



Media & Entertainment Consumer Insights 2025

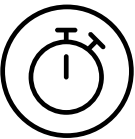
14th Edition

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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.

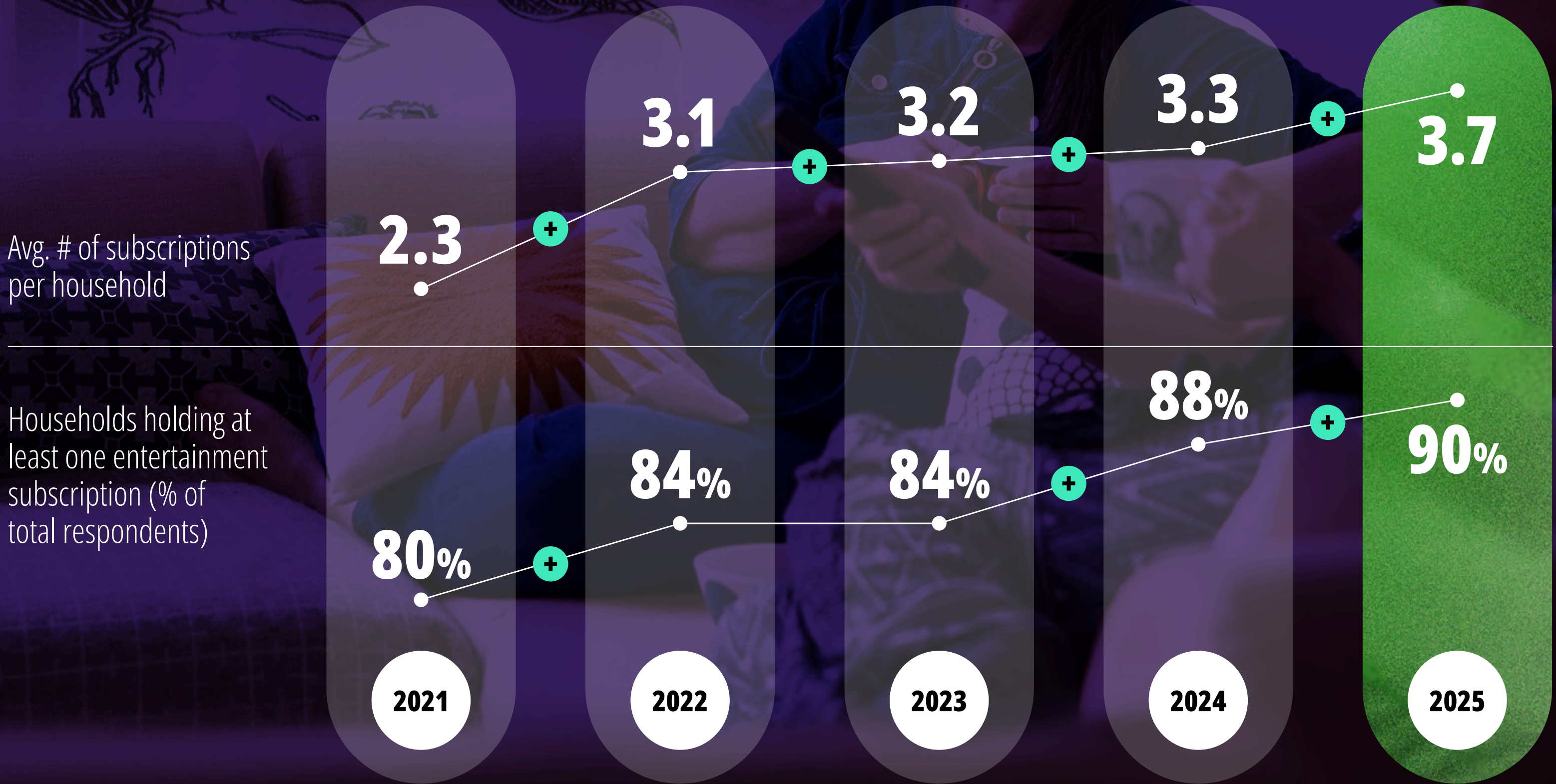
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Subscriptions

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)



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).

07 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.

KEY

Change versus 2024

##% Proportion who subscribe

#. # Average subscriptions per subscriber household¹

% Largest share of subscribers per category within a generation

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

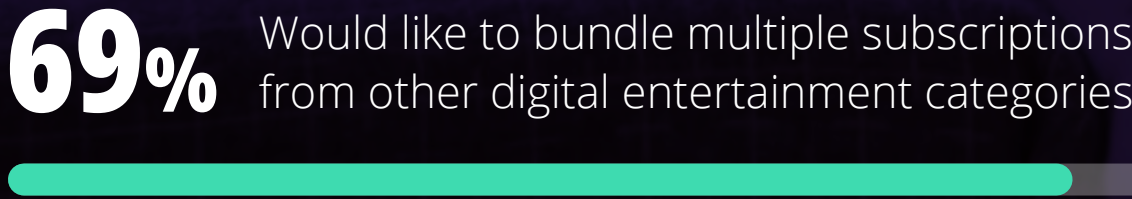
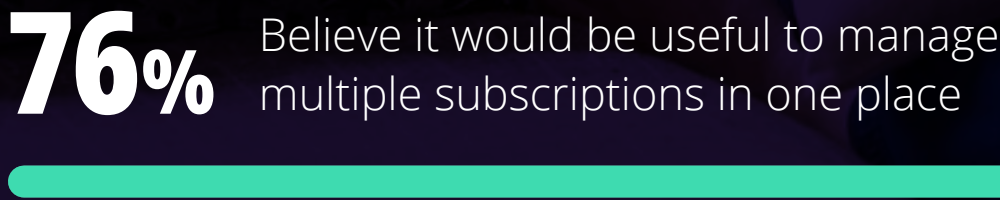
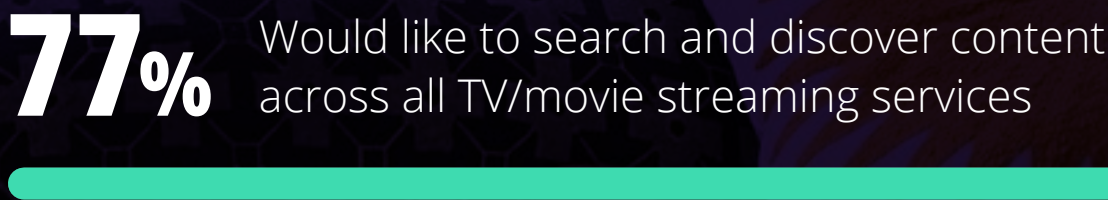
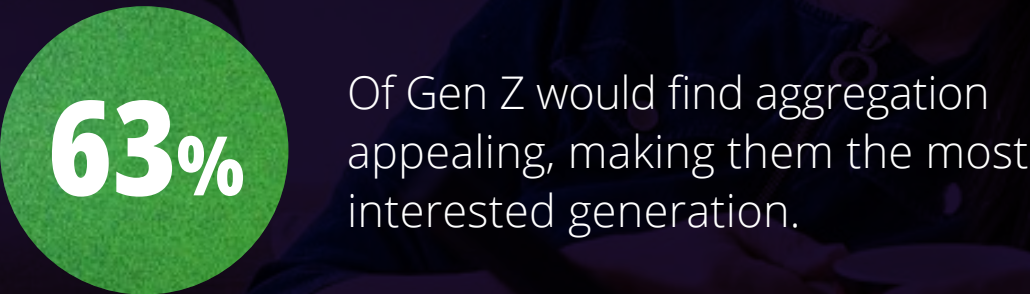
	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
SVOD	2.8 (2.6 in 2024) + 83% (81% in 2024) +	3.3 95%	2.9 93%	2.6 82%	2.4 66%	2.3 29%
Music	1.4 (1.4 in 2024) 51% (47% in 2024) +	1.4 83%	1.4 67%	1.3 41%	1.2 21%	N/A ² 4%
Sports	1.2 (1.2 in 2024) 25% (25% in 2024)	1.3 30%	1.2 29%	1.1 22%	1.1 19%	N/A ² 4%
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%

08 1. Excluding those with no subscription
2. Subpopulation size does not meet the threshold

AGGREGATION SERVICES

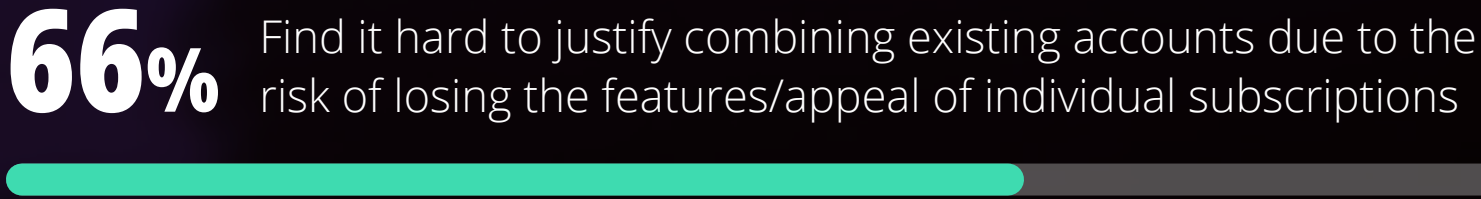
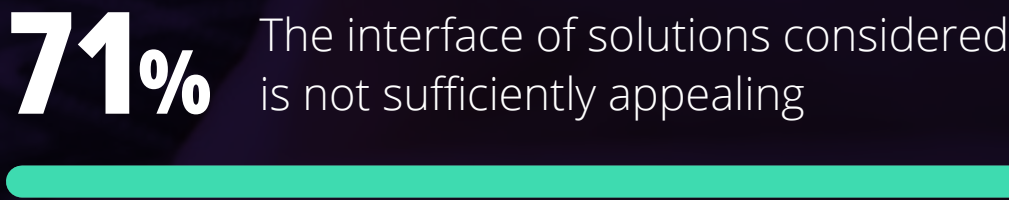
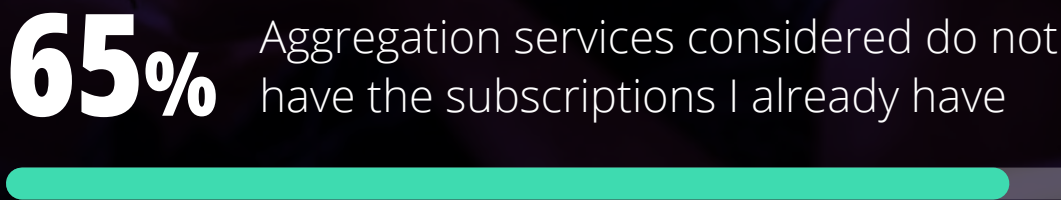
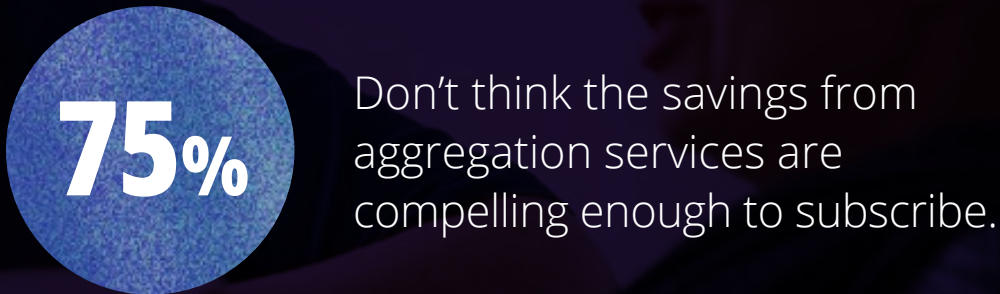
There’s appetite for aggregation services, but consumers either have limited awareness or see gaps in existing offerings.

ALMOST HALF OF RESPONDENTS WERE NOT AWARE OF AGGREGATION SERVICES



Gen Z	Millennials
86%	85%
88%	84%
80%	79%

FOR THOSE THAT ARE AWARE, MOST DO NOT SEE VALUE IN AVAILABLE OFFERINGS¹



Gen Z	Boomers
66%	63%
73%	80%
70%	63%

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.

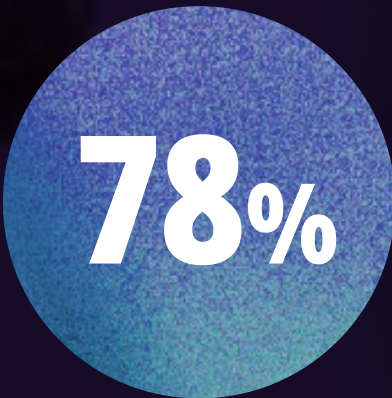
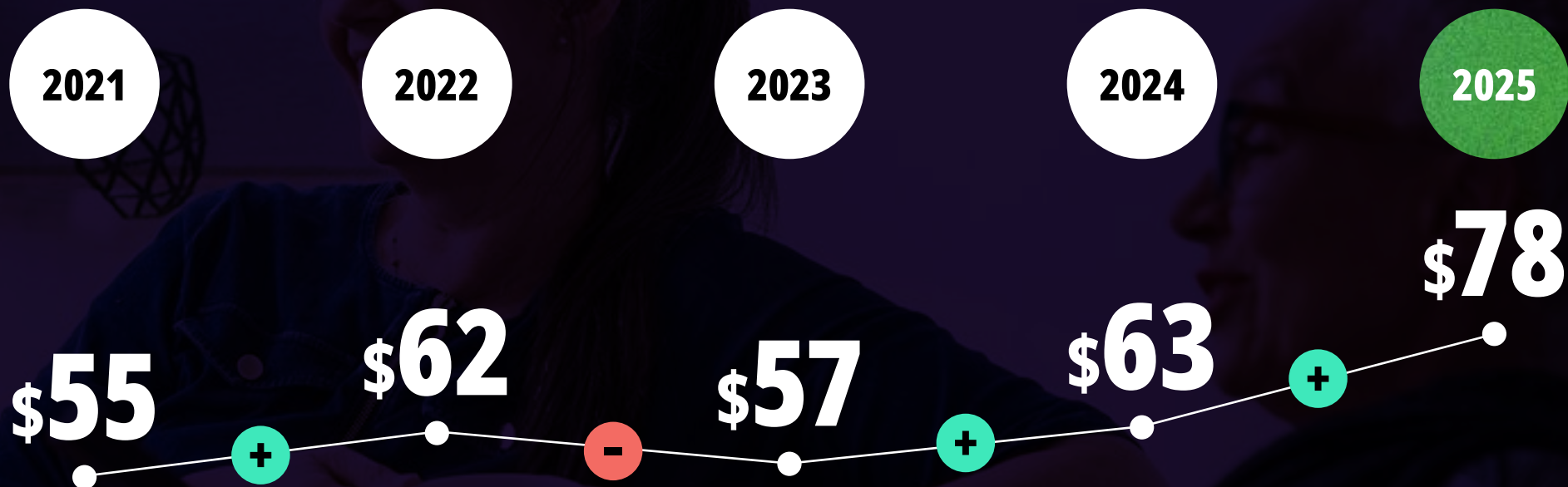
The increase in spend is likely driven by a combination of changes in market conditions (various SVOD players have increased prices, and new players continue to enter the market) and consumer behavior (65% of consumers feel they require multiple subscriptions to get the content they desire).

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)



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 SUBSCRIPTIONS³ (% 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 MEMBER¹ (% 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

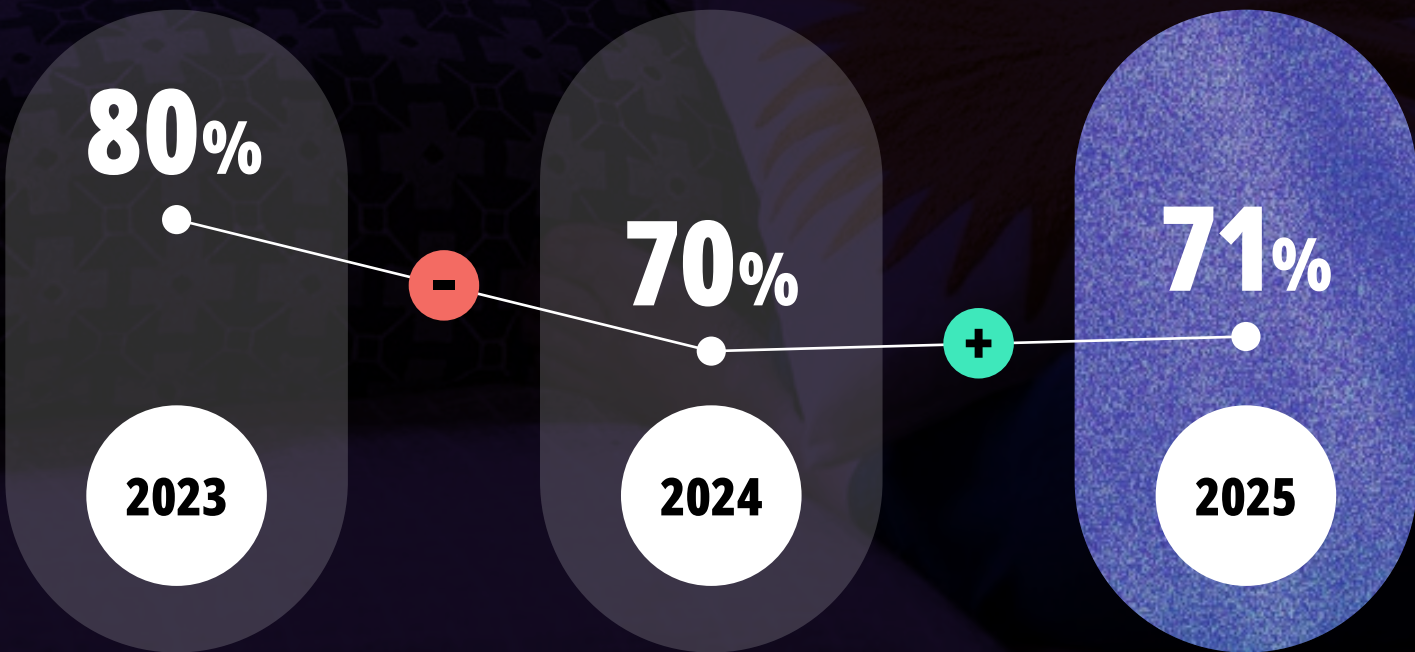
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1. For those with subscriptions in this media category
2. Subpopulation size does not meet the threshold
3. 90% of respondents

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)

	Podcast¹	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%

RETENTION PLAYS (SVOD)

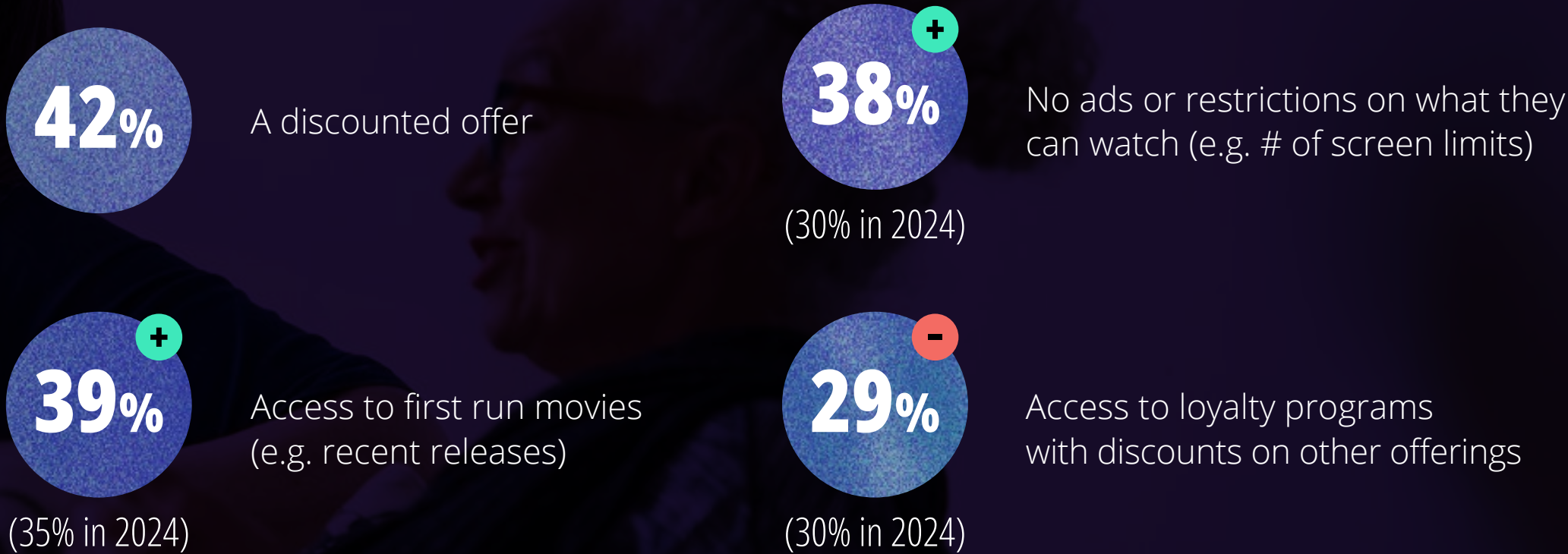
Gen Z and Millennials see first-run movies as a strong reason to stay, while older generations favour discounted offers.

