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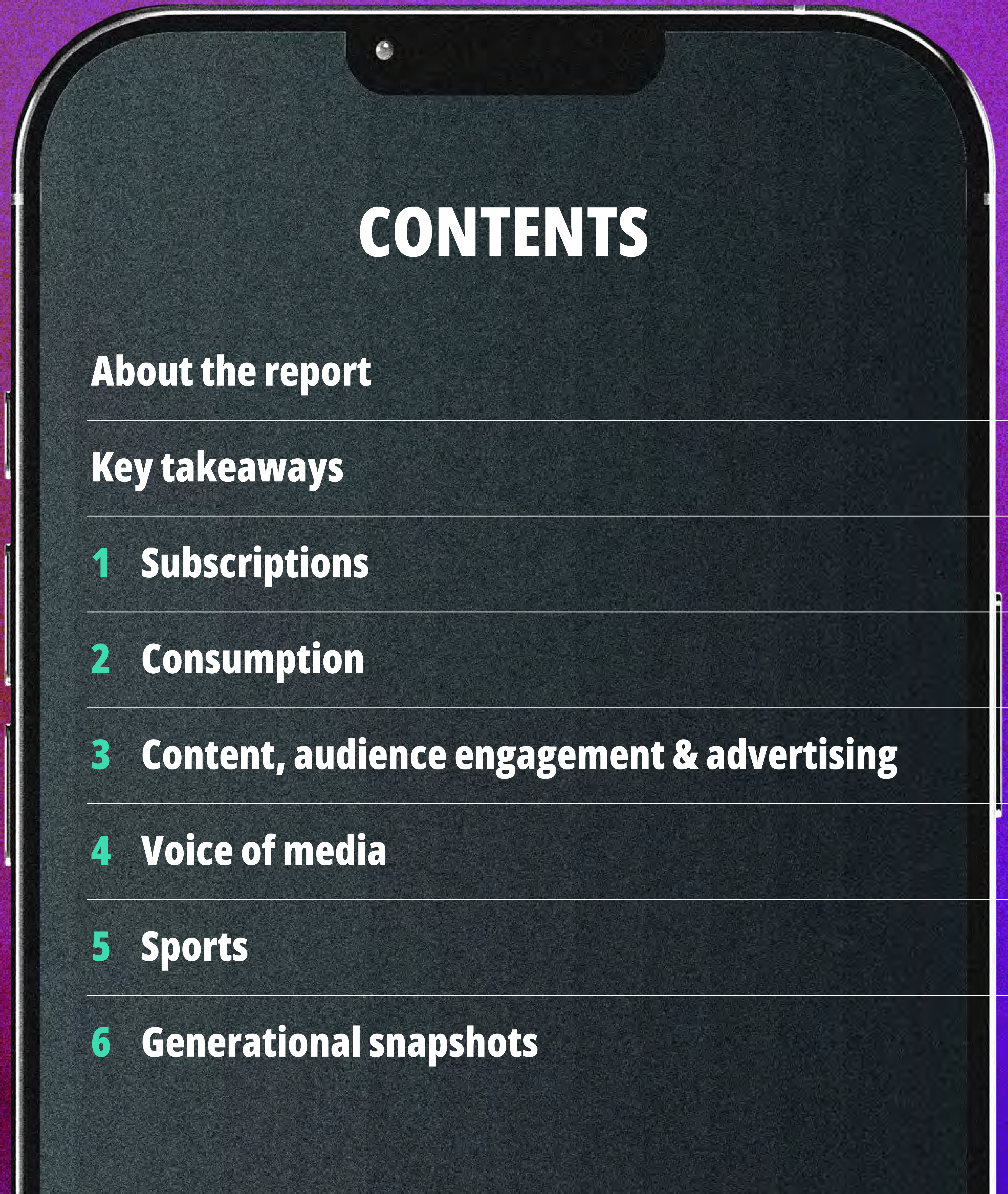
Media & Entertainment Consumer Insights 2025

14th Edition



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ABOUT THE REPORT

Our 14th Edition of Media & Entertainment Consumer Insights explores the ever-changing media landscape.

Areas explored in this report:

- The size and composition of Australians' subscription stack and the associated costs
- Time spent on different digital entertainment categories
- The various ways in which Australians interact with digital media, including a deep dive on advertising
- Australians' perception of media organisations and their views on online safety
- All things sport: followership, spend on sports content, women's sport, stadium experiences and more

We invite you to explore the shifting audience needs and behaviours, that define the Australian Media and Entertainment Consumer landscape in 2025.

KNOW YOUR JARGON

SVOD	Subscription Video on Demand
AVOD	Ad-supported Video on Demand
BVOD	Broadcast Video on Demand
FAST	Free ad-supported streaming television
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

Our research comprises a nationally representative sample of 2,000 consumers, aged 16–92, weighted for demographics such as age, gender, location and working status. An independent research organisation conducted the survey in July–August 2025. Data in this survey is self-reported and, as such reflects respondents' perceptions which may differ from measured industry data (such as OzTAM's VOZ) or that reported by market participants.

Generation	Ages
Gen Z	16 – 28
Millennials	29 – 44
Gen X	45 – 60
Boomers	61 – 79
Matures	80+

As in previous years, survey results are grouped by generation. This year, we've refreshed the age brackets to reflect where people are today (e.g. Gen Z is in the workforce, many Millennials are parents, ensuring the data remains current and meaningful).

KEY TAKEAWAYS

1

Australian households now hold an average of 3.7 digital entertainment subs (up from 3.3 in 2024), the biggest jump since the COVID-19 pandemic, and monthly subscription spend has also increased from $63 to $78.

$101

Gen Z households pay $101 per month for subscriptions – the highest amount to date – with 98% having at least one paid subscription.

SVOD and music are driving growth in subscription volumes and remain the dominant categories (2.3 and 0.7 paid subs per household respectively). Overall, 65% of respondents feel they need multiple subscriptions in one category to get their desired content.

36% of Australians are going over budget and 78% are worried about the total cost of their subscriptions.

2

Despite subscriptions and spend trending up, Australians are spending less time on digital entertainment for the second year in a row – highlighting continued conscious consumption.

-3.4%

Australians are spending less time on media and entertainment (down 3.4% since 2024), raising the question: is peak consumption in the past?

The 3.4% decline is less than last year (-10%), and is primarily driven by news/magazines (-26.5%), video (-12.5%) and social media (-15.8%).

Audio is the only media category that has seen significant growth in consumption time (+33%), driven by music (e.g. Spotify/Apple Music/radio), and now accounts for 28% of total digital entertainment consumption.

3

Younger audiences are reshaping engagement: they prefer ad-free content, use social media to find TV/movie recommendations, multi-task more and have most interest in being a content creator.

21%

1 in 5 Australians have been or considered being a content creator, with Gen Z most interested (39%) for commercial reasons.

Appetite for ad-free content continues to grow: 42% of consumers are willing to pay to avoid ads across content types (slightly up from 40% in 2024), with news the only exception.

SVOD content discovery is still primarily driven by new release lists (20%) and recommendations from friends and family (19%), but social media is emerging as a powerful source of recommendations for younger generations.

4

Established media and digital platforms are neck-and-neck when considering positive societal influences: TV broadcasters and YouTube lead. For news sources, national and regional publishers are most trusted.

50%

One in two parents are using parental controls to limit what their children can access on social media.

Despite new regulation, social media is still under significant scrutiny, especially among parents: 64% are concerned about its impact on children (down from 70%).

Gen Z view social media and YouTube as driving positive societal change, whereas Boomers see TV Broadcasters as the key changemakers.

5

Australians follow around 4 sports, and are willing to pay more for sports content than ever before. Younger generations prefer to casually follow a sport at large over supporting a specific team.

84%

of Australians consider themselves a sports fan, with the average fan following four different sports.

AFL is Australia's most-followed sport across every generation, with 42% of the population considering themselves a fan. Football (soccer) is a close second for Gen Z and Millennials.

For women's sports, men make up the higher share of the fanbase in all codes except netball and equestrian, yet rugby league and union lag other major sports in recruiting fans to the women's game.

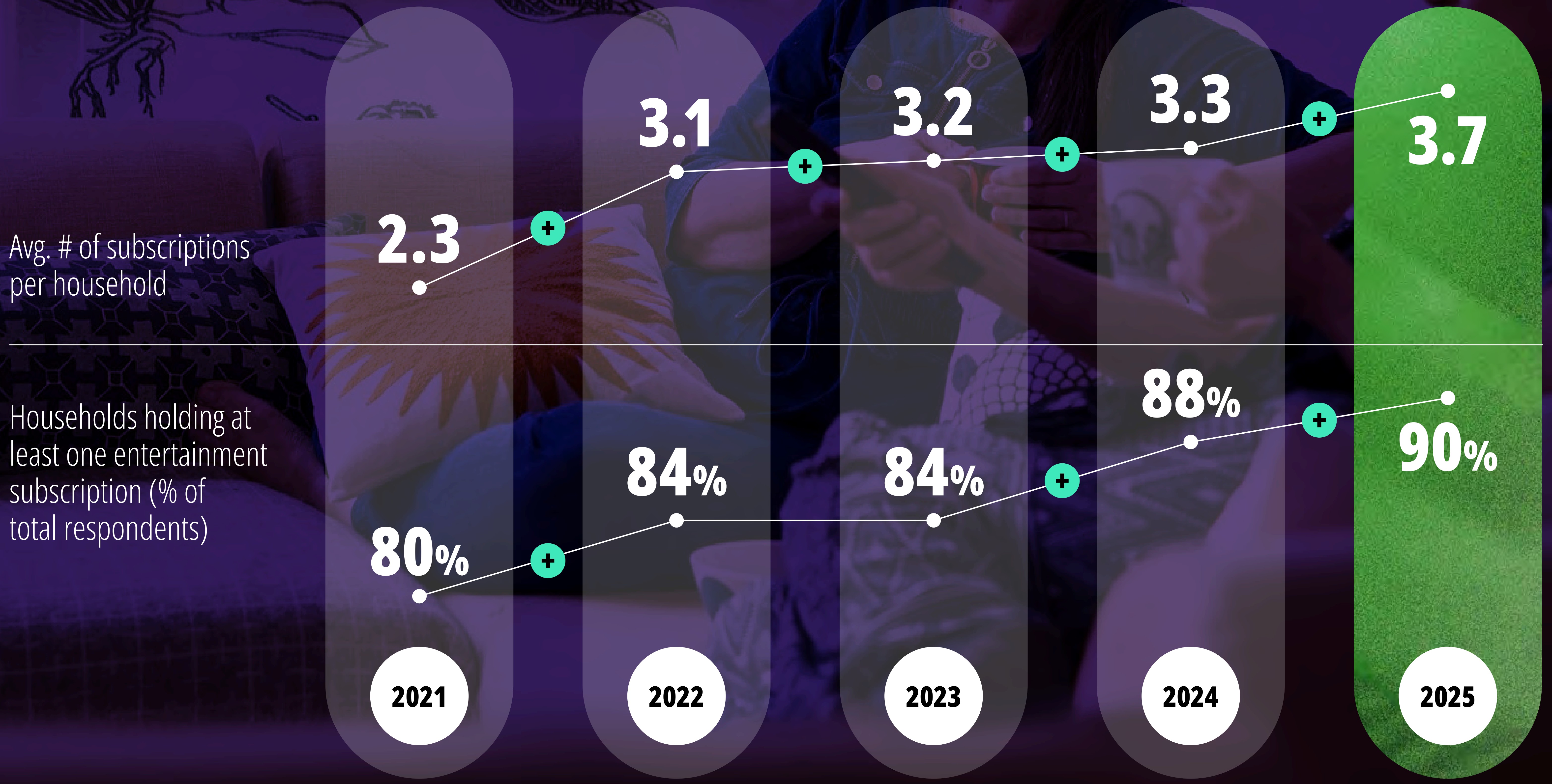
1

Subscriptions

HOLDINGS

Average digital entertainment subscriptions per household has seen the biggest jump since the COVID-19 pandemic.

AUSTRALIANS' DIGITAL ENTERTAINMENT SUBSCRIPTION STACK OVER TIME



After three years of relative stability, the average number of subscriptions per household has seen a big jump in 2025.

The number of subscriptions per household has surged – up 12% since last year, and up 61% since 2021 – to an average of 3.7. As the provider landscape continues to expand with new entrants, Australians are going far and wide to access all the content they desire.

HOLDINGS

Growth in SVOD subscriptions is the primary driver for increased subscriptions per household, as consumers hunt for quality content.

SUBSCRIPTION PENETRATION AND HOLDINGS PER HOUSEHOLD (PER CATEGORY AND BY GENERATION)

	SVOD	Music	Sports	Pay TV[1]	Gaming	News	Podcast[2]	Magazine	Gen Z	Millennials	Gen X	Boomers	Matures
Avg. subs per household	2.3 + (2.1 in 2024)	0.7 (0.7 in 2024)	0.3 (0.3 in 2024)	0.1 (0.1 in 2024)	0.1 (0.1 in 2024)	0.1 (0.1 in 2024)	0.1 (0.1 in 2024)	0.1 (0.1 in 2024)	5.1 + (3.4 in 2024)	4.4 + (3.6 in 2024)	3.2 − (3.7 in 2024)	2.5 + (2.4 in 2024)	1.3 − (4.5 in 2024)
% of households with a subscription	83% + (81% in 2024)	51% + (47% in 2024)	25% (25% in 2024)	14% − (15% in 2024)	7% + (6% in 2024)	5% + (3% in 2024)	4% (No data in 2024)	2% + (1% in 2024)	98% (98% in 2024)	98% + (97% in 2024)	88% + (87% in 2024)	78% + (75% in 2024)	54% + (32% in 2024)

Subscriptions continue to grow, driven in part by premium content seeking.

SVOD subscriptions account for most of the growth in average subscriptions per household. Gen Z and Millennials have the highest number of subscriptions (5.1 and 4.4 respectively).

New market entrants (e.g. HBO Max) may have partly driven this shift, along with consumers' willingness to trial new providers and hunt for the best content.

65%

Of respondents need more than one subscription in at least one category to access the content they desire (e.g. more than one sports subscription).

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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*

HOLDINGS

SVOD, music and sport subscriptions are more popular with Gen Z and Millennials, while Boomers and Matures have the highest demand for Pay TV, news and magazines.

SVOD and Music subscriptions continue to experience strong growth, with Gen Z and Millennials driving demand.

Pay TV subscriptions continued its slow decline overall with Boomers and Matures holding the market.

AVERAGE NUMBER OF SUBSCRIPTIONS HELD AND RESPONDENTS WITH A SUBSCRIPTION (% OF RESPONDENTS)

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
SVOD	2.8 (2.6 in 2024) + 83% (81% in 2024) +	3.3 **95%**	2.9 93%	2.6 82%	2.4 66%	2.3 29%
Music	1.4 (1.4 in 2024) 51% (47% in 2024) +	1.4 **83%**	1.4 67%	1.3 41%	1.2 21%	N/A[2] 4%
Sports	1.2 (1.2 in 2024) 25% (25% in 2024)	1.3 **30%**	1.2 29%	1.1 22%	1.1 19%	N/A[2] 4%
Pay TV	N/A (N/A in 2024) 14% (15% in 2024) −	N/A 10%	N/A 11%	N/A 13%	N/A 20%	N/A **21%**
Gaming	1.4 (1.3 in 2024) + 7% (6% in 2024) +	1.3 11%	1.5 **13%**	1.2 5%	N/A[2] 1%	0.0 0%
News	1.5 (1.4 in 2024) + 5% (3% in 2024) +	N/A[2] 0%	1.9 3%	1.3 5%	1.4 9%	N/A[2] **11%**
Podcast	N/A (N/A in 2024) 4% (N/A in 2024)	N/A 7%	N/A **13%**	N/A 2%	N/A 2%	N/A 0%
Magazine	1.5 (1.7 in 2024) − 2% (1% in 2024) +	N/A[2] 1%	1.5 2%	1.7 2%	1.4 3%	N/A[2] **7%**

KEY

− +	Change versus 2024
##%	Proportion who subscribe
#.#	Average subscriptions per subscriber household[1]
##%	Largest share of subscribers per category within a generation

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1. Excluding those with no subscription

2. Subpopulation size does not meet the threshold

AGGREGATION SERVICES

There's appetite for aggregation services, but consumers either have limited awareness or see gaps in existing offerings.

ALMOST HALF OF RESPONDENTS WERE NOT AWARE OF AGGREGATION SERVICES

46% Of respondents would be interested in aggregation services but were not previously aware of them.

63% Of Gen Z would find aggregation appealing, making them the most interested generation.

		Gen Z	Millennials
77%	Would like to search and discover content across all TV/movie streaming services	86%	85%
76%	Believe it would be useful to manage multiple subscriptions in one place	88%	84%
69%	Would like to bundle multiple subscriptions from other digital entertainment categories	80%	79%

FOR THOSE THAT ARE AWARE, MOST DO NOT SEE VALUE IN AVAILABLE OFFERINGS[1]

75% Don't think the savings from aggregation services are compelling enough to subscribe.

