITIES

(Regularly multitask = respondents who chose 'often' or 'always')



Multitasking (Cont.)

Most multitasking activities are on social media

MOST COMMON MEDIA AND ENTERTAINMENT MULTITASKING ACTIVITIES

(% of respondents who indicated the activity in their top three most common)

Overall		Women	Men
41%	Browsing friends' posts on social media	45%	37%
32%	Looking up something related to what you've seen in the primary content (e.g., actor bio)	33%	32%
31%	Use social media or a messaging service to interact with others	34%	27%
29%	Online shopping	36%	23%
29%	Watching online video content (e.g., YouTube)	24%	35%
21%	Watching short-form user-generated content (TikTok, Instagram Reels)	24%	19%
21%	Listening to music	19%	22%
15%	Engaging with news (e.g., reading/watching)	11%	19%
14%	Gaming	13%	15%
8%	Listening to a podcast/vodcast/audiobook	7%	9%

MOST COMMON MULTITASKING ACTIVITIES BY FREQUENCY OF MULTITASKING

Women	#1 (most common)	#2 (next most common)
Always	Browsing friends' posts on social media	Using social media or a messaging service to interact with others
Often	Browsing friends' posts on social media	Online shopping
Occasionally	Browsing friends' posts on social media	Online shopping
Rarely	Browsing friends' posts on social media	Using social media or a messaging service to interact with others

Men	#1 (most common)	#2 (next most common)
Always	Browsing friends' posts on social media	Looking up something related to primary content (e.g., actor bio)
Often	Watching online video content (e.g., YouTube)	Browsing friends' posts on social media
Occasionally	Watching online video content (e.g., YouTube)	Browsing friends' posts on social media
Rarely	Browsing friends' posts on social media	Listening to music

2.1 Video



Video Discovery

How Australians plan to discover content is highly varied with older generations favouring traditional forms of self-discovery over algorithms



AUSTRALIANS' PREFERRED METHODS FOR HOW THEY CHOOSE TO DISCOVER CONTENT

(% of respondents who ranked the method as #1)

Overall		Gen Z	Boomers
19%	Scrolling/browsing through titles on the service or platform	15%	29%
15%	List of new releases or newly added content on the service or platform	12%	18%
14%	Suggestions and recommendations from friends and family	13%	18%
13%	Google searching myself	11%	8%
12%	The personalised recommendations the service or platform gives me	14%	8%
7%	Coverage of TV/Movies in the news	6%	9%
7%	Coverage of TV/Movies on social media	13%	4%
7%	Coverage of TV/Movies by a content creator you follow	10%	3%
6%	Advertisements and/or marketing	6%	4%

Video Discovery (Cont.)

When reflecting on which discovery method most often influenced what video content each generation ended up watching, younger generations said they were most influenced by social media, with growing use of GenAI

MOST INFLUENTIAL METHOD OF CONTENT DISCOVERY BY GENERATION

(% of respondents who ranked the method as #1)

Overall	Service provider recommendations	27%
Gen Z	Social media	35%
Millennials	Self discovery through search (e.g., Google)	26%
Gen X	Service provider recommendations	34%
Boomers	Word of mouth	34%
Matures	Self discovery through search (e.g., Google)	32%

KEY CHANGES TO HOW GEN Z DECIDES WHAT NEW CONTENT TO WATCH/LISTEN TO

(% of Gen Z respondents that ranked the discovery method as #1)

15% Self-discovery through GenAI tools (e.g., ChatGPT)
8% in 2025 +

35% Content found across social media (e.g., TikTok)
42% in 2025 -

Movie and TV Show Preferences

TV shows/series garner around double the attention of movies



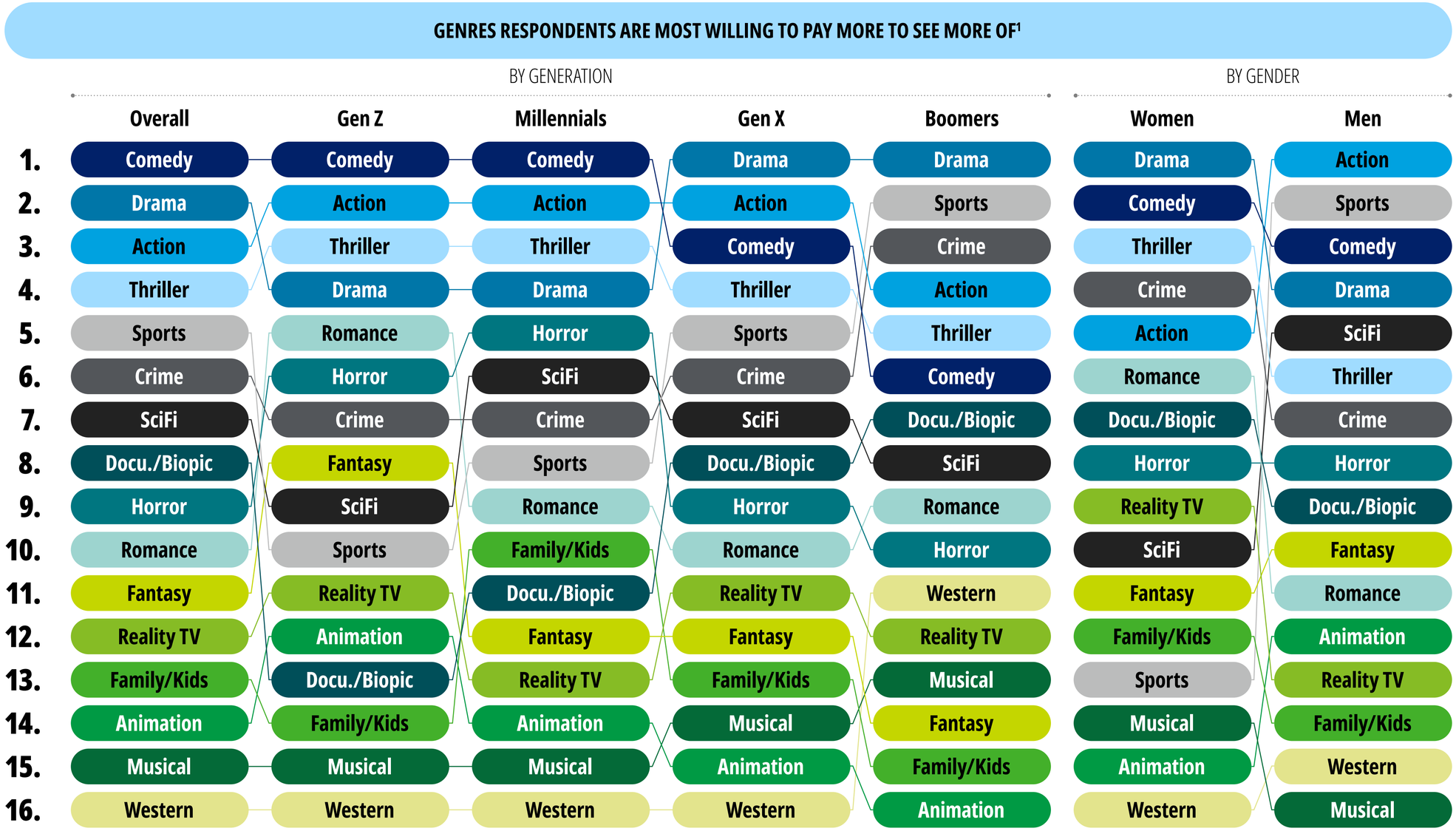
SHARE OF ATTENTION BETWEEN MOVIES AND TV SHOWS/SERIES

Movies | TV shows/series

	Movies	TV shows/series
Overall	39% 3h 10m	61% 4h 55m
Gen Z	41% 2h 25m	59% 3h 30m
Millennials	40% 3h 5m	60% 4h 35m
Gen X	39% 3h 25m	61% 5h 25m
Boomers	37% 3h 30m	63% 6h 0m
Matures	37% 2h 5m	63% 3h 35m
Women	36% 3h 0m	64% 5h 15m
Men	42% 3h 20m	58% 4h 40m

Movie and TV Show Preferences (Cont.)

Comedy, drama and action are the top three most in-demand genres



(1) Rankings for genres reflect a weighted average of all votes given to the genre category across all respondents surveyed, where respondents were allowed to vote for up to 5 of the 16 genres listed

Loyalty

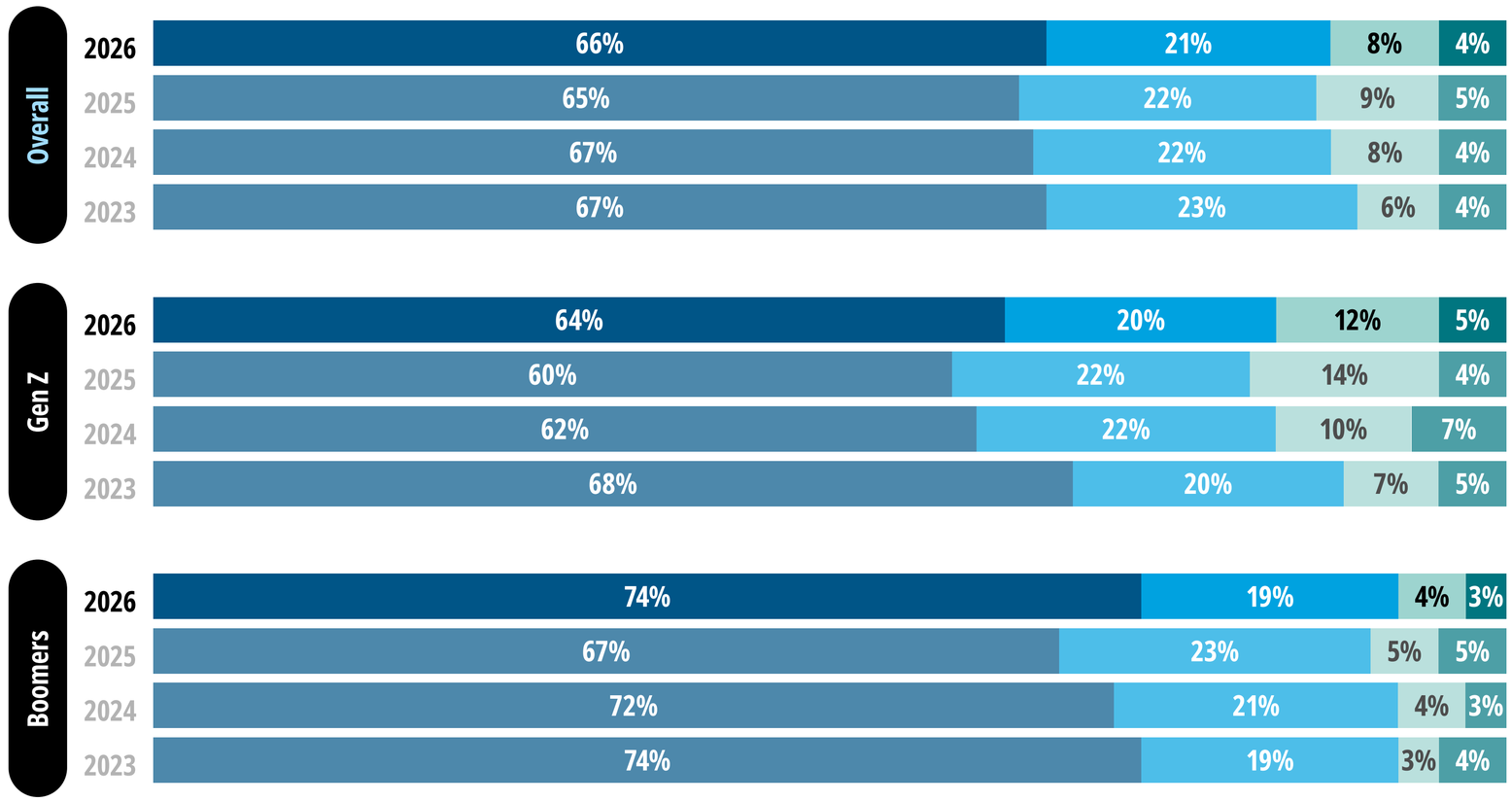
Two out of three Australians say they have the strongest brand relationship with the individual TV shows they watch

Consumers are loyal to things they have paid for, ascribing a certain value to that service or platform. Typically, they relate more strongly to the show itself than the broadcaster, streaming platform, studio or aggregation service.

To this end, if their drawcard title leaves, or they finish watching it, what will keep consumers around? An improved ability to discover new or related content? A cheaper plan? Or bundling with other products, services or experiences to increase the friction of switching?

CONSUMERS' STRONGEST RELATIONSHIPS WITH CONTENT BRANDS

(% of respondents)



YouTube Spotlight

The enduring appeal of the red play button

Engagement with YouTube is almost ubiquitous

89% of respondents watch YouTube, compared to 81% that have access to at least one paid video entertainment subscription service.

POPULARITY OF YOUTUBE

(% of respondents who watch YouTube)

Overall	Gen Z	Boomers
89%	97%	75%

PREFERRED YOUTUBE GENRES

(% of respondents consuming different content genres on YouTube more than once a week)

- **28%** Non-fiction stories
- **26%** Fiction stories
- **25%** News/politics content
- **19%** Sports content
- **14%** Reality/game shows
- **31%** Other content (e.g., react channels, day-in-the-life)

For younger age groups, it's increasingly a substitute for paid SVOD services

As more respondents turn to YouTube for content and spend more time watching it, they feel less need to pay for additional video subscription services.

66% (63% in 2025 +)
Actively go to YouTube to find specific content they're interested in
Gen Z **77%** Boomers **48%**

46% (40% in 2025 +)
Watch as much or more YouTube content as they do paid video services, yet still keep their paid subscriptions
Gen Z **60%** Boomers **22%**

45% (38% in 2025 +)
Feel no need to get a paid video subscription as YouTube satisfies their needs
Gen Z **54%** Boomers **37%**

40% (36% in 2025 +)
Feel watching YouTube has shifted their preference to watch content on their laptop or phone
Gen Z **65%** Boomers **17%**

The extent of the free content on offer is the top reason for using the platform

Gen Z finds the breadth and depth of free content as most appealing (39%), while Boomers most value the fact that it's free (29%).

TOP FIVE REASONS WHY YOUTUBE IS APPEALING

(% of respondents who ranked the element as #1)

Element	Overall	Gen Z	Boomers
The depth and breadth of all free content available	30%	39%	19%
The fact that it is free	25%	22%	29%
The flexibility to find a video relating to the topic area I want to engage with that fits any period of time I want to engage with it for	18%	17%	13%
The depth and breadth of content within any specific topic area	14%	14%	11%
Its recommendations help me discover interesting new content	3%	4%	2%

2.2 Audio



Audio Overview

Consumers are putting the earphones in, and none more than Gen Z

All generations are listening to more audio content, with Gen Z leading the way. This year, they're carving out an additional two and a half hours for listening every week.

Most of the additional time for Gen Z was spent listening to music (+1h 50m), but they're also listening to more podcasts (+35m) and radio (+20m).

Millennials are listening to more podcast content (+25m) and audiobook content (+25m) than in 2025. Most of the added listening time for Boomers is dedicated to radio (+45m).

Weekly media and entertainment consumption:

13h 30m in 2026 +
12h 25m in 2025 -
9h 20m in 2024 -
9h 15m in 2023

	Total audio	MUSIC (e.g., Spotify, Apple Music)	RADIO	PODCASTS	AUDIOBOOKS
Overall	**13h 30m** 12h 25m in 2025 +	**5h 40m** 5h 10m in 2025 +	**4h 30m** 4h 40m in 2025 -	**2h 10m** 1h 45m in 2025 +	**1h 5m** 0h 55m in 2025 +
Gen Z	**15h 20m** 12h 45m in 2025 +	**9h 40m** 7h 50m in 2025 +	**2h 5m** 1h 45m in 2025 +	**2h 30m** 1h 55m in 2025 +	**1h 05m** 1h 10m in 2025 -
Millennials	**14h 30m** 13h 55m in 2025 +	**6h 35m** 6h 30m in 2025 +	**3h 5m** 3h 25m in 2025 -	**3h 0m** 2h 35m in 2025 +	**1h 50m** 1h 25m in 2025 +
Gen X	**12h 40m** 12h 15m in 2025 +	**5h 10m** 4h 35m in 2025 +	**4h 40m** 5h 20m in 2025 -	**2h 5m** 1h 35m in 2025 +	**0h 50m** 0h 40m in 2025 +
Boomers	**11h 40m** 10h 30m in 2025 +	**2h 20m** 2h 20m in 2025	**7h 50m** 7h 5m in 2025 +	**1h 5m** 0h 50m in 2025 +	**0h 25m** 0h 15m in 2025 +
Matures	**11h 55m** 11h 35m in 2025 +	**0h 40m** 1h 0m in 2025 -	**9h 45m** 10h 25m in 2025 -	**0h 50m** 0h 10m in 2025 +	**0h 40m** 0h 0m in 2025 +

AUDIO TOTALS BY GENDER

Women **13h 35m** 12h 35m in 2025 +

Men **13h 15m** 12h 15m in 2025 +

Music vs. Podcast Audiences

Music and podcasts: complements, not substitutes

Nearly twice as many Australians regularly listen to music (70%) as they do podcasts (42%). And of the 40% of respondents who listen to five or more hours of music each week, 30% also listen to five or more hours of podcasts.