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

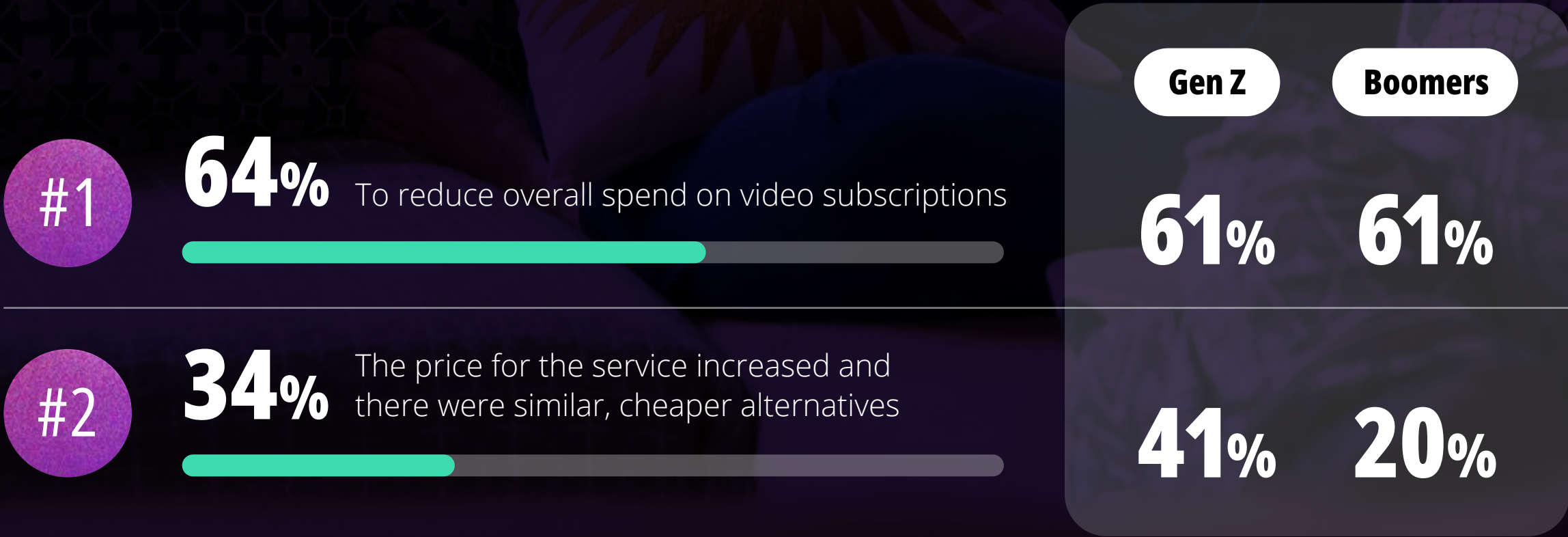
Most people are cancelling due to overall spend (ranked as primary reason by 47% of respondents). Some features are more effective than others for retaining these consumers, with no ads or restrictions increasing the most in popularity since 2024.

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.

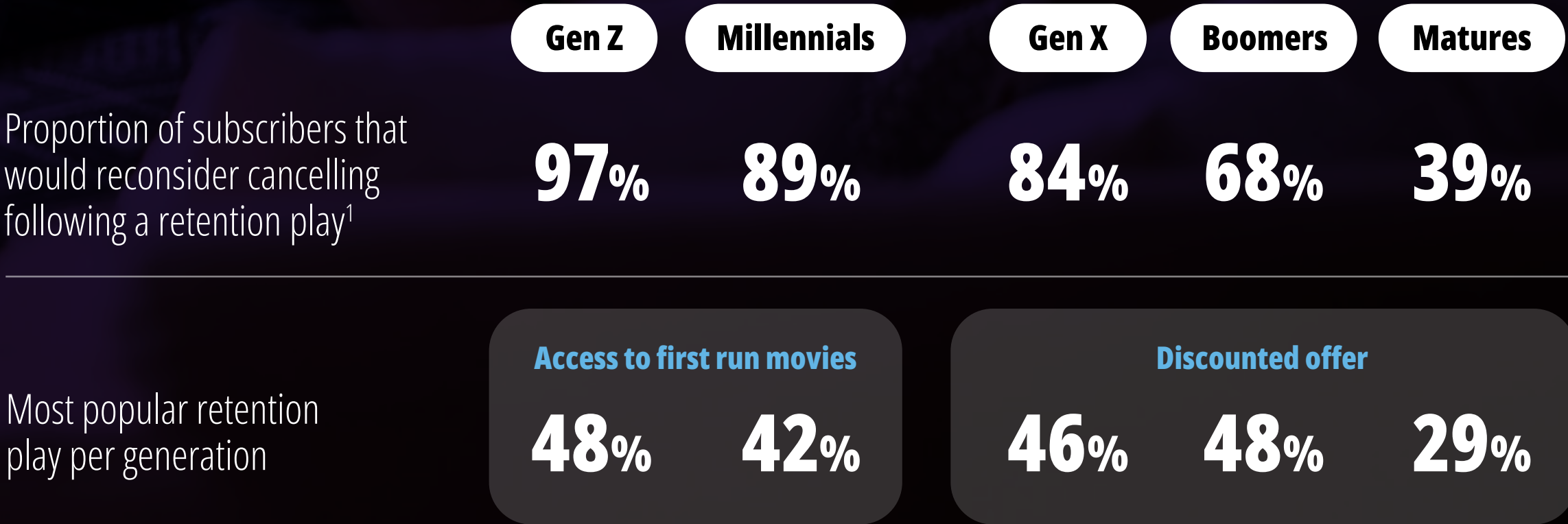
FEATURES THAT WOULD CONVINCE SVOD SUBSCRIBERS TO NOT CANCEL THEIR SUBSCRIPTION (% OF RESPONDENTS)



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



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

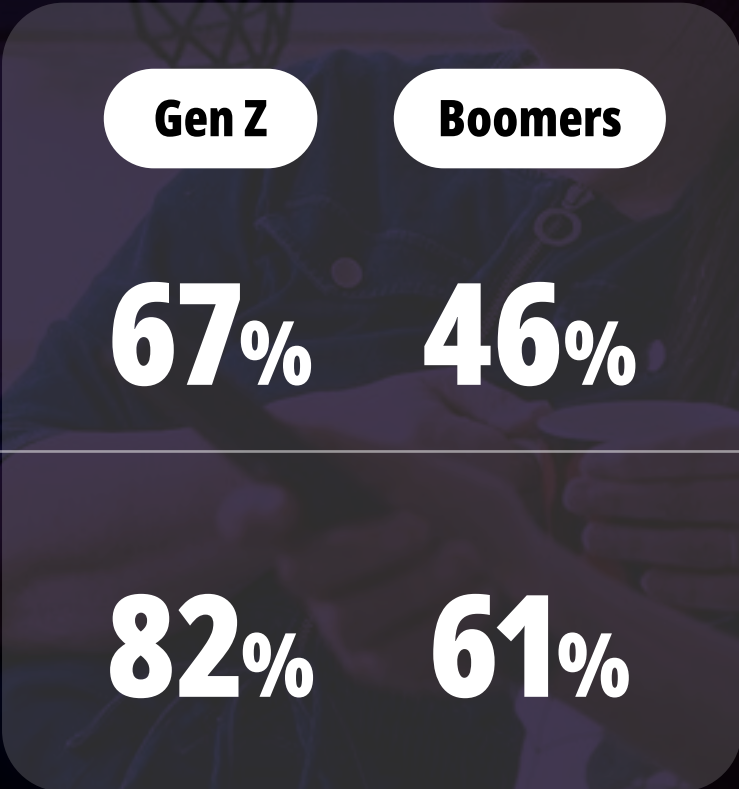
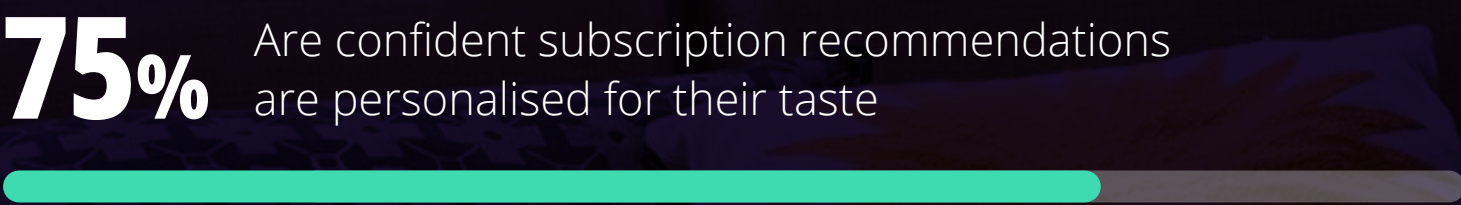
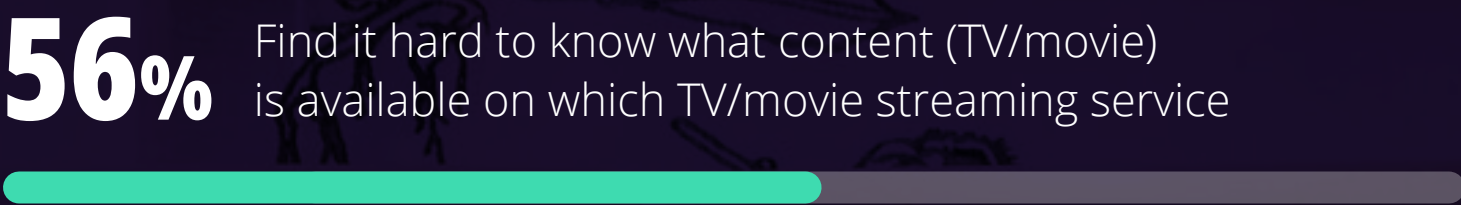


1. Retention plays include: access to first run movies; access to another gaming, music or video streaming service; access to a loyalty program that offers discounts on other services and products; greater personalisation; no ads or restrictions; or a discounted offer.

CONTENT DISCOVERY AND DIVERSITY

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

NAVIGATING SVOD CONTENT (% OF RESPONDENTS)

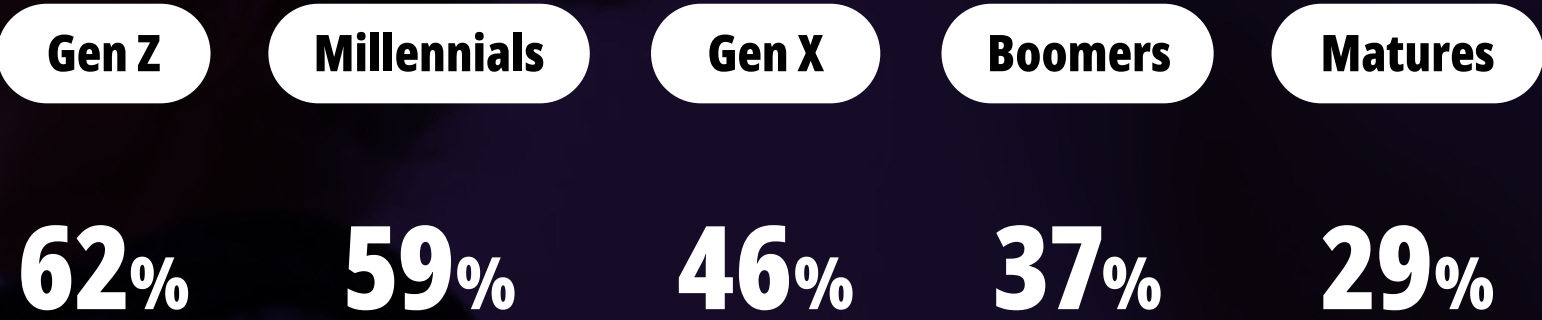


TOP THREE TYPES OF CONTENT CONSUMED ON SVOD (% OF RESPONDENTS)



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

Actively seek diverse voices and representation in the content they consume

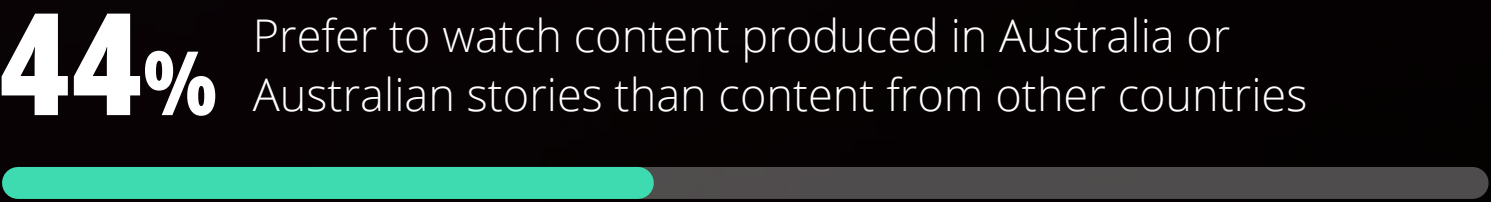
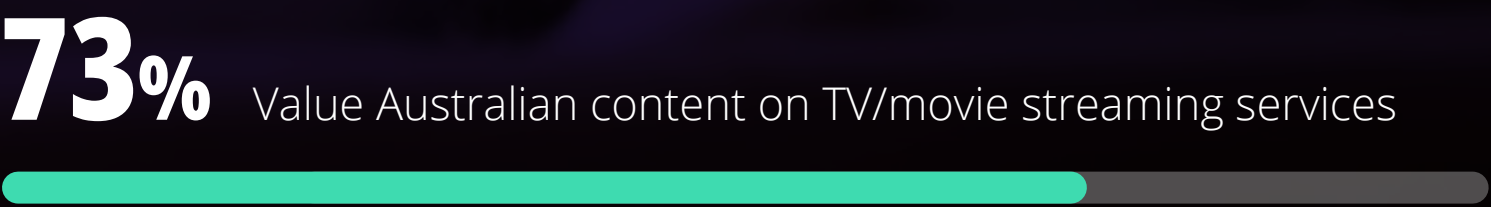


Believe they get diversity in tone, opinions, and cultural representation across the content providers they access



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)

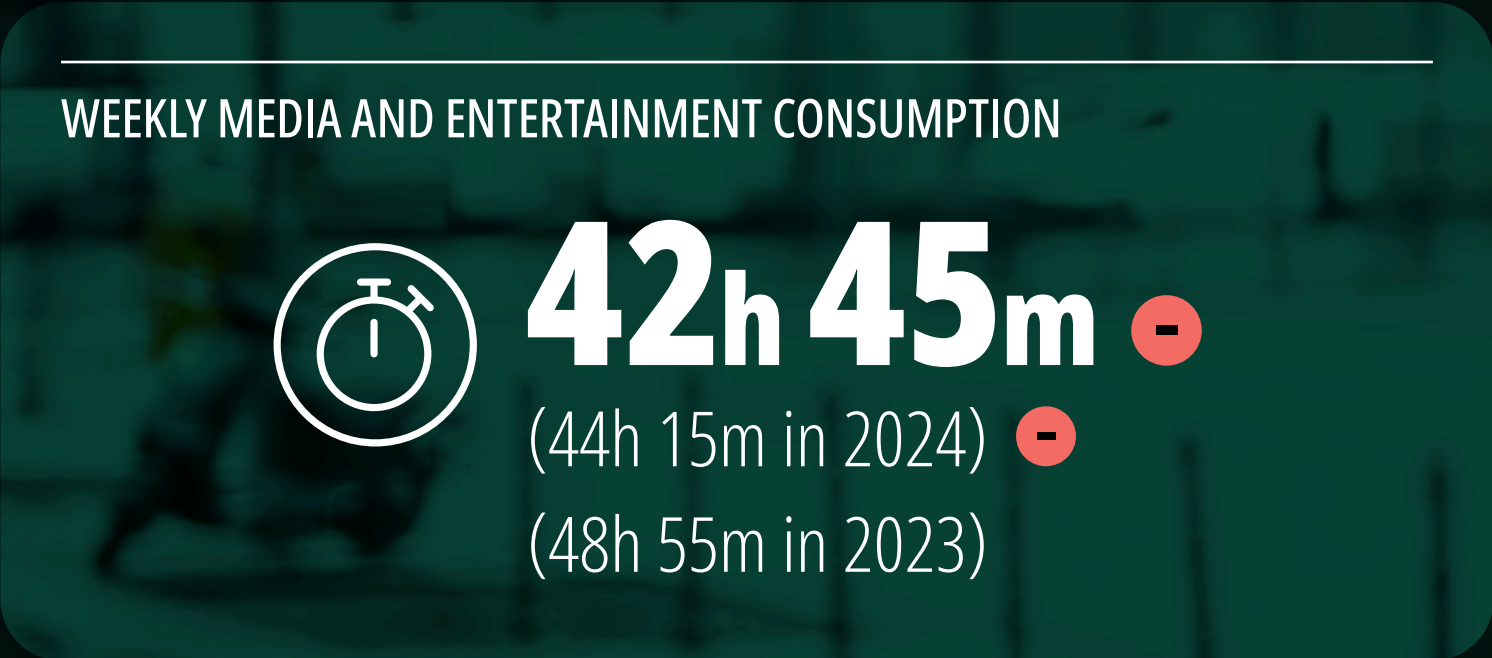


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Consumption

CONSUMPTION TOTALS

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

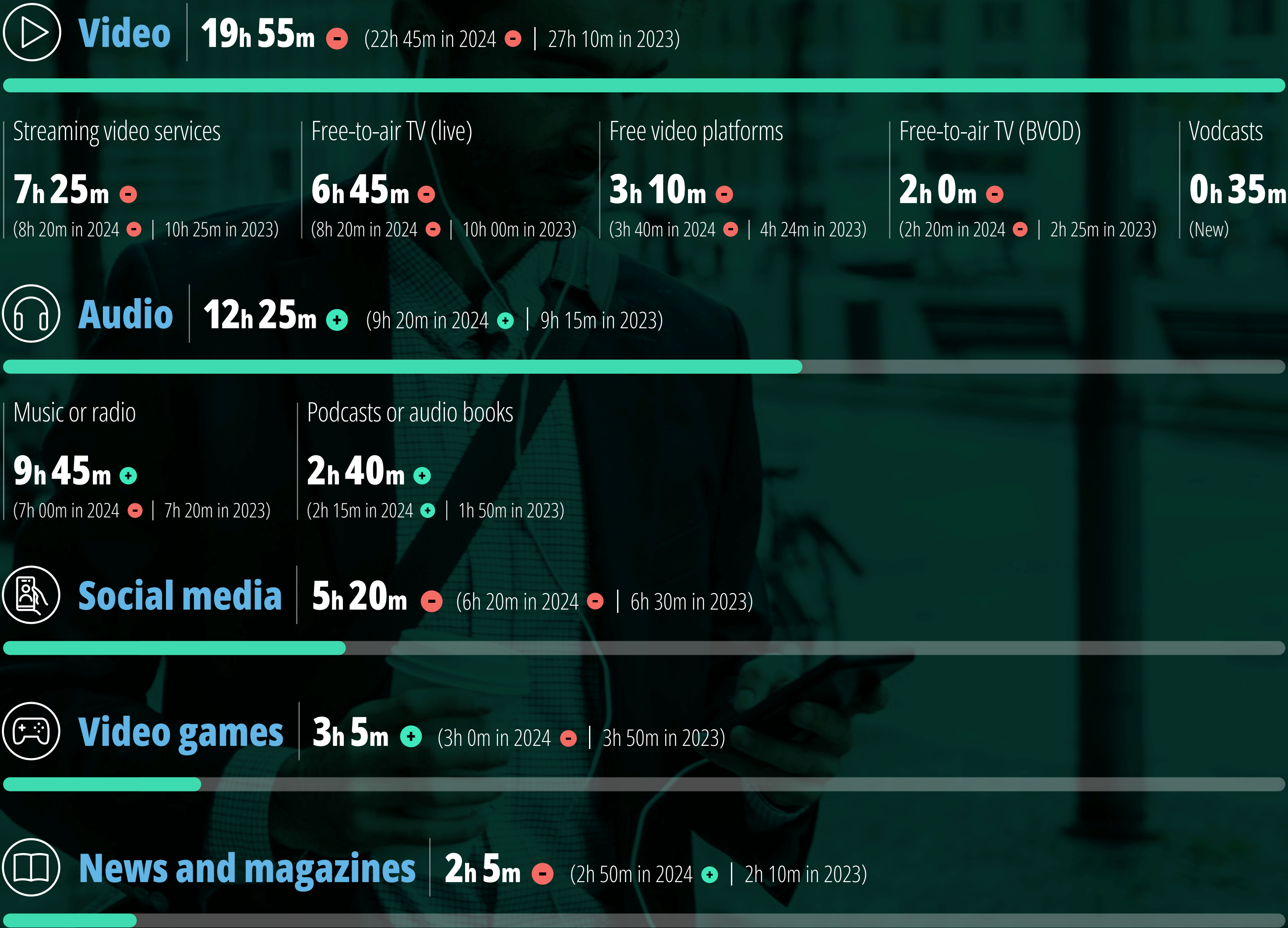


Content curation is becoming much more intentional, with consumers being targeted about what they view or listen to. Ultimately, quality matters.