69% Don't feel aggregation solutions can provide the desired content mix for a decent price.

		Gen Z	Boomers
65%	Aggregation services considered do not have the subscriptions I already have	66%	63%
71%	The interface of solutions considered is not sufficiently appealing	73%	80%
66%	Find it hard to justify combining existing accounts due to the risk of losing the features/appeal of individual subscriptions	70%	63%

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1. For those who were able to answer, i.e. those that have or are exploring aggregation services

SPEND

Monthly spend on digital entertainment has hit a record high, as Gen Z households become the first to exceed $100.

The rising cost of living has not deterred spending on subscriptions, now at $78 per month, an increase of 25% since last year.

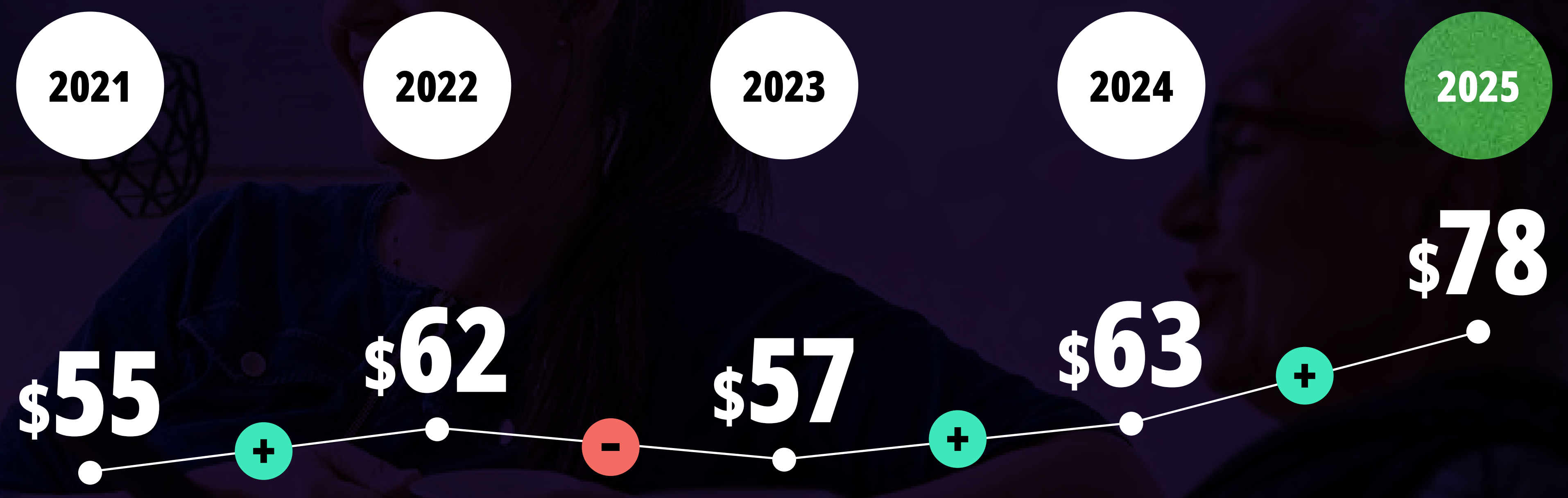
The increase in spend is likely driven by a combination of changes in market conditions (various SVOD players have increased prices, and new players continue to enter the market) and consumer behavior (65% of consumers feel they require multiple subscriptions to get the content they desire).

This increased spend is largely due to Gen Z and Millennial households, who are spending around $100 per month (for the first time ever). Monthly spend by older generations has declined slightly, with Boomers and Matures least likely to 'overspend' relative to their budgets. Overall, 78% of respondents are worried about the amount they spend.

36% **are over budget**

And 76% of respondents treat digital entertainment subscriptions as part of a total household budget, regardless of media type, with 36% spending over budget.

AVERAGE HOUSEHOLD MEDIA AND ENTERTAINMENT SUBSCRIPTION SPEND ($ PER MONTH)



78% Of respondents are worried about the total cost of their paid digital entertainment subscriptions.

AVERAGE MONTHLY HOUSEHOLD MEDIA SPEND BY GENERATION

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
Average monthly household media spend	$78 + ($63 in 2024)	$101 + ($84 in 2024)	$97 + ($77 in 2024)	$64 + ($52 in 2024)	$55 + ($46 in 2024)	$35 − ($44 in 2024)
Overspending relative to budget	36% + (35% in 2024)	53% + (39% in 2024)	44% + (36% in 2024)	31% − (40% in 2024)	20% − (25% in 2024)	18% − (45% in 2024)
Worried about total cost of subscriptions	78% + (75% in 2024)	79% + (72% in 2024)	82% + (79% in 2024)	80% + (76% in 2024)	70% − (72% in 2024)	50% − (65% in 2024)

PURCHASING AND ACCESS

While streaming platforms are increasingly strict on account sharing, splitting the bill or other workarounds are common.

WHO PAYS FOR ENTERTAINMENT SUBSCRIPTIONS BY GENERATION (% OF RESPONDENTS)

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
Pay entirely for own subscription(s)	68%	52%	68%	76%	71%	64%
Partner pays	11%	10%	13%	10%	12%	0%
Family pays (incl. parents, children)	7%	20%	5%	3%	4%	7%
Combination of the above	12%	16%	14%	10%	9%	11%

SVOD is the most shared media type, driven by Gen Z.

Almost half of Gen Z are not paying for all their entertainment subscriptions themselves (48%). Of those paying for an SVOD account, 47% are also accessing friends or family accounts.

ACCESS ACROSS ALL SUBSCRIBERS AND SUBSCRIPTIONS[3] (% OF RESPONDENTS)

10% Of respondents use pirating sites.

10% Of respondents use a VPN to access content not available in their region.

ACCESSING ACCOUNTS PAID FOR BY A FRIEND OR FAMILY MEMBER[1] (% OF RESPONDENTS)

	Overall	Gen Z	Gen X
SVOD	27%	47%	16%
Sports	20%	36%	13%
Music	17%	26%	10%
Gaming	15%	22%	24%
News	8%	N/A[2]	N/A[2]
Magazine	7%	N/A[2]	N/A[2]

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[1] For those with subscriptions in this media category

[2] Subpopulation size does not meet the threshold

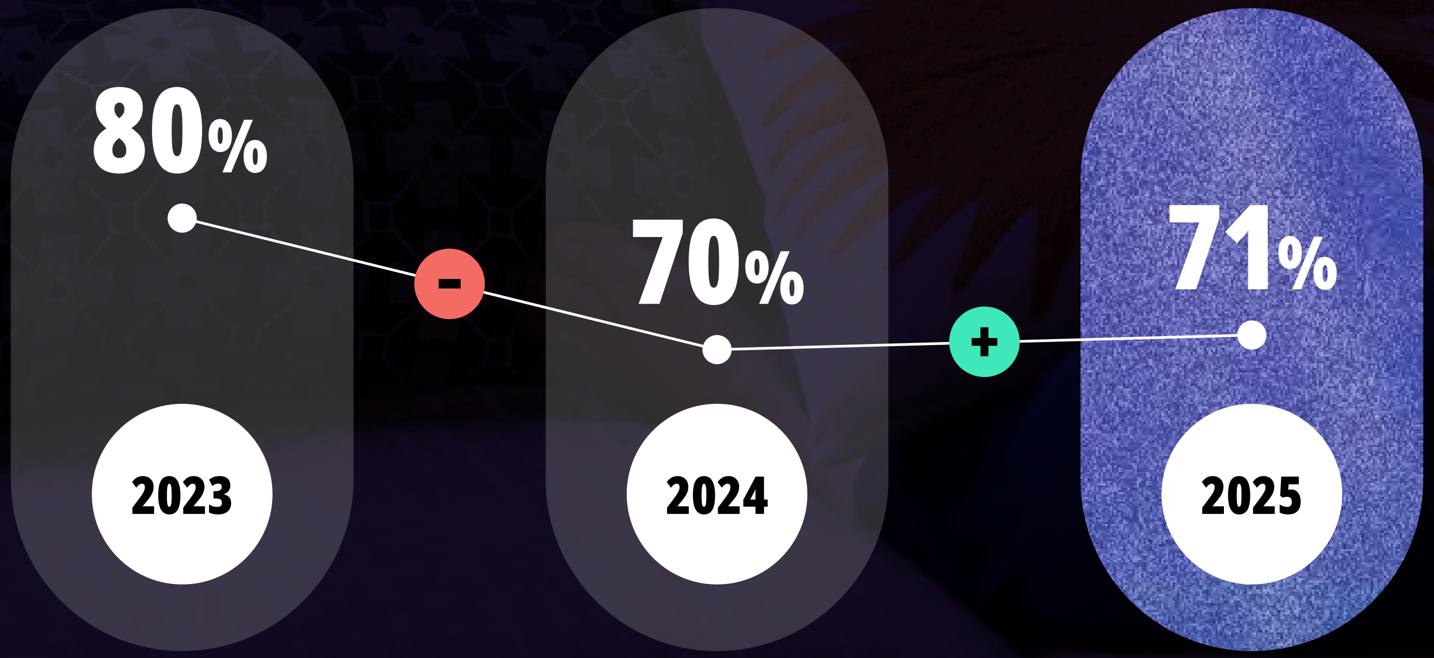
[3] 90% of respondents

SWITCHING BEHAVIOUR

Switching is most common among Gen Z and Millennials, with podcasts and gaming the most vulnerable categories.

Switching behaviour has remained steady or fallen across the most popular subscription categories of SVOD, music, sports and games. This contrasts with 2023, when switching behaviour rose across all four, highlighting that consumers are either more content with their stack or are less frequently reviewing it.

SHARE OF RESPONDENTS PERIODICALLY REVIEWING THEIR SUBSCRIPTION STACK TO DETERMINE IF THEY WANT TO MAKE ANY CHANGES



SUBSCRIPTION SWITCHING BEHAVIOUR IN THE LAST SIX MONTHS PER CATEGORY AND BY GENERATION (% OF RESPONDENTS)

	Podcast[1]	Gaming	SVOD	Sports	Music	Magazine	News
	70%	52% - (60% in 2024)	49% (49% in 2024)	47% - (51% in 2024)	40% - (44% in 2024)	27% + (21% in 2024)	19% + (16% in 2024)
Added	28%	25%	19%	23%	18%	20%	13%
Cancelled	22%	14%	15%	12%	11%	7%	6%
Both	20%	14%	16%	12%	11%	0%	10%

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
Added	37%	66%	47%	28%	18%	0%
Cancelled	31%	51%	42%	22%	14%	4%

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[1] First year reported for podcasts

RETENTION PLAYS (SVOD)

Gen Z and Millennials see first-run movies as a strong reason to stay, while older generations favour discounted offers.

Consumers are worried about their spend, but providers can tap into a range of retention plays.

Most people are cancelling due to overall spend (ranked as primary reason by 47% of respondents). Some features are more effective than others for retaining these consumers, with no ads or restrictions increasing the most in popularity since 2024.

Gen Z and Millennials are most incentivised by access to first-run movies followed by no ads or restrictions. They are prioritising premium, uninterrupted content, while older generations are focused on price.

FEATURES THAT WOULD CONVINCE SVOD SUBSCRIBERS TO NOT CANCEL THEIR SUBSCRIPTION (% OF RESPONDENTS)

42% A discounted offer

38% + No ads or restrictions on what they can watch (e.g. # of screen limits)
(30% in 2024)

39% + Access to first run movies (e.g. recent releases)
(35% in 2024)

29% − Access to loyalty programs with discounts on other offerings
(30% in 2024)

TOP REASONS FOR CANCELLING PAID VIDEO SUBSCRIPTION(S) (% WHO RANKED REASON IN TOP THREE)

			Gen Z	Boomers
#1	64%	To reduce overall spend on video subscriptions	61%	61%
#2	34%	The price for the service increased and there were similar, cheaper alternatives	41%	20%

THE IMPACT OF SVOD RETENTION PLAYS BY GENERATION (% OF RESPONDENTS)

	Gen Z	Millennials	Gen X	Boomers	Matures
Proportion of subscribers that would reconsider cancelling following a retention play[1]	97%	89%	84%	68%	39%
Most popular retention play per generation	Access to first run movies 48%	Access to first run movies 42%	Discounted offer 46%	Discounted offer 48%	Discounted offer 29%

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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; no ads or restrictions; or a discounted offer.

CONTENT DISCOVERY AND DIVERSITY

Awareness remains an issue: compelling content needs to be discoverable, not just available.

NAVIGATING SVOD CONTENT (% OF RESPONDENTS)

		Gen Z	Boomers
56%	Find it hard to know what content (TV/movie) is available on which TV/movie streaming service	67%	46%
75%	Are confident subscription recommendations are personalised for their taste	82%	61%

MOST CONSUMERS FEEL THE CONTENT THEY CONSUME IS SUFFICIENTLY DIVERSE (% OF RESPONDENTS)

	Gen Z	Millennials	Gen X	Boomers	Matures
Actively seek diverse voices and representation in the content they consume	62%	59%	46%	37%	29%
Believe they get diversity in tone, opinions, and cultural representation across the content providers they access	78%	75%	73%	62%	43%

TOP THREE TYPES OF CONTENT CONSUMED ON SVOD (% OF RESPONDENTS)

#1	**52%**	Fiction stories
#2	**41%**	Non-fiction stories
#3	**20%**	Reality/game shows

Many respondents have difficulty navigating the abundance of choice across streaming services, with recommendations being most helpful when we trust them to be personalised.

AUSTRALIAN CONTENT IS VALUED, BUT IT'S NOT NECESSARILY A MUST-HAVE (% OF RESPONDENTS)

73% Value Australian content on TV/movie streaming services

44% Prefer to watch content produced in Australia or Australian stories than content from other countries

2

Consumption

CONSUMPTION TOTALS

Overall media consumption continues to trend downwards, with audio the only exception.

WEEKLY MEDIA AND ENTERTAINMENT CONSUMPTION

42h 45m ⊖

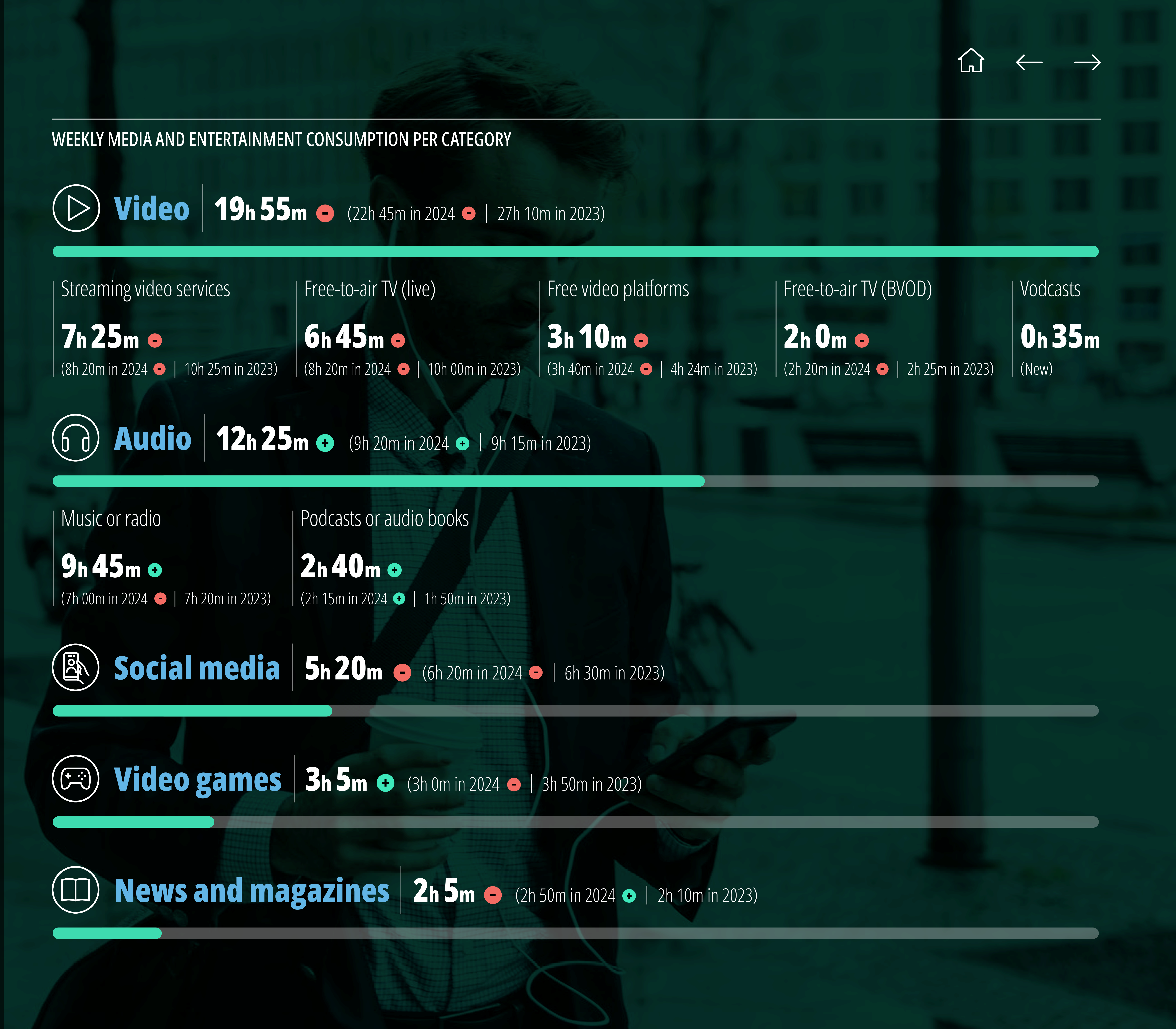
(44h 15m in 2024) ⊖

(48h 55m in 2023)

Content curation is becoming much more intentional, with consumers being targeted about what they view or listen to. Ultimately, quality matters.