91% of respondents listen to at least 1 hour of audio content[1] each week
Gen Z 96% Boomers 88%

36% of respondents listen to more audio content[1] than they watch of video[2]
Gen Z 46% Boomers 31%

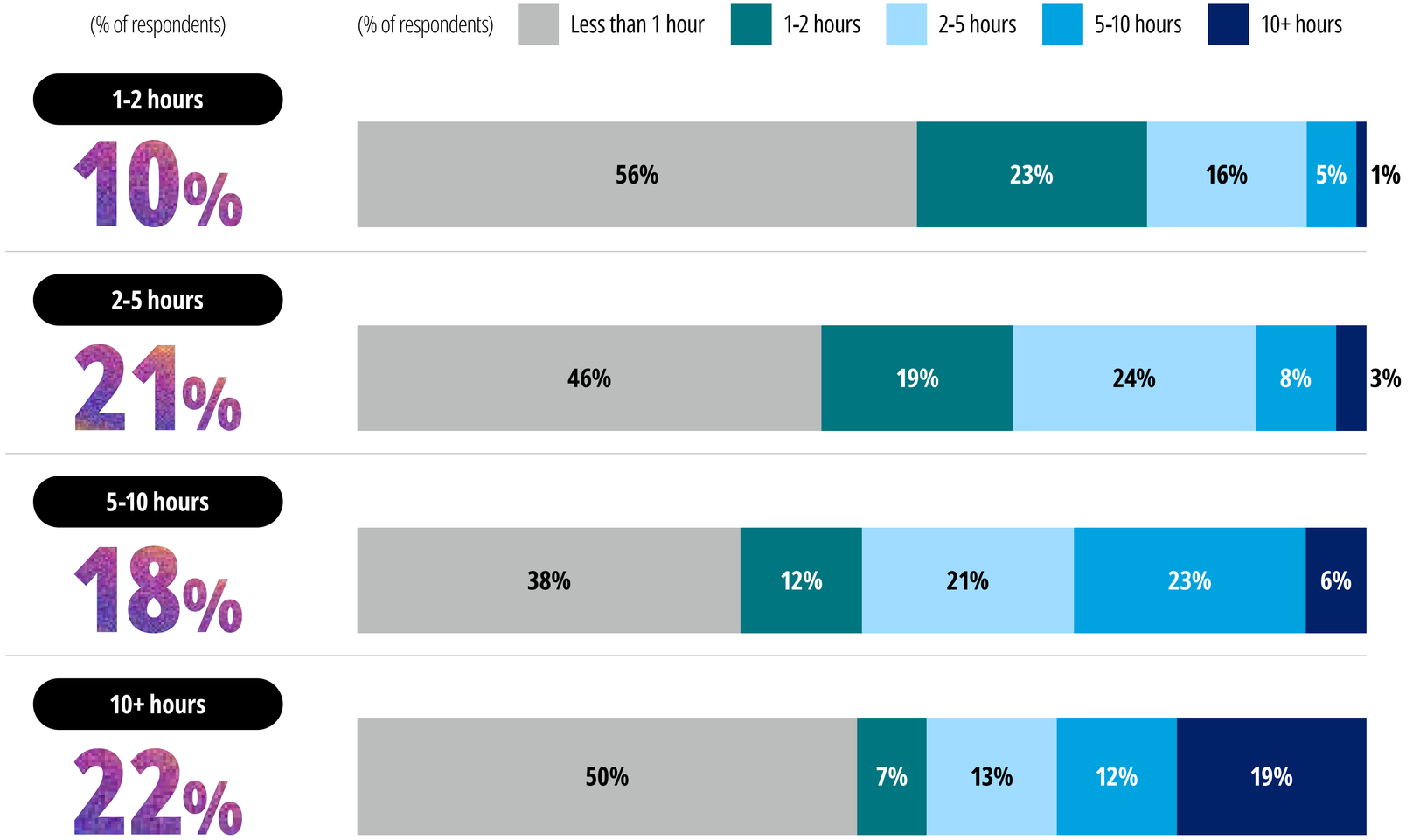
70% of respondents listen to at least 1 hour of music each week
Gen Z 94% Boomers 38%

42% of respondents listen to at least 1 hour of podcasts each week
Gen Z 50% Boomers 21%

TIME SPENT LISTENING TO MUSIC EACH WEEK

(% of respondents)

TIME SPENT LISTENING TO PODCASTS EACH WEEK



(1) Audio content considers time spent listening to music (e.g., Spotify, Apple Music, etc.), radio, podcasts, or audiobooks; (2) Video content considers time spent watching paid subscription video on demand services, free-to-air television either live or via BVOD, free video platforms (e.g., YouTube), or Vodcasts

Audiobooks Spotlight

Nearly 1 in 4 Australians say they listen to an hour or more of audiobooks each week

% OF RESPONDENTS LISTENING TO AN HOUR OR MORE OF AUDIOBOOKS EACH WEEK

23%

20% in 2025 +

of respondents say they listen to an hour or more of audiobooks per week

Gen Z	29%
Millennials	37%
Gen X	18%
Boomers	7%
Matures	9%
Women	26%
Men	20%

2.3 Social



Social Media Overview

Average weekly social media consumption increased, particularly among Gen X and Boomers

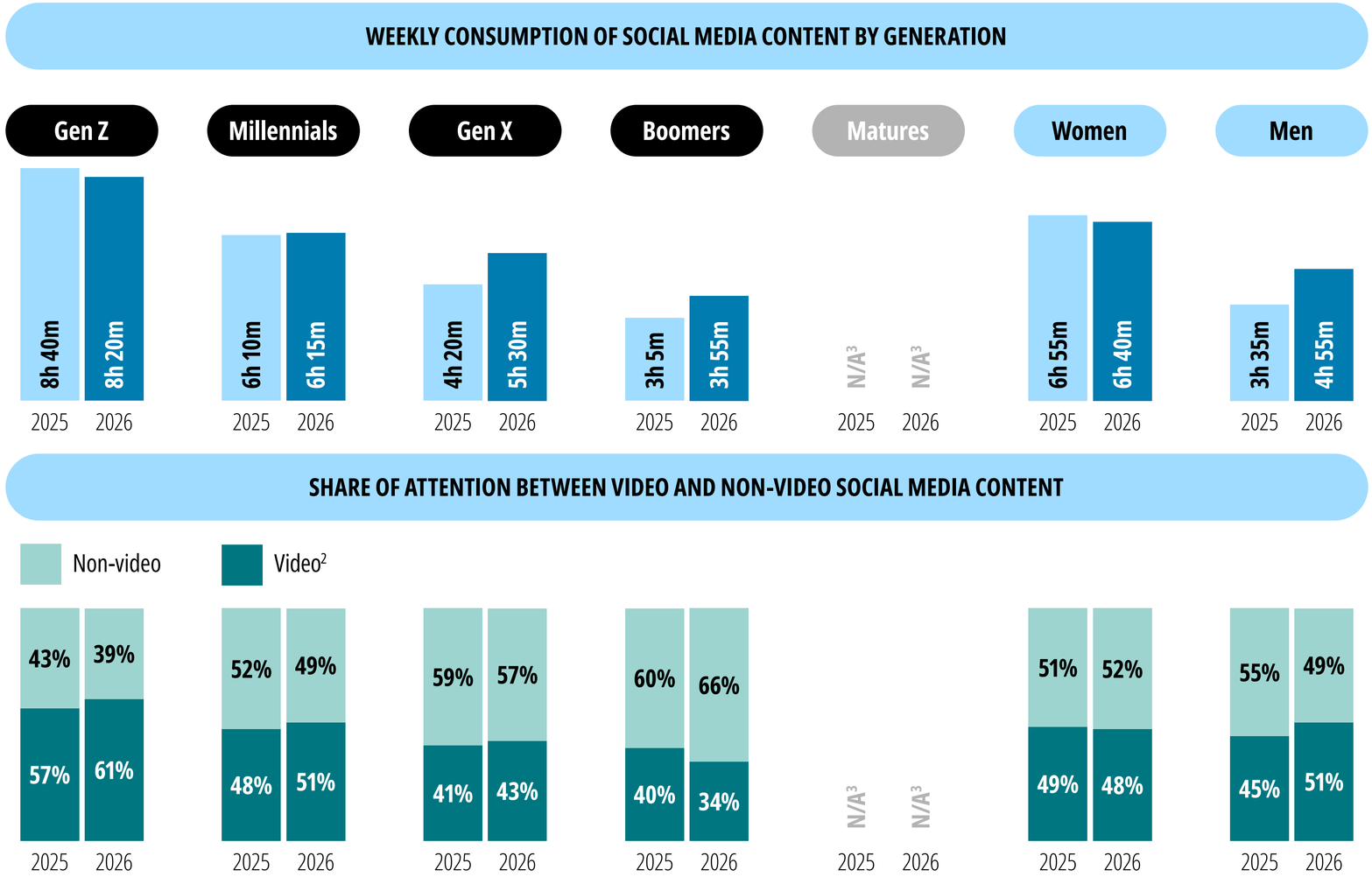
Overall use of social media is up on last year, led by Gen X (+26%) and Boomers (+28%). These generations prefer consuming non-video content (e.g., image and/or text-based) over video (e.g., Reels/Shorts).

Gen Z average weekly social media consumption declined by around 20 minutes. This could be due to the social media ban coming into effect.

Women spend more time using social media than men, despite men increasing the time they spend on social media by 38% this year. Most of this increase is attributable to greater consumption of video-based content (+1h vs. +20m for non-video).

Average weekly time spent consuming social media content[1]:

- **5h 50m in 2026** +
- 5h 20m in 2025 -
- 6h 20m in 2024 -
- 6h 30m in 2023



(1) Time spent consuming social media content does not consider the entirety of YouTube, only the portion of time spent on YouTube Shorts; (2) Video social media content includes content on TikTok, YouTube Shorts, Instagram Reels and other platforms;
(3) Omitted as sample size for Matures indicating they use social media does not meet the threshold for significance

Preferred Social Media Platforms

Facebook, YouTube, Instagram and TikTok dominate attention; but unlike all other generations, Gen Z prefer TikTok overall

In 2026, 3 in 4 Australians said one of Facebook, YouTube, Instagram, or TikTok was the social media platform they spent the most time on each week. The popularity of Facebook continues to decline, unlike YouTube, Instagram and TikTok which remain stable.

WhatsApp's addition to this year's survey demonstrates the utility of messaging as a feature of social media, entering the ranking ahead of X (Twitter), taking fifth place overall.

TOP 10 PREFERRED SOCIAL MEDIA PLATFORMS

(% of respondents that indicated the platform as their most used)

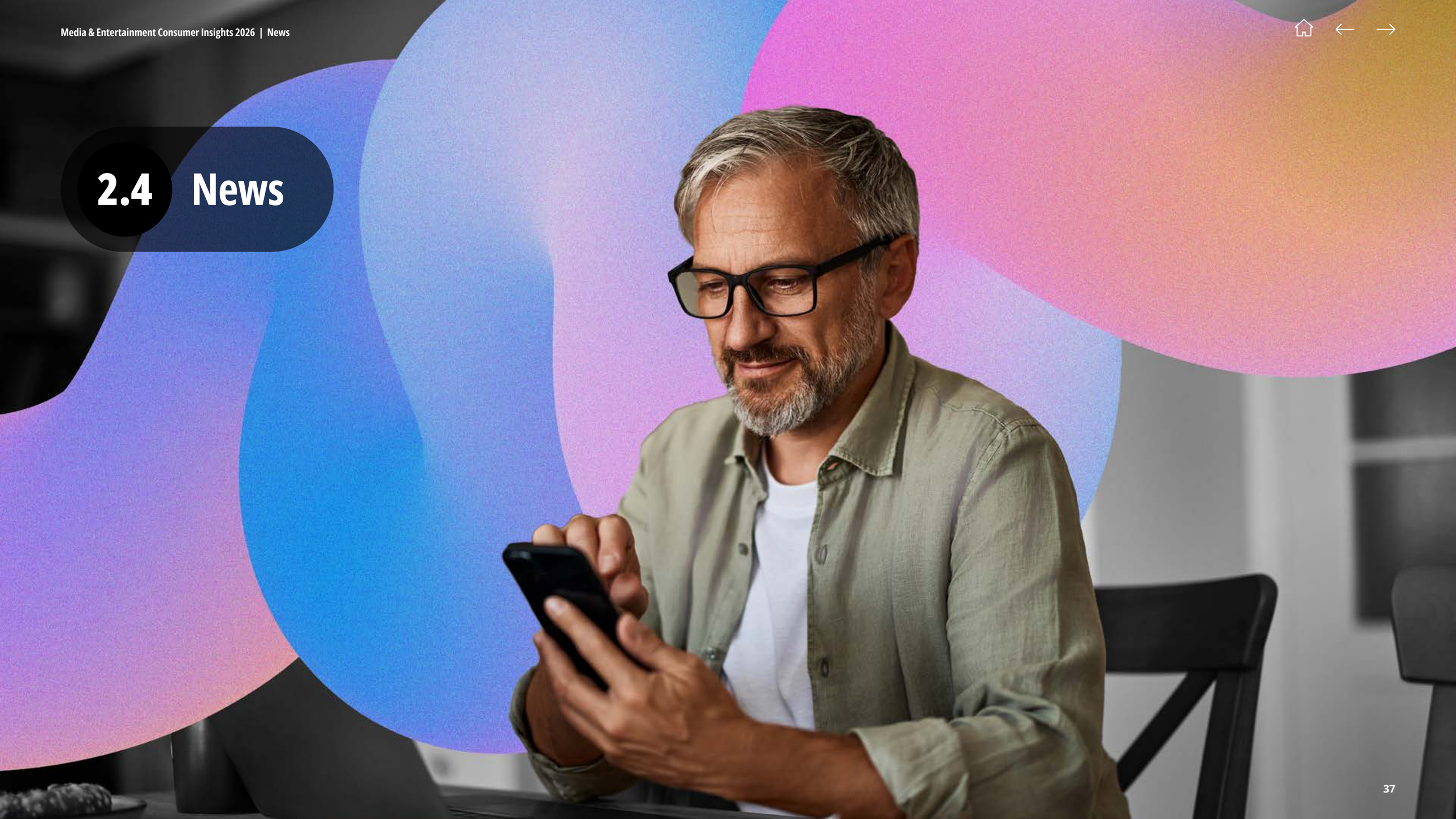
	2023	2024	2025	2026
1.	Meta (Facebook) 42%	Meta (Facebook) 37%	Meta (Facebook) 31%	Meta (Facebook) 29%
2.	YouTube 17%	YouTube 23%	YouTube 24%	YouTube 23%
3.	Instagram 16%	Instagram 16%	Instagram 15%	Instagram 14%
4.	TikTok 11%	TikTok 9%	TikTok 10%	TikTok 9%
5.	X (Twitter) 3%	X (Twitter) 3%	X (Twitter) 3%	WhatsApp 7%
6.	Snapchat	LinkedIn	LinkedIn	X (Twitter)
7.	LinkedIn	Pinterest	Snapchat	LinkedIn
8.	Reddit	Reddit	Reddit	Reddit
9.	Pinterest	Snapchat	Pinterest	Snapchat
10.	Tumblr	Twitch	Twitch	Pinterest

PREFERENCE OF 'BIG FOUR' SOCIAL MEDIA PLATFORMS BY GENERATION

(% of respondents that indicated the platform as their most used)

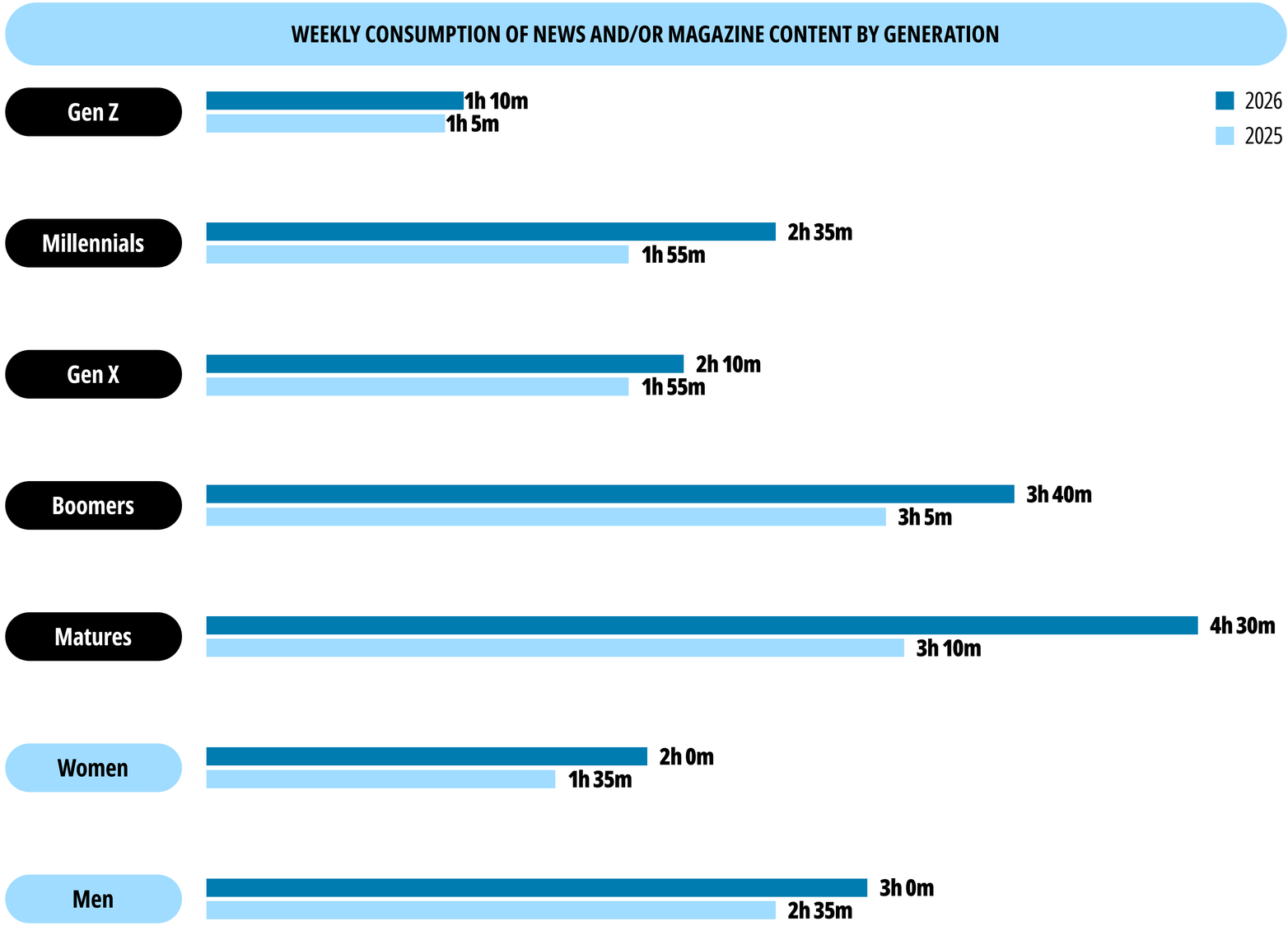
2026	Facebook	YouTube	Instagram	TikTok
Gen Z	7%	20%	21%	26%
Millennials	23%	22%	20%	9%
Gen X	36%	28%	11%	5%
Boomers	46%	21%	6%	1%

2.4 News



News Overview

All generations are consuming more news content with Gen Z consuming the least news overall



Average weekly time spent consuming news/magazine content:

2h 30m in 2026 +
2h 5m in 2025 -
2h 50m in 2024 +
2h 10m in 2023

News Overview (Cont.)