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



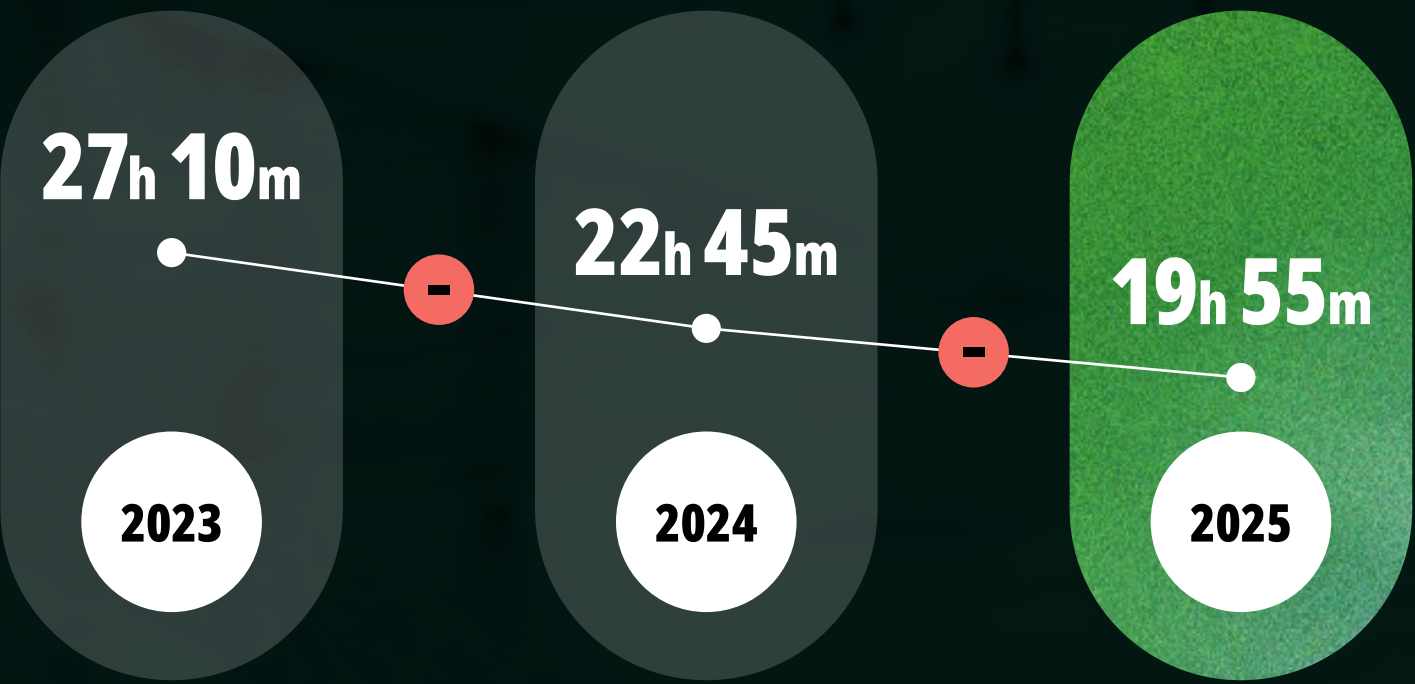
VIDEO SPOTLIGHT

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.

WEEKLY VIDEO CONSUMPTION



WEEKLY VIDEO CONSUMPTION (PER CATEGORY AND BY GENERATION)



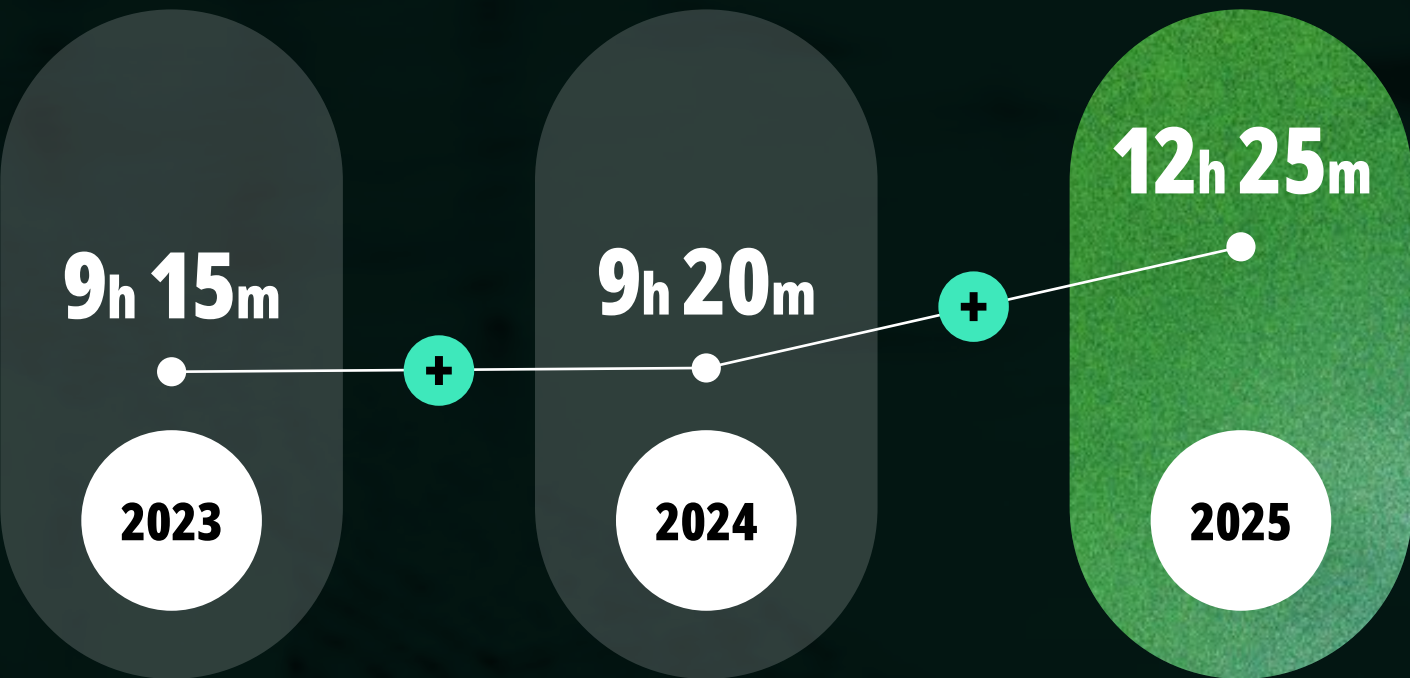
AUDIO SPOTLIGHT

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)



SOCIAL MEDIA SPOTLIGHT

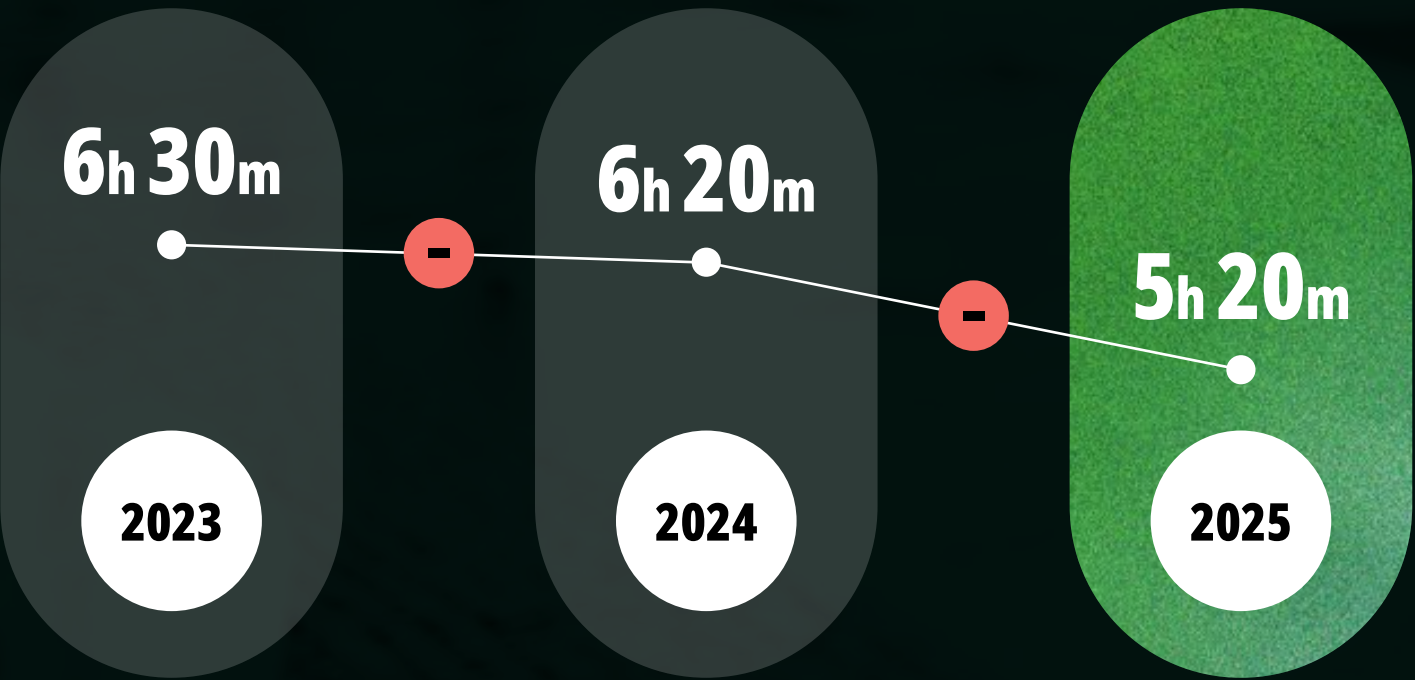
Social media remains a critical part of Australia’s media diet, but consumption is declining among all but Matures.

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%).

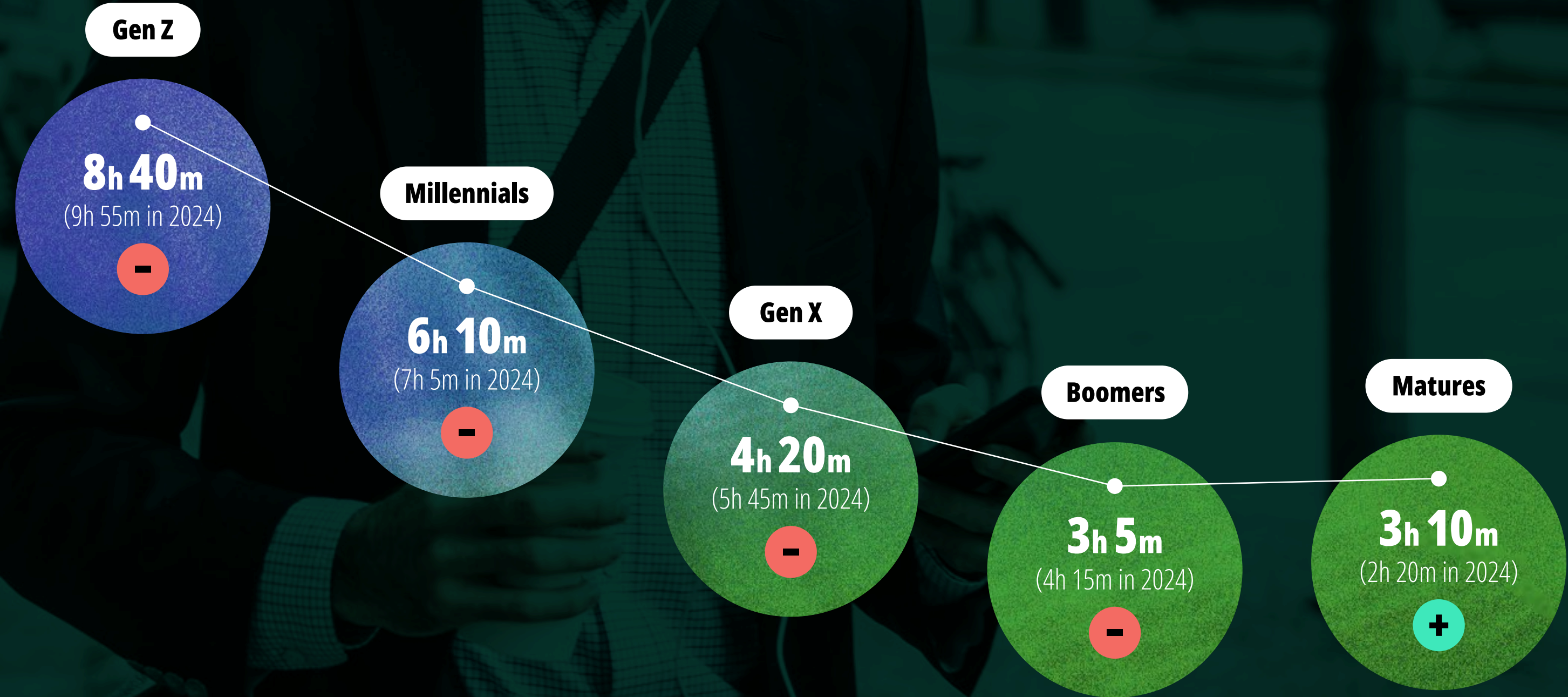
WEEKLY SOCIAL MEDIA CONSUMPTION



TOP SOCIAL MEDIA PLATFORMS (% OF RESPONDENTS)



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	Gen X
Watching video24%(2024: Browsing feeds 23%)	Browsing feeds25%(2024: Browsing feeds 28%)
Browsing feeds21%(2024: Watching video 22%)	Watching video23%(2024: Watching video 18%)
Messaging with friends18%(2024: Messaging with friends 19%)	Messaging with friends17%(2024: Messaging with friends 17%)
Gen Z	Boomers
Watching video30%(2024: Watching video 31%)	Messaging with friends24%(2024: Messaging with friends 29%)
Browsing feeds18%(2024: Browsing feeds 17%)	Watching video21%(2024: Browsing feeds 23%)
Messaging with friends15%(2024: Messaging with friends 16%)	Browsing feeds20%(2024: Watching video 15%)
Millennials	Matures
Watching video26%(2024: Watching video 24%)	Messaging with friends32%(2024: Messaging with friends 57%)
Browsing feeds22%(2024: Browsing feeds 23%)	Shopping21%(2024: Watching video 14%)
Messaging with friends15%(2024: Messaging with friends 14%)	Looking at photos14%(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
69%	63%
59%	56%
67%	52%
59%	51%
61%	49%
50%	41%

SOCIAL MEDIA SPOTLIGHT

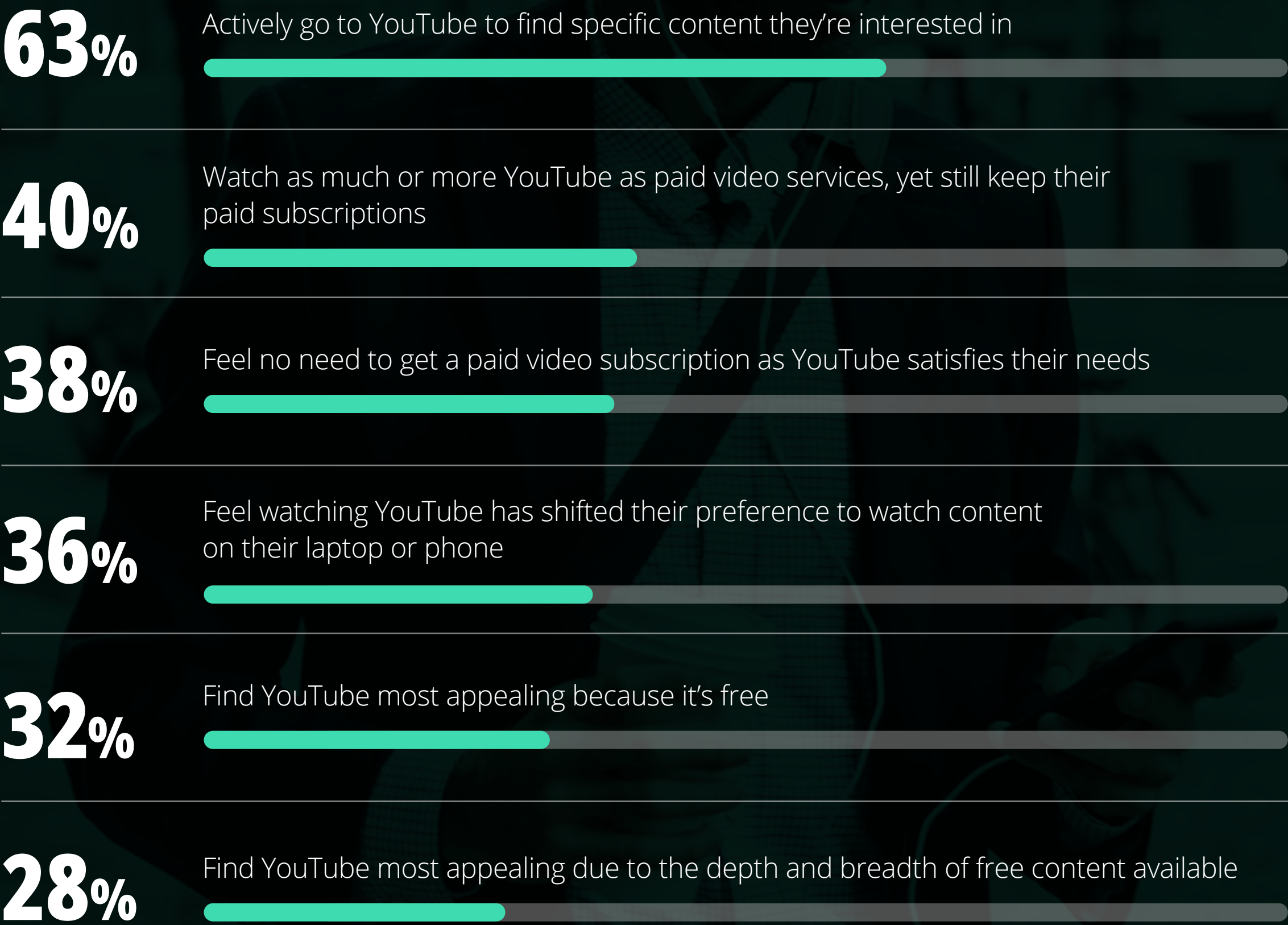
YouTube has changed Australia’s media landscape and has become a primary destination for those that value intentional, free and personalised content.