Video consumption declined this year (-13%), marking a second year of a significant reduction. Social media has taken a big hit as well (-17%), following a minor decline in the year prior.

Relative to 2024, audio is the only category that experienced significant growth in consumption (up 33%).



WEEKLY MEDIA AND ENTERTAINMENT CONSUMPTION PER CATEGORY

Video | 19h 55m ⊖ (22h 45m in 2024 ⊖ | 27h 10m in 2023)

Streaming video services
7h 25m ⊖
(8h 20m in 2024 ⊖ | 10h 25m in 2023)

Free-to-air TV (live)
6h 45m ⊖
(8h 20m in 2024 ⊖ | 10h 00m in 2023)

Free video platforms
3h 10m ⊖
(3h 40m in 2024 ⊖ | 4h 24m in 2023)

Free-to-air TV (BVOD)
2h 0m ⊖
(2h 20m in 2024 ⊖ | 2h 25m in 2023)

Vodcasts
0h 35m
(New)

Audio | 12h 25m ⊕ (9h 20m in 2024 ⊕ | 9h 15m in 2023)

Music or radio
9h 45m ⊕
(7h 00m in 2024 ⊖ | 7h 20m in 2023)

Podcasts or audio books
2h 40m ⊕
(2h 15m in 2024 ⊕ | 1h 50m in 2023)

Social media | 5h 20m ⊖ (6h 20m in 2024 ⊖ | 6h 30m in 2023)

Video games | 3h 5m ⊕ (3h 0m in 2024 ⊖ | 3h 50m in 2023)

News and magazines | 2h 5m ⊖ (2h 50m in 2024 ⊕ | 2h 10m in 2023)

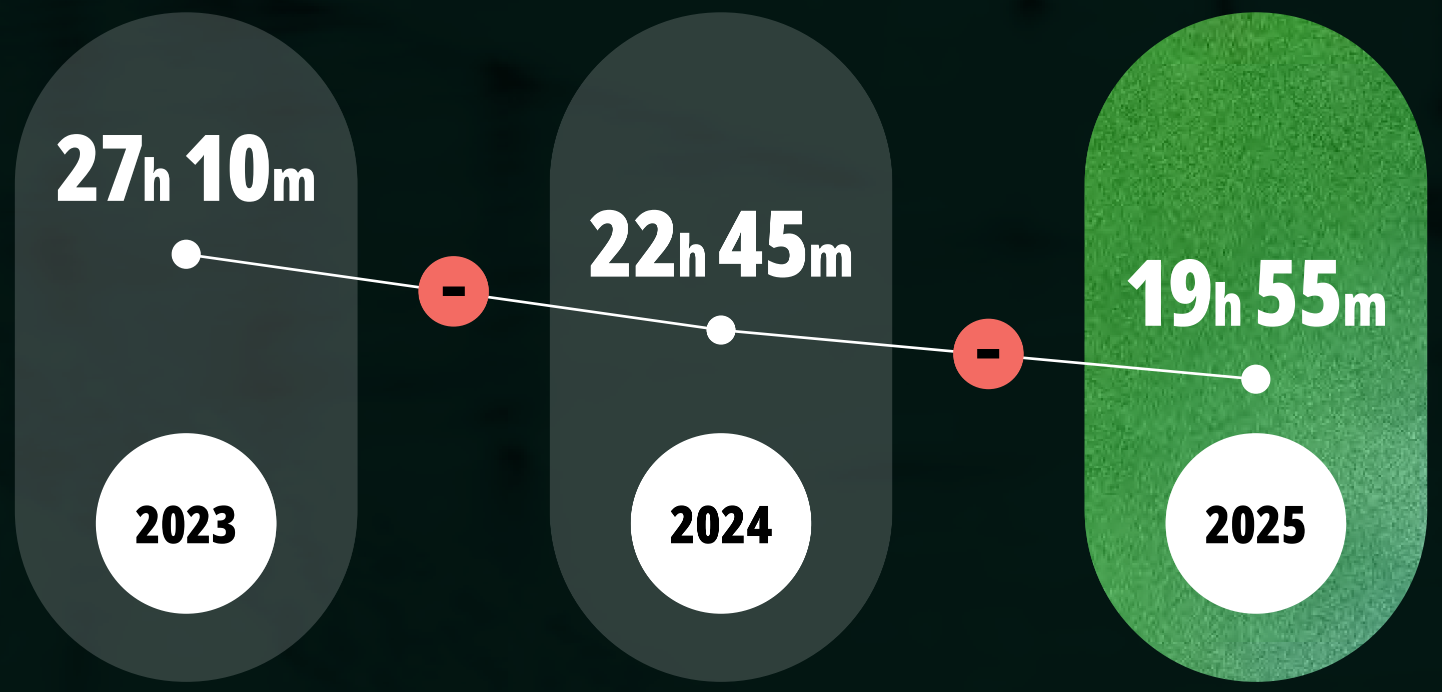
VIDEO SPOTLIGHT

Weekly video consumption has fallen for a second consecutive year, with free-to-air TV (live) the hardest hit.

Weekly consumption of free-to-air-TV (live) continues to decline (down 19% since 2024).

While viewership for key events (like sporting grand finals) has increased year on year, overall weekly of consumption of live free-to-air TV continues to decline significantly. Matures and Boomers drive the majority of live free-to-air TV media consumption, while Gen Z average less than 2 hours a week (see addendum on page 53 for a comparison to viewership data reported by OzTAM/Voz).

WEEKLY VIDEO CONSUMPTION



WEEKLY VIDEO CONSUMPTION (PER CATEGORY AND BY GENERATION)

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
Streaming video services (e.g., Netflix)	7h 25m ⊖ (8h 20m in 2024) (10h 25m in 2023)	6h 40m ⊖ (7h 45m in 2024)	8h 0m ⊖ (8h 55m in 2024)	8h 5m ⊖ (8h 30m in 2024)	6h 50m ⊖ (7h 45m in 2024)	3h 20m ⊖ (5h 5m in 2024)
Free-to-air TV (live)	6h 45m ⊖ (8h 20m in 2024) (9h 55m in 2023)	1h 45m ⊖ (2h 45m in 2024)	3h 30m ⊖ (3h 40m in 2024)	7h 10m ⊖ (9h 50m in 2024)	13h 5m ⊖ (15h 25m in 2024)	21h 20m ⊕ (18h 20m in 2024)
Free video platforms (e.g., YouTube)	3h 10m ⊖ (3h 40m in 2024) (4h 25m in 2023)	3h 5m ⊖ (5h 20m in 2024)	3h 15m ⊖ (3h 50m in 2024)	3h 5m ⊖ (3h 50m in 2024)	3h 5m ⊕ (2h 25m in 2024)	2h 35m ⊕ (1h 40m in 2024)
Free-to-air TV (BVOD)	2h 00m ⊖ (2h 20m in 2024) (2h 25m in 2023)	1h 20m ⊖ (1h 50m in 2024)	1h 35m ⊖ (1h 55m in 2024)	2h 20m ⊖ (2h 25m in 2024)	2h 30m ⊖ (3h 15m in 2024)	3h 40m ⊕ (1h 30m in 2024)

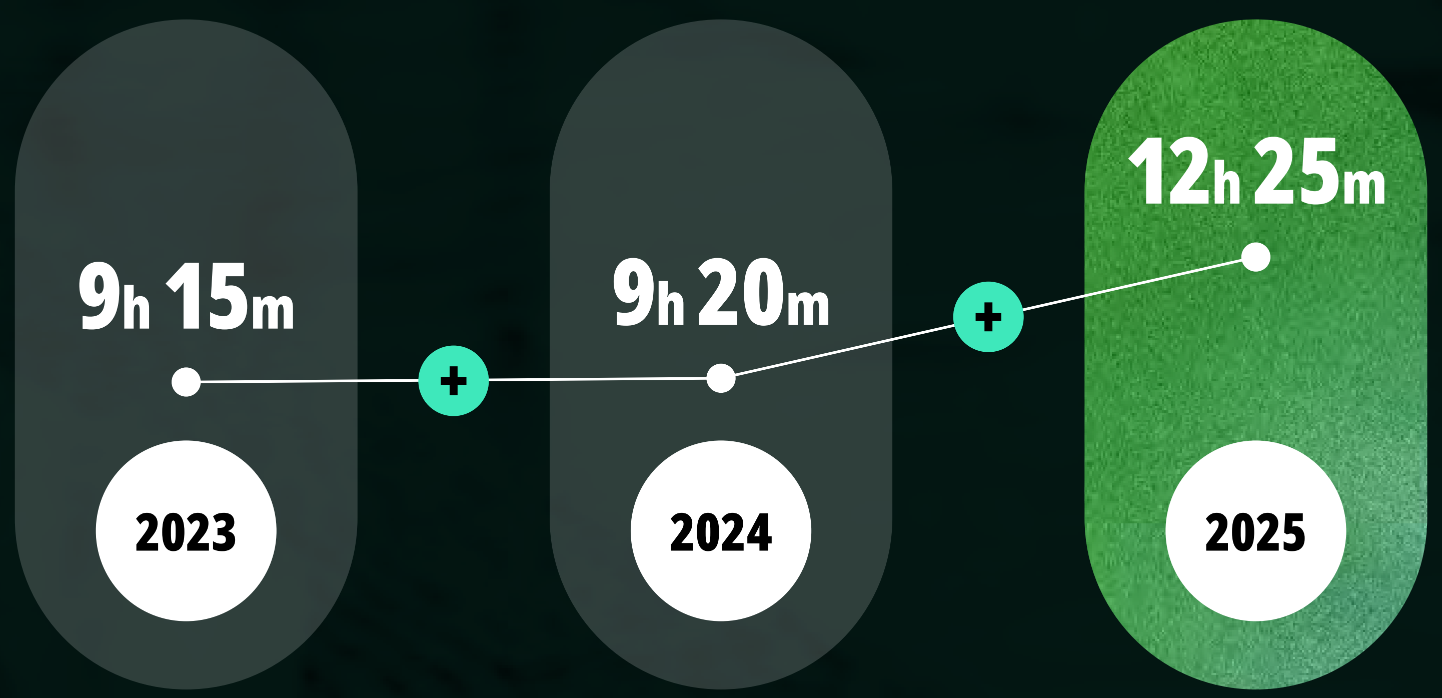
AUDIO SPOTLIGHT

Audio is the only category to see a major increase in consumption (33%), with the go-to category varying between generations.

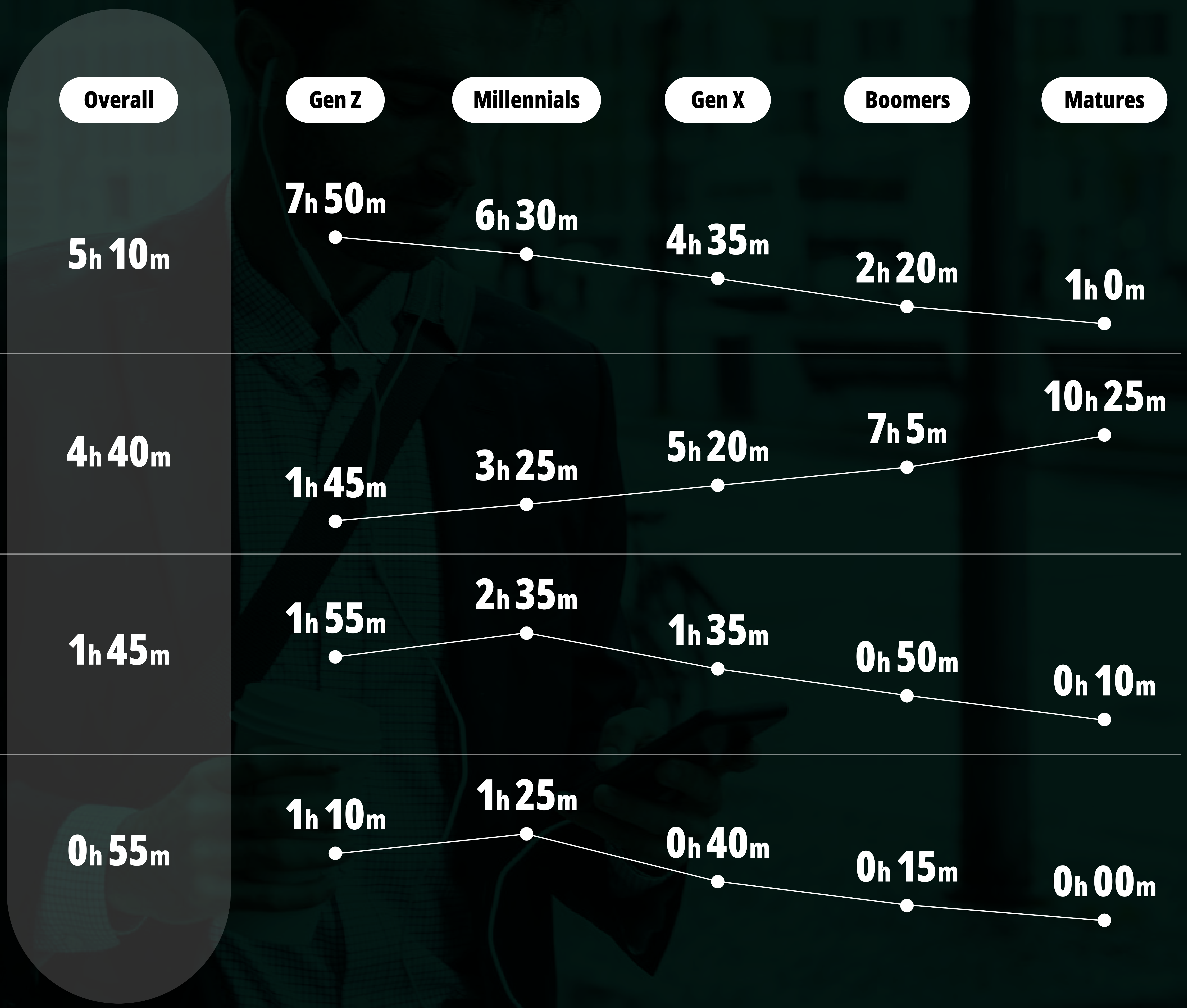
Audio consumption has increased with Millennials the biggest listeners.

Audio consumption surged in 2025, fuelled by growth in music service and radio consumption. Some of the contributors to this growth are smarter algorithms, more curated experiences, the continued growth of global genres, and seamless integration with creators and influencers. But listening habits remain diverse across generations: Matures continue to lean on radio as their primary source, while Gen Z prefer music and podcasts.