Current affairs, politics, local and international news are the most sought-after types of news content

NEWS GENRES CONSUMERS ACTIVELY LOOK OUT FOR BECAUSE THEY ENJOY CONSUMING IT[1]

(% of respondents)

		Overall	Gen Z	Millennials	Gen X	Boomers	Matures
CORE	National affairs and politics	68%	60%	67%	65%	77%	86%
CORE	Local news	67%	54%	66%	67%	80%	64%
CORE	International affairs and politics (breaking news)	64%	55%	64%	60%	74%	73%
ANCILLARY	Sports	53%	55%	56%	47%	55%	64%
ANCILLARY	Investigative journalism	50%	47%	52%	47%	51%	45%
ANCILLARY	Lifestyle (e.g., health and wellness, food and cooking, travel, home and garden, etc.)	47%	53%	57%	41%	36%	9%
ANCILLARY	Finance, business, and economics	44%	45%	51%	37%	41%	50%
ANCILLARY	Pop culture and entertainment (e.g., celebrities, movie/TV reviews, music, etc.)	40%	57%	55%	34%	15%	5%
ANCILLARY	Opinion pieces and editorials	38%	43%	44%	31%	34%	55%

(1) Considers respondents who selected either 'I actively look out for this genre and am engaged in the way I consume it as I have an ongoing interest in it' or 'I actively look out for this genre but prefer to skim its contents'

Preferred News Platforms

YouTube and social media rank ahead of TV as the preferred news platforms among Gen Z and Millennials

More than 50% of Boomers still prefer to consume news through traditional TV news programs, with YouTube increasingly popular for news consumption across all younger generations.

TOP FOUR PREFERRED PLATFORMS FOR ENGAGING WITH NEWS CONTENT

(% rankings as #1)

	Overall		Gen Z		Millennials		Gen X		Boomers		Matures	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
#1	32%	27%	38%	34%	22%	23%	41%	26%	55%	53%	71%	59%
#2	17%	19%	14%	26%	20%	22%	13%	19%	14%	13%	21%	14%
#3	14%	18%	9%	11%	19%	15%	11%	14%	12%	11%	4%	N/A
#4	10%	9%	8%	8%	13%	9%	10%	12%	9%	9%	N/A	N/A

Key

- TV news programs
- Social media (excl. YouTube)
- Search engine (incl. AI overviews)
- News aggregation services (e.g., Apple News, Google News)
- YouTube
- Newspapers (incl. digital articles)
- Radio

Preferred News Platforms (Cont.)

Those who avidly engage with breaking news are almost twice as likely to prefer TV news programs.



PREFERRED PLATFORM TO ENGAGE WITH BREAKING NEWS CONTENT BY LEVEL OF INTEREST[1]

(% rankings as #1)

I actively look out for breaking news and have an ongoing interest in it:

36%	TV news programs
16%	YouTube
13%	Social media (excl. YouTube)

I will occasionally engage with breaking news content:

21%	TV news programs
22%	YouTube
23%	Social media (excl. YouTube)

(1) Level of interest in breaking news categories considers if a respondent selected the specified level of interest for both national and international affairs and politics (breaking news)

Barriers to Accessing the News

Paywalls and excessive advertising are the main barriers to accessing desired news content

47%

of respondents identified too many ads (25%) and paywalls (22%) as the main barriers to them accessing the news content they are most interested in.

Among respondents who cited paywalls as the biggest barrier to accessing news...

53%

also ranked having too many ads among their top three concerns.

Lack of clarity about the trustworthiness of news content was the greatest barrier for 18% of all respondents, with Boomers ranking this the highest.

MAIN BARRIERS PREVENTING CONSUMERS FROM ACCESSING THE NEWS CONTENT THEY ARE MOST INTERESTED IN

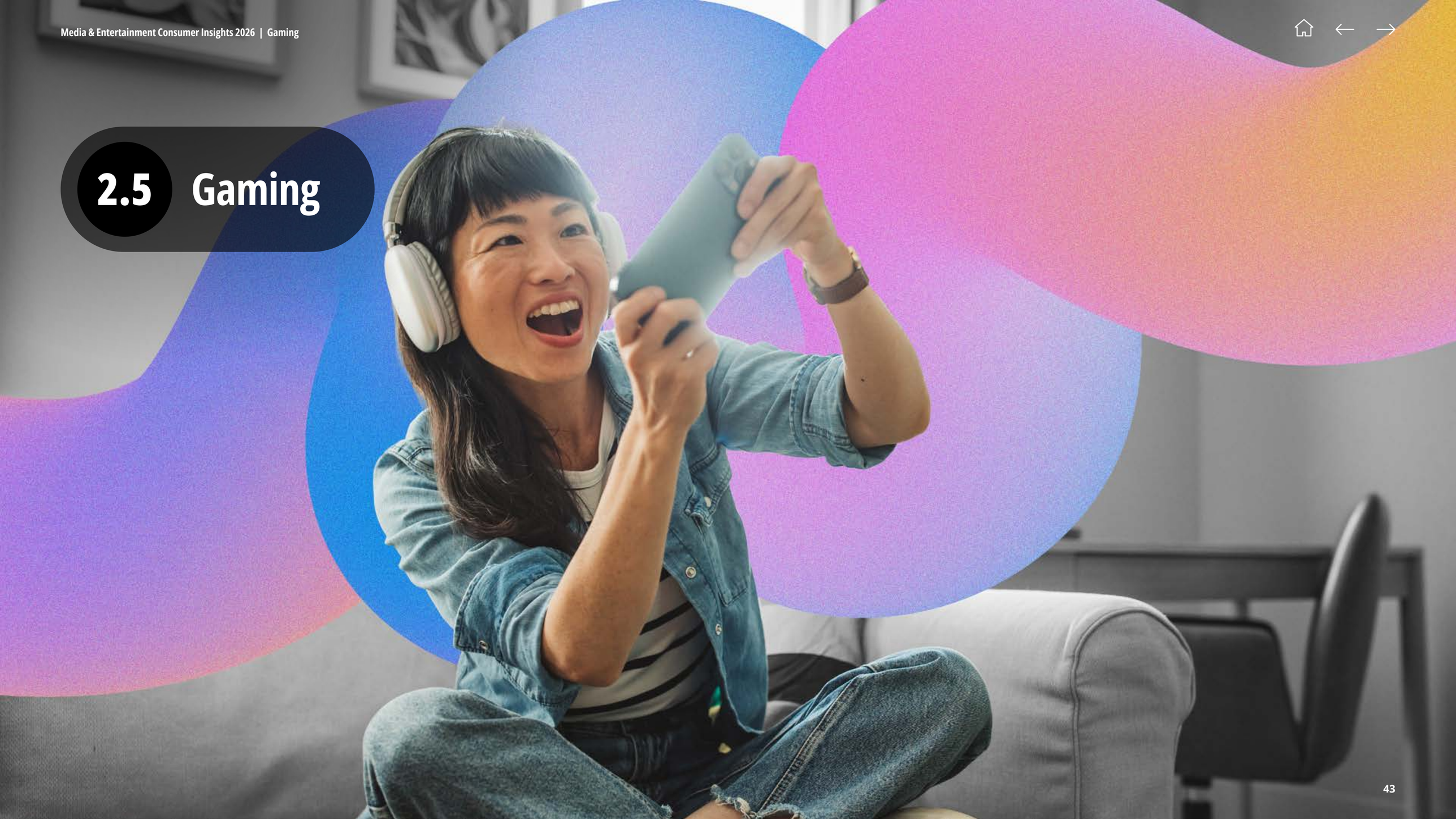
(% ranking as #1 barrier)

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
Too many ads	25%	23%	22%	26%	28%	36%
Paywalls	22%	21%	24%	23%	18%	27%
Lack of clarity around trustworthiness	18%	15%	17%	18%	22%	5%
Overload of content	13%	17%	13%	14%	11%	5%
Content does not have my desired format (e.g., audio, video)	8%	7%	10%	5%	7%	5%
Difficulty finding specific topics (i.e. search challenges)	8%	10%	8%	6%	6%	14%
Platform fragmentation	4%	6%	5%	3%	1%	5%

Key

- **Affordability:** Models for how consumers can access desired news content
- **Substance:** Characteristics of news content (i.e., quality of experience)
- **Discovery:** Drivers of whether consumers are aware news content exists and where to find it

2.5 Gaming



Gaming Overview

As cost-of-living pressures persist, time spent gaming has risen

Across all demographics, time spent gaming has increased since 2025. As a low cost-per-session form of entertainment, gaming is an attractive way to spend entertainment time, particularly when cost-of-living pressures persist.

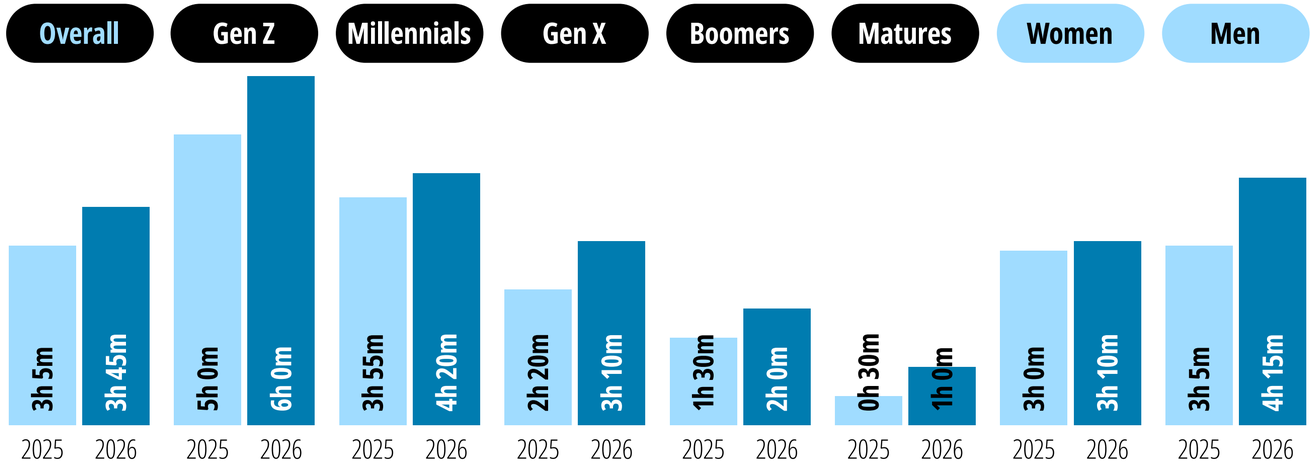
Gaming behaviour is also determined by available time. With typically fewer life responsibilities and more discretionary time, Gen Z have the greatest share of respondents who regularly game, spend the most time gaming, and have increased their time spent gaming the most (+1h).

Women are twice as likely to game regularly on mobile (48%) compared to consoles (25%). For men, the popularity of mobile (38%) and console (34%) is much more comparable.

Average weekly time spent gaming:

3h 45m in 2026 +
3h 5m in 2025 -
3h 0m in 2024 -
3h 50m in 2023

WEEKLY TIME SPENT GAMING BY GENERATION



PROPORTION OF AUSTRALIANS THAT SAY THEY REGULARLY GAME

(share of respondents)

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures	Women	Men
	64%	90%	79%	59%	34%	14%	64%	65%
By platform 1.	Mobile 43%	Mobile 58%	Mobile 52%	Mobile 43%	Mobile 22%	PC 9%	Mobile 48%	Mobile 38%
2.	Console 29%	Console 43%	Console 44%	Console 24%	PC 15%	Mobile 5%	Console 25%	Console 34%
3.	PC 24%	PC 42%	PC 30%	PC 16%	Console 7%	Console 0%	PC 19%	PC 30%
4.	Handhelds 12%	Handhelds 20%	Handhelds 19%	Handhelds 6%	Handhelds 2%	Handhelds 0%	Handhelds 13%	Handhelds 10%

In-Game Spend

Millennials are most likely to spend in-game and spend the most

The only other generation besides Gen Z to have been brought up when in-game spending became mainstream, Millennials are further in their careers and have more disposable income to put towards ancillary content and/or pay-to-win mechanics.



AVERAGE MONTHLY IN-GAME SPEND

SHARE OF RESPONDENTS BY MINIMUM MONTHLY SPEND...	Overall	Gen Z	Millennials	Gen X	Boomers	Women	Men
	$62	$59	$103	$27	$10	$50	$74
$10	63%	69%	77%	53%	31%	63%	64%
$25	39%	40%	55%	27%	8%	36%	42%
$50	28%	28%	42%	17%	6%	26%	30%
$100	16%	17%	24%	8%	3%	13%	19%
$250	6%	7%	11%	2%	0%	5%	8%
$500+	4%	2%	7%	1%	0%	2%	5%

2.6 Sports and Events



Sports Overview

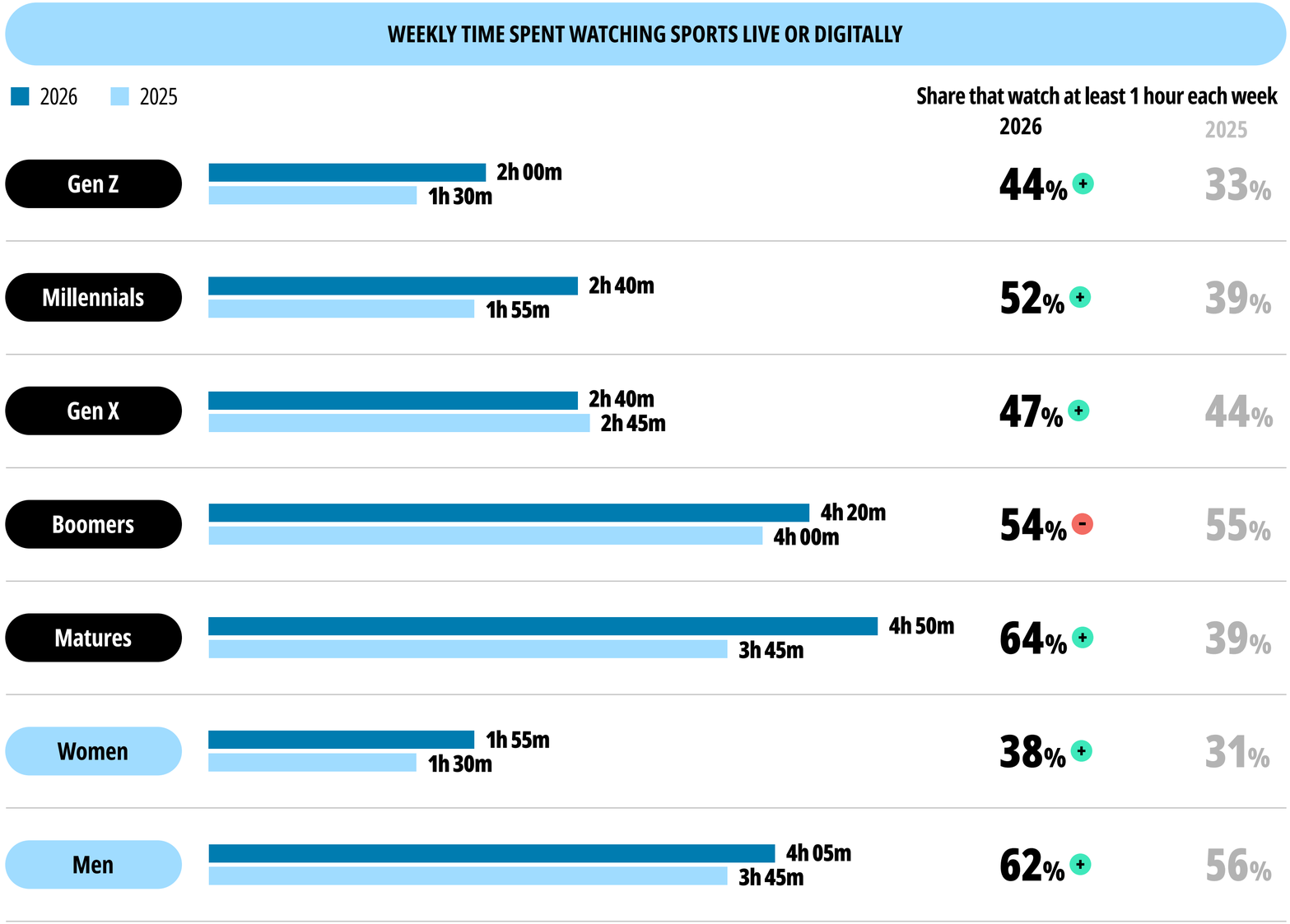
More Australians are tuning into sport in 2026, with weekly viewing time exceeding last year's level

While still consuming around half as much as Boomers, Gen Z (+30m) and Millennials (+45m) have increased their viewing time more than any other generation.