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
71%	51%
56%	23%
38%	38%
51%	19%
25%	40%
38%	20%

3

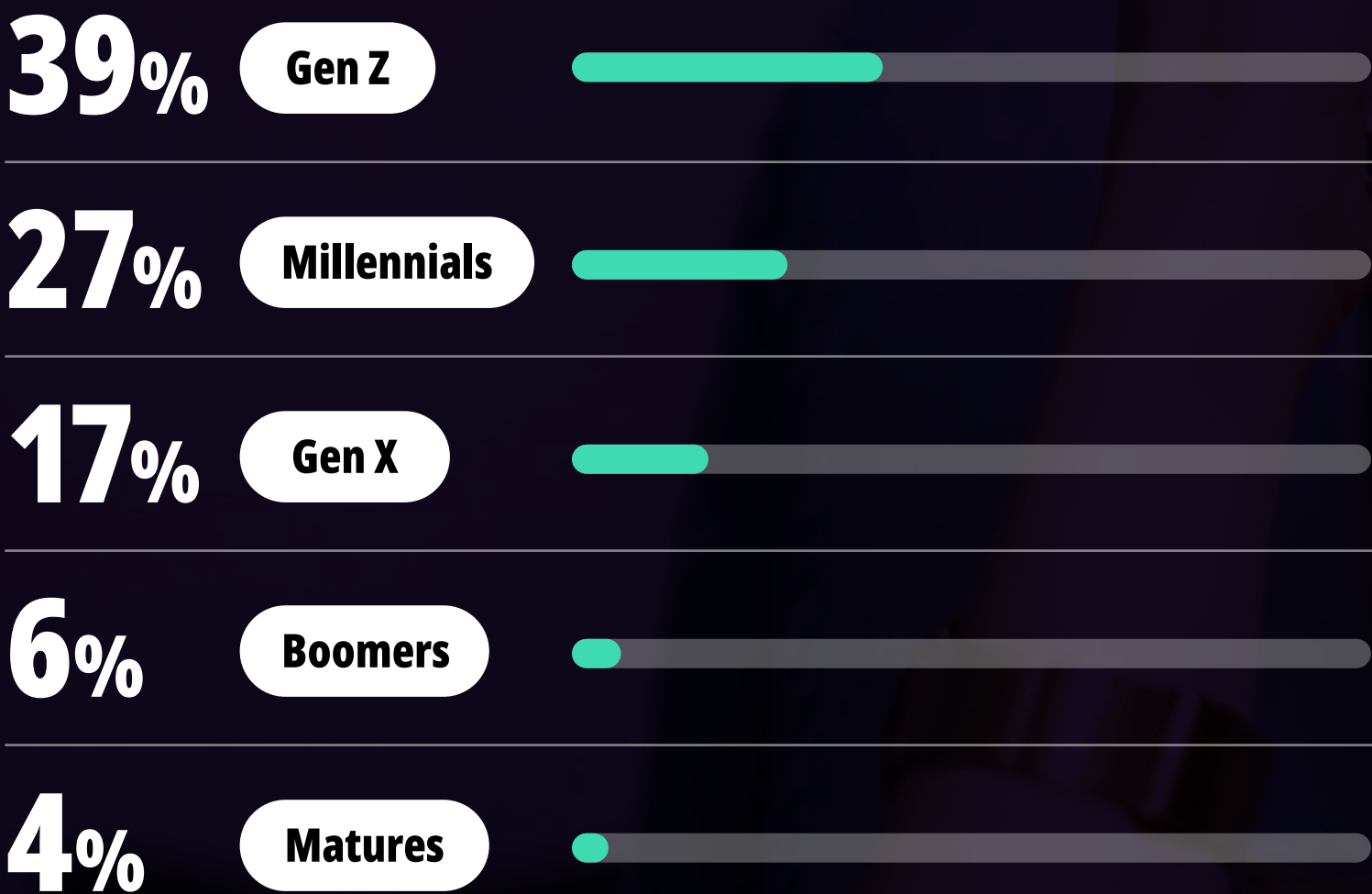
Content, audience engagement & advertising

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

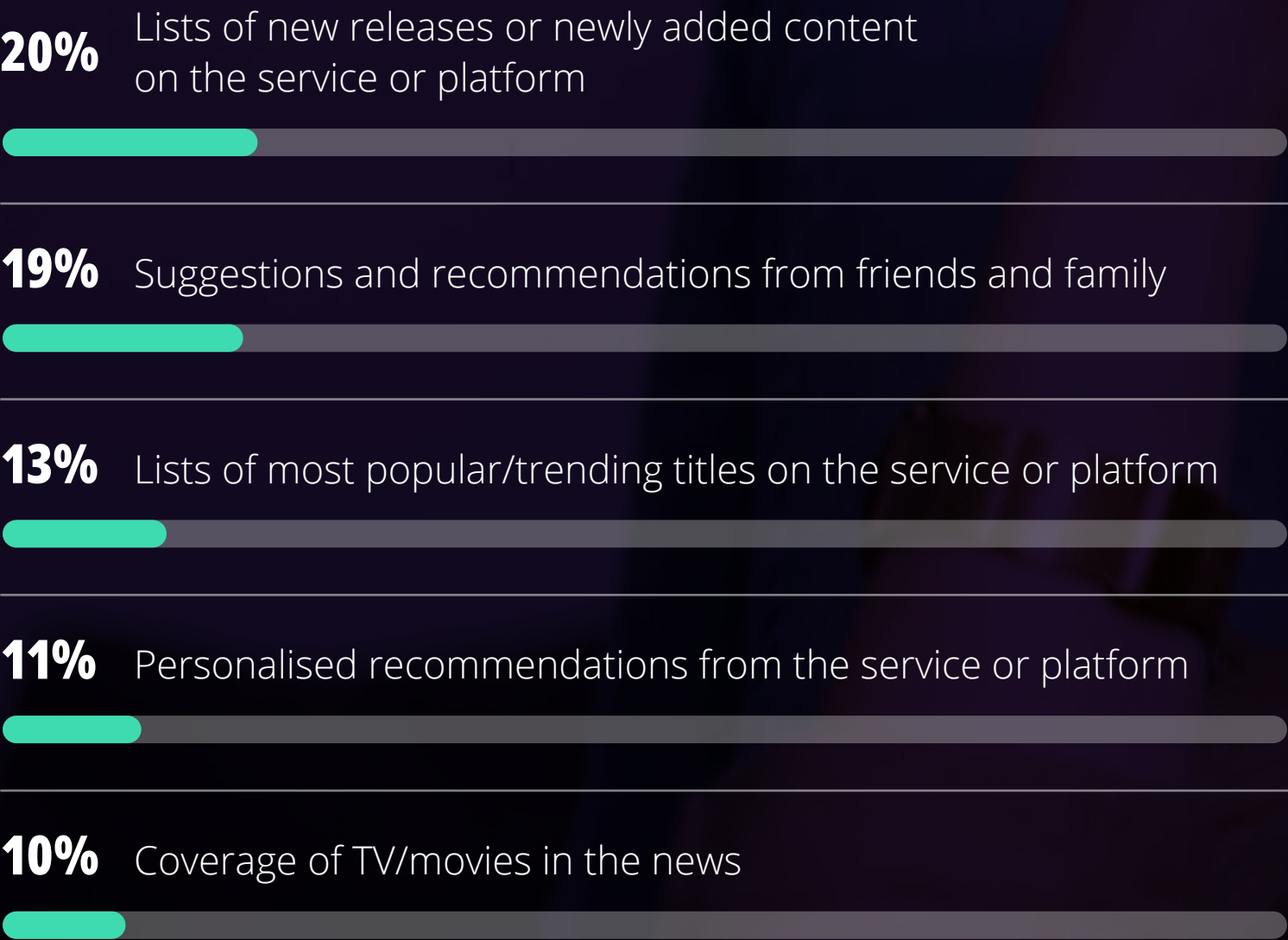
CONTENT DISCOVERY AND ENGAGEMENT

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.

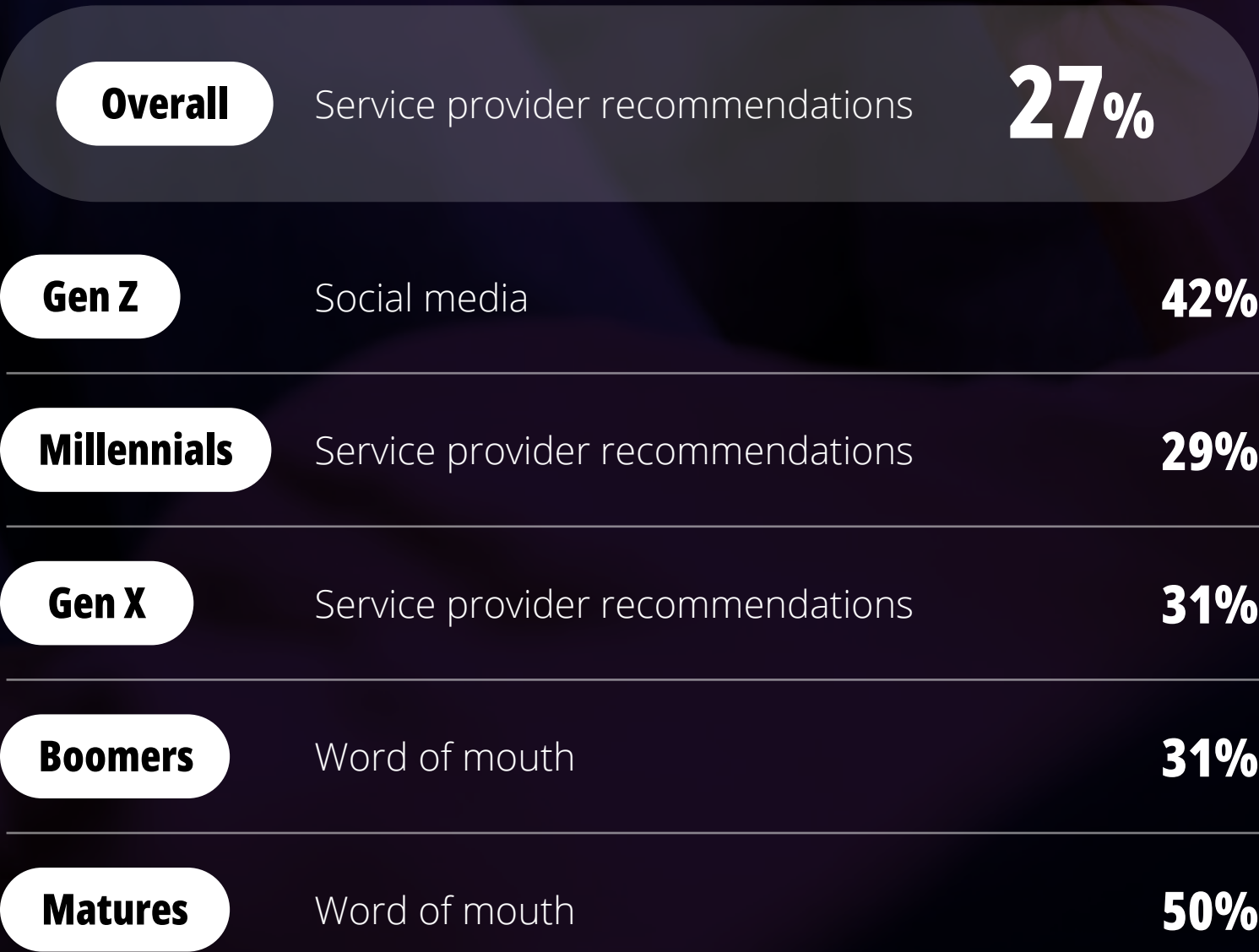
TOP FIVE METHODS FOR SVOD CONTENT DISCOVERY (% OF RESPONDENTS)



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.

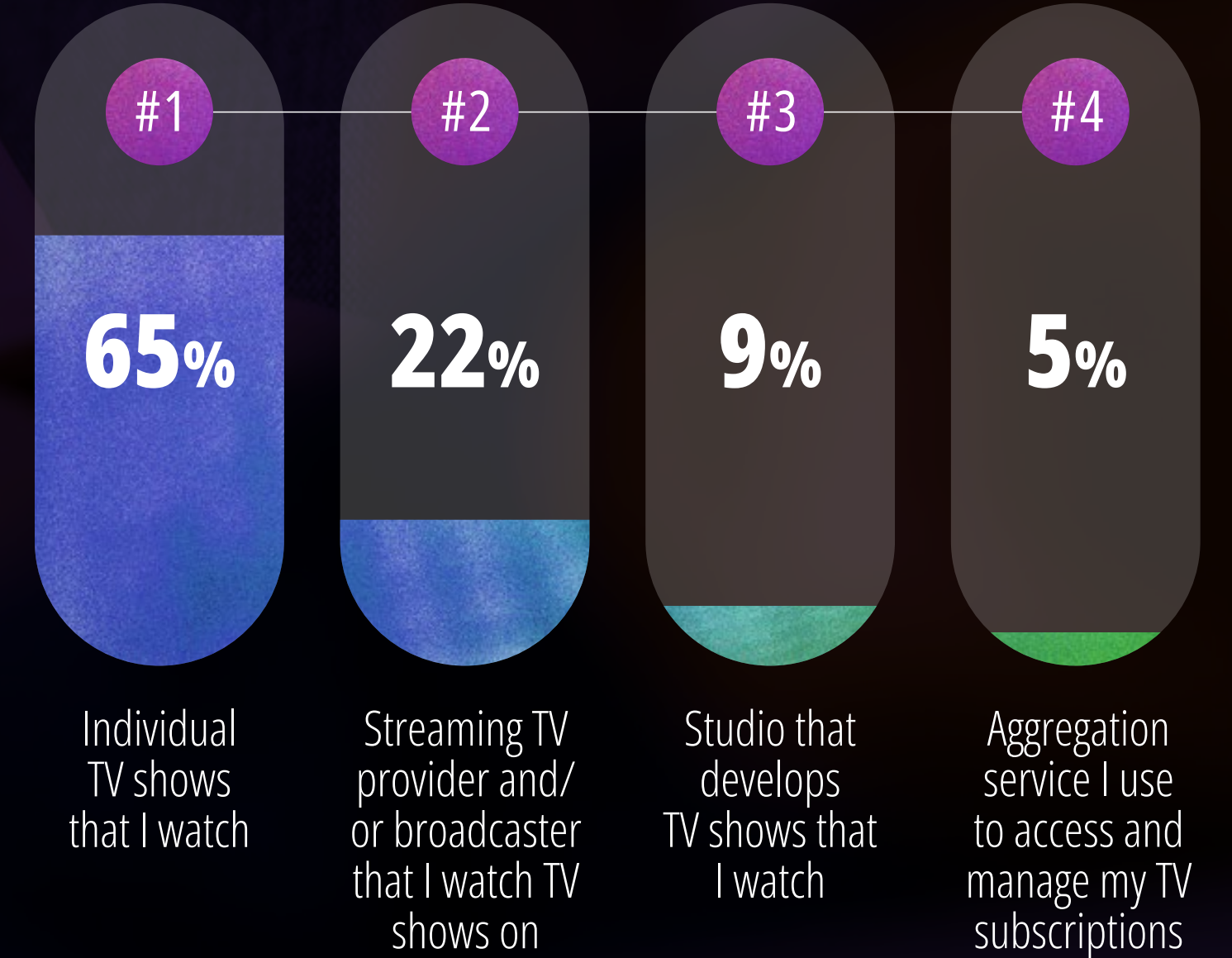
TOP WAY AUDIENCES DECIDE WHAT SVOD CONTENT TO WATCH BY GENERATION (% OF RESPONDENTS)



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.

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



MULTITASKING

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

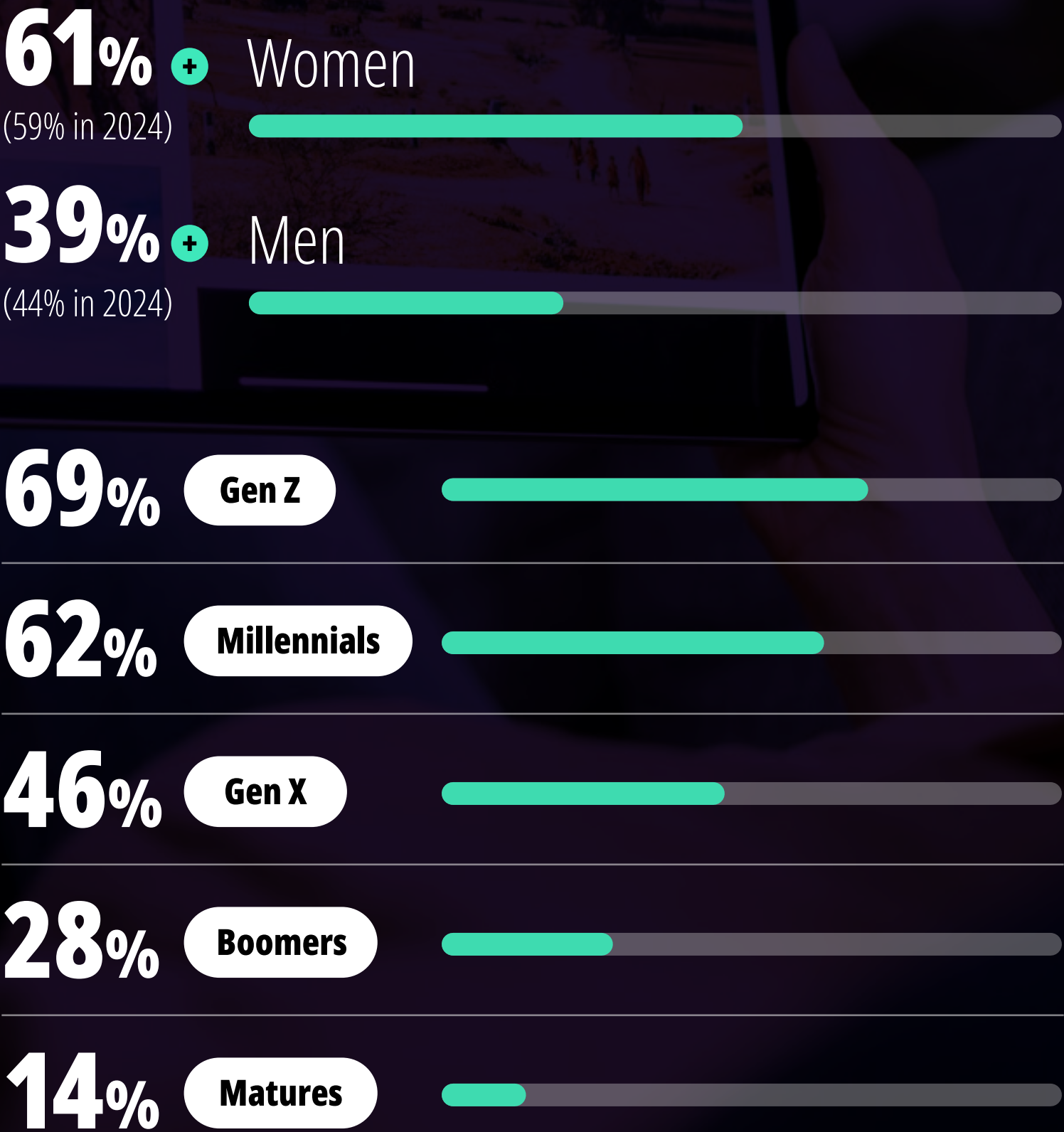
50%

-

Multitask while engaging with media content

(52% in 2024)

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



FAVORITE WAYS TO MULTITASK BY GENDER (% OF RESPONDENTS)



ADVERTISING

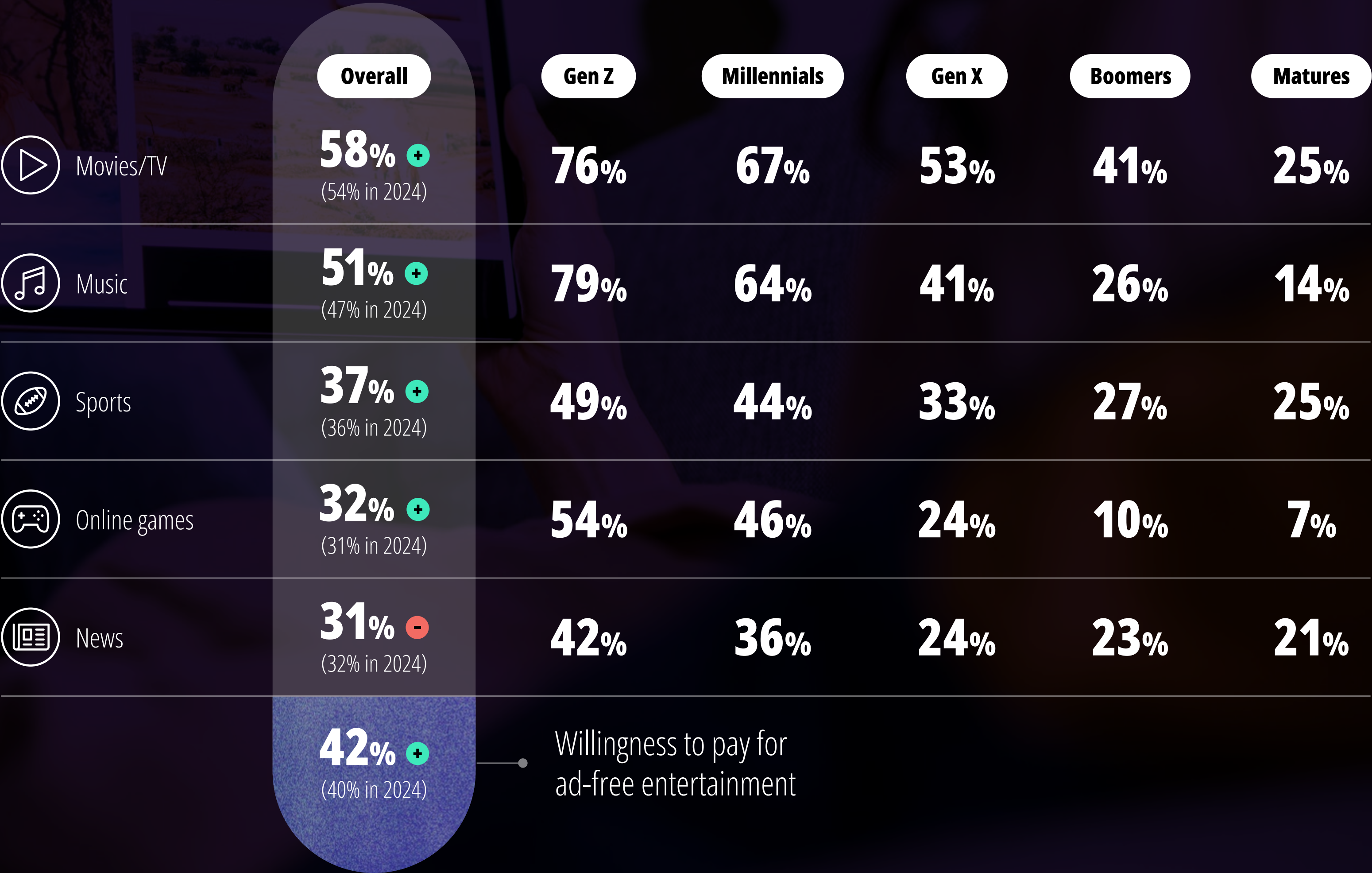
Australians are willing to pay to avoid content interruptions (except for news), with Gen Z the keenest on ad-free video and music.