WEEKLY AUDIO CONSUMPTION



WEEKLY AUDIO CONSUMPTION (PER CATEGORY AND BY GENERATION)



	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
Music (e.g., Spotify, Apple Music)	5h 10m	7h 50m	6h 30m	4h 35m	2h 20m	1h 0m
Radio	4h 40m	1h 45m	3h 25m	5h 20m	7h 5m	10h 25m
Podcasts	1h 45m	1h 55m	2h 35m	1h 35m	0h 50m	0h 10m
Audio books	0h 55m	1h 10m	1h 25m	0h 40m	0h 15m	0h 00m

SOCIAL MEDIA SPOTLIGHT

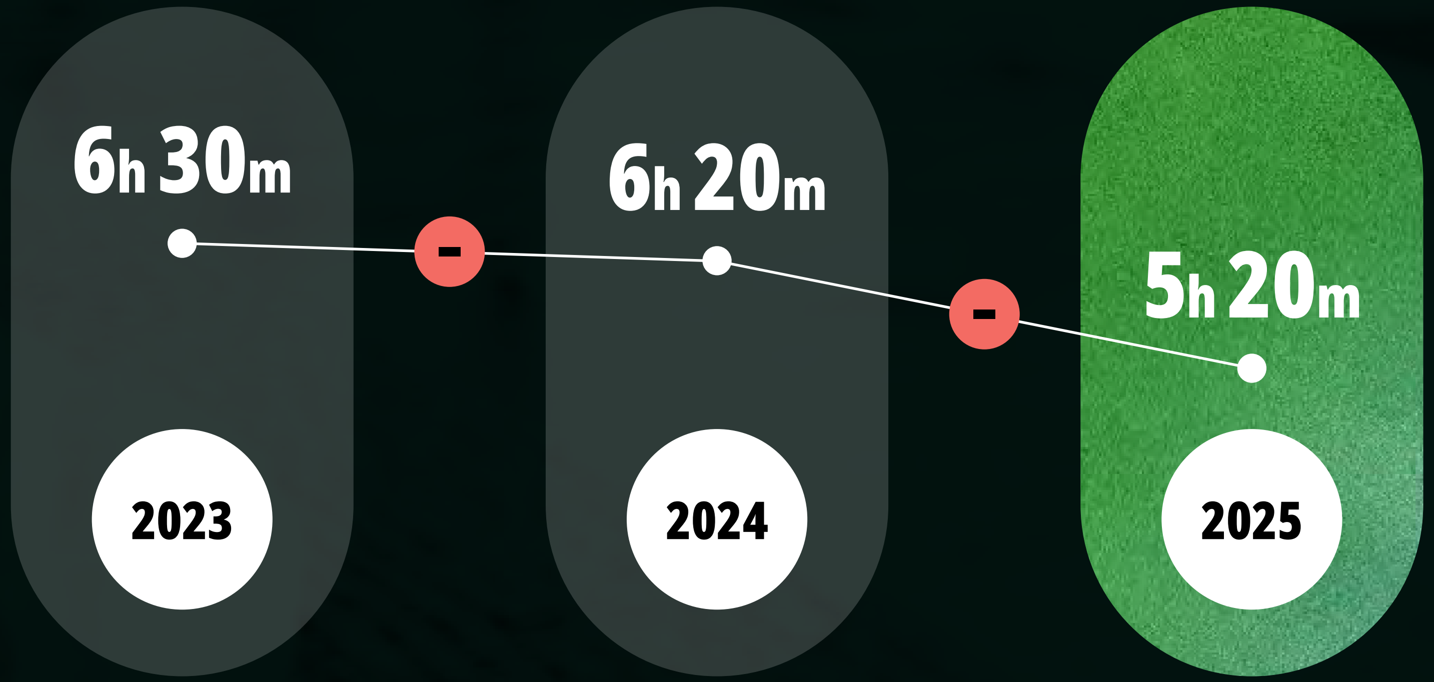
Social media remains a critical part of Australia's media diet, but consumption is declining among all but Matures.

Overall use of social media has decreased by 15% since 2024 but still represents a significant amount of consumption for all generations, particularly Gen Z.

Meta (Facebook) remains Australia's dominant social media platform, with 31% of respondents engaging weekly. This is largely driven by older generations – Gen X (38%), Boomers (40%), and Matures (46%). This underscores Meta's entrenched role as the go-to hub for older generations.

40% of respondents regularly consume news on social media with this being higher for Millenials (43%) and Gen X (43%).

WEEKLY SOCIAL MEDIA CONSUMPTION



TOP SOCIAL MEDIA PLATFORMS (% OF RESPONDENTS)

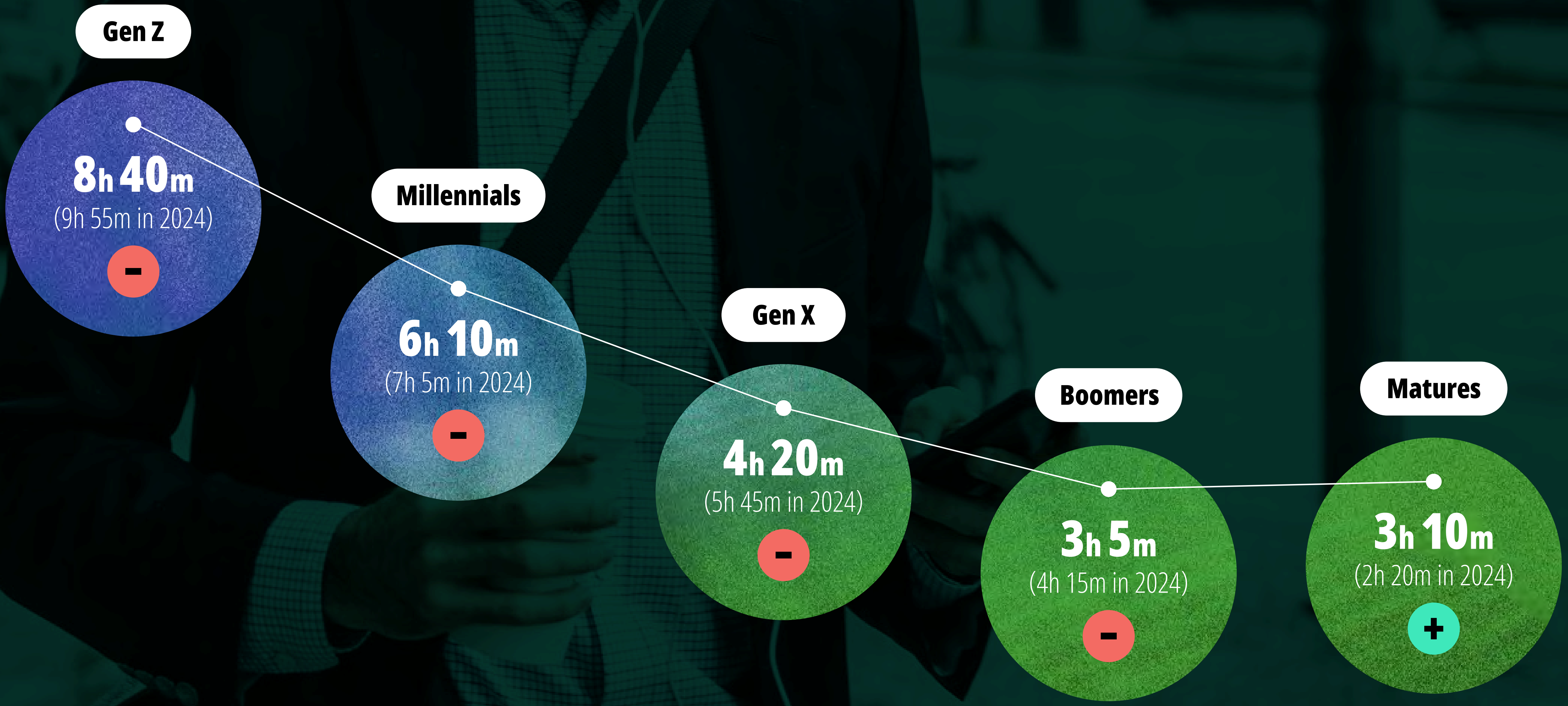
31% Meta (Facebook)

24% YouTube

15% Instagram

10% TikTok

TIME SPENT CONSUMING SOCIAL MEDIA CONTENT BY GENERATION



SOCIAL MEDIA SPOTLIGHT

Watching video content is the top social media activity for Gen Z, Millennials and Gen X. Boomers prefer looking at photos and Matures spend most time messaging friends.

Across all generations, watching video ranks as the most popular social media activity, with browsing feeds and messaging both in the top three.

For Gen Z and Millennials, social media is first and foremost a video destination that provides a lean-back experience driven by endless, algorithm-curated feeds. In contrast, older generations use these platforms mainly to stay connected with friends and family through messaging. The divide is clear: while younger audiences turn to social media for entertainment, older users see it as a tool for connection.

TOP THREE ACTIVITIES ON SOCIAL MEDIA BY GENERATION (% OF RESPONDENTS)

Overall

Watching video	**24%**	(2024: Browsing feeds 23%)
Browsing feeds	**21%**	(2024: Watching video 22%)
Messaging with friends	**18%**	(2024: Messaging with friends 19%)

Gen Z

Watching video	**30%**	(2024: Watching video 31%)
Browsing feeds	**18%**	(2024: Browsing feeds 17%)
Messaging with friends	**15%**	(2024: Messaging with friends 16%)

Millennials

Watching video	**26%**	(2024: Watching video 24%)
Browsing feeds	**22%**	(2024: Browsing feeds 23%)
Messaging with friends	**15%**	(2024: Messaging with friends 14%)

Gen X

Browsing feeds	**25%**	(2024: Browsing feeds 28%)
Watching video	**23%**	(2024: Watching video 18%)
Messaging with friends	**17%**	(2024: Messaging with friends 17%)

Boomers

Messaging with friends	**24%**	(2024: Messaging with friends 29%)
Watching video	**21%**	(2024: Browsing feeds 23%)
Browsing feeds	**20%**	(2024: Watching video 15%)

Matures

Messaging with friends	**32%**	(2024: Messaging with friends 57%)
Shopping	**21%**	(2024: Watching video 14%)
Looking at photos	**14%**	(2024: Looking at photos 14%)

SOCIAL MEDIA SPOTLIGHT

Despite social media consumption trending down overall, demand for UGC is on the rise.

Gen Z and Millennials are increasing their UGC consumption, a consequence of their preference for snackable, short-form content.

Half of all respondents find they are spending more time watching UGC than planned, with this particularly the case for younger age groups – or Generation YouTube.

Short form video content is popular with all age groups, with the proportion of respondents who spend more time watching this than streaming movies and TV shows increasing since last year (to 37%).

UGC CONSUMPTION (% OF RESPONDENTS)

		Gen Z	Millennials
48% + (45% in 2024)	Spend more time watching UGC online than planned	69%	63%
42% + (38% in 2024)	Spend more time viewing UGC online than they did six months ago	59%	56%
39% + (36% in 2024)	Share UGC online as a way to communicate with friends and/or family	67%	52%
38% (37% in 2024)	Consume most of their UGC content through likes and shares from friends	59%	51%
37% + (34% in 2024)	Spend more time watching UGC (videos) online than streaming movies and TV shows	61%	49%
32% + (29% in 2024)	Would, if given the choice, prefer watching UGC online instead of streaming movies and TV shows	50%	41%

SOCIAL MEDIA SPOTLIGHT

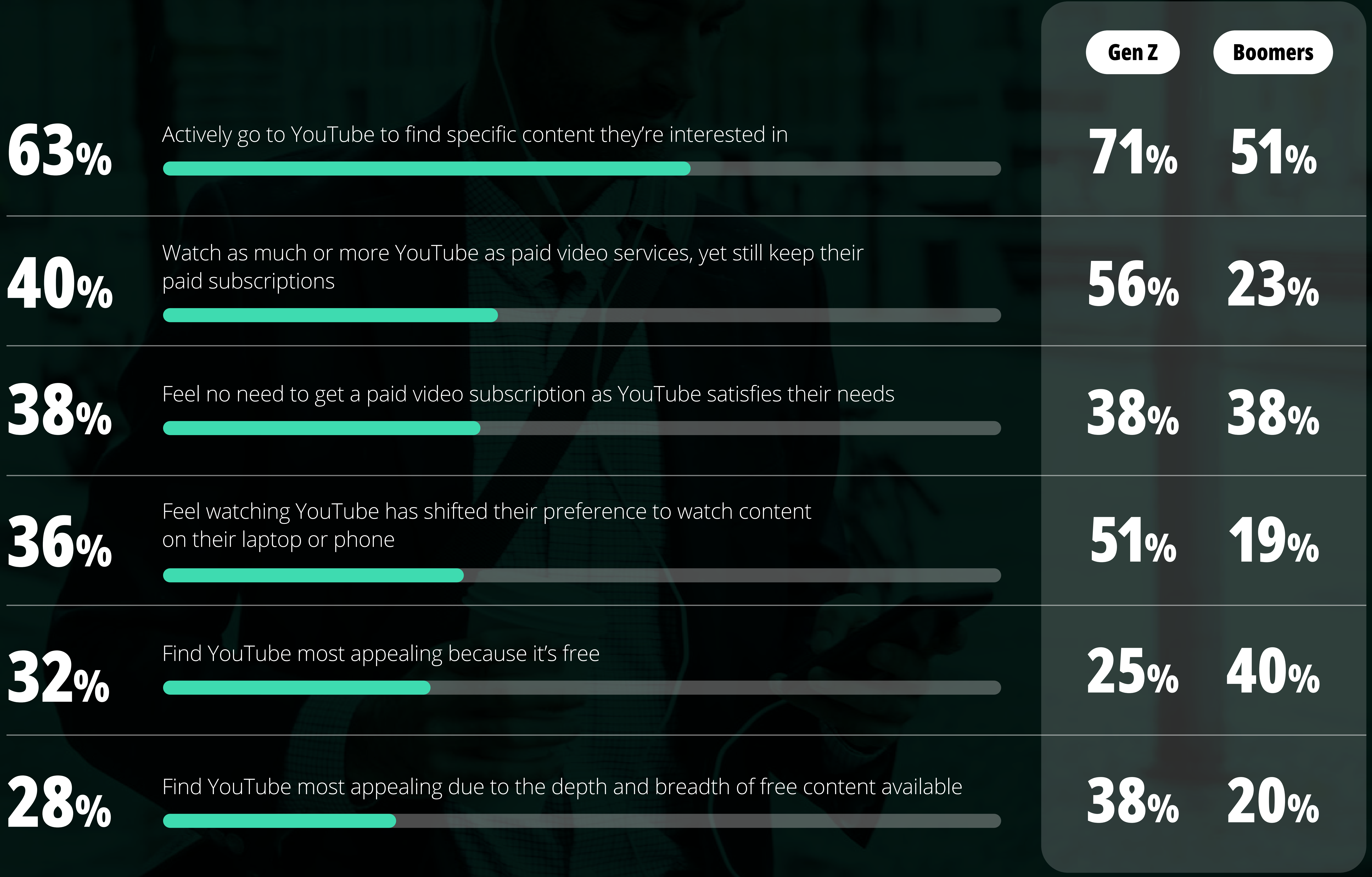
YouTube has changed Australia's media landscape and has become a primary destination for those that value intentional, free and personalised content.

YouTube's flexible, on-demand platform has drawn Australians away from traditional TV and paid video subscriptions.

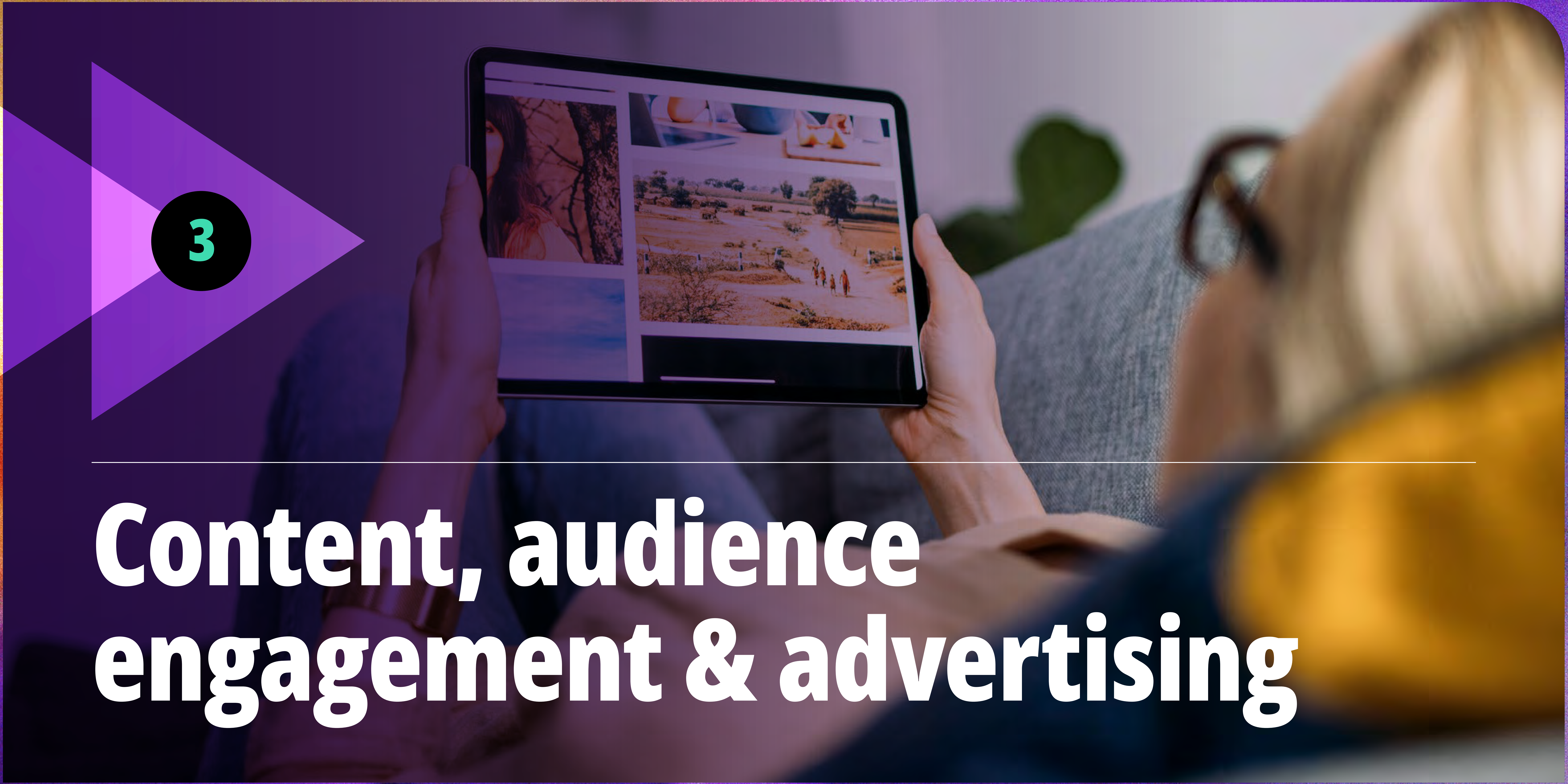
YouTube is reshaping how Australians consume video content. More than a third of respondents feel no need for paid video subscriptions because YouTube meets their needs, with this sentiment strongest among men (43%) and Matures (50%).