50% 43% in 2025 +
of all respondents
watch at least one hour of sport each week

Average weekly time spent watching sport:

3h 0m in 2026 +
2h 35m in 2025 -
2h 55m in 2024 +
2h 50m in 2023

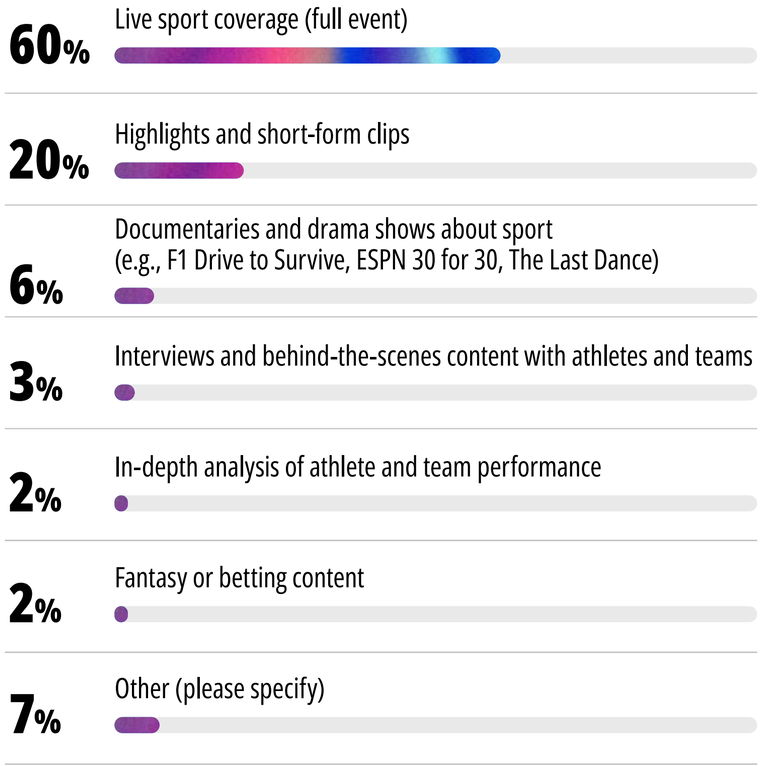


Preferred Sports Content Types

Live sport remains the most desired type of sports content, with Gen Z more willing to engage with non-live sport as well

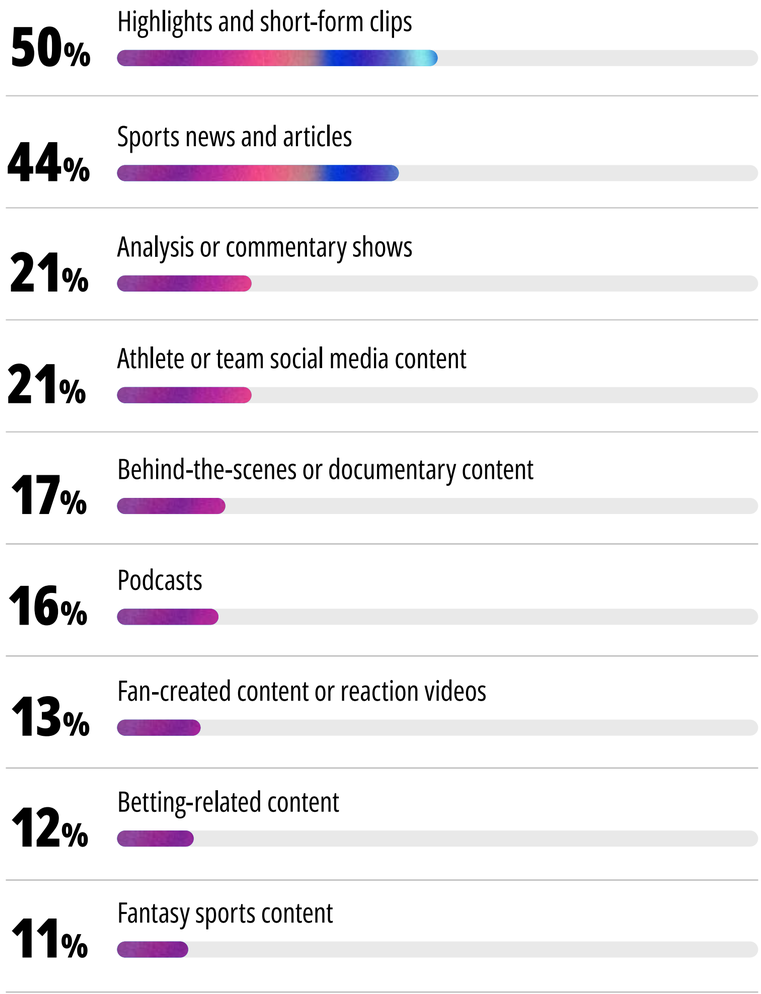
FAVOURITE SPORTS CONTENT TO ENGAGE WITH

(% of respondents)

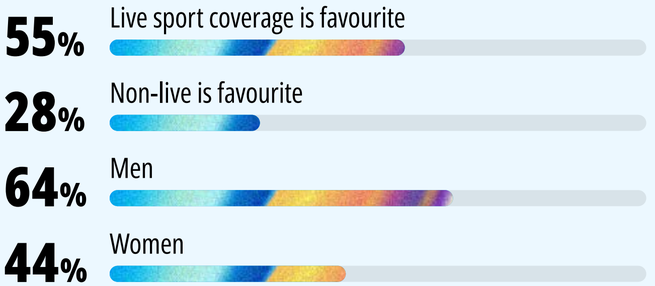


ENGAGEMENT WITH NON-LIVE SPORTS CONTENT

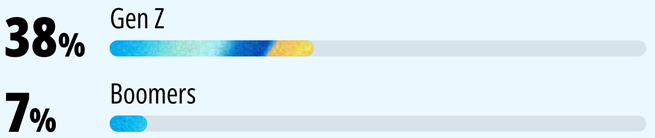
(% of respondents who engage with the content type)



Sports news and articles



Athlete or team social media content



Fan-created content or reaction videos



Preferred Platforms to Watch Sport

Australians still prefer watching sports on large screens, with three in four enjoying sports on television the most

Gen Z is the only generation that most prefers to watch live sport through an app or set-top box, where laptops and smartphones closely contest with free-to-air as the next most preferred platform.



FAVOURITE DEVICE FOR WATCHING SPORT BY GENERATION

(% of respondents that ranked platform as #1 preference)

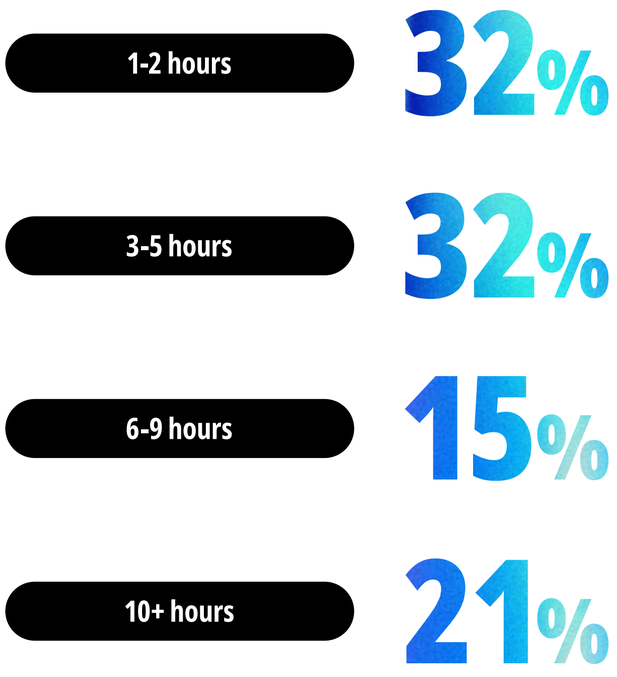
		Overall	Gen Z	Millennials	Gen X	Boomers	Matures
TELEVISION	Television (free-to-air)	38%	17%	26%	46%	59%	64%
TELEVISION	Television through apps or a set-top box (e.g., Kayo or Stan Sport or Optus Sport on Fetch, Apple TV, Telstra TV etc.)	23%	27%	26%	26%	17%	7%
TELEVISION	Television through Foxtel box	14%	9%	11%	14%	20%	21%
DEVICE	Smartphone	10%	15%	17%	6%	2%	7%
DEVICE	Laptop computer	8%	17%	10%	6%	2%	0%
DEVICE	Tablet	4%	7%	6%	3%	2%	0%
DEVICE	Gaming console	3%	7%	5%	0%	0%	0%

Preferred Platforms to Watch Sport (Cont.)

Of those who watch at least one hour of sports content each week, one in three watch six hours or more.

DISTRIBUTION OF SPORTS CONSUMERS BY HOURS WATCHED

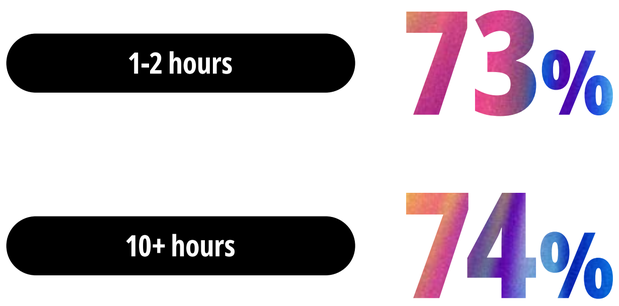
(% of respondents who watch at least one hour of sport content each week)



How much time Australians spend watching sport does not impact the extent to which they engage with a second device.

PREVALENCE OF SPLITTING TIME WATCHING SPORTS ACROSS TWO DEVICES

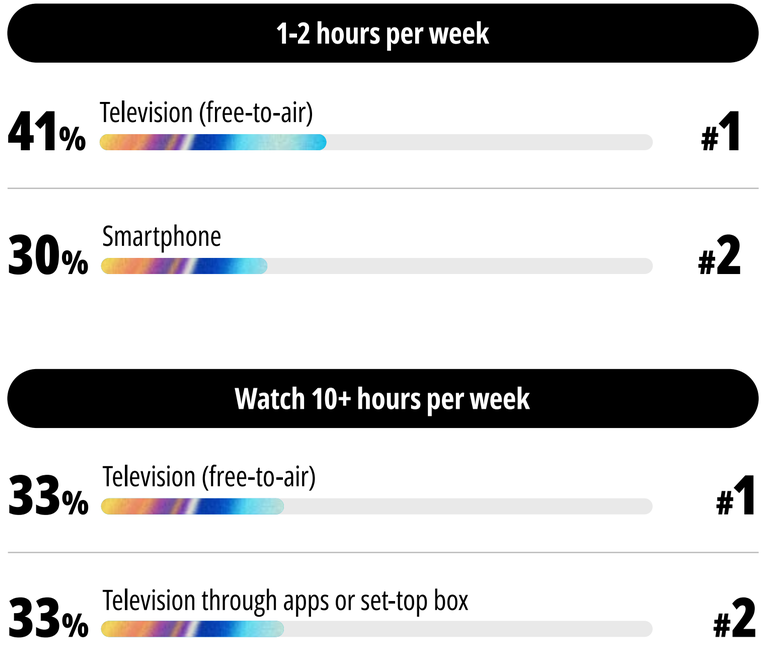
(% of respondents who watch at least one hour of sport content each week)



After free-to-air television, apps or set-top boxes are where most viewers choose to watch sport.

PREFERRED DEVICES BY HOURS WATCHED

(% of respondents that indicated the platform as their rank #1 and rank #2[1] preference)



(1) Percentages for rank 2 preferences consider the share of total second place votes given to each platform category, adjusted to exclude second place votes given to the platform that was determined first place (e.g., television free-to-air)

Spend on Sports Content

The share of respondents willing to pay for sports content has decreased for all generations except Millennials; however, the amount they are willing to spend on subscriptions has increased for the third year in a row

SHARE OF RESPONDENTS WILLING TO PAY FOR SPORTS CONTENT

(% of respondents)

	2026	2025	2024	2023
Overall	56% -	57%	53%	53%
Gen Z	66% -	70%	68%	65%
Millennials	67% +	62%	61%	60%
Gen X	48% -	52%	49%	49%
Boomers	42% -	47%	48%	46%
Matures	27% -	39%	34%	32%
Women	46% -	51%	51%	51%
Men	65% +	63%	56%	56%

HOW MUCH RESPONDENTS ARE WILLING TO SPEND ON SPORT SUBSCRIPTIONS

($ per month)[1]

	2026	2025	2024	2023
Overall	$24 +	$22	$20	$17
Gen Z	$25 +	$22	$20	$17
Millennials	$27 +	$24	$22	$16
Gen X	$22 +	$20	$18	$15
Boomers	$22 +	$20	$17	$15
Matures	$30 +	$24	$14	$17
Women	$23 +	$21	$19	$17
Men	$26 +	$22	$22	$18

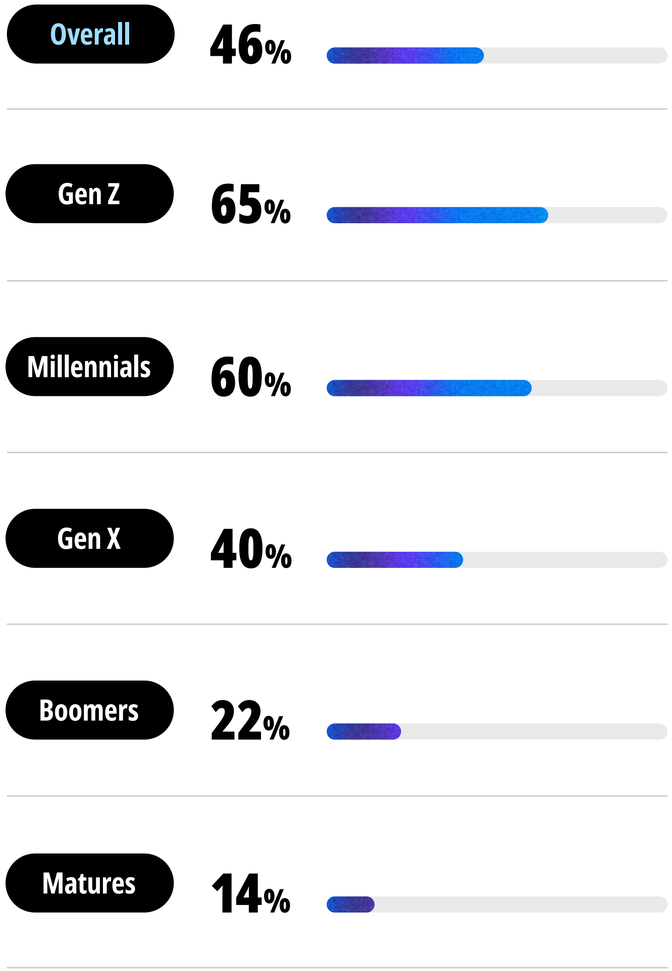
(1) Only considers respondents who indicated that they are willing to pay for sports content (i.e. level of spend excl. those who are not willing to pay)

Pay-Per-View Potential

Younger generations are more likely to purchase pay-per-view sporting events, and of those willing to pay, Gen Z shows broader willingness to pay across event types

PROPORTION OF RESPONDENTS WHO ARE WILLING TO PAY SEPARATELY FOR SPORTING EVENTS

(% of respondents)



SPORTING EVENT PREFERENCES OF THOUSE WHO ARE WILLING TO PAY SEPARATELY

(% of respondents willing to pay separately who indicated the event as a top three preference)

Overall		Gen Z	Boomers
37%	Major finals or championship games	37%	43%
35%	International tournaments	31%	34%
28%	Motorsport events[1]	30%	31%
25%	UFC/MMA events[1]	28%	8%
24%	Concerts or entertainment events linked to sport	26%	16%
22%	Boxing events[1]	24%	16%
16%	Wrestling events[1]	16%	4%
15%	One-off rivalry or showcase matches	17%	10%

(1) Sporting event that historically has offered pay-per-view formats

Pay-Per-View Potential (Cont.)