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)



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

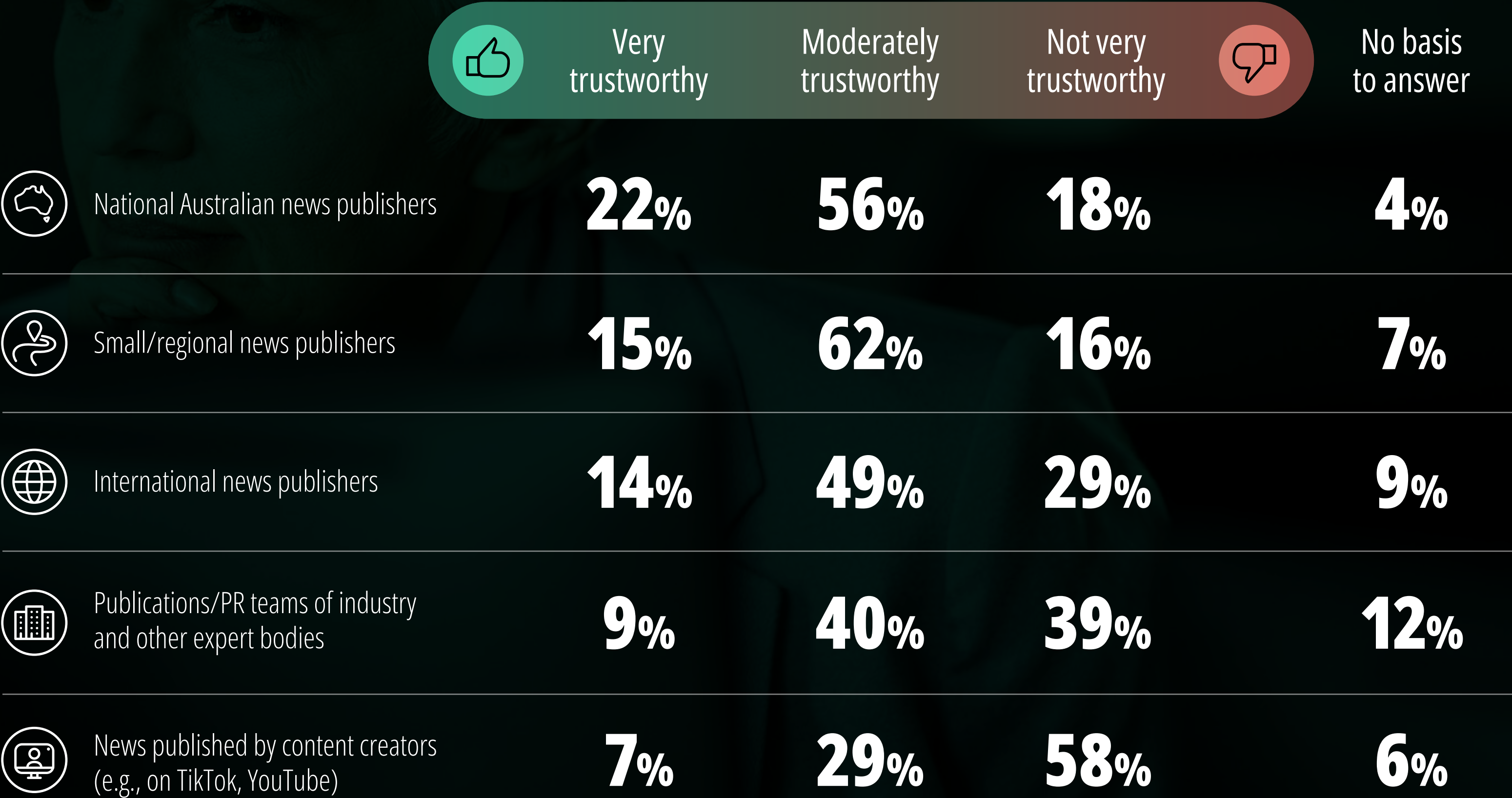
Consumers are most trusting of news content from Australian publishers.

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)



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.

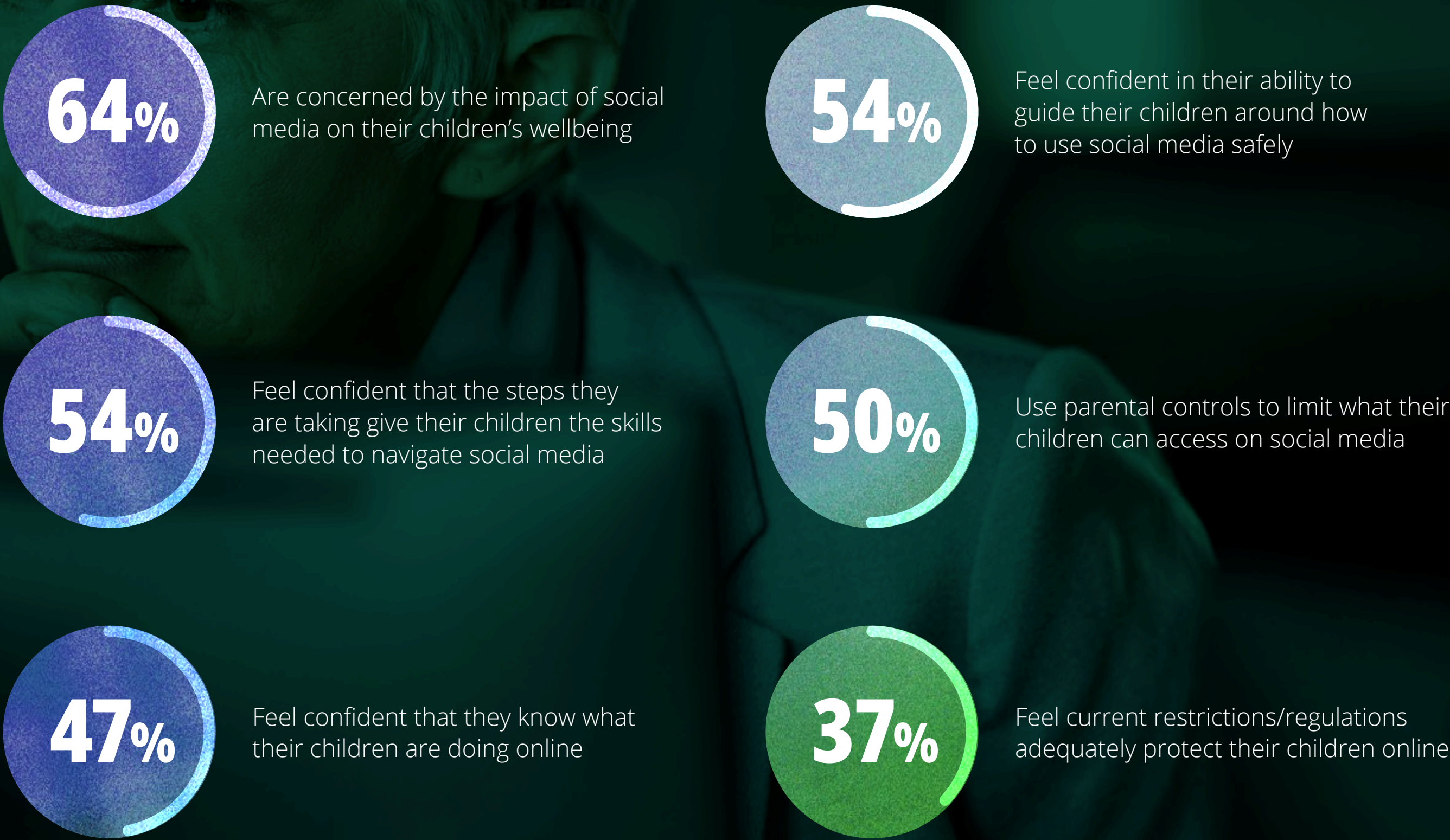
Social media is widely viewed as a major threat to children’s wellbeing, with nearly two-thirds (64%) of Australian parents concerned about its impact. Yet trust in existing regulations is low (37%), indicating parents’ belief that more must be done.

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)

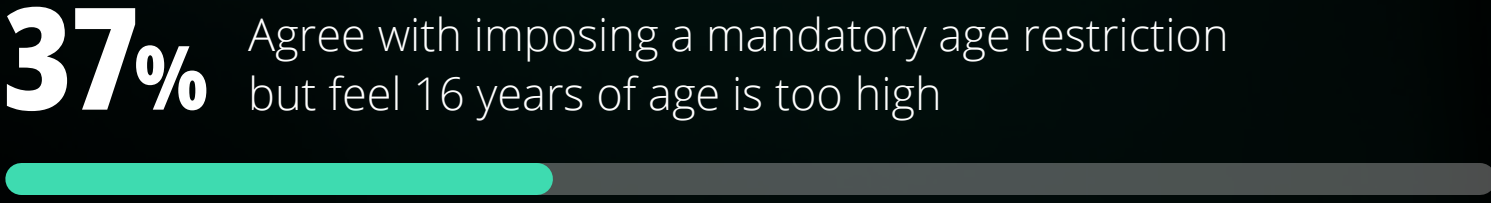
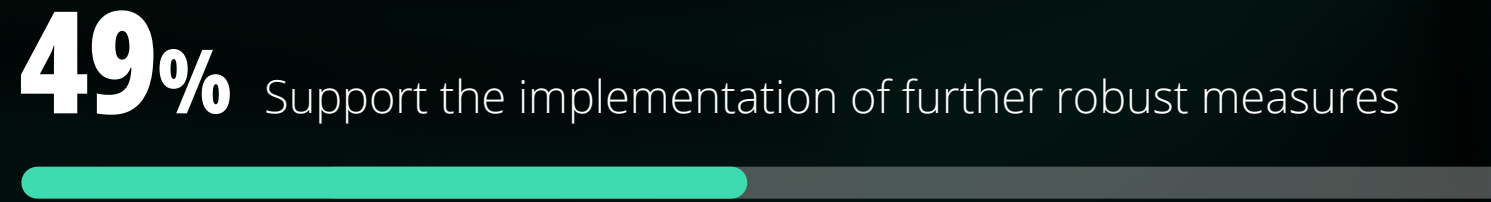
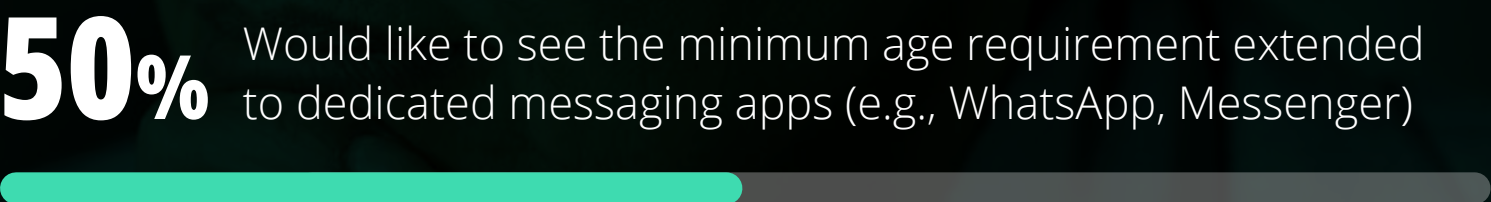
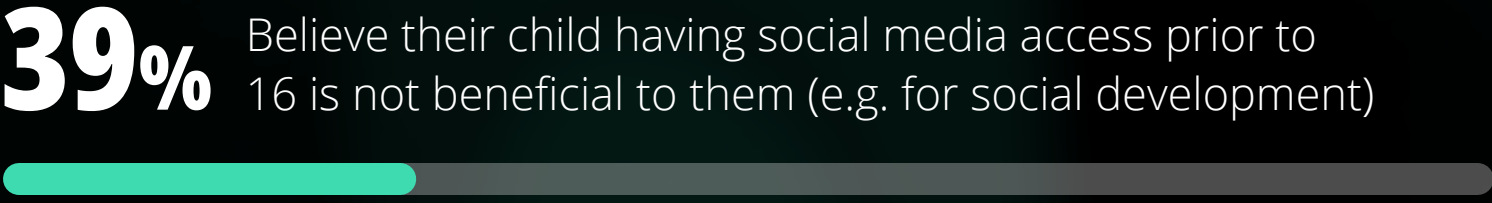
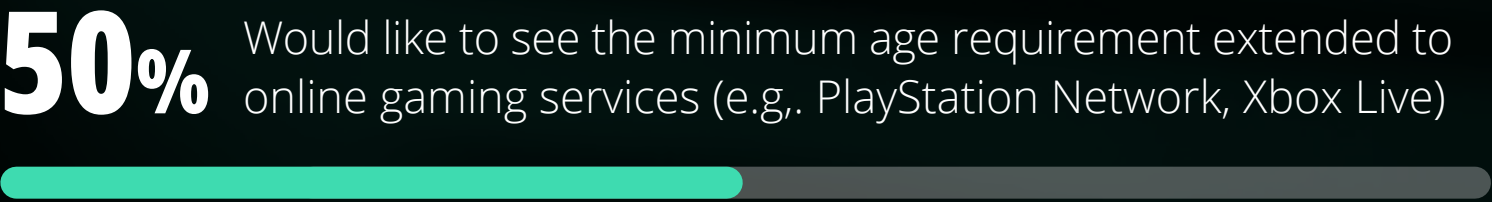
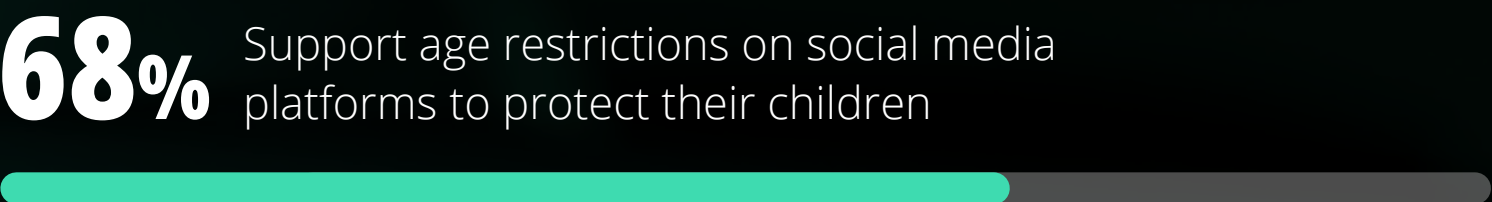


AGE RESTRICTIONS AND ONLINE SAFETY

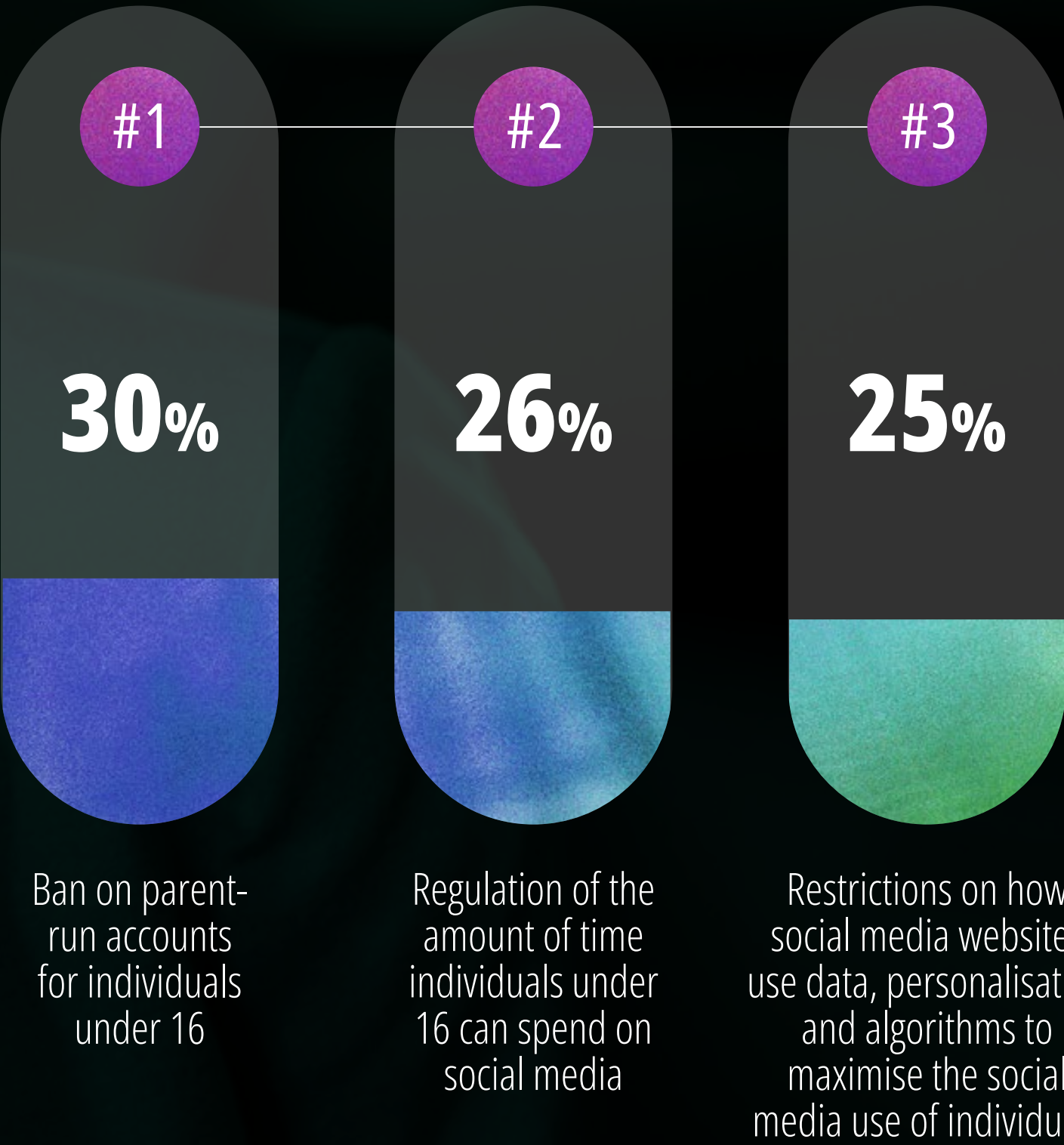
Australia’s social media age restrictions are strongly supported, but questions remain on enforcement and age thresholds.