Many respondents say they watch as much or more YouTube relative to paid services, but continue to keep their subscriptions, especially Gen Z (56%) and Millennials (46%).

YOUTUBE CONSUMPTION (% OF RESPONDENTS)



		Gen Z	Boomers
63%	Actively go to YouTube to find specific content they're interested in	71%	51%
40%	Watch as much or more YouTube as paid video services, yet still keep their paid subscriptions	56%	23%
38%	Feel no need to get a paid video subscription as YouTube satisfies their needs	38%	38%
36%	Feel watching YouTube has shifted their preference to watch content on their laptop or phone	51%	19%
32%	Find YouTube most appealing because it's free	25%	40%
28%	Find YouTube most appealing due to the depth and breadth of free content available	38%	20%



3

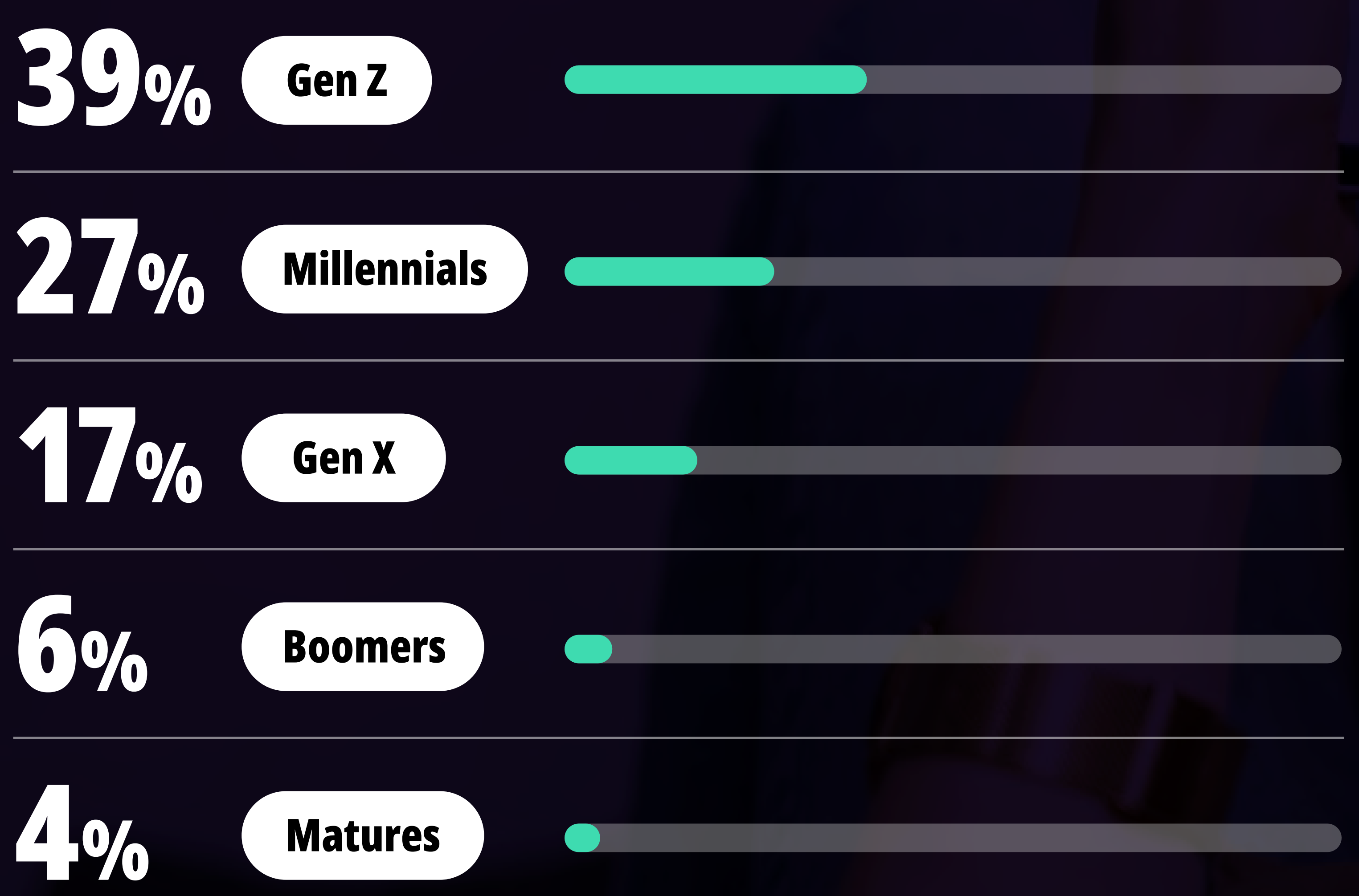
Content, audience engagement & advertising

CONTENT CREATION

Content creation is now more accessible and popular than ever, with Gen Z particularly drawn to the commercial opportunities of the ‘creator economy’.

One in five people (21%) have either been or have considered being a content creator.

HAVE BEEN OR CONSIDERED BEING A CONTENT CREATOR BY GENERATION (% OF RESPONDENTS)



Motivations for becoming a creator differ across generations. For Gen Z, the primary reason is to make money, whereas Millennials, Gen X and Boomers are more driven by self-fulfilment.

TOP THREE REASONS FOR BECOMING A CONTENT CREATOR BY GENERATION (% OF RESPONDENTS)

Overall	Money	26%
	Creative self-expression	24%
	Connection/community	22%
Gen Z	Money	33%
	Creative self-expression	27%
	Growth, fulfilment and learning	21%
Millennials	Connection/community	39%
	Money	24%
	Creative self-expression	22%
Gen X	Share knowledge	30%
	Creative self-expression	23%
	Money	23%
Boomers	Creative self-expression	50%
	Share knowledge	50%
	N/A	N/A
Matures	N/A	N/A
	N/A	N/A
	N/A	N/A

CONTENT DISCOVERY AND ENGAGEMENT

Content discovery methods are fragmented, and viewing preferences vary greatly by generation.

Discovery of SVOD content is mostly influenced by user experience and personalisation.

The top two methods for discovering what to watch on SVOD are lists of new releases (20%) and recommendations from friends and family (19%). Popularity signals like trending lists (13%) and personalised recommendations (11%) still matter, but they play more of a filtering role than a primary driver of choice.

Discovery builds awareness, but the actual decision on what to watch follows a different pattern.

The top two methods for deciding what to watch on SVOD are service provider recommendations (28%) and word of mouth (26%). For Gen Z however, social media is the main contributor to their decision making.

Ultimately its content that consumers come back for and which drives their loyalty.

Platforms cannot rely on brand affinity alone. Sustained loyalty depends on continually refreshing content catalogues and securing signature titles, highlighting the need for platforms to find other ways to keep users on platform.

TOP FIVE METHODS FOR SVOD CONTENT DISCOVERY (% OF RESPONDENTS)

20% Lists of new releases or newly added content on the service or platform

19% Suggestions and recommendations from friends and family

13% Lists of most popular/trending titles on the service or platform

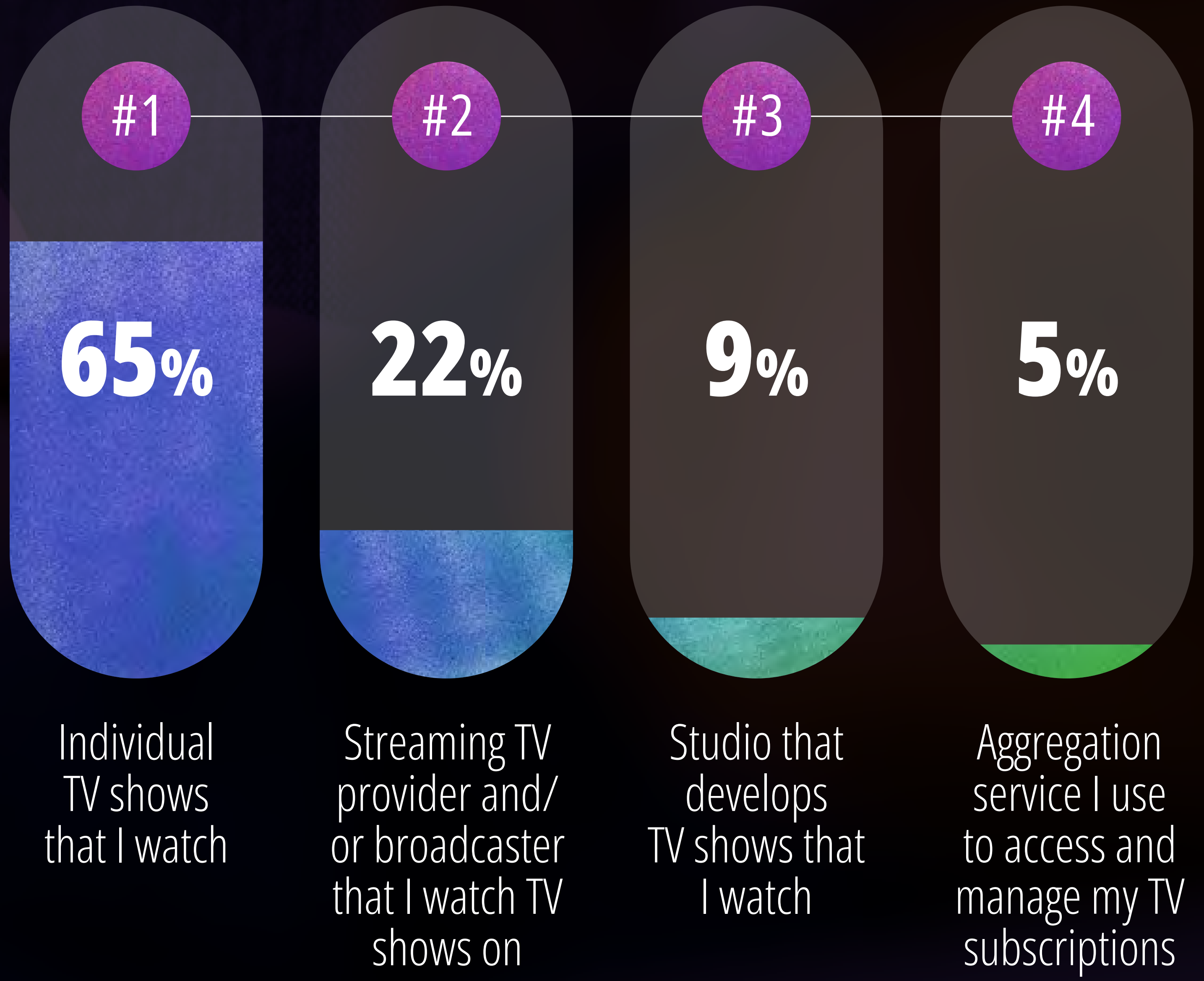
11% Personalised recommendations from the service or platform

10% Coverage of TV/movies in the news

TOP WAY AUDIENCES DECIDE WHAT SVOD CONTENT TO WATCH BY GENERATION (% OF RESPONDENTS)

Overall	Service provider recommendations	**27%**
Gen Z	Social media	**42%**
Millennials	Service provider recommendations	**29%**
Gen X	Service provider recommendations	**31%**
Boomers	Word of mouth	**31%**
Matures	Word of mouth	**50%**

CONSUMERS' STRONGEST RELATIONSHIPS WITH CONTENT BRANDS (% OF RESPONDENTS)



#1	**65%**	Individual TV shows that I watch
#2	**22%**	Streaming TV provider and/ or broadcaster that I watch TV shows on
#3	**9%**	Studio that develops TV shows that I watch
#4	**5%**	Aggregation service I use to access and manage my TV subscriptions

MULTITASKING

One in two Australians frequently multitask when consuming digital entertainment, with women multitasking 1.5x more often than men.

50% - Multitask while engaging with media content
(52% in 2024)

FREQUENCY OF MEDIA MULTITASKING BY GENDER AND GENERATION (% OF RESPONDENTS)

61% + (59% in 2024)	Women
39% + (44% in 2024)	Men

69%	**Gen Z**
62%	**Millennials**
46%	**Gen X**
28%	**Boomers**
14%	**Matures**

FAVORITE WAYS TO MULTITASK BY GENDER (% OF RESPONDENTS)

Women

Browsing friends' posts on social media	**49%**
Social media or messaging to interact with others	**36%**
Online shopping	**36%**

Men

Browsing friends' posts on social media	**37%**
Watching online video content	**30%**
Looking up something related to primary content	**28%**

ADVERTISING

Australians are willing to pay to avoid content interruptions (except for news), with Gen Z the keenest on ad-free video and music.

Despite the array of free content options available, respondents are willing to pay for ad-free experiences, with more than half expressing a preference for uninterrupted online TV/movie and music services.

Consumers demonstrate a greater tolerance for advertising exposure when it comes to sports and news content, however only around one in three would prefer to pay for ad-free experiences in these categories.

The preference to avoid advertisements also reveals a clear generational pattern. Regardless of the content category, younger generations, particularly Gen Z, are considerably more inclined than Boomers to pay for ad-free options.

CONSUMERS WHO WOULD RATHER PAY IN EXCHANGE FOR NOT BEING EXPOSED TO ADVERTISEMENTS BY GENERATION (% OF RESPONDENTS)

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
Movies/TV	58% ⊕ (54% in 2024)	76%	67%	53%	41%	25%
Music	51% ⊕ (47% in 2024)	79%	64%	41%	26%	14%
Sports	37% ⊕ (36% in 2024)	49%	44%	33%	27%	25%
Online games	32% ⊕ (31% in 2024)	54%	46%	24%	10%	7%
News	31% ⊖ (32% in 2024)	42%	36%	24%	23%	21%
Willingness to pay for ad-free entertainment	42% ⊕ (40% in 2024)					

ADVERTISING

Free-to-air TV is seen as the most influential type of advertising, but its power is threatened by declining viewership.

The degree to which we engage with the ads we see varies by device, generation and gender.

Gen Z, Millennials and Gen X are more willing to engage with advertisements on their smartphones than on TV, while the opposite is true for Boomers and Matures.

These device-based preferences reflect the types of advertising that consumers perceive to be the most influential on buying decisions. Ads on free-to-air rank highest in this regard – but with a broader decline in consumption time, the challenge is capturing viewers in the first place.