Younger generations are motivated most to purchase a pay-per-view sporting event when it's highly anticipated and they plan to watch with friends or family



BIGGEST MOTIVATOR FOR PAY-PER-VIEW SPORTING EVENTS[1]

(% of respondents willing to pay separately who ranked motivator within top three)

Overall	41%	Watching with friends or family
Gen Z	45%	Watching with friends or family
Millennials	46%	Watching with friends or family
Gen X	35%	The significance of the event or match-up
Boomers	37%	The significance of the event or match-up
Matures	N/A	

Key generational differences in motivation[1]

Gen Z is twice as likely as Boomers to purchase a pay-per-view sporting event due to fears of missing out, while the reverse is true when it comes to being offered a better deal.

Fear of missing out on a major moment

Gen Z 28% Boomers 11%

Promotional pricing or bundled offers

Gen Z 11% Boomers 23%

(1) Other survey response options for what motivations respondents could choose from included exclusive access to an event; access to star athletes or teams; higher quality production or viewing experience; convenience of one-off access; additional behind-the-scenes or exclusive content; or other (free text response option)

3 Creators and Commerce



UGC Consumption

UGC is central to how younger consumers spend their time, connect with others and express themselves online

For younger audiences, UGC is an increasingly prominent part of their everyday media habits. It's shaping how they spend time online, communicate with others and engage in digital communities, creating deeper and more sustained relationships with creator-led platforms and content.

However, the growth of UGC is not just a Gen Z story. While Gen Z and Millennials are preferencing creator content over traditional entertainment, Gen X and Boomers are driving some of the largest increases in UGC engagement (more time than planned) and content sharing behaviours.

(% of respondents)

52%
48% in 2025 +
Spend more time watching UGC online than planned
Gen Z 73% Millennials 65%

46%
42% in 2025 +
Spend more time viewing UGC online than they did six months ago
Gen Z 65% Millennials 60%

43%
39% in 2025 +
Share UGC online as a way to communicate with friends and/or family
Gen Z 64% Millennials 58%

42%
38% in 2025 +
Consume most of their UGC content through likes and shares from friends
Gen Z 58% Millennials 56%

42%
37% in 2025 +
Spend more time watching UGC (videos) online than streaming movies and TV shows
Gen Z 65% Millennials 53%

35%
32% in 2025 +
Would, if given the choice, prefer watching UGC online instead of streaming movies and TV shows
Gen Z 55% Millennials 46%

Creator Influence

Gen Z were eight times more likely than Boomers to have made a purchase in the last year because of a creator recommendation

Creator influence is shaping purchasing behaviour, with 18% of consumers considering a product or service and 38% making a purchase based on a creator recommendation. These recommendations are more likely to influence purchases among Gen Z (61%) and Millennials (58%), while older consumers lean more towards research and consideration without a purchase.

Influence is strongest in lifestyle-oriented categories, with food, beauty, fashion, entertainment and health emerging as the most purchased categories. This suggests consumers increasingly turn to creators not just for inspiration, but as trusted curators who help them discover, evaluate and make decisions about products and experiences that are closely linked to their everyday lives.

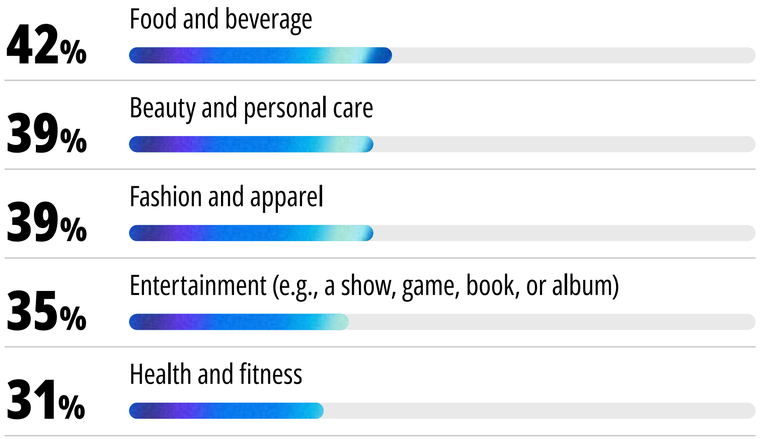
FREQUENCY OF PURCHASES BASED ON CREATOR RECOMMENDATIONS IN THE LAST 12 MONTHS

(% of respondents)

	Overall	Gen Z	Millennials	Gen X	Boomers
Purchased frequently (>5 times)	5%	8%	9%	3%	<1%
Purchased occasionally (2-5 times)	24%	37%	36%	19%	5%
Purchased once	9%	16%	13%	6%	2%
Never purchased, but researched or considered	18%	22%	16%	21%	14%
Never	44%	17%	26%	51%	79%

TOP FIVE PRODUCTS/SERVICES PURCHASED IN THE LAST 12 MONTHS DUE TO CREATOR RECOMMENDATIONS

(% of respondents who've purchased in the last 12 months)



CATEGORIES WHERE CREATOR INFLUENCE ON PURCHASING DECISIONS DIFFERS MOST BETWEEN MEN AND WOMEN

(% of respondents who've purchased in the last 12 months)

Beauty and personal care

Women 52% Men 22%

Consumer electronics and technology

Women 16% Men 35%

Creator Influence (Cont.)

Authenticity and transparency are the primary drivers for sustaining creator influence

As the creator economy grows, creators play an influential role in audiences' purchasing behaviours.

Audiences, particularly Gen Z, are responding to creator partnerships that are transparent and aligned with a creator's personal brand. In contrast, partnerships perceived as overly commercial, forced or insufficiently disclosed are more likely to erode trust, reduce engagement and diminish a creator's influence.

Brands and creators that prioritise authenticity, transparency and genuine product fit are more likely to drive engagement and purchases.

(% of respondents)

58% Find it easy to tell when a creator's content/ recommendation is paid or sponsored versus organic

Gen Z 79% Gen X 51%

44% Stopped following a creator after finding their recommendations inauthentic or overly commercial

Gen Z 63% Gen X 37%

41% Are more likely to act on a recommendation if the creator discloses that they have been paid to promote it

Gen Z 57% Gen X 35%

38% Trust sponsored recommendations from creators they follow more than traditional advertising

Gen Z 64% Gen X 31%

32% Trust sponsored recommendations from creators they follow more than recommendations from friends or family

Gen Z 45% Gen X 26%

4 Advertising



Advertising Influence and Comfort

Comfort and influence of ad mediums are not always aligned – FTA leads overall, while social media leads among Gen Z

Free-to-air (FTA) television and radio rank first and second respectively for advertising comfort, highlighting audiences' receptivity to advertising in these environments. However, declining FTA viewing time presents a challenge for advertisers seeking to capitalise on this strength. Social media also plays an important role for younger audiences, with 65% of Gen Z and 63% of Millennials reporting that it influences their purchases.

DEGREE TO WHICH RESPONDENTS FEEL INFLUENCED BY AND COMFORTABLE WITH DIFFERENT TYPES OF ADVERTISING[1]

Influences buying decisions | Most comfortable[2]

	Ads on free-to-air program/shows		Social media ads		Shopping websites ads		Ads on search engine websites		Ads on streaming video content		Ads on radio	
Overall	46% (50% in 2025 -)	1st	45% (46% in 2025 -)	6th	44% (47% in 2025 -)	3rd	38% (40% in 2025 -)	5th	36% (39% in 2025 -)	9th	34% (36% in 2025 -)	2nd
Gen Z	44%	1st	65%	2nd	56%	3rd	46%	5th	48%	9th	35%	6th
Millennials	52%	1st	63%	4th	57%	5th	52%	6th	51%	9th	42%	2nd
Gen X	47%	1st	38%	7th	41%	3rd	34%	5th	33%	9th	35%	2nd
Boomers	37%	1st	15%	8th	21%	3rd	19%	5th	14%	8th	23%	2nd
Matures	18%	1st	9%	9th	23%	3rd	9%	6th	5%	13th	9%	4th

(1) 14 advertising options were given to respondents, of which six are shown. Those not shown are ads in the following medium, in order of overall advertising influence: 1) OOH media (see report page 61) (38%), 2) YouTube (36%), 3) sports content (33%), 4) mobile apps (e.g., push notifications) (33%), 5) news sites or newspapers (digital or physical) (33%), 6) podcasts (30%), 7) video games (28%), 8) music streaming (27%); (2) 'Most comfortable' advertising mediums considers a weighted average 1-14 rank across all respondents, where 1 is most comfortable. E.g. most comfortable reflects where the sum of all votes given to the advertising medium which was cumulatively the lowest

Advertising Engagement

Younger generations are more willing to engage with ads on their phones, with most consumers being neutral towards personalised advertising

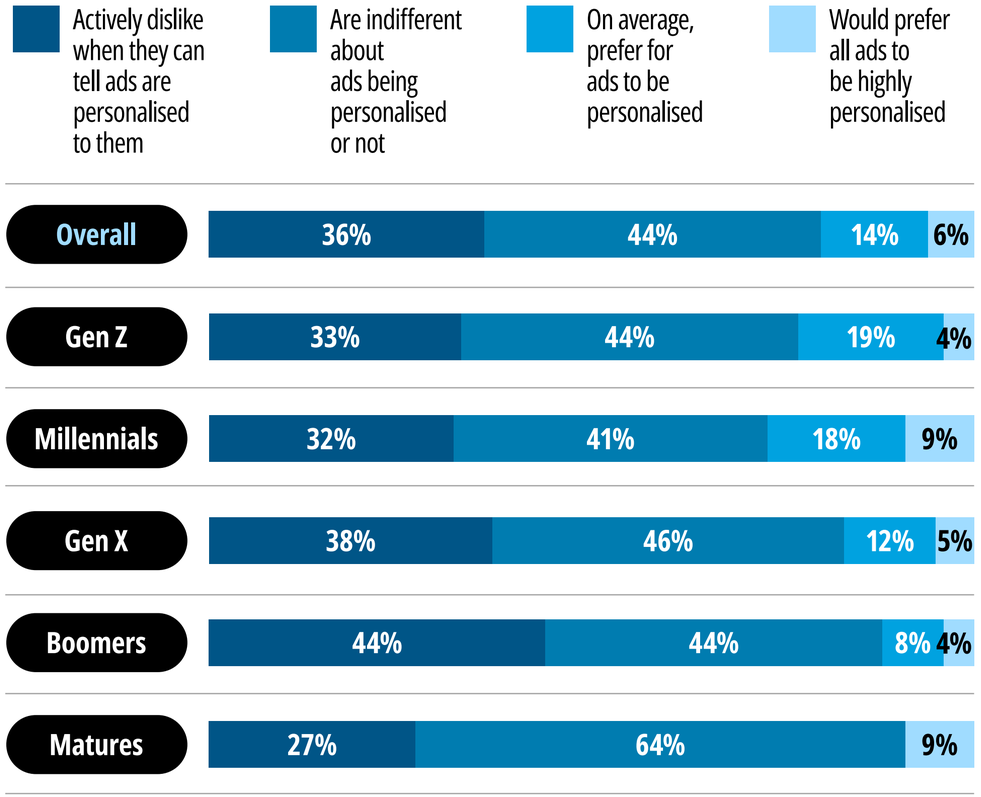
Australians continue to be more willing to engage in ads, with Gen Z, Millennials and Gen X more likely to engage with ads on smartphones than on television, while Boomers and Matures remain more receptive to TV-based advertising.

Most Australians are indifferent to personalised advertising. Gen X and Boomers are most likely to dislike it (38% and 44%), while Millennials are most receptive (27% prefer it). Despite mixed attitudes, personalisation remains central to media business models, highlighting a potential tension between consumer sentiment and its role in driving relevance and engagement.

WILLINGNESS TO ENGAGE WITH ADS BY DEVICE

	Television	Smartphone
Overall	34% (33% in 2025 +)	41% (39% in 2025 +)
Gen Z	17% (13% in 2025 +)	57% (63% in 2025 +)
Millennials	21% (24% in 2025 -)	55% (54% in 2025 +)
Gen X	38% (41% in 2025 -)	38% (30% in 2025 +)
Boomers	59% (49% in 2025 +)	13% (15% in 2025 -)
Matures	50% (57% in 2025 -)	0% (0% in 2025)

ATTITUDE TOWARDS PERSONALISED ADS



Out-of-Home (OOH) Media

OOH may be widely encountered, but not always consciously remembered, particularly by older generations

Public transport advertising has greater visibility among metro consumers, with 21% identifying it as the OOH format they notice most often, compared with 13% of regional consumers. Conversely, metro consumers are more likely to say they rarely notice OOH media at all (30% vs. 21%).

38%
37% in 2025 +

Say their buying decisions are influenced by OOH advertising

Gen Z **50%** Boomers **17%**

7th

Ranked 7th out of 14 for comfort[1]

77%

OOH advertising in its many forms may seem ubiquitous, however only 77% of survey respondents reported noticing it[2]

WHAT TYPES OF OUT-OF-HOME ADVERTISING DO YOU NOTICE MOST OFTEN?

(weighted average)[3,4]

	Overall	Metro	Regional
Billboards	35%	35%	35%
Public transport	19%	21%	13%
Public venues	11%	10%	12%
Street furniture	4%	4%	2%
I rarely notice any	23%	30%	21%

'I RARELY NOTICE ANY'

Only 10% of Gen Z report they rarely notice OOH advertising, compared with 44% of Boomers. This is consistent with 50% of Gen Z saying OOH influences buying decisions, compared to 17% of Boomers.

This could reflect greater exposure through more frequent travel, public transport use or time spent in OOH-rich environments.

Gen Z	10%
Millennials	15%
Gen X	22%
Boomers	44%
Matures	59%

(1) See footnote 2 of report page 59; (2) A recent MOVE study found that OOH media reaches 97% of Australians aged 14+ each week, connecting with an audience of more than 22 million people across 95 million daily trips; (3) Other OOH media in order of most-often noticed included 1) Niche (e.g., bathroom ads, petrol station pumps) (4%) and 2) Pop-ups and interactive installations (4%); (4) 'Billboards' considers other large-format displays (e.g., wallscapes); 'Public transport' considers advertisements on public transport itself (e.g., buses, trains) or at major stations (e.g., terminals, airports); 'Public venues' considers advertisements at major public areas (e.g., shopping centres, stadiums); 'Street furniture' considers advertisements on small-scale public infrastructure (e.g., bus stops, benches)

5 Trust in Media and AI



How Australians Use Social Media

Gen Z is more likely to use social media to discover content or as a source of news than to engage with friends and family

Social media has evolved beyond connecting people, with more than half of respondents (54%) using it to discover content on other platforms. This is particularly pronounced among Gen Z, who are more likely to use social media for content discovery (82%) than to connect with friends and family (71%).

For Boomers, staying connected remains a stronger draw than discovery. Although they are less likely than Gen Z to use social media to connect with friends and family, almost half (47%) do so, more than twice the proportion who use it to discover content (22%) or access news (19%).

43% of Australians say that sharing user-generated content has become a form of communication between themselves and their friends/family

Gen Z **64%** Boomers **17%**

HOW AUSTRALIANS USE SOCIAL MEDIA

(% of respondents)

		Overall	Gen Z	Millennials	Gen X	Boomers	Matures	Women	Men
CONNECTION	To engage with friends and family (and find it just as fulfilling as in-person engagement)	62% 66% in 2023 −	71%	72%	60%	47%	27%	65%	59%
CONNECTION	To create and share my own content	36% 34% in 2023 +	56%	53%	27%	12%	9%	37%	35%
DISCOVERY	To discover content on other platforms (e.g., find TV shows and movies to watch)	54% 51% in 2023 +	82%	68%	48%	22%	9%	57%	50%
DISCOVERY	As a main source of news and current affairs	49% 49% in 2023	76%	65%	42%	19%	9%	54%	45%
DISCOVERY	As a primary source of education	31% 23% in 2024[1] +	43%	44%	25%	14%	9%	32%	31%

(1) Was not asked in 2023 survey

The Impact of Social Media

Half of Australians regularly spend longer on social media than intended, while fewer than a third see it as positively impacting their wellbeing

One in two Australians now say they regularly spend longer on social media than intended, and concern about time spent has risen to 38%. Among those who have limited their use, almost two-thirds are looking to reduce distraction or protect their mental wellbeing.