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.



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

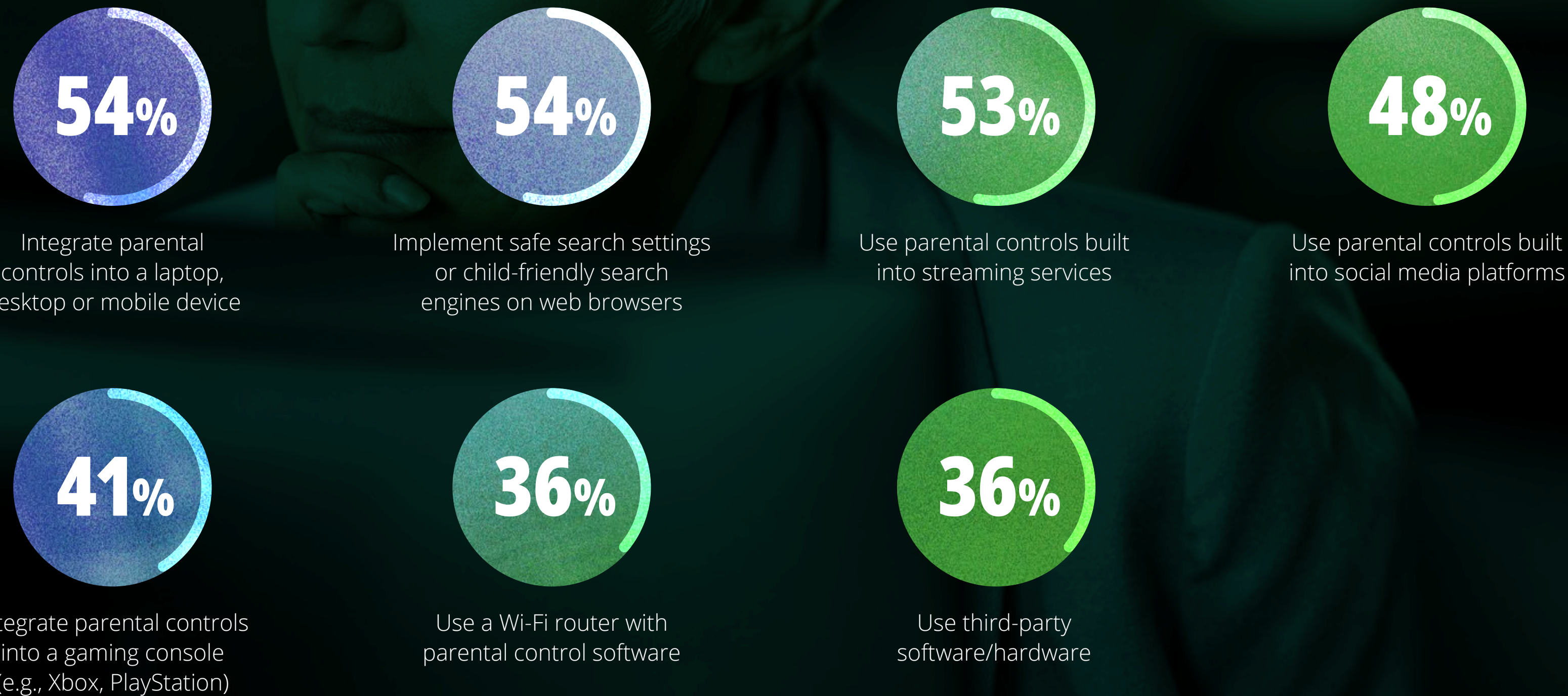


ONLINE SAFETY AT HOME

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.



5

Sports

SPORTS FOLLOWERSHIP

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

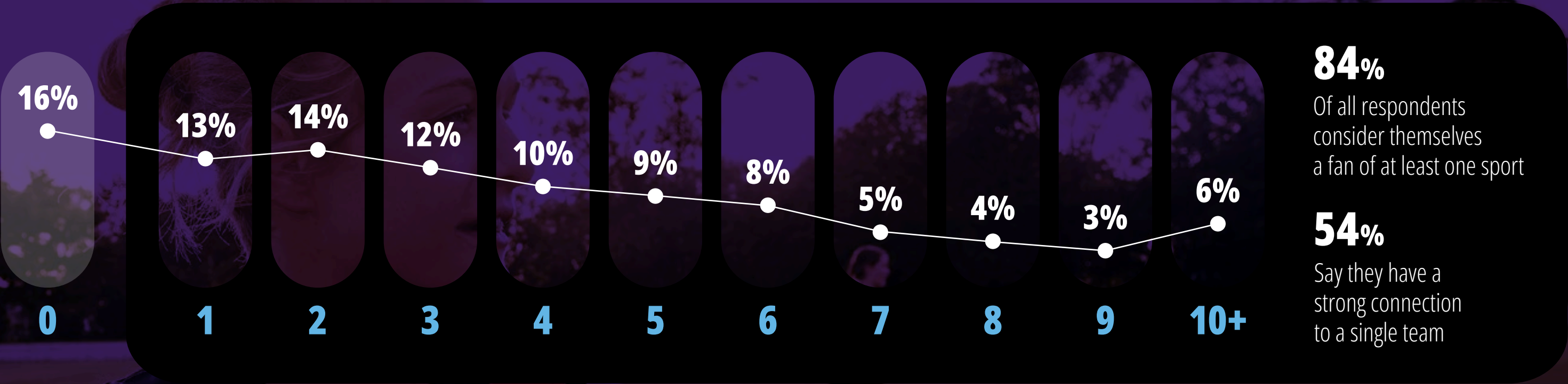
Sport remains a critical part of Australians' media diet, with more than four in five a 'fan' of at least one sport.

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 in Australia is still as strong as it has ever been, it has just evolved.

NUMBER OF SPORTS FOLLOWED BY AUSTRALIANS (% OF RESPONDENTS)



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%
	Tennis	32%	29%	17%
	Rugby League	30%	54%	32%
	Football/Soccer	30%	47%	38%
	Test and ODI Cricket	29%	61%	30%
	T20 Cricket (e.g. BBL)	26%	52%	41%
Olympic and Paralympic sports (e.g. gymnastics, athletics, swimming, wheelchair basketball etc.)		24%	37%	46%
Basketball		18%	42%	44%
Formula 1		18%	35%	47%
Rugby Union		15%	34%	47%
Netball		13%	30%	47%
Golf		12%	29%	53%
Motorsports (excluding F1)		12%	34%	53%
Horse Racing		11%	40%	43%
Boxing and MMA		10%	33%	49%
Cycling		10%	27%	53%
Winter Sports		9%	24%	55%
NFL/American Football		7%	35%	50%
Surfing		7%	24%	53%
Baseball		6%	31%	46%
Field Hockey		4%	34%	50%
Equestrian		3%	39%	39%
Precision Indoor Sports (e.g. Darts, Pool, Snooker)		2%	26%	48%

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)

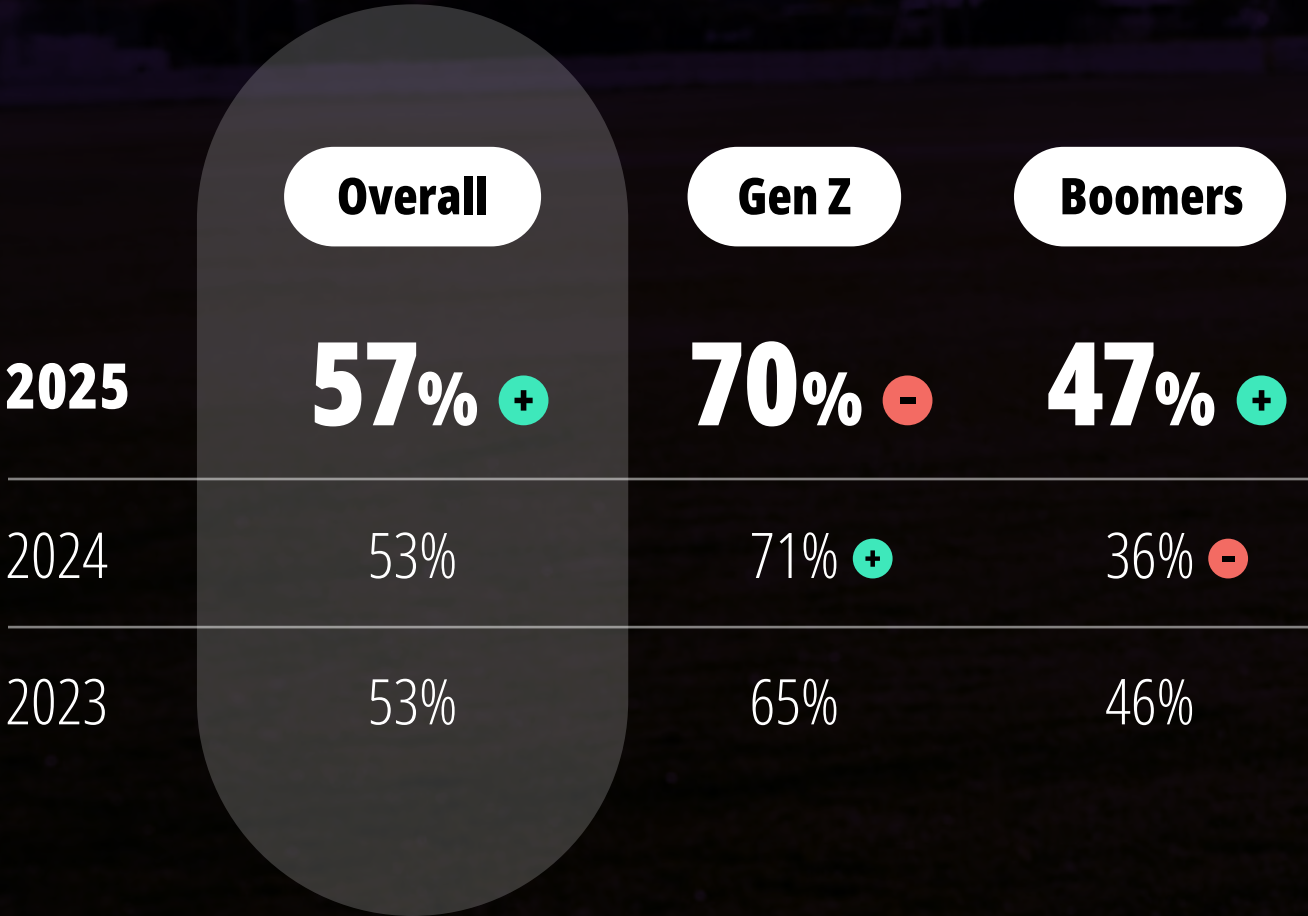
	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
#1	 42% AFL	 36% AFL	 37% AFL	 41% AFL	 54% AFL	 54% AFL
#2	 32% Tennis	 32% Football/Soccer	 35% Football/Soccer	 34% Tennis	 48% Test & ODI Cricket	 46% T20 Cricket
#3	 30% Football/Soccer	 25% Basketball	 32% Tennis	 30% Rugby League	 38% Rugby League	 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.

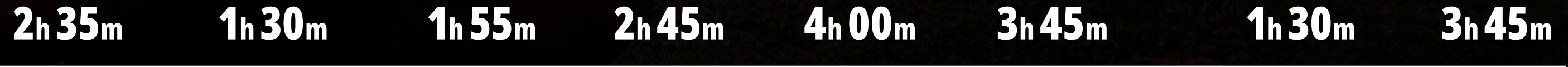
Interest in sports content continues to rise, with 57% of Australians willing to pay for sports content (up from 53% in 2024). Demand from Gen Z has plateaued at 70%, while Boomers' interest has increased significantly to 47% (up from 36% in 2024).

WILLINGNESS TO PAY FOR SPORTS CONTENT (% OF RESPONDENTS)



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)



HOURS PER WEEK SPENT WATCHING SPORT (LIVE OR DIGITALLY)

WOMEN'S SPORTS

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

65%

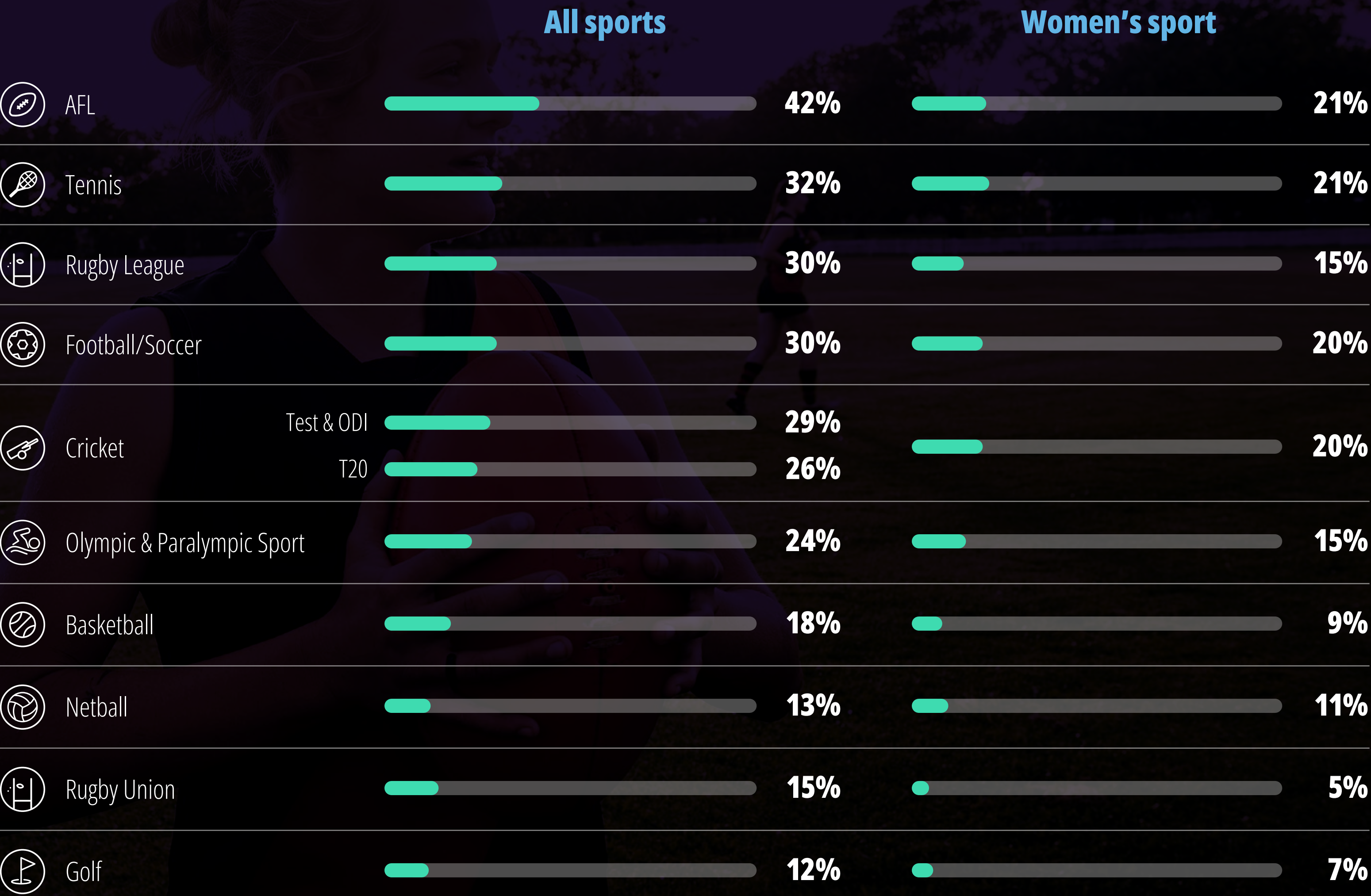
Of all respondents consider themselves a fan of a women's sport

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.

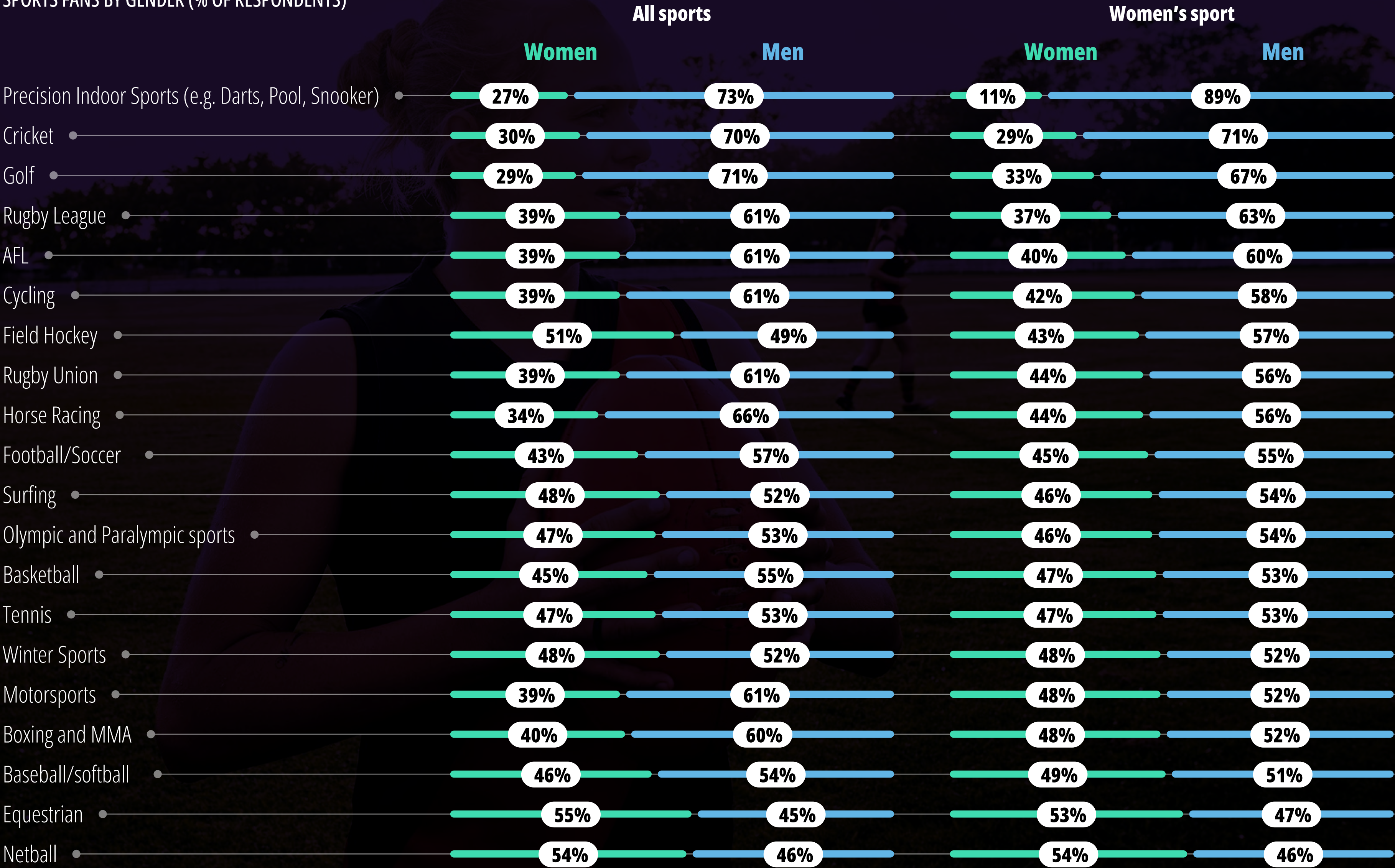
SPORTS FOLLOWERSHIP BY CODE (% OF RESPONDENTS)



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)



STADIUM EXPERIENCES

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



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.