DEGREE TO WHICH DIFFERENT TYPES OF ADVERTISING INFLUENCE CONSUMERS' BUYING DECISIONS BY GENERATION (% OF RESPONDENTS)

		Overall	Gen Z	Millennials	Gen X	Boomers	Matures
Device	Television	33% ⊕ (30% in 2024)	13%	29%	41%	49%	57%
	Smartphone	39% ⊖ (40% in 2024)	63%	54%	30%	15%	N/A
Source	Ads on free-to-air program/shows	50% ⊕ (49% in 2024)	50%	53%	53%	45%	39%
	Shopping webs. ads	47% ⊕ (45% in 2024)	62%	58%	44%	25%	29%
	Social media ads	46% ⊕ (42% in 2024)	75%	62%	39%	16%	11%
	Ads on search engine websites	40% ⊕ (39% in 2024)	49%	51%	38%	23%	14%
	Ads on streaming video content	39% ⊕ (37% in 2024)	59%	50%	35%	17%	14%

4

Voice of media

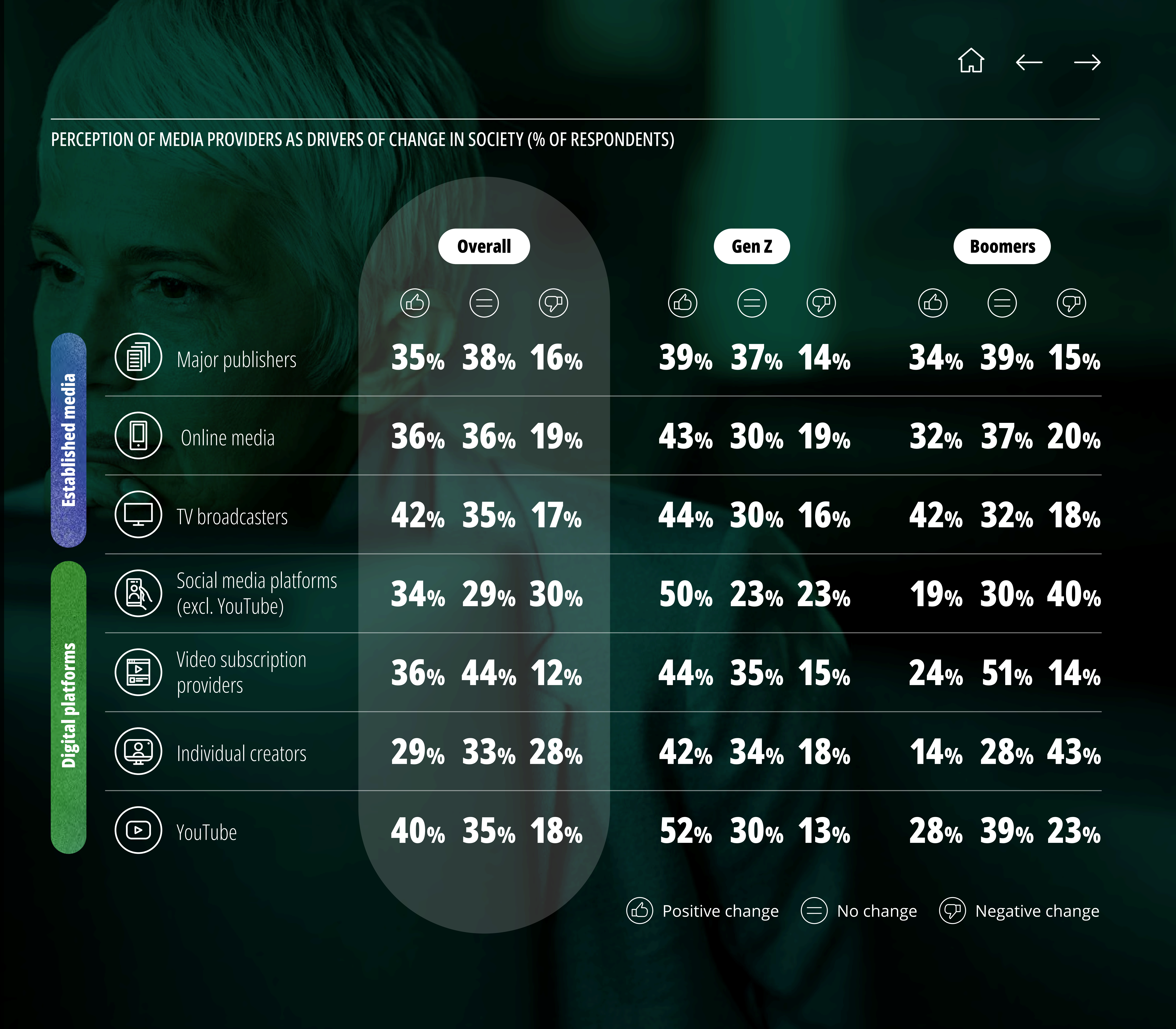
MEDIA'S ROLE IN SOCIETY

The media is seen as a changemaker in society, with both traditional media and digital platforms playing an important role.

Australians believe established media (TV broadcasters, major publishers and online media) and digital platforms (YouTube and SVOD providers) drive positive change in society.

Gen Z perceive the positive impact of user-generated content to be the greatest (52% see YouTube as a driver of positive change as compared with 28% of Boomers). Boomers are far less likely than Gen Z to attribute changemaker impact to social media (19% as compared with 50%) or individual creators (14% as compared with 42%).

In contrast, established media providers are perceived to be drivers of positive change by both Gen Z and Boomers.



PERCEPTION OF MEDIA PROVIDERS AS DRIVERS OF CHANGE IN SOCIETY (% OF RESPONDENTS)

		Overall			Gen Z			Boomers		
		👍	⊜	👎	👍	⊜	👎	👍	⊜	👎
Established media	Major publishers	35%	38%	16%	39%	37%	14%	34%	39%	15%
	Online media	36%	36%	19%	43%	30%	19%	32%	37%	20%
	TV broadcasters	42%	35%	17%	44%	30%	16%	42%	32%	18%
Digital platforms	Social media platforms (excl. YouTube)	34%	29%	30%	50%	23%	23%	19%	30%	40%
	Video subscription providers	36%	44%	12%	44%	35%	15%	24%	51%	14%
	Individual creators	29%	33%	28%	42%	34%	18%	14%	28%	43%
	YouTube	40%	35%	18%	52%	30%	13%	28%	39%	23%

👍 Positive change ⊜ No change 👎 Negative change

TRUST IN NEWS

Consumers are most trusting of news content from Australian publishers.

Sovereignty impacts consumers' trust in providers of news content. More than three in four consumers consider national (78%) and regional (77%) Australian news publishers moderately or very trustworthy.

This falls to 49% for industry and other expert bodies, perhaps due to perceptions of their commercial interests.

Even though older generations consume a significant amount of news/political content on social media, trust is the lowest (36%) for news-oriented UGC.

TRUST IN NEWS SOURCES (% OF RESPONDENTS)

	Very trustworthy	Moderately trustworthy	Not very trustworthy	No basis to answer
National Australian news publishers	22%	56%	18%	4%
Small/regional news publishers	15%	62%	16%	7%
International news publishers	14%	49%	29%	9%
Publications/PR teams of industry and other expert bodies	9%	40%	39%	12%
News published by content creators (e.g., on TikTok, YouTube)	7%	29%	58%	6%

NEWS FORMATS AND FEATURES

Video and audio-based news is preferred over text and image-based formats, with the speed of breaking news considered the most valued feature.

PREFERRED NEWS FORMATS BY GENERATION (BY % RANKING AS #1)	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
Video/audio content up to 1 minute (in length)	10%	20%	15%	7%	3%	0%
Video/audio content between 1–10 minutes	14%	19%	9%	12%	8%	7%
Video/audio content longer than 10 minutes	6%	9%	8%	5%	4%	4%
Articles with less than 500 words	12%	9%	13%	15%	9%	11%
Articles with more than 500 words	7%	8%	7%	5%	9%	0%
Live news broadcasts	38%	12%	25%	46%	60%	75%
Placemats/infographics	2%	4%	2%	1%	0%	0%
Explainers	3%	6%	4%	2%	1%	0%
Newsletters	5%	5%	4%	4%	5%	4%
Push notifications/text alerts	5%	7%	4%	3%	2%	0%

TOP FIVE FEATURES OF NEWS CONTENT (% RANKING AS #1)

#1	19%	The speed at which breaking news is accessible to me (i.e. I am notified very quickly).
#2	17%	Alignment with personal interests in a topic area (e.g. finance, politics, cooking, sport, etc.).
#3	13%	The current popularity/importance of the story and feeling knowledgeable about major issues.
#4	10%	The appeal of the headline (e.g. wit/ clarity/sense of emotion, mystery, etc.).
#5	8%	The format and presentation of the article is appealing (e.g. language style, use of data visualisations and/or infographics).

SAFETY ON SOCIAL MEDIA

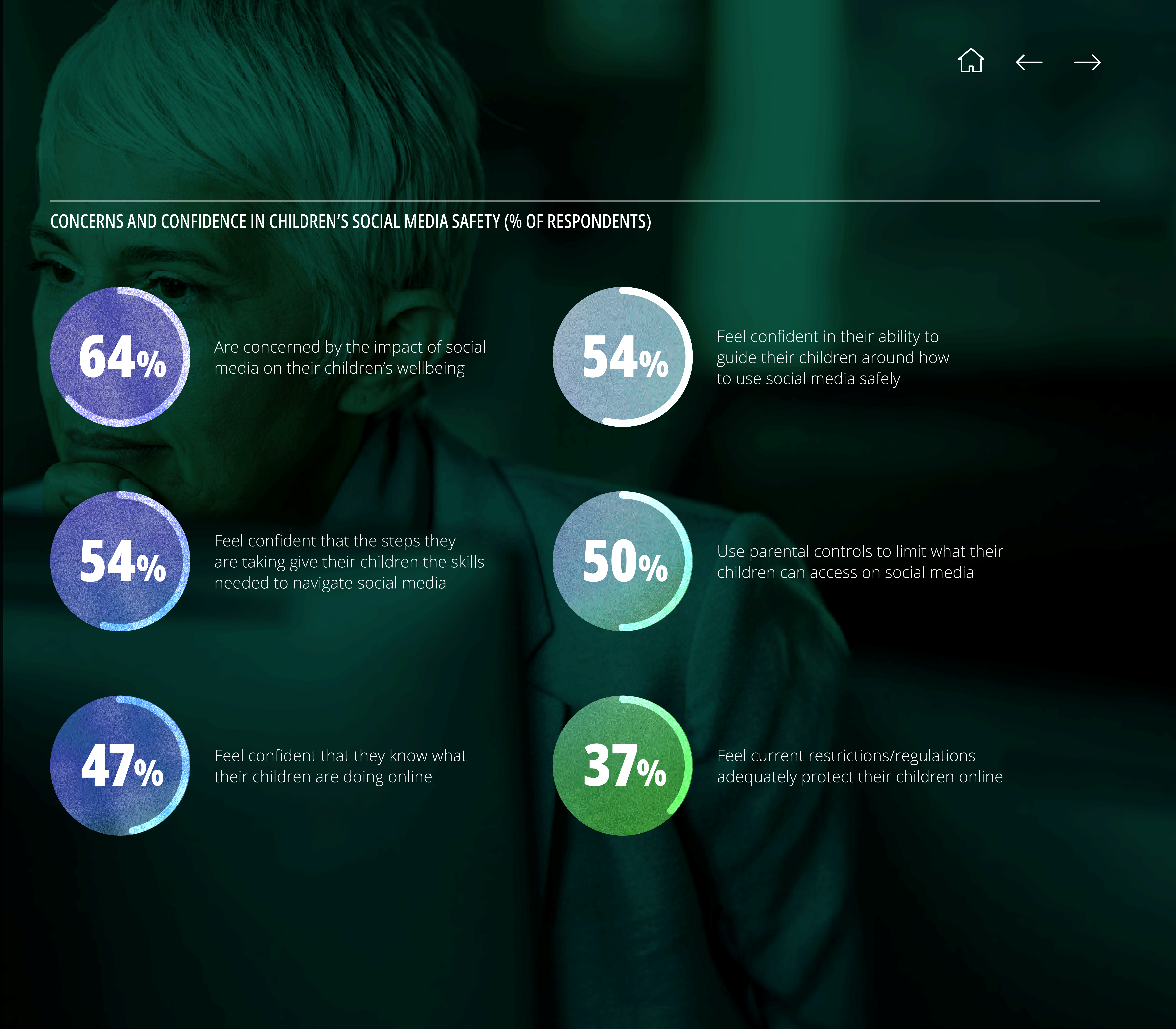
Parents overwhelmingly support stronger protections for online engagement, driven by deep concerns about social media's impact on their children's wellbeing.

Social media is widely viewed as a major threat to children's wellbeing, with nearly two-thirds (64%) of Australian parents concerned about its impact. Yet trust in existing regulations is low (37%), indicating parents' belief that more must be done.

Shows like Netflix's Adolescence highlight the sentiment, with only half of parents feeling confident they know what their children are doing online (47%) or how best to guide them (54%).

Although half of parents (50%) use parental controls to manage online risks, adoption remains inconsistent, hampered by technology barriers and differing views on responsibility.

The findings point to a clear public mandate: parents want stronger regulation, but also greater support from government and industry in the form of education, accessible tools and trustworthy safeguards.



CONCERNS AND CONFIDENCE IN CHILDREN'S SOCIAL MEDIA SAFETY (% OF RESPONDENTS)

64% Are concerned by the impact of social media on their children's wellbeing

54% Feel confident in their ability to guide their children around how to use social media safely

54% Feel confident that the steps they are taking give their children the skills needed to navigate social media

50% Use parental controls to limit what their children can access on social media

47% Feel confident that they know what their children are doing online

37% Feel current restrictions/regulations adequately protect their children online

AGE RESTRICTIONS AND ONLINE SAFETY

Australia's social media age restrictions are strongly supported, but questions remain on enforcement and age thresholds.

UNDERSTANDING PUBLIC SUPPORT FOR KEY PROVISIONS OF THE AGE RESTRICTION BILL (% OF RESPONDENTS)

Respondents broadly support stronger online safety measures, with a clear consensus in favour of age restrictions for children's use of social media.

68% Support age restrictions on social media platforms to protect their children

50% Would like to see the minimum age requirement extended to dedicated messaging apps (e.g., WhatsApp, Messenger)

50% Would like to see the minimum age requirement extended to online gaming services (e.g,. PlayStation Network, Xbox Live)

49% Support the implementation of further robust measures

39% Believe their child having social media access prior to 16 is not beneficial to them (e.g. for social development)

37% Agree with imposing a mandatory age restriction but feel 16 years of age is too high

TOP-3 ADDITIONAL RESTRICTIONS (% AS VOTED AS #1)

#1	#2	#3
30%	26%	25%
Ban on parent-run accounts for individuals under 16	Regulation of the amount of time individuals under 16 can spend on social media	Restrictions on how social media websites use data, personalisation and algorithms to maximise the social media use of individuals

ONLINE SAFETY AT HOME

Many parents are actively managing their children’s online activity, using a range of tools to restrict access and enhance digital safety.

TOOLS PURCHASED OR USED TO RESTRICT CHILDREN’S ONLINE ACTIVITIES (% OF RESPONDENTS)

Australian parents are taking a proactive and multifaceted approach to managing their children’s online safety at home.

54%

Integrate parental controls into a laptop, desktop or mobile device

54%

Implement safe search settings or child-friendly search engines on web browsers

53%

Use parental controls built into streaming services

48%

Use parental controls built into social media platforms

41%

Integrate parental controls into a gaming console (e.g., Xbox, PlayStation)

36%

Use a Wi-Fi router with parental control software

36%

Use third-party software/hardware

5

Sports

SPORTS FOLLOWERSHIP

Australians watch about four sports on average, as the nature of fandom evolves.

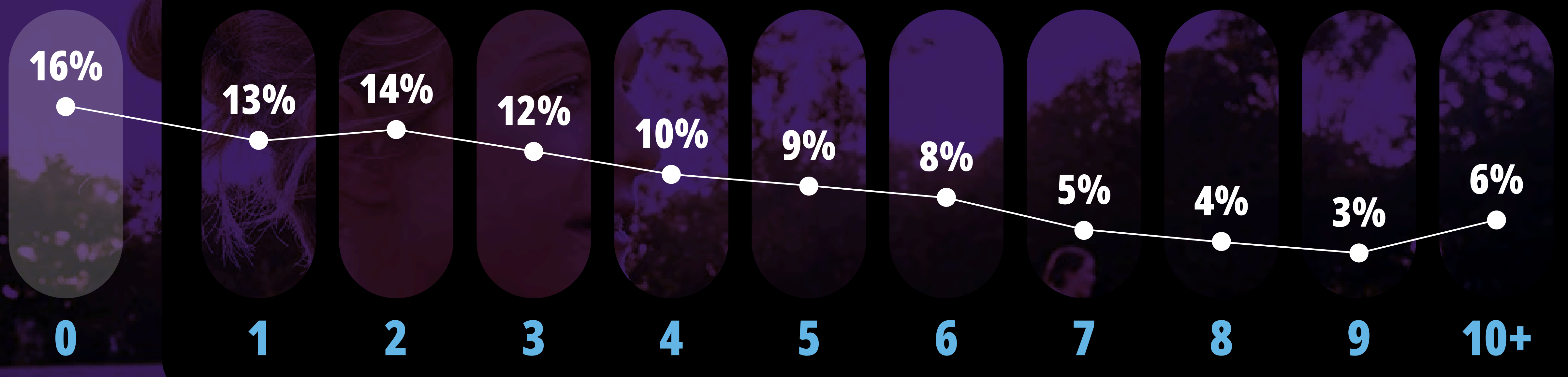
Sport remains a critical part of Australians' media diet, with more than four in five a 'fan' of at least one sport.

But the way Australians follow sport is changing. Older generations are more likely to follow an individual team (61% of Boomers, 53% of Gen Z), whereas interest in sport codes more broadly hasn't changed (61% of Boomers, 60% of Gen Z). Further, Gen Z displays notably higher levels of casual followership (33% as compared to 14% for Matures).

The difference in fandom is in part explained by how the different generations watched sports. Older generations would go to local stadiums to view live sports more often, whereas younger generations now have unprecedented access to digital sports content (including off-field content). The digital viewership of younger audiences seems to contribute to more casual fandom.

To this end, sports fandom is Australia is still as strong as it has ever been, it has just evolved.

NUMBER OF SPORTS FOLLOWED BY AUSTRALIANS (% OF RESPONDENTS)



84%
Of all respondents consider themselves a fan of at least one sport

54%
Say they have a strong connection to a single team

INTEREST IN SPORT BY GENERATION, BREAKDOWN BY TYPE OF FAN (% OF RESPONDENTS)

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
	84%	**84%**	**83%**	**82%**	**86%**	**93%**
Avid fan Has a strong connection to a single team	54%	53%	51%	53%	61%	57%
Interested fan Regularly follows the sport out of an interest for it more broadly but does not have a strong allegiance to any single team	57%	60%	54%	56%	61%	79%
Casual fan Willing to engage with the sport for social reasons and/or because marquee events are popular at the time	28%	33%	26%	28%	27%	14%

SPORTS FOLLOWERSHIP

AFL is the most popular sport among the Big Four sports, with Tennis now ahead of Rugby League, Football and Cricket.