ATTITUDES TOWARDS ONE'S OWN USAGE OF SOCIAL MEDIA

(% of respondents)

50% regularly spend more time on social media than intended
47% in 2025 +
Gen Z 69% Boomers 28%

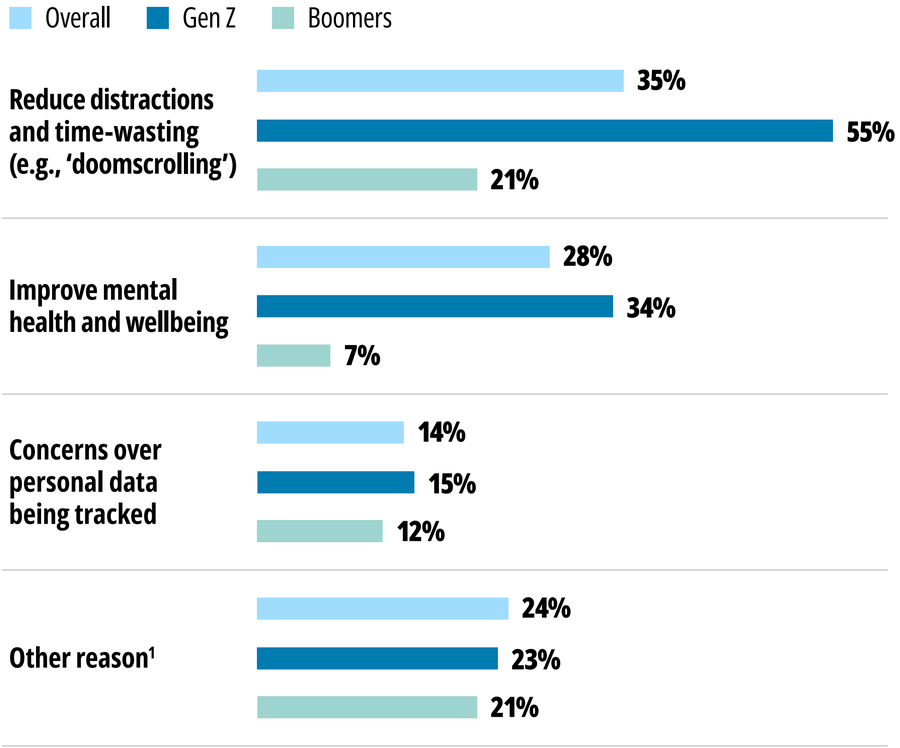
38% are concerned about the amount of time they spend on social media
36% in 2025 +
Gen Z 56% Boomers 14%

29% believe social media has a positive impact on their wellbeing
26% in 2025 +
Gen Z 38% Boomers 16%

68% of Australians have at some point in their life either turned off or deliberately limited their use of social media
Gen Z 87% Boomers 42%

TOP THREE REASONS FOR CEASING OR DELIBERATELY LIMITING SOCIAL MEDIA USAGE

(% of respondents who indicated they had turned off or deliberately limited their social media use)



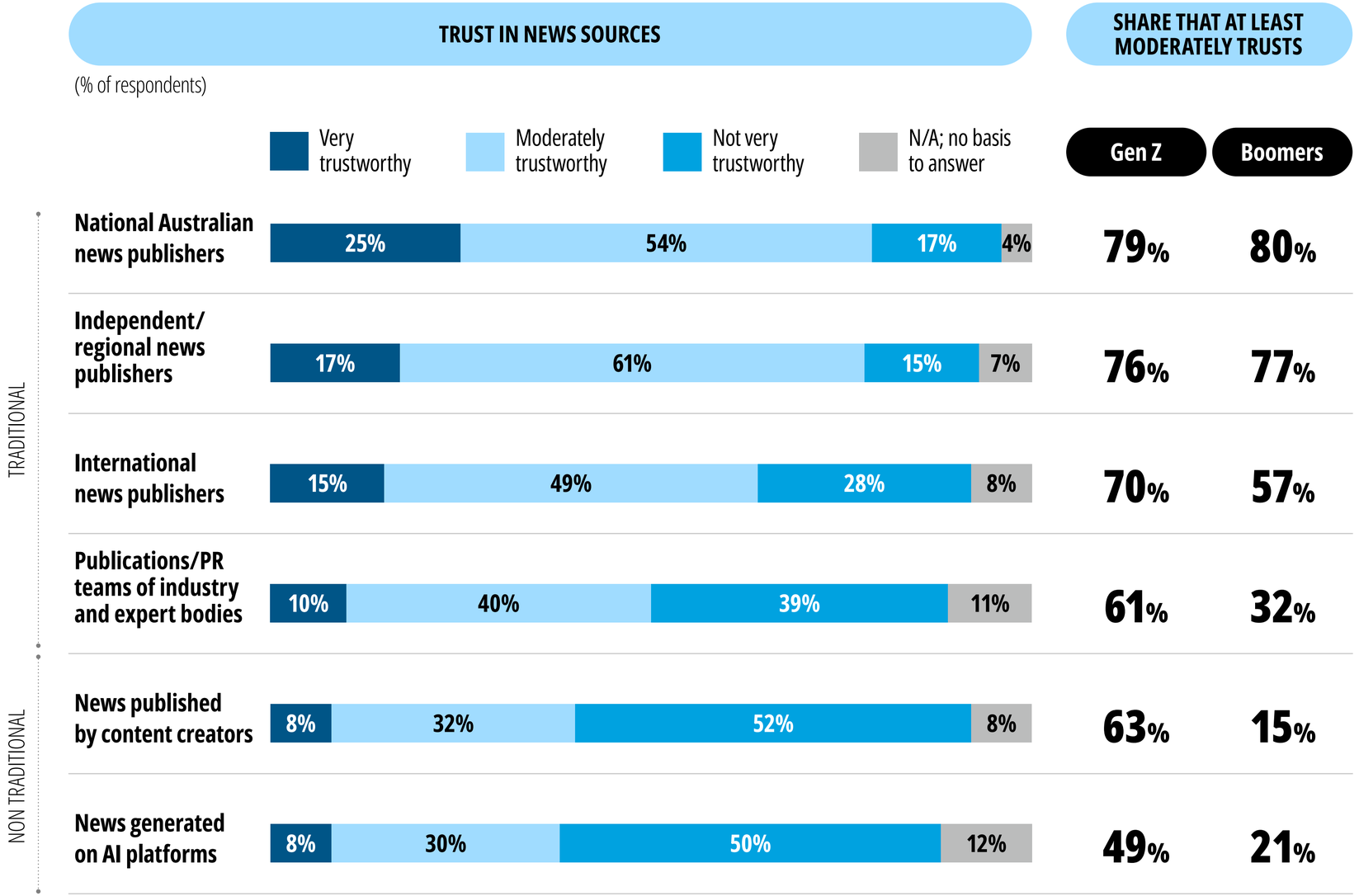
(1) 'Other reason' includes 'discomfort with abusive content', 'improve physical wellbeing' (e.g., avoid blue light, improve sleep hygiene), 'Went through a life transition' (e.g., became a parent, started a new job, underwent an exam period) or 'Other'

Trust in News

Traditional news sources remain the most trusted overall, while nearly half of Gen Z at least moderately trust AI-generated news

Less than half

of Australians do not find news from non-traditional sources at least moderately trustworthy. Gen Z is the most trusting, four times as likely as Boomers to trust news published by content creators and two times as likely to trust news generated on AI platforms.



Trust in AI

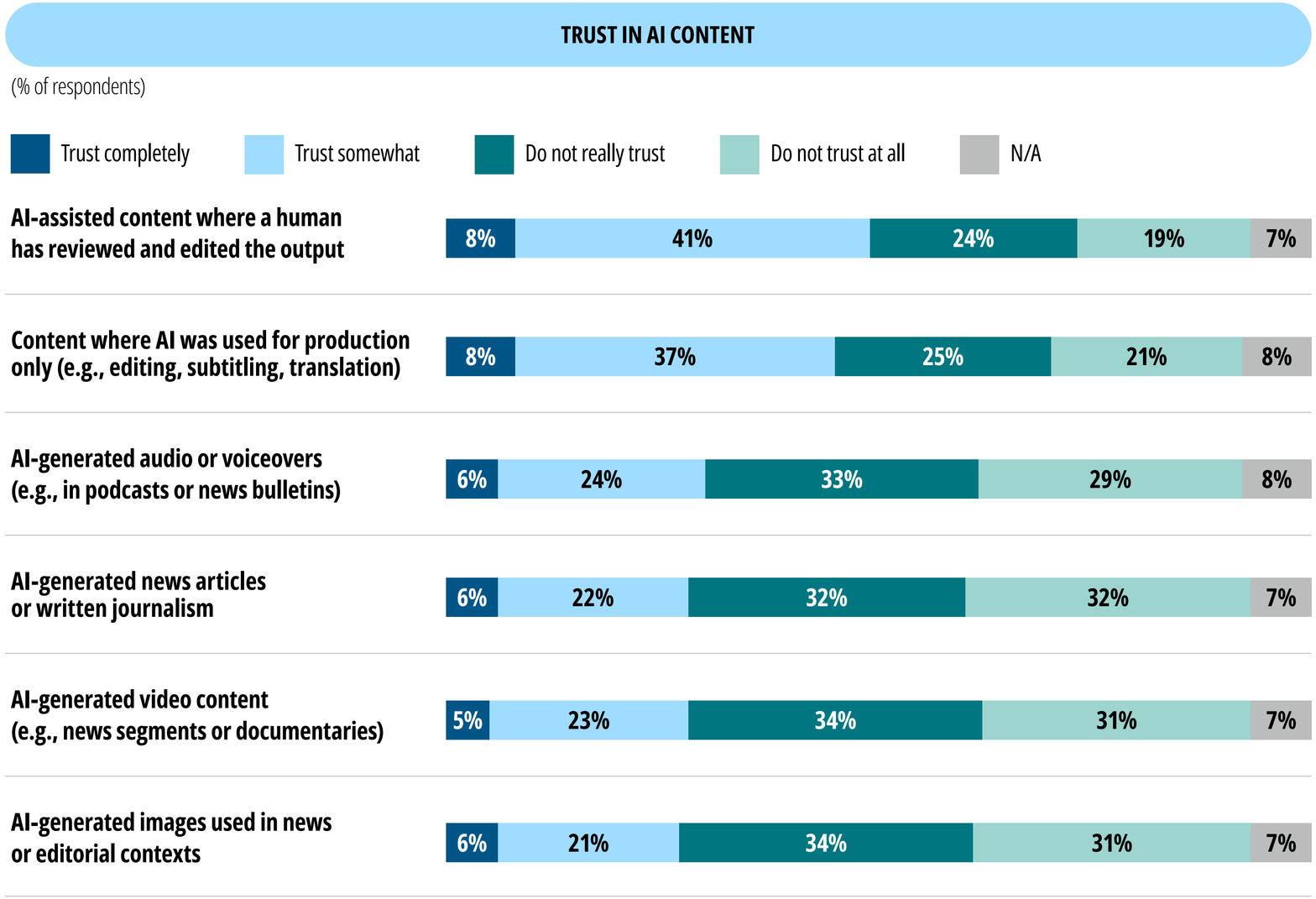
Australians are more trusting of AI content if they perceive humans to be involved, with younger generations more confident in their ability to detect AI-generated material

74% believe AI-generated content has made it harder to know what is real online

Gen Z **69%** Boomers **80%**

53% can tell when content has been generated or significantly altered by AI

Gen Z **72%** Boomers **31%**



Trust in AI (Cont.)

Boomers are three times as likely as Gen Z to be unsure of whether they have come across AI-generated or manipulated content online; with most Australians feeling strongly that AI-generated content must be transparent

ATTITUDES TOWARDS AI-GENERATED CONTENT AND TRANSPARENCY

(% of respondents)

84% believe platforms and publishers should be legally required to label AI-generated content

Gen Z **76%** Boomers **90%**

71% say they would stop using a platform that did not clearly disclose when content is AI-generated

Gen Z **67%** Boomers **77%**

PROPORTION OF RESPONDENTS WHO CAN RECALL ENCOUNTERING THE FOLLOWING TYPES OF AI-GENERATED OR MANIPULATED CONTENT ONLINE

(% of respondents)

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
An AI-generated image presented as a real photograph	37%	43%	40%	35%	30%	14%
An AI-generated video of made-up people, and/or the personification of an animal, and/or of an inanimate object (e.g., fruit)	33%	49%	38%	30%	21%	14%
A deepfake video of a public figure (e.g., a politician, celebrity or executive)	31%	40%	31%	31%	25%	14%
A manipulated or selectively edited video clip presented as genuine	29%	37%	32%	25%	22%	14%
An AI-generated voice or deepfake audio clip of a real person	26%	41%	28%	24%	17%	0%
An AI-generated news article or written piece presented as authored by a human journalist	23%	33%	28%	21%	13%	14%
A deepfake video of someone you personally know	9%	13%	13%	7%	4%	5%
Share that is unsure if they have encountered any of the above	18%	9%	11%	20%	29%	45%

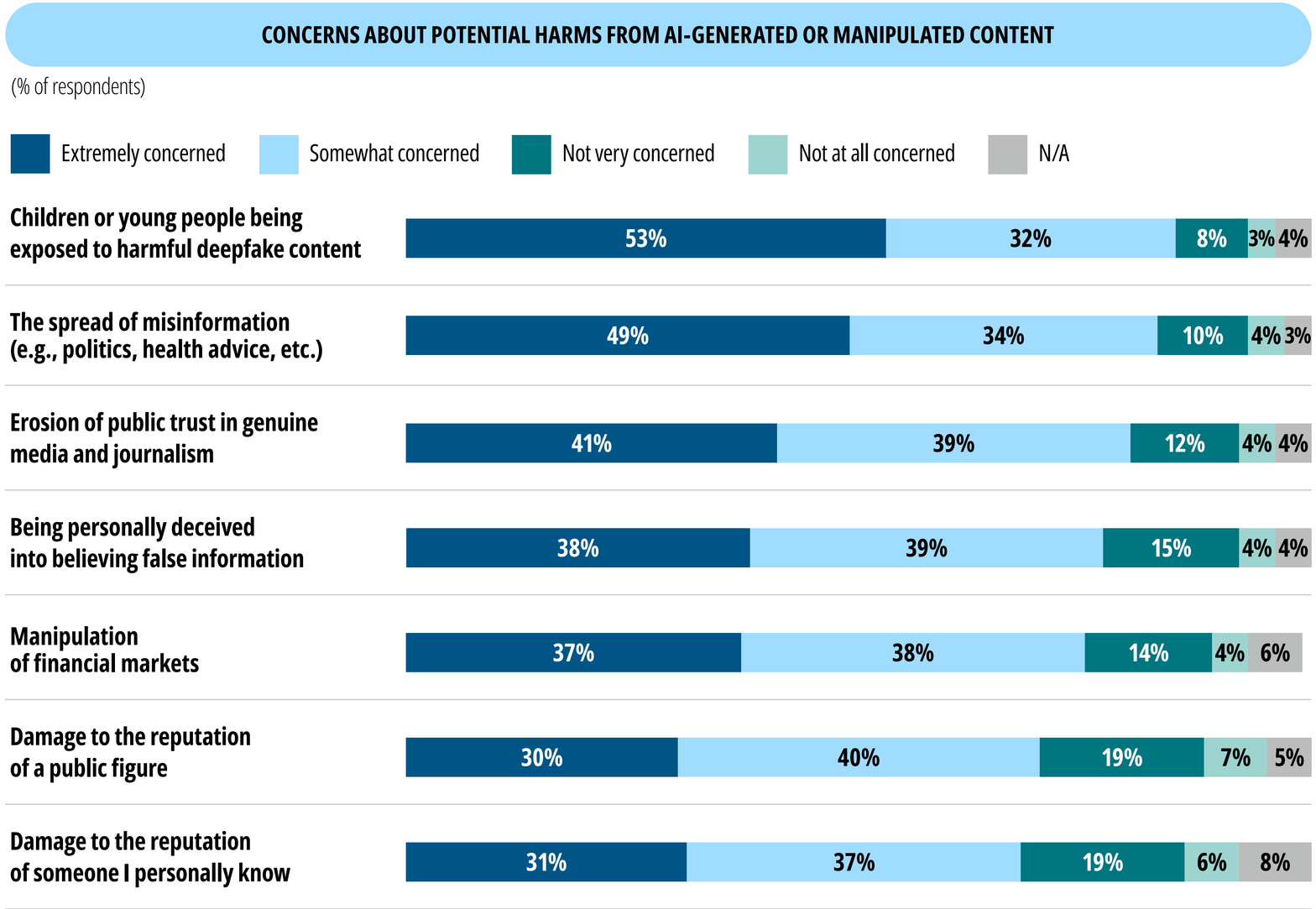
Concerns about AI

Australians are most concerned about the impact of AI on society at large

Australians are most concerned about the potential for AI to negatively impact the broader population, spread misinformation and erode trust; with

1 in 2

Australians saying they are extremely concerned about deepfake content influencing children or young people (53%) and the spread of misinformation across critical public-interest domains (49%).



6 AI as an Interface



AI Use in Everyday Activities

ChatGPT's position as the default AI assistant for Australians is strong across all age groups, although preference for Gemini is higher among older users

A two-model hierarchy has emerged in Australia. ChatGPT and Google Gemini rank as the two most preferred AI models across every activity tested, with ChatGPT maintaining a substantial lead overall.

Gemini's relative position strengthens with respondent age. While ChatGPT remains the preferred model among Boomers for most activities, the gap between Gemini and ChatGPT is much narrower than is the case for Gen Z.

Translation is the most competitive use case. Across all age groups, ChatGPT's lead narrows to 14 percentage points for language translation, while among Boomers, Gemini overtakes ChatGPT, 46% to 34%.