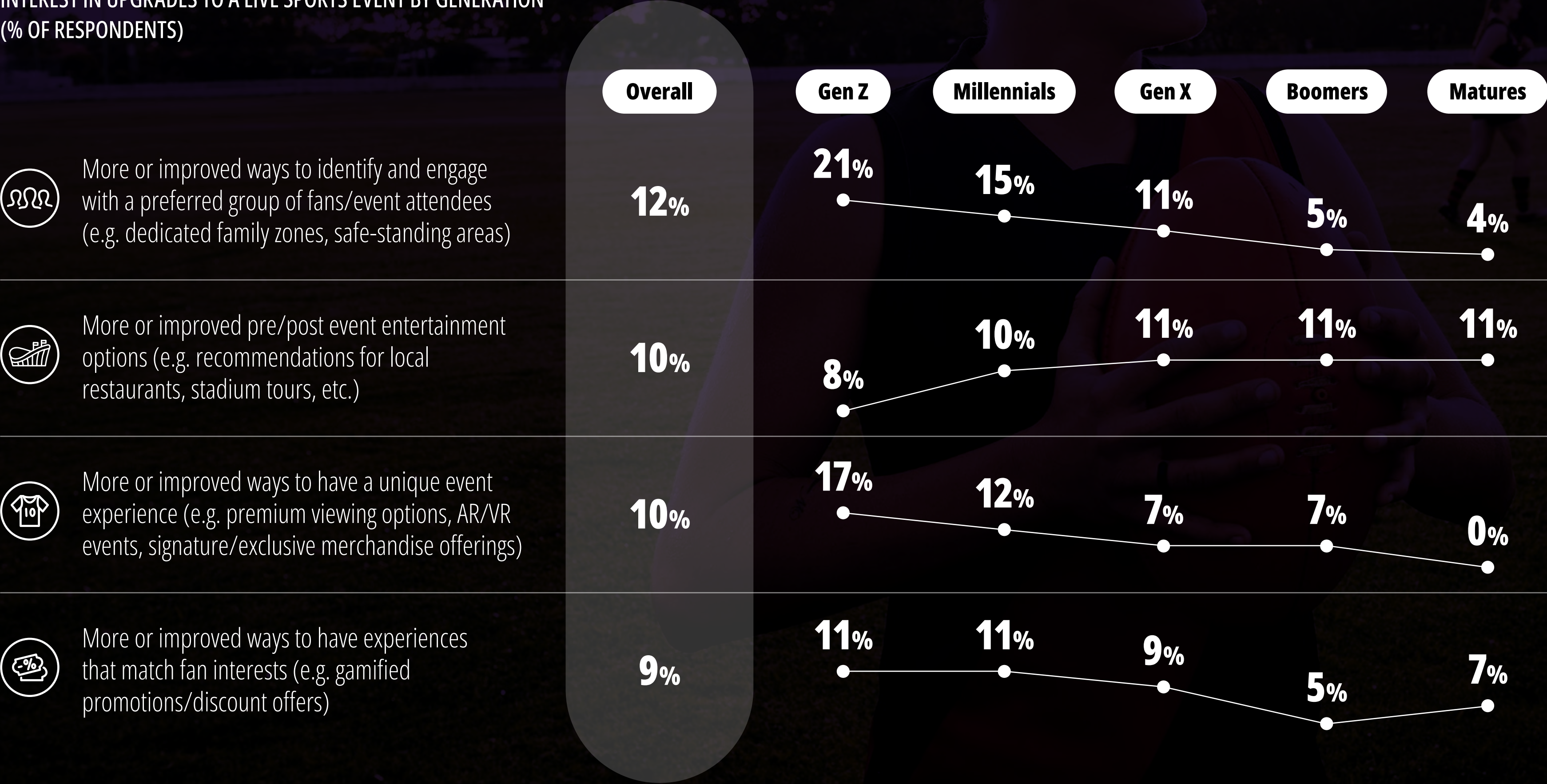
FEATURES THAT WOULD HAVE IMPROVED FANS' EXPERIENCE AT THEIR MOST RECENT LIVE EVENT (% OF RESPONDENTS)



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)



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)

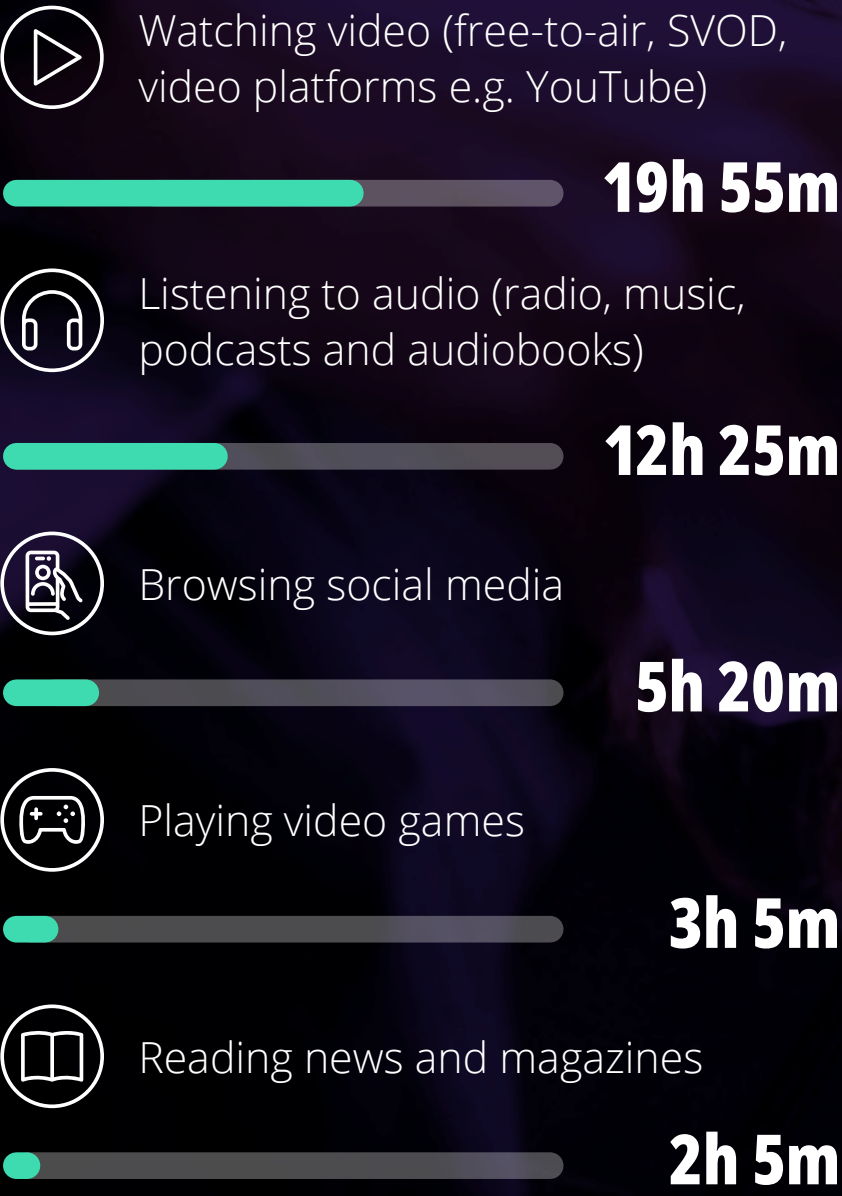
See broadcasters as key drivers of positive change



4

Number of sports followed

TOP 5 HOME ENTERTAINMENT ACTIVITIES (WEEKLY CONSUMPTION)



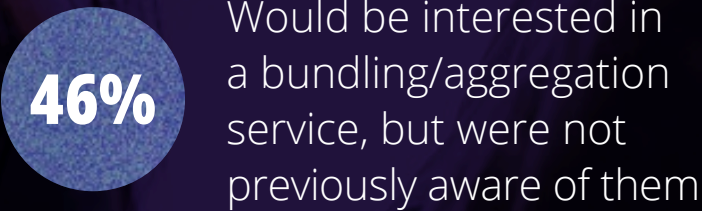
SUBSCRIPTIONS (PER HOUSEHOLD)



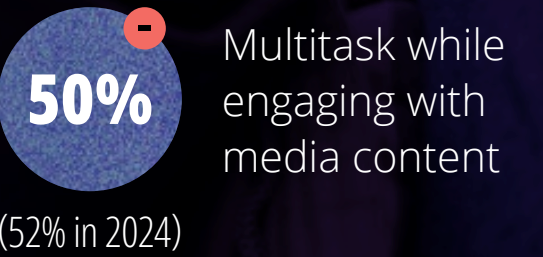
SPEND (% OF RESPONDENTS)



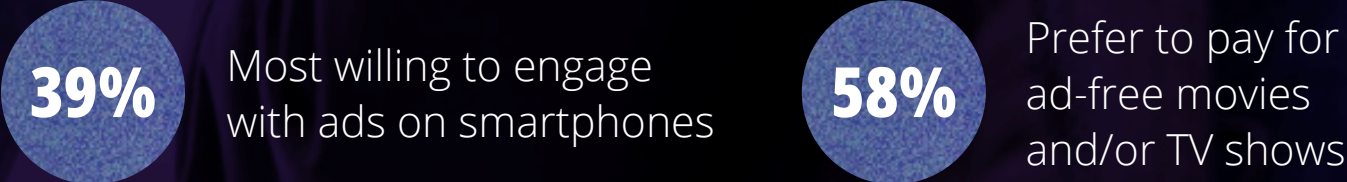
AGGREGATION (% OF RESPONDENTS)



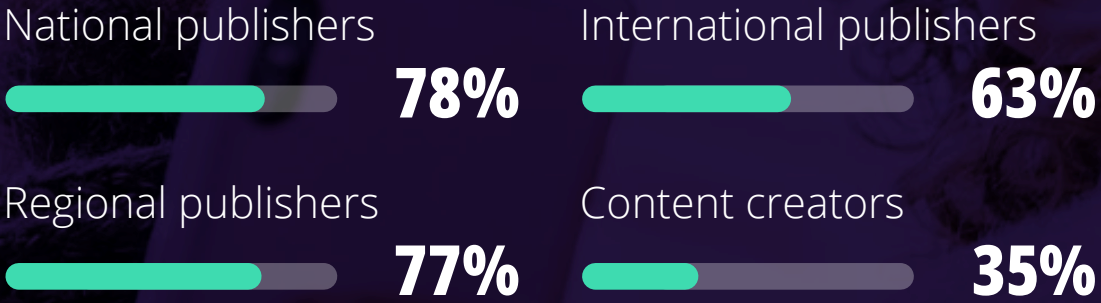
MULTITASKING (% OF TOTAL RESPONDENTS)



ADVERTISEMENT (% OF RESPONDENTS)



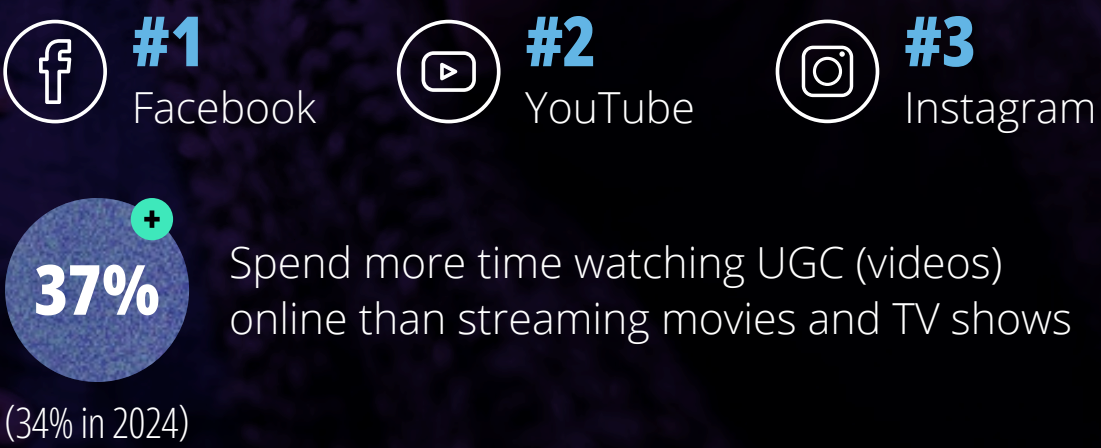
TRUST LEVELS IN DIFFERENT NEWS SOURCES (% OF RESPONDENTS)



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



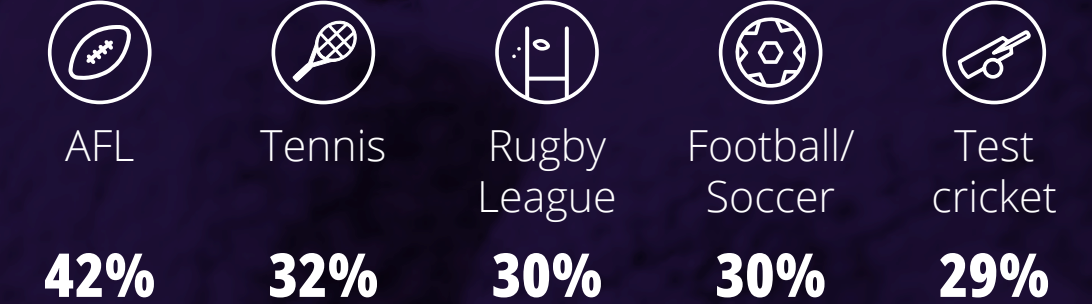
TIME SPENT ON SOCIAL MEDIA



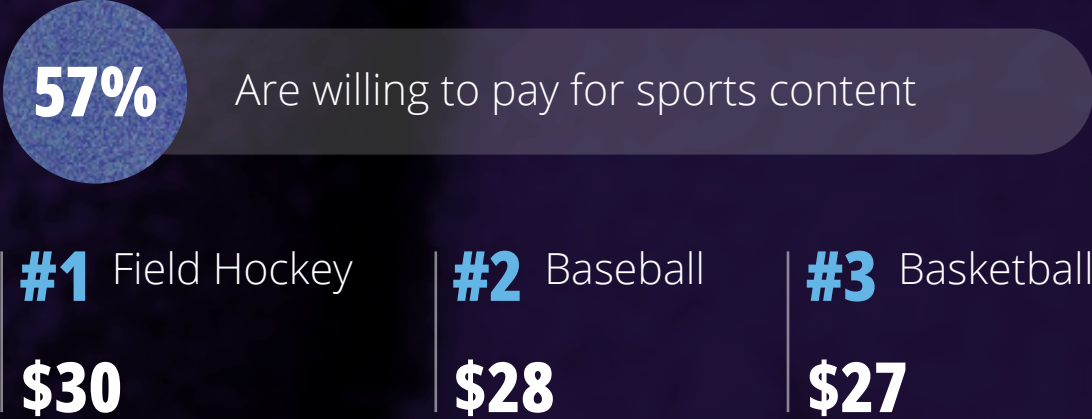
38%

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

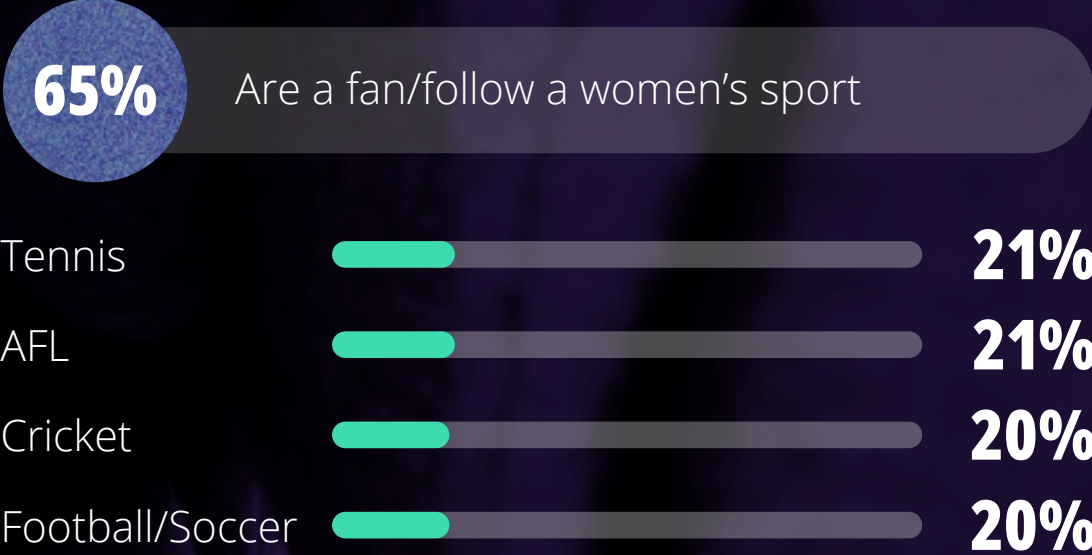
SPORTS FANS (% OF RESPONDENTS)



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



MOST POPULAR WOMEN'S SPORTS (% OF RESPONDENTS)



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)

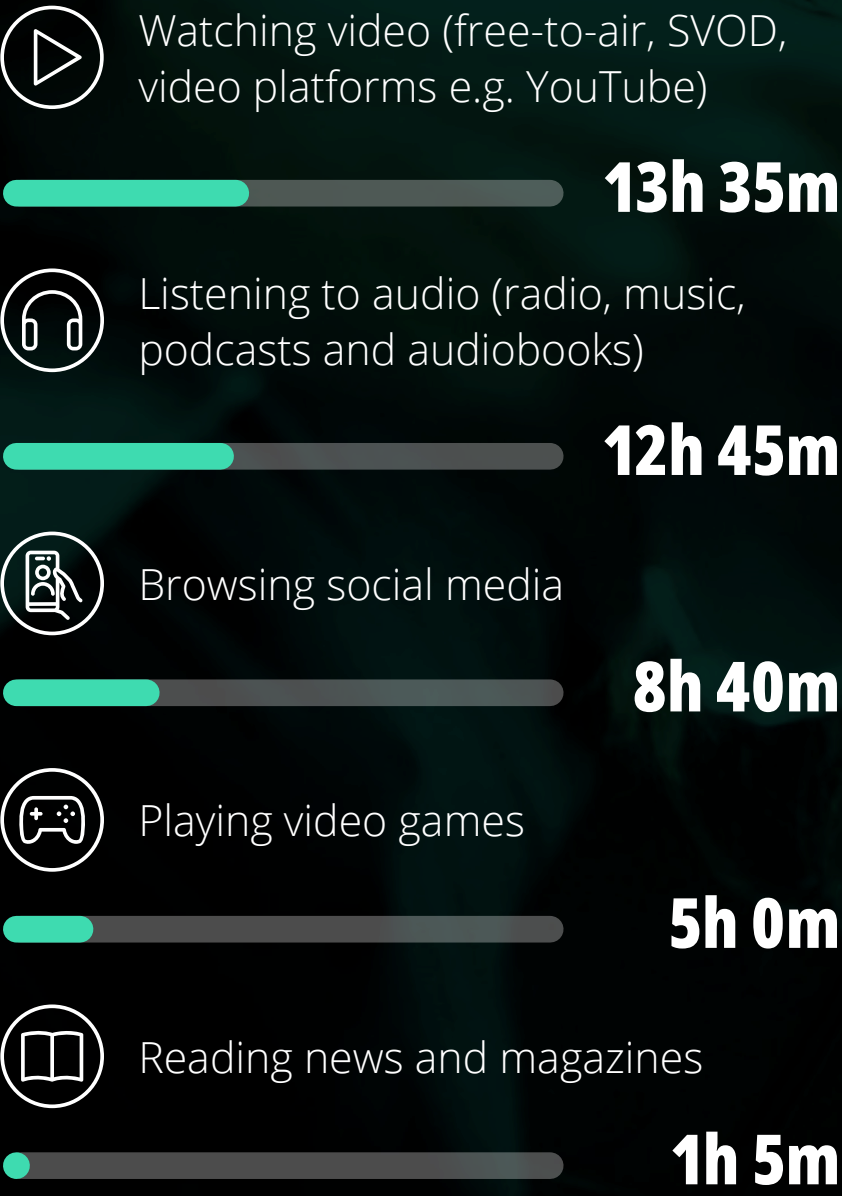
See broadcasters as key drivers of positive change



3

Number of sports followed

TOP 5 HOME ENTERTAINMENT ACTIVITIES (WEEKLY CONSUMPTION)



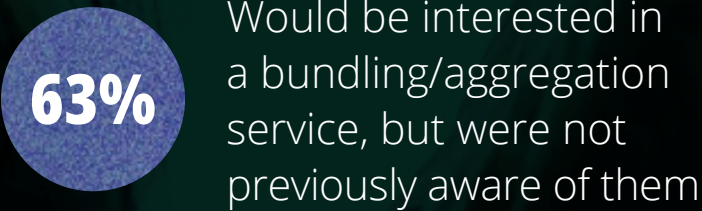
SUBSCRIPTIONS (PER HOUSEHOLD)



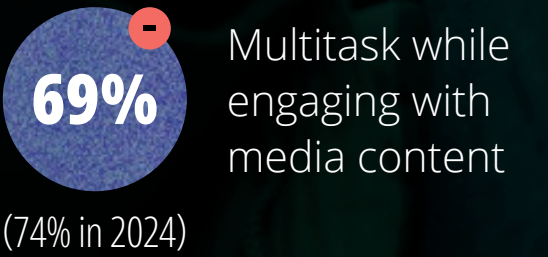
SPEND (% OF RESPONDENTS)