7 out of 10

Australians follow at least one of the Big Four sports

SPORTS FOLLOWERSHIP (% OF RESPONDENTS)

		Share of respondents that consider themselves a fan	Avid fan	Interested fan	Casual fan
Fans of the Big Four sports generally have the most avid fanbases	AFL	**42%**	55%	31%	15%
	Tennis	**32%**	29%	54%	17%
	Rugby League	**30%**	54%	32%	14%
	Football/Soccer	**30%**	47%	38%	15%
	Test and ODI Cricket	**29%**	61%	30%	9%
	T20 Cricket (e.g. BBL)	**26%**	52%	41%	7%
	Olympic and Paralympic sports (e.g. gymnastics, athletics, swimming, wheelchair basketball etc.)	**24%**	37%	46%	17%
	Basketball	**18%**	42%	44%	15%
	Formula 1	**18%**	35%	47%	19%
	Rugby Union	**15%**	34%	47%	19%
	Netball	**13%**	30%	47%	22%
	Golf	**12%**	29%	53%	18%
	Motorsports (excluding F1)	**12%**	34%	53%	14%
	Horse Racing	**11%**	40%	43%	17%
	Boxing and MMA	**10%**	33%	49%	18%
	Cycling	**10%**	27%	53%	20%
	Winter Sports	**9%**	24%	55%	21%
	NFL/American Football	**7%**	35%	50%	15%
	Surfing	**7%**	24%	53%	24%
	Baseball	**6%**	31%	46%	23%
	Field Hockey	**4%**	34%	50%	16%
	Equestrian	**3%**	39%	39%	23%
	Precision Indoor Sports (e.g. Darts, Pool, Snooker)	**2%**	26%	48%	26%

A GENERATIONAL VIEW OF SPORTS

AFL is the most popular sport across all generations but second preference is a mix.

SPORTS FOLLOWERSHIP BY GENERATION (% OF RESPONDENTS)

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
#1	**42%** AFL	**36%** AFL	**37%** AFL	**41%** AFL	**54%** AFL	**54%** AFL
#2	**32%** Tennis	**32%** Football/Soccer	**35%** Football/Soccer	**34%** Tennis	**48%** Test & ODI Cricket	**46%** T20 Cricket
#3	**30%** Football/Soccer	**25%** Basketball	**32%** Tennis	**30%** Rugby League	**38%** Rugby League	**46%** Tennis
#4	**30%** Rugby League	**24%** Rugby League	**27%** Rugby League	**29%** Test & ODI Cricket	**37%** Tennis	**39%** Test & ODI Cricket
#5	**29%** Test & ODI Cricket	**23%** Tennis	**25%** Basketball	**28%** Football/Soccer	**37%** Olympic & Paralympic Sport	**36%** Rugby League
#6	**26%** T20 Cricket	**22%** Formula 1	**24%** T20 Cricket	**26%** Olympic & Paralympic Sport	**35%** T20 Cricket	**36%** Olympic & Paralympic Sport
#7	**24%** Olympic & Paralympic Sport	**18%** Netball	**21%** Test & ODI Cricket	**24%** T20 Cricket	**26%** Football/Soccer	**32%** Football/Soccer
#8	**18%** Basketball	**17%** Boxing & MMA	**18%** Olympic & Paralympic Sport	**17%** Formula 1	**20%** Rugby Union	**21%** Golf

SPEND ON SPORTS CONTENT

More Australians are finding paid sports content compelling and are willing to pay more for it.

Interest in sports content continues to rise, with 57% of Australians willing to pay for sports content (up from 53% in 2024).
Demand from Gen Z has plateaued at 70%, while Boomers' interest has increased significantly to 47% (up from 36% in 2024).

WILLINGNESS TO PAY FOR SPORTS CONTENT (% OF RESPONDENTS)

	Overall	Gen Z	Boomers
2025	**57%** ⊕	**70%** ⊖	**47%** ⊕
2024	53%	71% ⊕	36% ⊖
2023	53%	65%	46%

In any given week, Boomers watch ~2.6x times as much live sports content as Gen Z. While this may be driven by older adults having more discretionary time, the low viewing time among younger audiences also reflects shifting consumption habits, notably the growing preference to watch shorter form content (e.g., highlights videos).

HOW MUCH AUSTRALIANS ARE WILLING TO SPEND ON SPORT SUBSCRIPTIONS BY GENERATION AND GENDER ($ PER MONTH)

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures	Women	Men
2025	**$22** ⊕	**$22** ⊕	**$24** ⊕	**$20** ⊕	**$20** ⊕	**$24** ⊕	**$21** ⊕	**$22**
2024	$20 ⊕	$20 ⊕	$22 ⊕	$18 ⊕	$17 ⊕	$14 ⊖	$19 ⊕	$22 ⊕
2023	$16	$17	$16	$15	$15	$17	$17	$18
HOURS PER WEEK SPENT WATCHING SPORT (LIVE OR DIGITALLY)	**2h 35m**	**1h 30m**	**1h 55m**	**2h 45m**	**4h 00m**	**3h 45m**	**1h 30m**	**3h 45m**

WOMEN'S SPORTS

Interest in women's sports continues to surge among both men and women.

65%

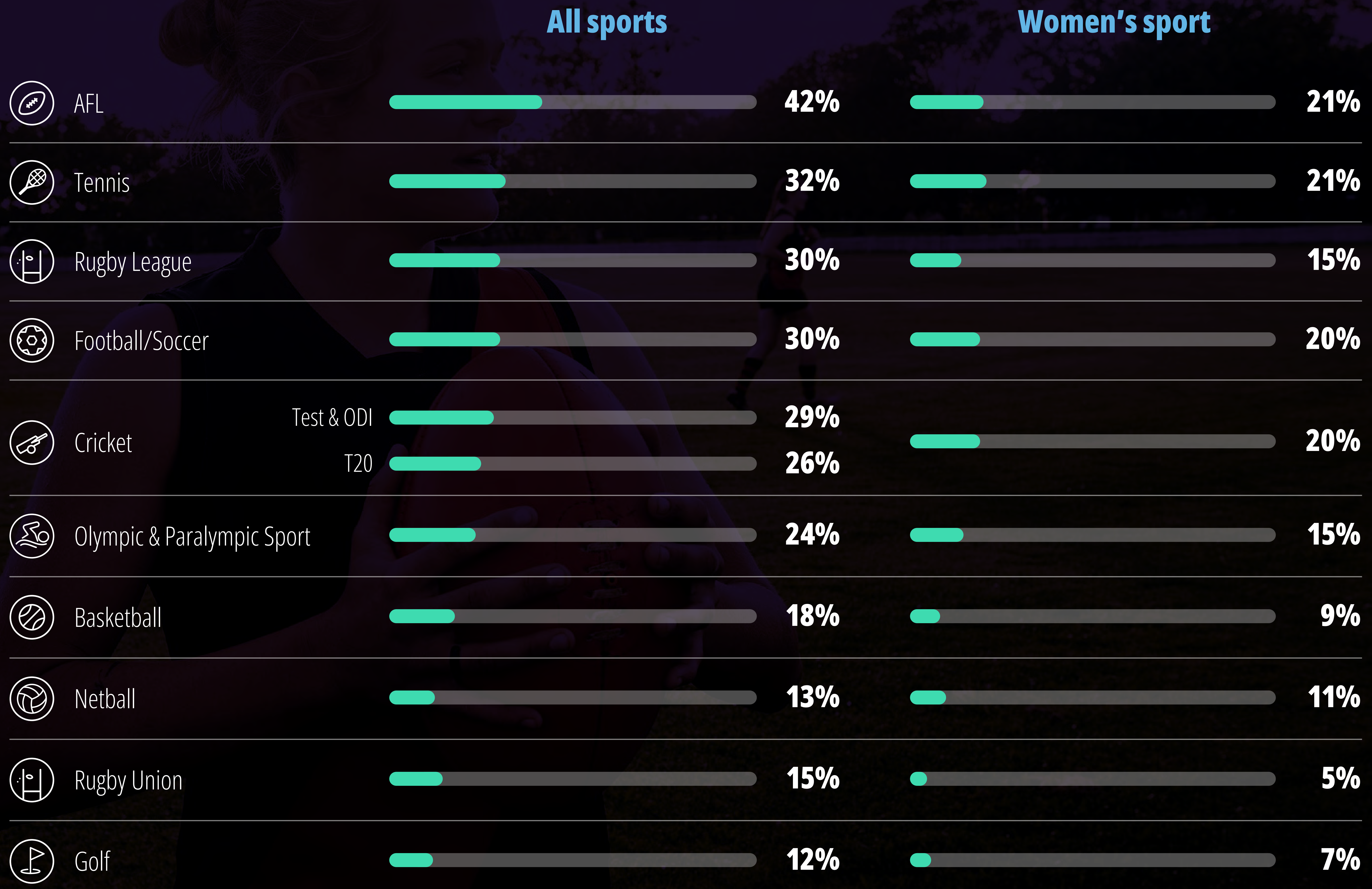
Of all respondents consider themselves a fan of a women's sport

Tennis leads as the most popular women's sports despite a smaller overall fan base than AFL.

The difference? There has been backing and female representation in women's tennis for a long time; the first women's Grand Slam tournament was Wimbledon in 1884 vs. AFLW debuting in 2017. Over time, women's tennis has been able to demand parity, from pay to broadcasting, due to the audience it has built.

While tennis has had a head-start, the core to growth in other codes could be accessible viewing and global reach, as well as continued investment into female athletes to ensure strong talent and rivalries that will entertain the masses and lead to popularity that matches (and even surpasses) tennis.

SPORTS FOLLOWERSHIP BY CODE (% OF RESPONDENTS)



		All sports	Women's sport
AFL		42%	21%
Tennis		32%	21%
Rugby League		30%	15%
Football/Soccer		30%	20%
Cricket	Test & ODI	29%	20%
	T20	26%	
Olympic & Paralympic Sport		24%	15%
Basketball		18%	9%
Netball		13%	11%
Rugby Union		15%	5%
Golf		12%	7%

WOMEN'S SPORTS

Men are the biggest fans of women's sport, with Precision Indoor, Cricket, Golf, Rugby League and the AFL all boasting a significant share of male fans.

SPORTS FANS BY GENDER (% OF RESPONDENTS)

	All sports		Women's sport	
	Women	Men	Women	Men
Precision Indoor Sports (e.g. Darts, Pool, Snooker)	27%	73%	11%	89%
Cricket	30%	70%	29%	71%
Golf	29%	71%	33%	67%
Rugby League	39%	61%	37%	63%
AFL	39%	61%	40%	60%
Cycling	39%	61%	42%	58%
Field Hockey	51%	49%	43%	57%
Rugby Union	39%	61%	44%	56%
Horse Racing	34%	66%	44%	56%
Football/Soccer	43%	57%	45%	55%
Surfing	48%	52%	46%	54%
Olympic and Paralympic sports	47%	53%	46%	54%
Basketball	45%	55%	47%	53%
Tennis	47%	53%	47%	53%
Winter Sports	48%	52%	48%	52%
Motorsports	39%	61%	48%	52%
Boxing and MMA	40%	60%	48%	52%
Baseball/softball	46%	54%	49%	51%
Equestrian	55%	45%	53%	47%
Netball	54%	46%	54%	46%

STADIUM EXPERIENCES

Stadium upgrades that improve comfort, views and ease of entry and exit would have the biggest impact on match-day experiences.

29% Of respondents feel a differentiating stadium upgrade would have improved their experience.

While some Australians are interested in innovative experiences, stadium owners and operators should not prioritise these above making more foundational improvements first. If the stadium-going experience is to become more appealing to fans, facilities need to be more comfortable and cleaner, the view from the seat needs to be better, and wayfaring needs to be a priority.

Broadly speaking, upgrade options for live sports venues can be distilled into three categories:

The non-negotiables: expectations that every fan brings to any live sports venue; foundational requirements that must be met to create any meaningful in-person experience.

The basics: Ancillary elements on any in-person experience that won't solely motivate a fan to attend a live sports venue but still drive engagement.

Differentiators: Standalone features that personalise the in-person experience for any fan.

FEATURES THAT WOULD HAVE IMPROVED FANS' EXPERIENCE AT THEIR MOST RECENT LIVE EVENT (% OF RESPONDENTS)

STADIUM EXPERIENCES

Younger fans are more receptive to ‘differentiating’ upgrades, particularly those that help them find *their* fans and give them a novel experience beyond the live spectacle.

INTEREST IN UPGRADES TO A LIVE SPORTS EVENT BY GENERATION (% OF RESPONDENTS)

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
More or improved ways to identify and engage with a preferred group of fans/event attendees (e.g. dedicated family zones, safe-standing areas)	12%	21%	15%	11%	5%	4%
More or improved pre/post event entertainment options (e.g. recommendations for local restaurants, stadium tours, etc.)	10%	8%	10%	11%	11%	11%
More or improved ways to have a unique event experience (e.g. premium viewing options, AR/VR events, signature/exclusive merchandise offerings)	10%	17%	12%	7%	7%	0%
More or improved ways to have experiences that match fan interests (e.g. gamified promotions/discount offers)	9%	11%	11%	9%	5%	7%

39% Gen Z

21% Boomers

At least one differentiating upgrade would have improved their experience at their most recent live event

6

Generational snapshots

Overall

$78 + ($63 in 2024) Monthly spend on media subscriptions

42h 45m − (44h 15m in 2024) Total time spent across media and digital entertainment

42% − (40% in 2024) See broadcasters as key drivers of positive change

4 Number of sports followed

TOP 5 HOME ENTERTAINMENT ACTIVITIES (WEEKLY CONSUMPTION)

Watching video (free-to-air, SVOD, video platforms e.g. YouTube)	19h 55m
Listening to audio (radio, music, podcasts and audiobooks)	12h 25m
Browsing social media	5h 20m
Playing video games	3h 5m
Reading news and magazines	2h 5m

SUBSCRIPTIONS (PER HOUSEHOLD)

3.7 + Average number of paid entertainment subscriptions (3.3 in 2024)

2.8 + Average number of SVOD subscriptions (among SVOD subscribers) (2.5 in 2024)

SPEND (% OF RESPONDENTS)

36% + Are overspending relative to their media budget (35% in 2024)

78% + Are worried about the total cost of media spend (75% in 2024)

AGGREGATION (% OF RESPONDENTS)

46% Would be interested in a bundling/aggregation service, but were not previously aware of them

MULTITASKING (% OF TOTAL RESPONDENTS)

50% − Multitask while engaging with media content (52% in 2024)

ADVERTISEMENT (% OF RESPONDENTS)

39% Most willing to engage with ads on smartphones

58% Prefer to pay for ad-free movies and/or TV shows

TRUST LEVELS IN DIFFERENT NEWS SOURCES (% OF RESPONDENTS)

National publishers	78%
International publishers	63%
Regional publishers	77%
Content creators	35%

TOP NEWS PLATFORMS RANKED AS #1 (% OF RESPONDENTS)

TV	32%
Social media	17%
YouTube	14%

TIME SPENT ON SOCIAL MEDIA

#1 Facebook

#2 YouTube

#3 Instagram

37% + Spend more time watching UGC (videos) online than streaming movies and TV shows (34% in 2024)

38% Feel no need to get a paid video subscription as YouTube satisfies their needs

SPORTS FANS (% OF RESPONDENTS)

AFL	Tennis	Rugby League	Football/ Soccer	Test cricket
42%	32%	30%	30%	29%

HOW MUCH FANS OF ARE WILLING TO PAY FOR SPORTS CONTENT ($)

57% Are willing to pay for sports content

#1 Field Hockey	#2 Baseball	#3 Basketball
$30	$28	$27

MOST POPULAR WOMEN'S SPORTS (% OF RESPONDENTS)

65% Are a fan/follow a women's sport

Tennis	21%
AFL	21%
Cricket	20%
Football/Soccer	20%

Gen Z

$101 + ($84 in 2024) Monthly spend on media subscriptions

41h 10m − (45h 5m in 2024) Total time spent across media and digital entertainment

44% − (45% in 2024) See broadcasters as key drivers of positive change

3 Number of sports followed

TOP 5 HOME ENTERTAINMENT ACTIVITIES (WEEKLY CONSUMPTION)

Watching video (free-to-air, SVOD, video platforms e.g. YouTube)	13h 35m
Listening to audio (radio, music, podcasts and audiobooks)	12h 45m
Browsing social media	8h 40m
Playing video games	5h 0m
Reading news and magazines	1h 5m

SUBSCRIPTIONS (PER HOUSEHOLD)

5.1 + Average number of paid entertainment subscriptions (3.4 in 2024)

3.3 + Average number of SVOD subscriptions (among SVOD subscribers) (2.2 in 2024)

SPEND (% OF RESPONDENTS)

53% + Are overspending relative to their media budget (39% in 2024)

79% + Are worried about the total cost of media spend (72% in 2024)

AGGREGATION (% OF RESPONDENTS)

63% Would be interested in a bundling/aggregation service, but were not previously aware of them

MULTITASKING (% OF TOTAL RESPONDENTS)