MOST PREFERRED STANDALONE AI CHATBOT BY ACTIVITY[1]

(% of respondents who say they regularly use standalone AI tools, e.g., ChatGPT, in their personal life)

		Share who say they use standalone AI chatbots for this activity	Overall		Gen Z		Boomers	
			Gemini	ChatGPT	Gemini	ChatGPT	Gemini	ChatGPT
'THINKING' TASKS	Basic search query	91%	24%	51%	20%	52%	35%	47%
	Concept simplification and explanation	92%	18%	48%	11%	50%	24%	55%
	Brainstorming options	88%	19%	50%	13%	54%	31%	53%
	Support to compare options and make decisions	88%	18%	50%	14%	50%	34%	45%
	Deep data research	89%	20%	48%	20%	44%	32%	48%
	Sourcing 'how-to' guidance	88%	21%	46%	16%	47%	32%	41%
	Thought experimentation	81%	19%	48%	13%	53%	30%	43%
'DOING' TASKS	Language translation	77%	27%	41%	23%	43%	46%	34%
	Planning and scheduling	75%	18%	49%	13%	47%	33%	46%
	Grammar and language refinement	86%	20%	47%	16%	48%	36%	41%
	Creative writing	78%	15%	50%	12%	49%	31%	50%

(1) For each activity, respondents were provided with a list of standalone AI models with which to indicate in each case which was their most preferred. This list included ChatGPT, Claude, Google Gemini, Microsoft Copilot, Perplexity, DeepSeek, Grok, Meta AI, Julius AI, and a free text option 'Other'

Chatbot Convergence

Younger users assemble broader AI toolkits, while older users consolidate around a single model

Australians vary in how consistently they prefer the same AI model across activities. 40% of users select the same model as their most preferred tool for every surveyed activity where they use standalone AI, while 24% select four or more different preferred models across those activities.

More than half of Boomers who use standalone AI regularly (53%) consolidate around one "chatbot-of-choice", whereas more than one third of Gen Z who also do so (35%) use four or more. Younger generations perceive the value of each chatbot differently and are more inclined to swap to an alternative for a different activity.

48% of respondents say they regularly use standalone AI tools (e.g., ChatGPT) in their personal life

Gen Z **67%** Boomers **19%**

40% of respondents who say they regularly use standalone AI chatbots indicated they only use one type of chatbot across all surveyed activities

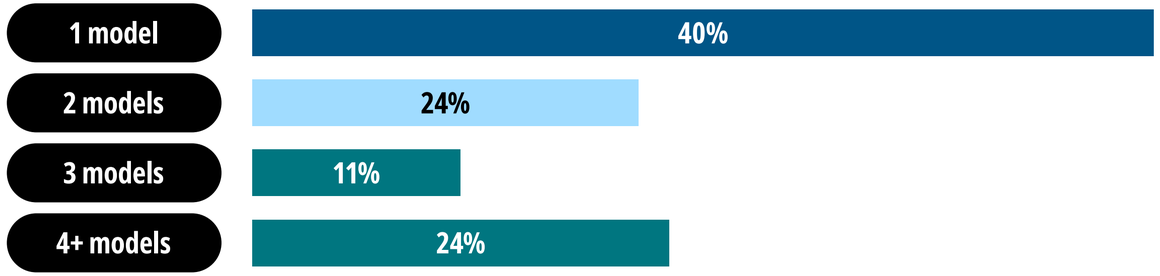
Gen Z **33%** Boomers **53%**

24% of respondents who say they regularly use standalone AI chatbots indicated they use four or more different AI chatbots across all surveyed activities

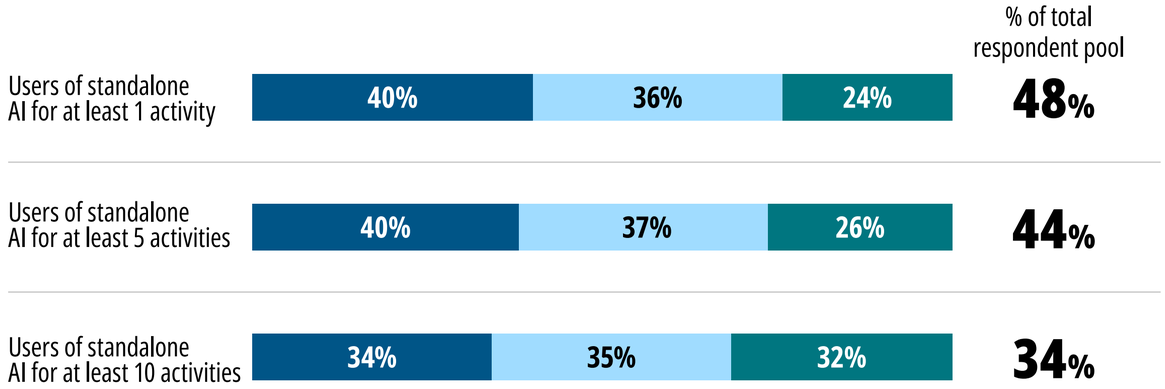
Gen Z **35%** Boomers **2%**

NO. OF DISTINCT "MOST-PREFERRED" MODELS SELECTED ACROSS 11 ACTIVITIES

(% of respondents who said they regularly use standalone AI tools in their personal life)



SHARE OF RESPONDENTS BY CONCENTRATION OF PREFERRED AI MODEL ACROSS ACTIVITIES



Devotees: Respondents who use the same AI tool across all activities

Mostly Loyal: Respondents who use a single "primary model" for 50-99% of activities

Jugglers: Respondents for whom no primary model accounted for 50% or more of their activities

AI-Generated Search Summaries

Only one in ten Australians say they no longer click through to source materials, with more than half of Gen Z finding standalone AI chatbots materially better than AI-generated search summaries

ATTITUDES TOWARDS AI-GENERATED SEARCH SUMMARIES

(% of respondents)

39% find they get a materially better response from using standalone AI chatbots than they do from AI-generated search summaries

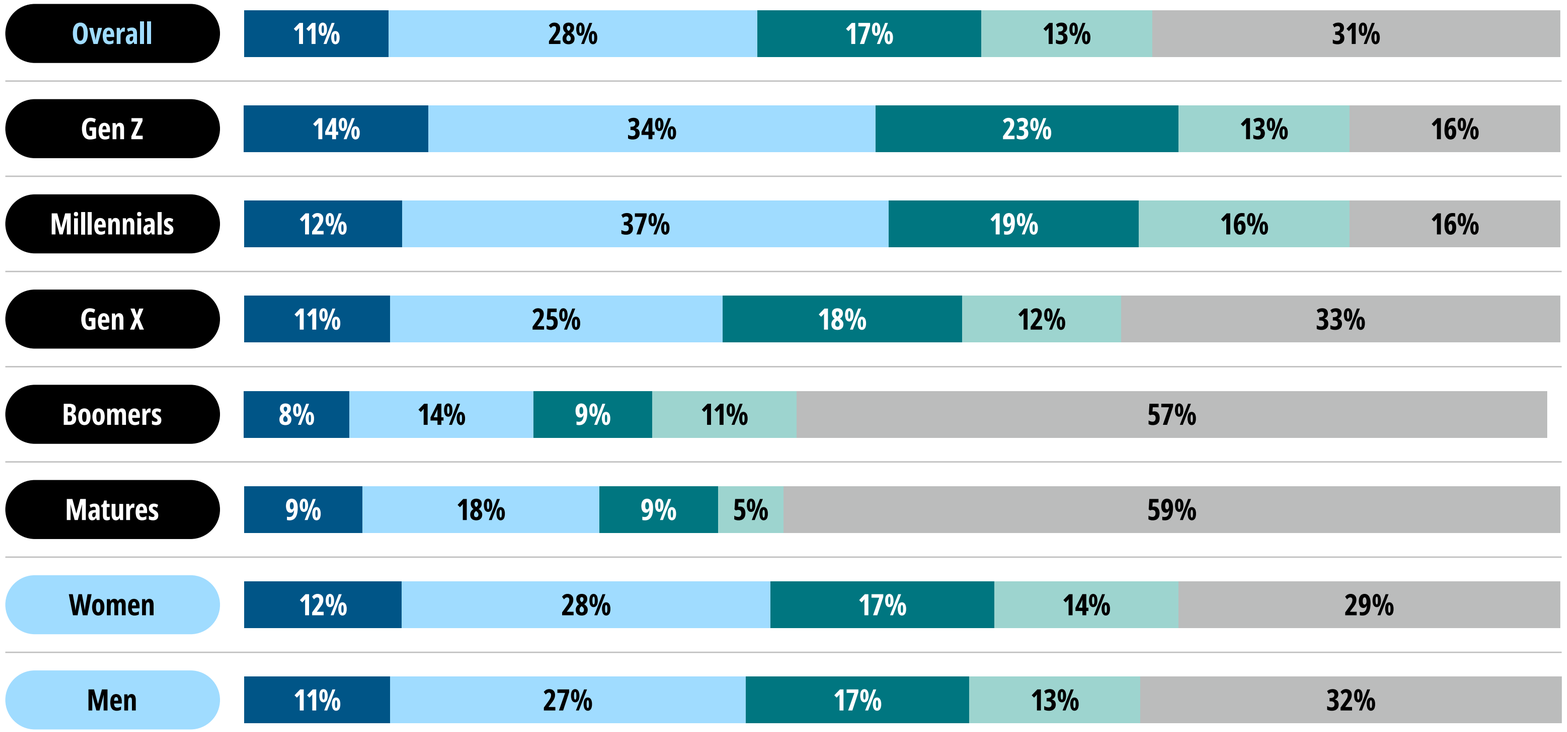
Gen Z **53%** Boomers **17%**

57% are now making more searches because they find it easier to query

Gen Z **68%** Boomers **37%**

EXTENT RESPONDENTS CLICK THROUGH TO SOURCE MATERIALS AFTER ENGAGING WITH AI-GENERATED SEARCH SUMMARIES

(% of respondents)

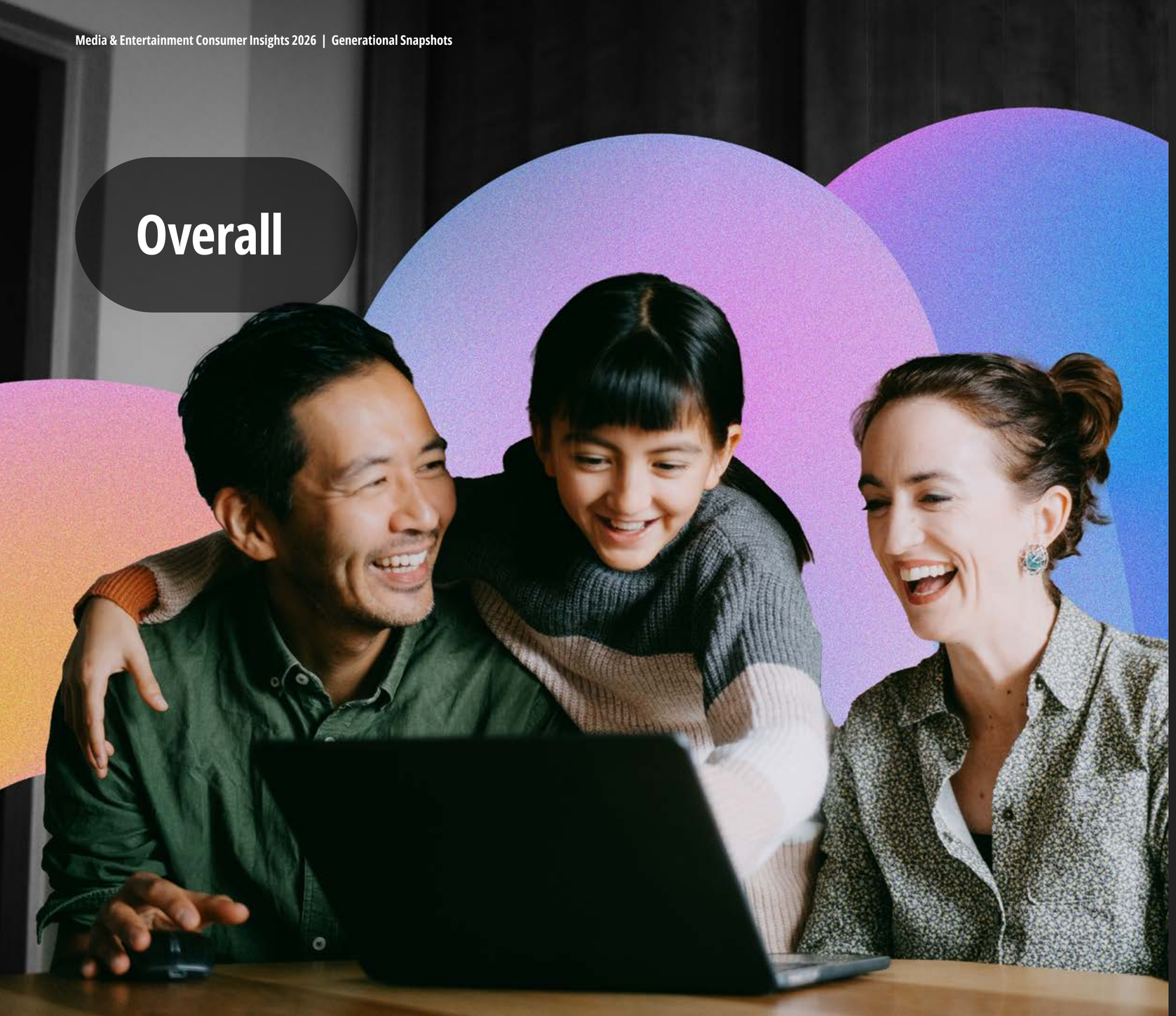


- Do not click through anymore: "I find AI-generated search summaries largely satisfy what I am looking to understand (i.e., the summary provides all the details I need and uses sources that look reputable to me)"
- Still click through sometimes: "I sometimes find there is additional value to reading, in detail, the sources tagged in AI-generated search summaries (i.e., the AI-generated summary largely captures the important information)"
- Still click through often: "I predominantly read AI-generated search summaries as a navigation tool to point me towards "source-of-truth" materials, where I then discern my own understandings"
- Will always click through: "Even when I am satisfied with an AI-generated search summary, I will still read through additional materials (i.e., those not tagged as sources) to cross-reference and validate"
- N/A: "I do not engage with AI search summaries and/or do not have a basis to answer"

7 Generational Snapshots



Overall



ENTERTAINMENT WALLET AND ADVERTISING

$73 $78 in 2025 (-)
Monthly spend on media subscriptions

Spend

26% 36% in 2025 (-)
Are overspending relative to their media budget

75% 78% in 2025 (-)
Are worried about the cumulative cost of media spend

Subscriptions (per household)

3.8 3.7 in 2025 (+)
Average number of paid entertainment subscriptions

2.7 2.8 in 2025 (-)
Average number of SVOD subscriptions per subscriber household

Switching behaviours

39% 37% in 2025 (+)
Added one or more subscriptions in the last 6 months

30% 31% in 2025 (-)
Cancelled one or more subscriptions in the last 6 months

Extent ads influence buying decisions (% of respondents)

#1 46%
Ads on free-to-air program/show

#2 45%
Ads on social media

#3 44%
Ads on shopping websites

ATTENTION AND CREATORS

45h 20m 45h 20m in 2025
Total time spent across media and digital entertainment

Top 5 home entertainment activities (in weekly hours: minutes)

16h 55m Watching video (free-to-air, SVOD, video platforms e.g., YouTube)

13h 30m Listening to audio (radio, music, podcasts and audiobooks)

5h 50m Browsing social media

3h 45m Playing video games

3h 0m Watching sports (live or digitally)

Multitasking

42% Regularly multitask across at least two different media and/or entertainment activities

Time spent on social media

#1 Facebook
#2 YouTube
#3 Instagram

42% 37% in 2025
Spend more time watching UGC (videos) online than streaming movies and TV shows

TRUST

29% 26% in 2025
Believe social media has a positive impact on their wellbeing

Trust levels in different news sources

79% National AU publishers
78% Independent publishers
64% International publishers
50% Industry and expert bodies
40% Content creators
38% AI-generated

Top reason for using social media

62% 61% in 2025
To engage with friends and family

News in social media

49% 45% in 2025
Use social media as a main source of news and current affairs

Turning off social media

68% Have at some point in their life either turned off or deliberately limited their use of social media

19% Cite wanting to improve their mental health and wellbeing as the #1 reason why

AI AS AN INTERFACE

48% Regularly use standalone AI tools in their personal life

Top 3 tools by task

	#1	#2	#3
Basic search	**ChatGPT** (47%)	**Gemini** (22%)	**Copilot** (7%)
Deep data research	**ChatGPT** (43%)	**Gemini** (18%)	**Copilot** (8%)
Brainstorming	**ChatGPT** (44%)	**Gemini** (17%)	**Copilot** (8%)
Planning and scheduling	**ChatGPT** (40%)	**Gemini** (15%)	**Copilot** (8%)
Concept explanation	**ChatGPT** (45%)	**Gemini** (17%)	**Copilot** (9%)
Comparing options	**ChatGPT** (44%)	**Gemini** (16%)	**Copilot** (9%)

Searching

11% Do not click through anymore, as they find AI-generated summaries sufficient

57% Find that they are making more searches with AI

Usage

40% Have one preferred standalone model across all activities

24% Have four or more preferred models across all activities

Gen Z



ENTERTAINMENT WALLET AND ADVERTISING

$90 $101 in 2025 -
Monthly spend on media subscriptions

Spend

40% 53% in 2025 -
Are overspending relative to their media budget

79% 79% in 2025
Are worried about the cumulative cost of media spend

Subscriptions (per household)

5.1 5.1 in 2025
Average number of paid entertainment subscriptions

3.0 3.3 in 2025 -
Average number of SVOD subscriptions per subscriber household

Switching behaviours

57% 66% in 2025 -
Added one or more subscriptions in the last 6 months

47% 51% in 2025 -
Cancelled one or more subscriptions in the last 6 months

Extent ads influence buying decisions (% of respondents)