69% − Multitask while engaging with media content (74% in 2024)

ADVERTISEMENT (% OF RESPONDENTS)

63% Most willing to engage with ads on smartphones

76% Prefer to pay for ad-free movies and/or TV shows

TRUST LEVELS IN DIFFERENT NEWS SOURCES (% OF RESPONDENTS)

National publishers	73%
International publishers	66%
Regional publishers	71%
Content creators	56%

TOP NEWS PLATFORMS RANKED AS #1 (% OF RESPONDENTS)

Social media	38%
YouTube	18%
TV	9%

TIME SPENT ON SOCIAL MEDIA

#1 TikTok

#2 YouTube

#3 Instagram

61% − Spend more time watching UGC (videos) online than streaming movies and TV shows (65% in 2024)

38% Feel no need to get a paid video subscription as YouTube satisfies their needs

SPORTS FANS (% OF RESPONDENTS)

AFL	Football/ Soccer	Basketball	Rugby League	Tennis
36%	32%	25%	24%	23%

HOW MUCH FANS OF ARE WILLING TO PAY FOR SPORTS CONTENT ($)

70% Are willing to pay for sports content

#1 Field Hockey	#2 Winter Sports	#3 Motorsports (excl. F1)
$33	$30	$29

MOST POPULAR WOMEN'S SPORTS (% OF RESPONDENTS)

68% Are a fan/follow a women's sport

AFL	20%
Football/Soccer	20%
Tennis	16%
Cricket	14%

Millennials

$97 +
($77 in 2024)
Monthly spend on media subscriptions

43h 0m +
(42h 15m in 2024)
Total time spent across media and digital entertainment

42% +
(39% in 2024)
See broadcasters as key drivers of positive change

3
Number of sports followed

TOP 5 HOME ENTERTAINMENT ACTIVITIES (WEEKLY CONSUMPTION)

Watching video (free-to-air, SVOD, video platforms e.g. YouTube)	17h 10m
Listening to audio (radio, music, podcasts and audiobooks)	13h 55m
Browsing social media	6h 10m
Playing video games	3h 55m
Reading news and magazines	1h 55m

SUBSCRIPTIONS (PER HOUSEHOLD)

4.4 +
(3.6 in 2024)
Average number of paid entertainment subscriptions

2.9 +
(2.4 in 2024)
Average number of SVOD subscriptions (among SVOD subscribers)

SPEND (% OF RESPONDENTS)

44% +
(36% in 2024)
Are overspending relative to their media budget

82% +
(79% in 2024)
Are worried about the total cost of media spend

AGGREGATION (% OF RESPONDENTS)

53%
Would be interested in a bundling/aggregation service, but were not previously aware of them

MULTITASKING (% OF TOTAL RESPONDENTS)

62% −
(64% in 2024)
Multitask while engaging with media content

ADVERTISEMENT (% OF RESPONDENTS)

54%
Most willing to engage with ads on smartphones

67%
Prefer to pay for ad-free movies and/or TV shows

TRUST LEVELS IN DIFFERENT NEWS SOURCES (% OF RESPONDENTS)

National publishers	81%
International publishers	68%
Regional publishers	79%
Content creators	45%

TOP NEWS PLATFORMS RANKED AS #1 (% OF RESPONDENTS)

Social media	22%
YouTube	20%
TV	19%

TIME SPENT ON SOCIAL MEDIA

#1 Facebook
#2 Instagram
#3 YouTube

49% +
(46% in 2024)
Spend more time watching UGC (videos) online than streaming movies and TV shows

38%
Feel no need to get a paid video subscription as YouTube satisfies their needs

SPORTS FANS (% OF RESPONDENTS)

AFL	Football/ Soccer	Tennis	Rugby League	Basketball
37%	35%	32%	28%	25%

HOW MUCH FANS OF ARE WILLING TO PAY FOR SPORTS CONTENT ($)

62% Are willing to pay for sports content

#1 Field Hockey	**#2** Precision Indoor Sports	**#3** Baseball
$32	$31	$31

MOST POPULAR WOMEN'S SPORTS (% OF RESPONDENTS)

67% Are a fan/follow a women's sport

Footbal/Soccer	24%
Tennis	20%
AFL	20%
Cricket	16%

Gen X

$64 ⊕ ($52 in 2024) Monthly spend on media subscriptions

42h 0m ⊖ (45h 10m in 2024) Total time spent across media and digital entertainment

38% ⊖ (39% in 2024) See broadcasters as key drivers of positive change

4 Number of sports followed

TOP 5 HOME ENTERTAINMENT ACTIVITIES (WEEKLY CONSUMPTION)

Watching video (free-to-air, SVOD, video platforms e.g. YouTube)	21h 10m
Listening to audio (radio, music, podcasts and audiobooks)	12h 15m
Browsing social media	4h 20m
Playing video games	2h 20m
Reading news and magazines	1h 55m

SUBSCRIPTIONS (PER HOUSEHOLD)

3.2 ⊖ (3.7 in 2024) Average number of paid entertainment subscriptions

2.6 ⊖ (3.0 in 2024) Average number of SVOD subscriptions (among SVOD subscribers)

SPEND (% OF RESPONDENTS)

31% ⊖ (40% in 2024) Are overspending relative to their media budget

80% ⊕ (76% in 2024) Are worried about the total cost of media spend

AGGREGATION (% OF RESPONDENTS)

42% Would be interested in a bundling/aggregation service, but were not previously aware of them

MULTITASKING (% OF TOTAL RESPONDENTS)

46% ⊖ (50% in 2024) Multitask while engaging with media content

ADVERTISEMENT (% OF RESPONDENTS)

30% Most willing to engage with ads on smartphones

53% Prefer to pay for ad-free movies and/or TV shows

TRUST LEVELS IN DIFFERENT NEWS SOURCES (% OF RESPONDENTS)

National publishers	77%
International publishers	61%
Regional publishers	77%
Content creators	32%

TOP NEWS PLATFORMS RANKED AS #1 (% OF RESPONDENTS)

41% TV

13% YouTube

11% Social media

TIME SPENT ON SOCIAL MEDIA

#1 Facebook

#2 YouTube

#3 Instagram

29% ⊕ (27% in 2024) Spend more time watching UGC (videos) online than streaming movies and TV shows

37% Feel no need to get a paid video subscription as YouTube satisfies their needs

SPORTS FANS (% OF RESPONDENTS)

AFL	Tennis	Rugby League	Test Cricket	Football/ Soccer
41%	34%	30%	29%	28%

HOW MUCH FANS OF ARE WILLING TO PAY FOR SPORTS CONTENT ($)

52% Are willing to pay for sports content

#1 Baseball	**#2** Surfing	**#3** Netball
$26	$25	$25

MOST POPULAR WOMEN'S SPORTS (% OF RESPONDENTS)

60% Are a fan/follow a women's sport

Tennis	23%
AFL	18%
Cricket	17%
Football/Soccer	16%

Boomers

$55 + ($46 in 2024) Monthly spend on media subscriptions

44h 1m − (45h 40m in 2024) Total time spent across media and digital entertainment

42% + (39% in 2024) See broadcasters as key drivers of positive change

5 Number of sports followed

TOP 5 HOME ENTERTAINMENT ACTIVITIES (WEEKLY CONSUMPTION)

Watching video (free-to-air, SVOD, video platforms e.g. YouTube)	25h 50m
Listening to audio (radio, music, podcasts and audiobooks)	10h 30m
Browsing social media	3h 5m
Playing video games	1h 30m
Reading news and magazines	3h 5m

SUBSCRIPTIONS (PER HOUSEHOLD)

2.5 + Average number of paid entertainment subscriptions (2.4 in 2024)

2.4 + Average number of SVOD subscriptions (among SVOD subscribers) (2.3 in 2024)

SPEND (% OF RESPONDENTS)

20% − Are overspending relative to their media budget (25% in 2024)

70% − Are worried about the total cost of media spend (72% in 2024)

AGGREGATION (% OF RESPONDENTS)

32% Would be interested in a bundling/aggregation service, but were not previously aware of them

MULTITASKING (% OF TOTAL RESPONDENTS)

28% + Multitask while engaging with media content (26% in 2024)

ADVERTISEMENT (% OF RESPONDENTS)

15% Most willing to engage with ads on smartphones

41% Prefer to pay for ad-free movies and/or TV shows

TRUST LEVELS IN DIFFERENT NEWS SOURCES (% OF RESPONDENTS)

National publishers	78%
International publishers	56%
Regional publishers	77%
Content creators	14%

TOP NEWS PLATFORMS RANKED AS #1 (% OF RESPONDENTS)

55%	TV
14%	Newpapers
12%	Radio

TIME SPENT ON SOCIAL MEDIA

#1 Facebook

#2 YouTube

#3 None

16% + Spend more time watching UGC (videos) online than streaming movies and TV shows (11% in 2024)

38% Feel no need to get a paid video subscription as YouTube satisfies their needs

SPORTS FANS (% OF RESPONDENTS)

AFL	Test Cricket	Rugby League	Tennis	Olympic Sports
54%	48%	38%	37%	37%

HOW MUCH FANS OF ARE WILLING TO PAY FOR SPORTS CONTENT ($)

47% Are willing to pay for sports content

#1	Field Hockey	$27
#2	Precision Indoor Sports	$25
#3	Netball	$24

MOST POPULAR WOMEN'S SPORTS (% OF RESPONDENTS)

65% Are a fan/follow a women's sport

Cricket	32%
AFL	26%
Olympic Sports	26%
Tennis	25%

Matures

$35 − ($44 in 2024) Monthly spend on media subscriptions

49h 19m + (38h 52m in 2024) Total time spent across media and digital entertainment

43% + (26% in 2024) See broadcasters as key drivers of positive change

4 Number of sports followed

TOP 5 HOME ENTERTAINMENT ACTIVITIES (WEEKLY CONSUMPTION)

Watching video (free-to-air, SVOD, video platforms e.g. YouTube)	30h 55m
Listening to audio (radio, music, podcasts and audiobooks)	11h 35m
Browsing social media	3h 10m
Playing video games	0h 30m
Reading news and magazines	3h 10m

SUBSCRIPTIONS (PER HOUSEHOLD)

1.3 − Average number of paid entertainment subscriptions (4.5 in 2024)

2.3 − Average number of SVOD subscriptions (among SVOD subscribers) (5.3 in 2024)

SPEND (% OF RESPONDENTS)

18% − Are overspending relative to their media budget (45% in 2024)

50% − Are worried about the total cost of media spend (65% in 2024)

AGGREGATION (% OF RESPONDENTS)

36% Would be interested in a bundling/aggregation service, but were not previously aware of them

MULTITASKING (% OF TOTAL RESPONDENTS)

14% − Multitask while engaging with media content (23% in 2024)

ADVERTISEMENT (% OF RESPONDENTS)

N/A Most willing to engage with ads on smartphones

25% Prefer to pay for ad-free movies and/or TV shows

TRUST LEVELS IN DIFFERENT NEWS SOURCES (% OF RESPONDENTS)

National publishers	86%
International publishers	50%
Regional publishers	89%
Content creators	14%

TOP NEWS PLATFORMS RANKED AS #1 (% OF RESPONDENTS)

TV	71%
Newpapers	21%
Radio	4%

TIME SPENT ON SOCIAL MEDIA

#1 Facebook

#2 None

#3 YouTube

14% + Spend more time watching UGC (videos) online than streaming movies and TV shows (10% in 2024)

50% Feel no need to get a paid video subscription as YouTube satisfies their needs

SPORTS FANS (% OF RESPONDENTS)

AFL	T20 Cricket	Tennis	Test Cricket	Rugby League
54%	46%	46%	39%	36%

HOW MUCH FANS OF ARE WILLING TO PAY FOR SPORTS CONTENT ($)

39% Are willing to pay for sports content

#1 Basketball	#2 Winter Sports	#3 Horse Racing
$46	$45	$46

MOST POPULAR WOMEN'S SPORTS (% OF RESPONDENTS)

68% Are a fan/follow a women's sport

Cricket	32%
Tennis	25%
Football/Soccer	21%
AFL	21%

CONTACTS

AUTHORS

Peter Corbett
Partner
Telecommunications, Media and Technology Industry Lead
pcorbett@deloitte.com.au

Niki Alcorn
Partner
Media Sector Lead
nalcorn@deloitte.com.au

Thom Greving
Director
Strategy, Risk and Transactions
thgreving@deloitte.com.au

KEY CONTRIBUTORS

Bec McConnochie
Partner
Technology Sector Lead
bmcconnochie@deloitte.com.au

Sandra Sweeney
Partner
Sport Sector Lead
ssweeney@deloitte.com.au

Melissa Hopkins
Principal
Telecommunications, Media and Technology Industry Lead
mehopkins@deloitte.com.au

Daniel Manolios Reichert
Manager
Strategy, Risk and Transactions

Ari Sikavitsas
Senior Consultant
Strategy, Risk and Transactions

Jessica Kruppa
Senior Consultant
Strategy, Risk and Transactions

Nicky Tkachuk
Consultant
Strategy, Risk and Transactions

Ineke Mann
Consultant
Strategy, Risk and Transactions

Iris Chien
Consultant
Strategy, Risk and Transactions

Boston Williams
Consultant
Strategy, Risk and Transactions

Ted Dennis
Consultant
Strategy, Risk and Transactions

Arquette Milin-Byrne
Consultant
Strategy, Risk and Transactions

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To view this report online and related insights from Deloitte, visit https://www.deloitte.com/au/en/Industries/tmt/research/media-and-entertainment-consumer-insights.html

Our research comprises a nationally representative sample of 2,000 consumers, aged 16–92, weighted for demographics such as age, gender, location and working status. An independent research organisation conducted the survey in July–August 2025. Data in this survey is self-reported and, as such reflects respondents' perceptions which may differ from measured industry data (such as OzTAM's VOZ) or that reported by market participants.

MECI 2025 ADDENDUM

Australia benefits from one of the most sophisticated multi-source audience measurement environments globally. This ecosystem includes, but is not limited to the following, each serving a distinct and complementary role:

- OzTAM's VOZ Total TV currency data, which provides an independent, industry-endorsed and nationally representative measurement of actual viewing behaviour with streaming platform data available via Streamscape.
- Survey-based research, including Deloitte's Media & Entertainment Consumer Insights (MECI) which is designed to capture claimed viewing from a sample of respondents based on their self-reported behaviours, attitudes and perceptions.

These approaches offer complementary perspectives on how Australians engage with television and broader media and entertainment. While both contribute valuable insight, they differ in methodology and application and are not intended to be used interchangeably.

The differences can be detailed as:

MECI (CLAIMED VIEWING) UNIQUELY CAPTURES:

- Perceived platform loyalty
- Emotional connection to content
- Trust in news and content
- Willingness to pay and perceived value
- Claimed shifts in viewing behaviour from a sample of respondents

OZTAM'S VOZ & STREAMSCAPE (ACTUAL VIEWING) UNIQUELY MEASURE:

- Actual broadcast TV and BVOD minutes viewed, minute by minute, 365 days a year
- De-duplicated audience and reach across broadcast linear TV and BVOD
- Co-viewing for broadcast TV and for BVOD on connected TVs
- Total Video consumption on TV sets across broadcast TV, BVOD and other streaming platforms

These methodological differences are important to understand as highlighted in a comparison of results. Analysis of the VOZ Total TV data reveals that weekly time spent viewing Free-to-Air broadcast TV (live and playback) was, on average, 8h 08m for the full year 2025, down 4.6% on 2024's 8h 32m[1]. In contrast, the 2025 MECI report, which indicates a decrease of 19% from 2024 to 6h and 45m in the July-August survey period. VOZ data also shows that average weekly time spent viewing BVOD is increasing year on year (1h 24m in 2025 which is an increase of 20.4% on 2024).

Furthermore, the published **VOZ Total TV Viewing Report H1 2025** reveals that total consumption (average weekly minutes viewed) for Total TV (broadcast TV and BVOD) increased by approximately 2.5% in H1 2025 compared to H1 2024[2].

These two views capture valuable insight into video consumption in Australia with:

- OzTAM's VOZ and Streamscape revealing how Australians behave at scale and remain the industry endorsed standard for planning, trading and evaluation of Total TV audiences.
- MECI reflecting how Australians feel and perceive their viewing behaviour in a fragmented digital world, with the report now in its 14th year of publication.

Both contribute distinct perspectives, highlighting a market that is emotionally shifting toward on-demand and personalisation, while behaviourally remaining anchored in mass-reach and shared-screen television.

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1. *OzTAM VOZ National FTA, When Watched, Total People, Average Weekly Time Spent Viewing (Universe) full year 2025 (29 Dec 2024 – 27 Dec 2025) vs full year 2024 (31 Dec 2023 – 28 Dec 2024) broadcast TV, BVOD 2am to 2am*
2. *OzTAM VOZ National FTA, When Watched, Total People, Average Weekly Total Minutes viewed, H1 2025 (29 Dec 2024 – 28 Jun 2025) vs H1 2024 (31 Dec 2023 – 29 June 2024) Total TV (broadcast TV and BVOD) 2am to 2am*

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