#1 65%
Ads on social media

#2 56%
Ads on shopping websites

#3 51%
Ads on YouTube

ATTENTION AND CREATORS

46h 25m 44h 25m in 2025
Total time spent across media and digital entertainment

Top 5 home entertainment activities (in weekly hours: minutes)

15h 20m Listening to audio (radio, music, podcasts and audiobooks)

13h 40m Watching video (free-to-air, SVOD, video platforms e.g., YouTube)

8h 20m Browsing social media

6h 0m Playing video games

2h 0m Watching sports (live or digitally)

Multitasking

58% Regularly multitask across at least two different media and/or entertainment activities

Time spent on social media

#1 TikTok
#2 Instagram
#3 YouTube

65% 61% in 2025
Spend more time watching UGC (videos) online than streaming movies and TV shows

TRUST

38% 30% in 2025
Believe social media has a positive impact on their wellbeing

Trust levels in different news sources

79% National AU publishers
77% Independent publishers
70% International publishers
61% Industry and expert bodies
63% Content creators
49% AI-generated

Top reason for using social media

82% 83% in 2025
To discover content on other platforms

News in social media

76% 73% in 2025
Use social media as a main source of news and current affairs

Turning off social media

87% Have at some point in their life either turned off or deliberately limited their use of social media

24% Cite wanting to improve their mental health and wellbeing as the #1 reason why

AI AS AN INTERFACE

67% Regularly use standalone AI tools in their personal life

Top 3 tools by task

	#1	#2	#3
Basic search	**ChatGPT** (46%)	**Gemini** (18%)	**Claude** (6%)
Deep data research	**ChatGPT** (39%)	**Gemini** (18%)	**Claude** (7%)
Brainstorming	**ChatGPT** (50%)	**Gemini** (12%)	**Copilot** (6%)
Planning and scheduling	**ChatGPT** (41%)	**Gemini** (12%)	**Claude** (10%)
Concept explanation	**ChatGPT** (47%)	**Gemini** (11%)	**Claude** (9%)
Comparing options	**ChatGPT** (44%)	**Gemini** (12%)	**Claude** (9%)

Searching

14% Do not click through anymore, as they find AI-generated summaries sufficient

68% Find that they are making more searches with AI

Usage

33% Have one preferred standalone model across all activities

35% Have four or more preferred models across all activities

Millennials



ENTERTAINMENT WALLET AND ADVERTISING

$93 $97 in 2025 -
Monthly spend on media subscriptions

Spend

29% 44% in 2025 -
Are overspending relative to their media budget

82% 82% in 2025
Are worried about the cumulative cost of media spend

Subscriptions (per household)

4.6 4.4 in 2025 +
Average number of paid entertainment subscriptions

2.7 2.9 in 2025 -
Average number of SVOD subscriptions per subscriber household

Switching behaviours

53% 47% in 2025 +
Added one or more subscriptions in the last 6 months

41% 42% in 2025 -
Cancelled one or more subscriptions in the last 6 months

Extent ads influence buying decisions (% of respondents)

#1 63%
Ads on social media

#2 57%
Ads on shopping websites

#3 52%
Ads on free-to-air program/show

ATTENTION AND CREATORS

46h 35m 44h 55m in 2025 +
Total time spent across media and digital entertainment

Top 5 home entertainment activities (in weekly hours: minutes)

16h 15m Watching video (free-to-air, SVOD, video platforms e.g., YouTube)

14h 30m Listening to audio (radio, music, podcasts and audiobooks)

6h 15m Browsing social media

4h 20m Playing video games

2h 40m Watching sports (live or digitally)

Multitasking

55% Regularly multitask across at least two different media and/or entertainment activities

Time spent on social media

#1 Facebook
#2 YouTube
#3 Instagram

53% 49% in 2025 +
Spend more time watching UGC (videos) online than streaming movies and TV shows

TRUST

39% 34% in 2025 +
Believe social media has a positive impact on their wellbeing

Trust levels in different news sources

81% National AU publishers
81% Independent publishers
68% International publishers
62% Industry and expert bodies
52% Content creators
52% AI-generated

Top reason for using social media

72% 72% in 2025
To engage with friends and family

News in social media

65% 63% in 2025 +
Use social media as a main source of news and current affairs

Turning off social media

87% Have at some point in their life either turned off or deliberately limited their use of social media

28% Cite wanting to improve their mental health and wellbeing as the #1 reason why

AI AS AN INTERFACE

64% Regularly use standalone AI tools in their personal life

Top 3 tools by task

	#1	#2	#3
Basic search	**ChatGPT** (50%)	**Gemini** (20%)	**Copilot** (6%)
Deep data research	**ChatGPT** (45%)	**Gemini** (17%)	**Claude** (7%)
Brainstorming	**ChatGPT** (45%)	**Gemini** (18%)	**Copilot** (7%)
Planning and scheduling	**ChatGPT** (43%)	**Gemini** (16%)	**Copilot** (7%)
Concept explanation	**ChatGPT** (42%)	**Gemini** (18%)	**Copilot** (10%)
Comparing options	**ChatGPT** (47%)	**Gemini** (15%)	**Copilot** (9%)

Searching

12% Do not click through anymore, as they find AI-generated summaries sufficient

69% Find that they are making more searches with AI

Usage

34% Have one preferred standalone model across all activities

31% Have four or more preferred models across all activities



Gen X

ENTERTAINMENT WALLET AND ADVERTISING

$57 $64 in 2025 (-)
Monthly spend on media subscriptions

Spend

23% 31% in 2025 (-)
Are overspending relative to their media budget

75% 80% in 2025 (-)
Are worried about the cumulative cost of media spend

Subscriptions (per household)

3.3 3.2 in 2025 (+)
Average number of paid entertainment subscriptions

2.6 2.6 in 2025
Average number of SVOD subscriptions per subscriber household

Switching behaviours

29% 28% in 2025 (+)
Added one or more subscriptions in the last 6 months

24% 22% in 2025 (+)
Cancelled one or more subscriptions in the last 6 months

Extent ads influence buying decisions (% of respondents)

#1 47%
Ads on free-to-air program/show

#2 41%
Ads on shopping websites

#3 38%
Ads on social media

ATTENTION AND CREATORS

44h 0m 44h 45m in 2025 (-)
Total time spent across media and digital entertainment

Top 5 home entertainment activities (in weekly hours: minutes)

17h 55m Watching video (free-to-air, SVOD, video platforms e.g., YouTube)

12h 40m Listening to audio (radio, music, podcasts and audiobooks)

5h 30m Browsing social media

3h 10m Playing video games

2h 40m Watching sports (live or digitally)

Multitasking

37% Regularly multitask across at least two different media and/or entertainment activities

Time spent on social media

#1 Facebook
#2 YouTube
#3 Instagram

37% 29% in 2025 (+)
Spend more time watching UGC (videos) online than streaming movies and TV shows

TRUST

24% 27% in 2025 (-)
Believe social media has a positive impact on their wellbeing

Trust levels in different news sources

76% National AU publishers
76% Independent publishers
60% International publishers
43% Industry and expert bodies
34% Content creators
32% AI-generated

Top reason for using social media

60% 56% in 2025 (+) To engage with friends and family

News in social media

42% 36% in 2025 (+) Use social media as a main source of news and current affairs

Turning off social media

66% Have at some point in their life either turned off or deliberately limited their use of social media

18% Cite wanting to improve their mental health and wellbeing as the #1 reason why

AI AS AN INTERFACE

43% Regularly use standalone AI tools in their personal life

Top 3 tools by task

	#1	#2	#3
Basic search	**ChatGPT** (44%)	**Gemini** (25%)	**Copilot** (9%)
Deep data research	**ChatGPT** (46%)	**Gemini** (18%)	**Copilot** (12%)
Brainstorming	**ChatGPT** (41%)	**Gemini** (19%)	**Copilot** (10%)
Planning and scheduling	**ChatGPT** (40%)	**Gemini** (15%)	**Copilot** (9%)
Concept explanation	**ChatGPT** (47%)	**Gemini** (19%)	**Copilot** (10%)
Comparing options	**ChatGPT** (43%)	**Gemini** (17%)	**Copilot** (10%)

Searching

11% Do not click through anymore, as they find AI-generated summaries sufficient

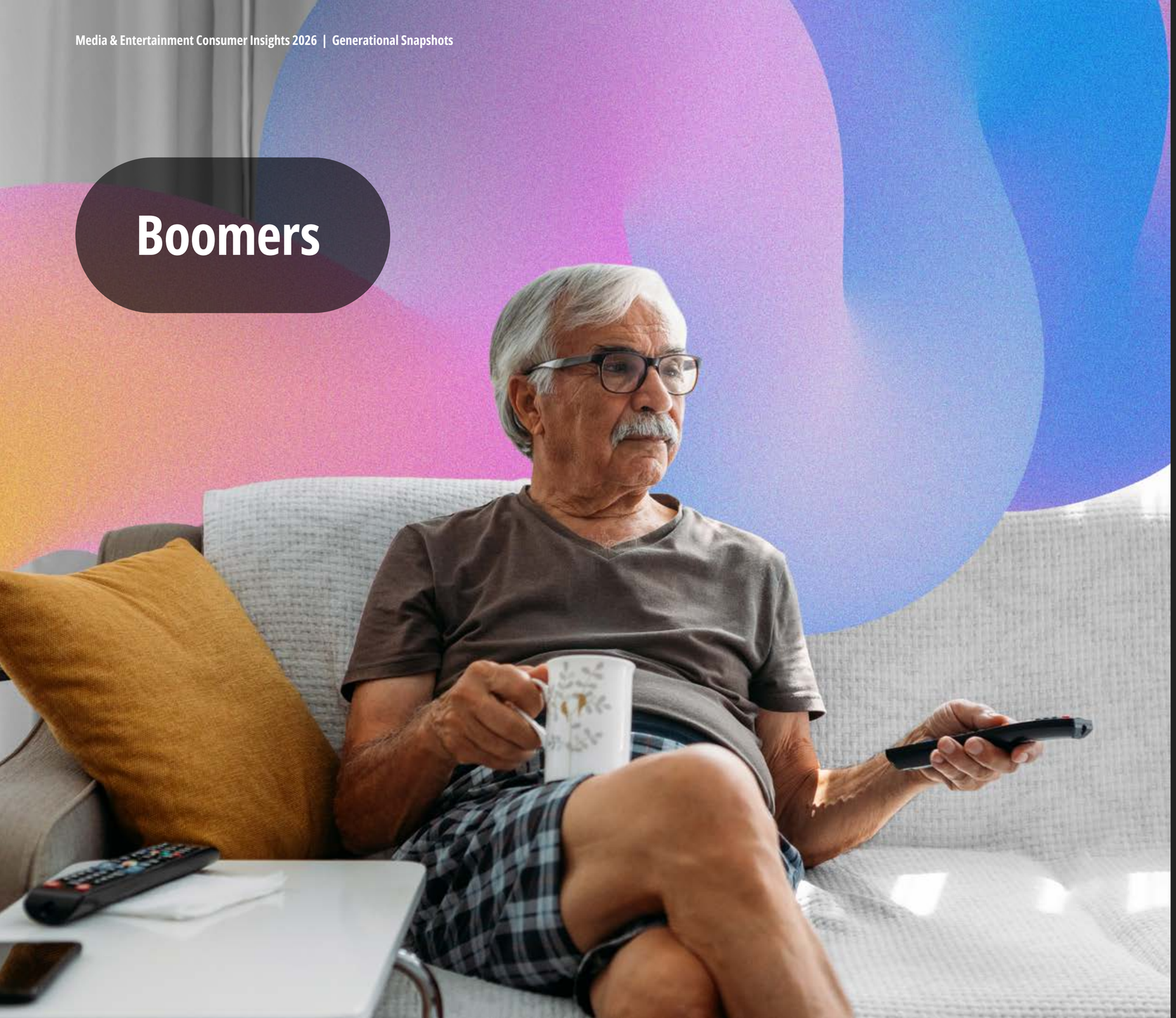
55% Find that they are making more searches with AI

Usage

52% Have one preferred standalone model across all activities

10% Have four or more preferred models across all activities

Boomers



ENTERTAINMENT WALLET AND ADVERTISING

$51 $55 in 2025 -
Monthly spend on media subscriptions

Spend

17% 20% in 2025 -
Are overspending relative to their media budget

64% 70% in 2025 -
Are worried about the cumulative cost of media spend

Subscriptions (per household)

2.4 2.5 in 2025 -
Average number of paid entertainment subscriptions

2.2 2.4 in 2025 -
Average number of SVOD subscriptions per subscriber household

Switching behaviours

19% 18% in 2025 +
Added one or more subscriptions in the last 6 months

12% 14% in 2025 -
Cancelled one or more subscriptions in the last 6 months

Extent ads influence buying decisions (% of respondents)

#1 37%
Ads on free-to-air program/show

#2 23%
Ads on radio

#3 21%
Ads on shopping websites

ATTENTION AND CREATORS

44h 45m 48h 0m in 2025 (-)
Total time spent across media and digital entertainment

Top 5 home entertainment activities (in weekly hours: minutes)

19h 15m Watching video (free-to-air, SVOD, video platforms e.g., YouTube)

11h 40m Listening to audio (radio, music, podcasts and audiobooks)

4h 20m Watching sports (live or digitally)

3h 55m Browsing social media

3h 40m Reading news and magazines

Multitasking

21% Regularly multitask across at least two different media and/or entertainment activities

Time spent on social media

#1 Facebook
#2 YouTube
#3 Instagram/WhatsApp

15% 16% in 2025 (-)
Spend more time watching UGC (videos) online than streaming movies and TV shows

TRUST

16% 15% in 2025 (+)
Believe social media has a positive impact on their wellbeing

Trust levels in different news sources

80% National AU publishers
77% Independent publishers
57% International publishers
33% Industry and expert bodies
15% Content creators
21% AI-generated

Top reason for using social media

47% 42% in 2025 (+) To engage with friends and family

News in social media

19% 16% in 2025 (+) Use social media as a main source of news and current affairs

Turning off social media

42% Have at some point in their life either turned off or deliberately limited their use of social media

5% Cite wanting to improve their mental health and wellbeing as the #1 reason why

AI AS AN INTERFACE

19% Regularly use standalone AI tools in their personal life

Top 3 tools by task

	#1	#2	#3
Basic search	**ChatGPT** (42%)	**Gemini** (31%)	**Copilot** (12%)
Deep data research	**ChatGPT** (37%)	**Gemini** (25%)	**Copilot** (9%)
Brainstorming	**ChatGPT** (34%)	**Gemini** (20%)	**Copilot** (8%)
Planning and scheduling	**ChatGPT** (26%)	**Gemini** (19%)	**Copilot** (8%)
Concept explanation	**ChatGPT** (46%)	**Gemini** (20%)	**Copilot** (10%)
Comparing options	**ChatGPT** (35%)	**Gemini** (26%)	**Copilot** (11%)

Searching

8% Do not click through anymore, as they find AI-generated summaries sufficient

37% Find that they are making more searches with AI

Usage

53% Have one preferred standalone model across all activities

2% Have four or more preferred models across all activities



Matures

ENTERTAINMENT WALLET AND ADVERTISING

$70 $35 in 2025
Monthly spend on media subscriptions

Spend

23% 18% in 2025
Are overspending relative to their media budget

68% 50% in 2025
Are worried about the cumulative cost of media spend

Subscriptions (per household)

2.4 1.3 in 2025
Average number of paid entertainment subscriptions

2.3 2.3 in 2025
Average number of SVOD subscriptions per subscriber household

Switching behaviours

5% 0% in 2025
Added one or more subscriptions in the last 6 months

5% 4% in 2025
Cancelled one or more subscriptions in the last 6 months

Extent ads influence buying decisions (% of respondents)

#1 23%
Ads on shopping websites

#2 18%
Ads on free-to-air program/show

#3 14%
Ads on YouTube

ATTENTION AND CREATORS

38h 0m 49h 19m in 2025 -
Total time spent across media and digital entertainment

Top 5 home entertainment activities (in weekly hours: minutes)

15h 0m Watching video (free-to-air, SVOD, video platforms e.g., YouTube)

11h 55m Listening to audio (radio, music, podcasts and audiobooks)

4h 50m Watching sports (live or digitally)

4h 30m Reading news and magazines

1h 0m Playing video games

Multitasking

5% Regularly multitask across at least two different media and/or entertainment activities

Time spent on social media

#1 YouTube
#2 Facebook
#3 LinkedIn

18% 14% in 2025 +
Spend more time watching UGC (videos) online than streaming movies and TV shows

TRUST

9% 11% in 2025 -
Believe social media has a positive impact on their wellbeing

Trust levels in different news sources

77% National AU publishers
77% Independent publishers
55% International publishers
27% Industry and expert bodies
9% Content creators
18% AI-generated

Top reason for using social media

27% 32% in 2025 - To engage with friends and family

News in social media

9% 11% in 2025 - Use social media as a main source of news and current affairs

Turning off social media

27% Have at some point in their life either turned off or deliberately limited their use of social media

0% Cite wanting to improve their mental health and wellbeing as the #1 reason why

AI AS AN INTERFACE

32% Regularly use standalone AI tools in their personal life

Searching

9% Do not click through anymore, as they find AI-generated summaries sufficient

32% Find that they are making more searches with AI

Usage

57% Have one preferred standalone model across all activities

0% Have four or more preferred models across all activities

Appendix



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