AGGREGATION (% OF RESPONDENTS)



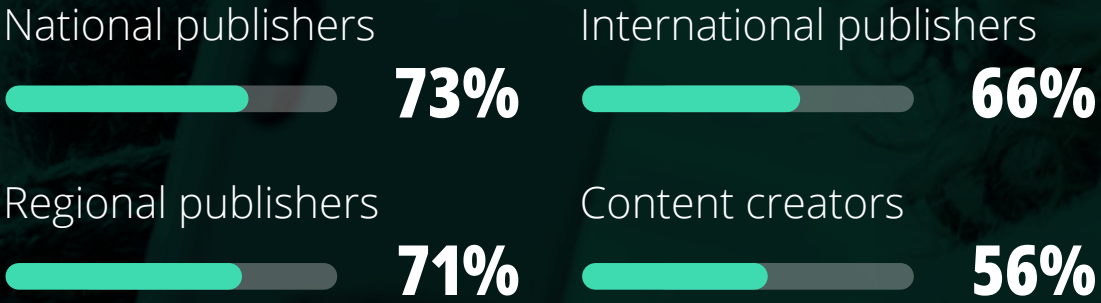
MULTITASKING (% OF TOTAL RESPONDENTS)



ADVERTISEMENT (% OF RESPONDENTS)



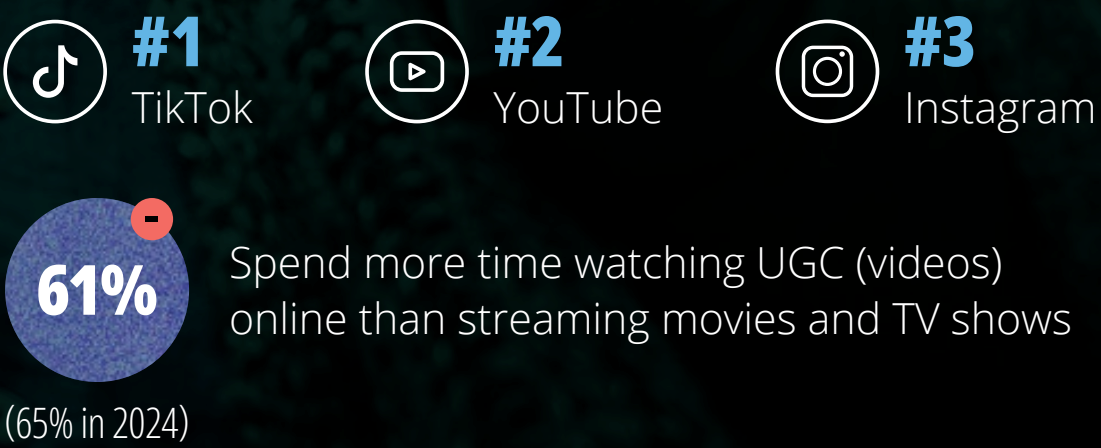
TRUST LEVELS IN DIFFERENT NEWS SOURCES (% OF RESPONDENTS)



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



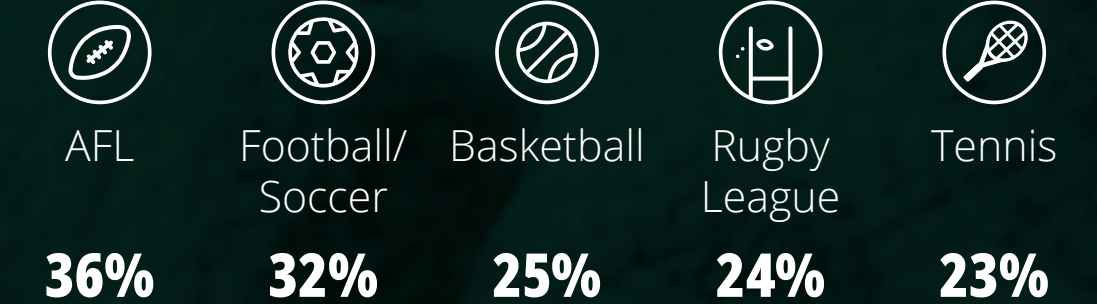
TIME SPENT ON SOCIAL MEDIA



38%

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

SPORTS FANS (% OF RESPONDENTS)



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%

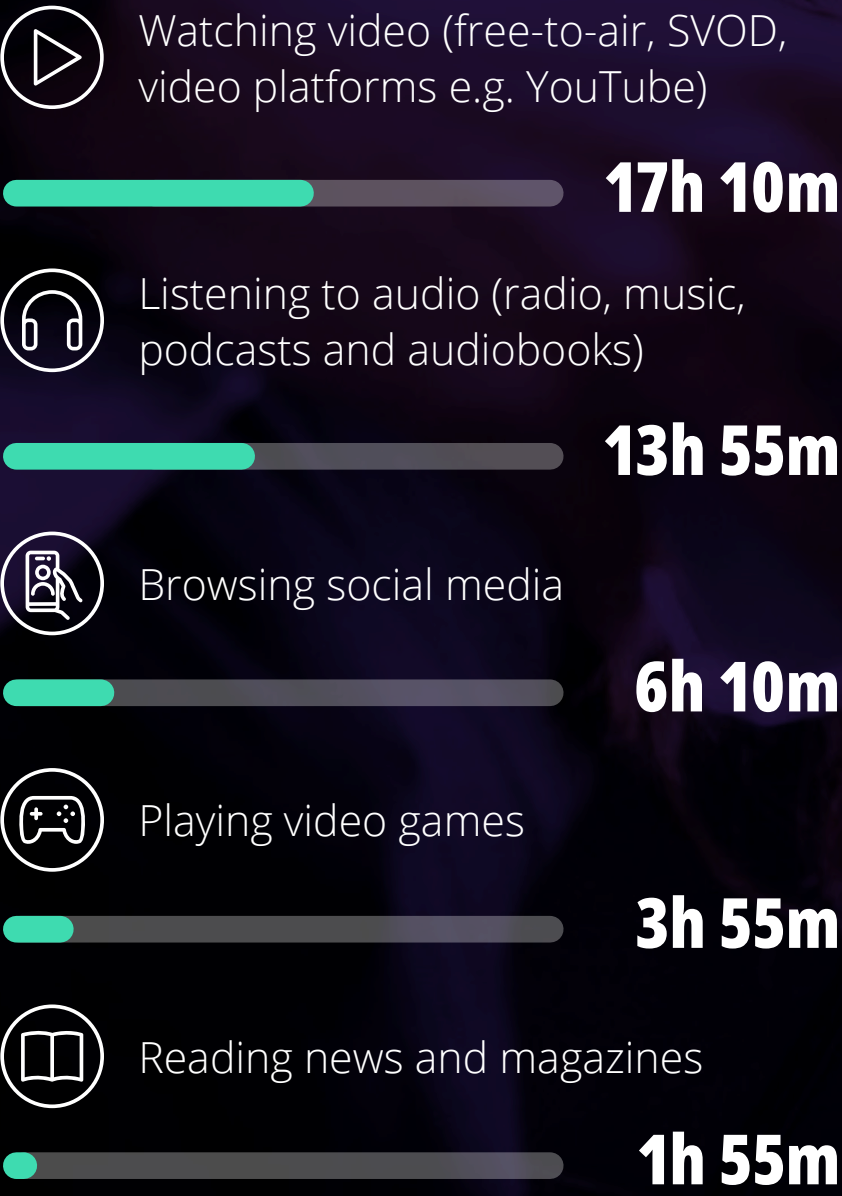
(39% in 2024)

See broadcasters as key drivers of positive change

3

Number of sports followed

TOP 5 HOME ENTERTAINMENT ACTIVITIES (WEEKLY CONSUMPTION)



SUBSCRIPTIONS (PER HOUSEHOLD)

4.4

Average number of paid entertainment subscriptions

(3.6 in 2024)

2.9

Average number of SVOD subscriptions (among SVOD subscribers)

(2.4 in 2024)

SPEND (% OF RESPONDENTS)

44%

Are overspending relative to their media budget

(36% in 2024)

82%

Are worried about the total cost of media spend

(79% in 2024)

AGGREGATION (% OF RESPONDENTS)

53%

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

MULTITASKING (% OF TOTAL RESPONDENTS)

62%

Multitask while engaging with media content

(64% in 2024)

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)

22%

Social media

20%

YouTube

19%

TV

TIME SPENT ON SOCIAL MEDIA

#1

Facebook

#2

Instagram

#3

YouTube

49%

Spend more time watching UGC (videos) online than streaming movies and TV shows

(46% in 2024)

38%

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

SPORTS FANS (% OF RESPONDENTS)

AFL

37%

Football/Soccer

35%

Tennis

32%

Rugby League

28%

Basketball

25%

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

62%

Are willing to pay for sports content

#1

Field Hockey

\$32

#2

Precision Indoor Sports

\$31

#3

Baseball

\$31

MOST POPULAR WOMEN'S SPORTS (% OF RESPONDENTS)

67%

Are a fan/follow a women's sport

Football/Soccer

24%

Tennis

20%

AFL

20%

Cricket

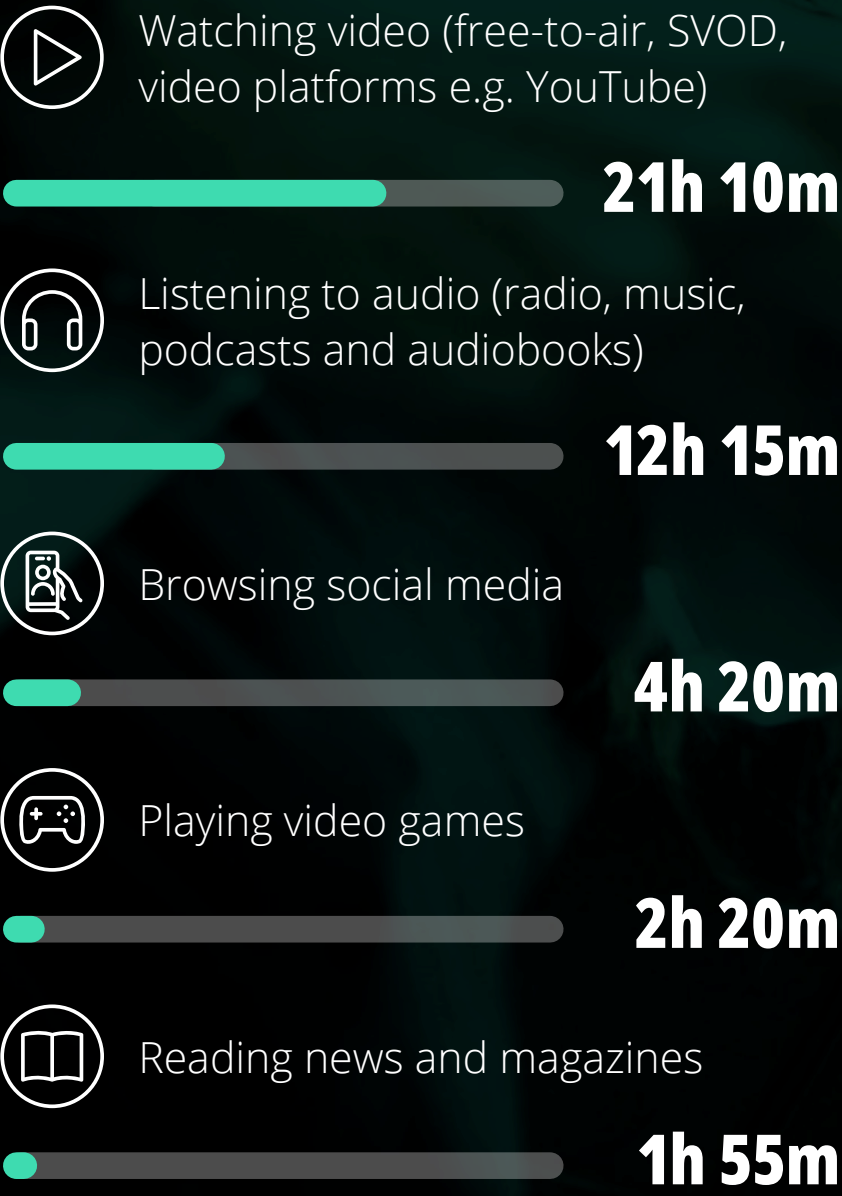
16%

48

Gen X



TOP 5 HOME ENTERTAINMENT ACTIVITIES (WEEKLY CONSUMPTION)



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)

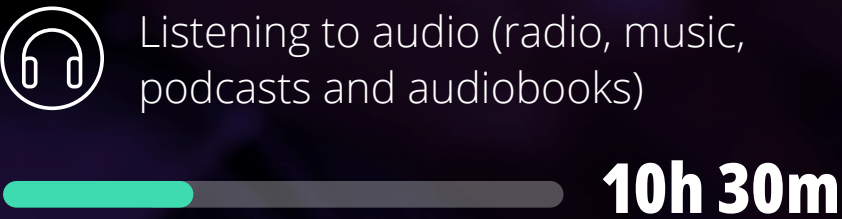
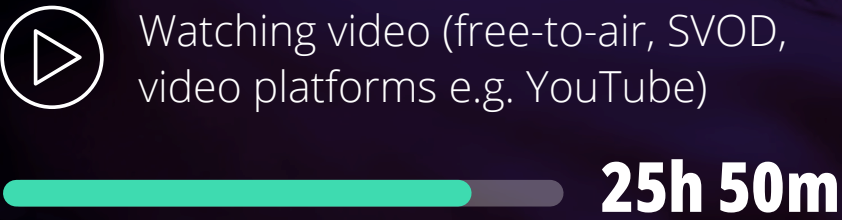
See broadcasters as key drivers of positive change



5

Number of sports followed

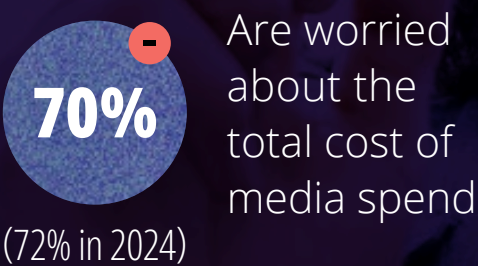
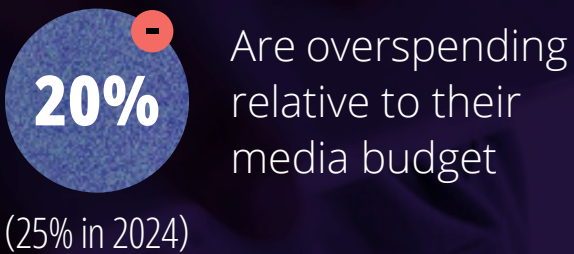
TOP 5 HOME ENTERTAINMENT ACTIVITIES (WEEKLY CONSUMPTION)



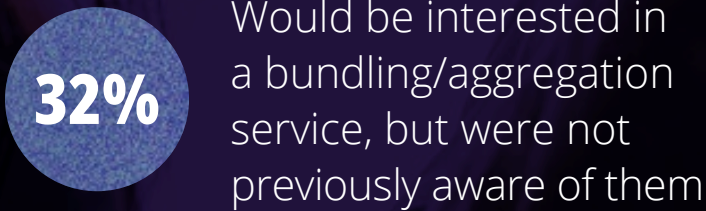
SUBSCRIPTIONS (PER HOUSEHOLD)



SPEND (% OF RESPONDENTS)



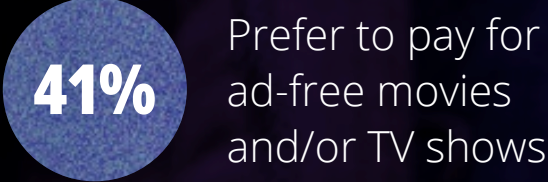
AGGREGATION (% OF RESPONDENTS)



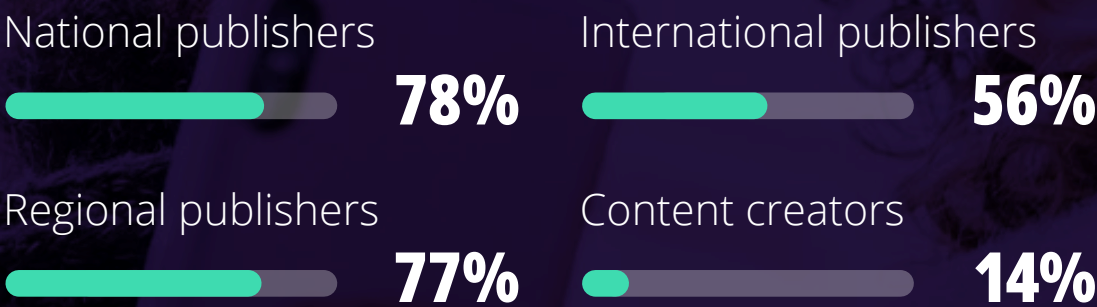
MULTITASKING (% OF TOTAL RESPONDENTS)



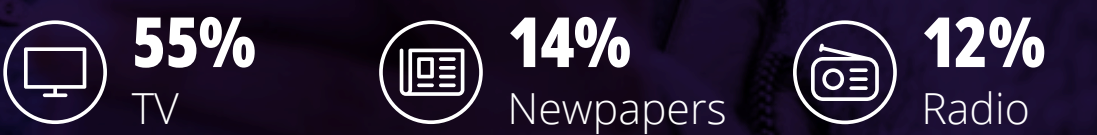
ADVERTISEMENT (% OF RESPONDENTS)



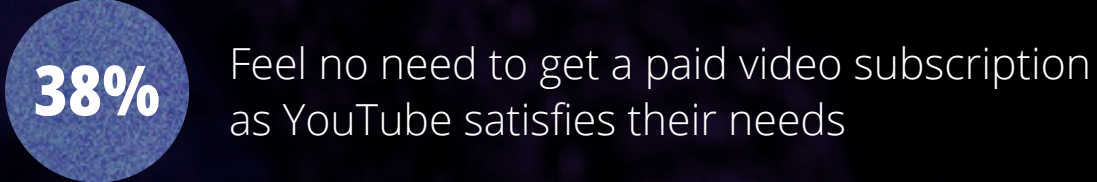
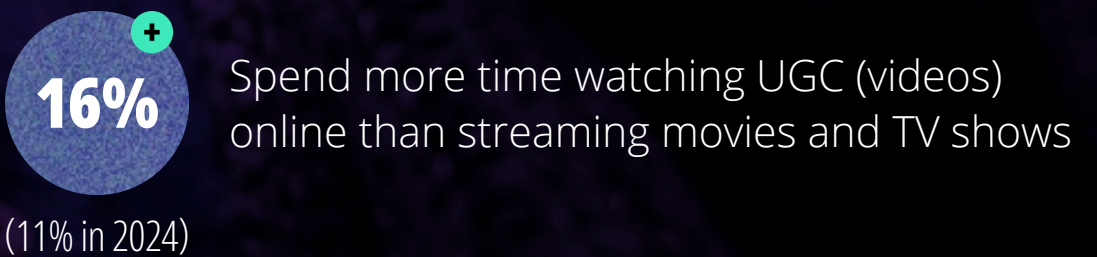
TRUST LEVELS IN DIFFERENT NEWS SOURCES (% OF RESPONDENTS)



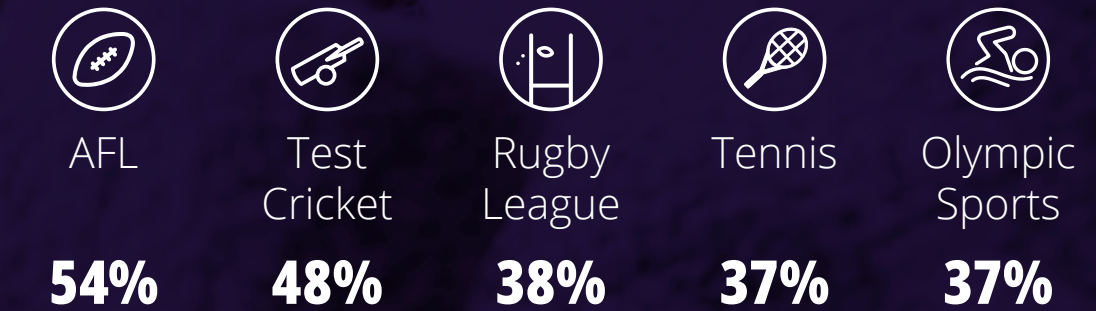
TOP NEWS PLATFORMS RANKED AS #1 (% OF RESPONDENTS)



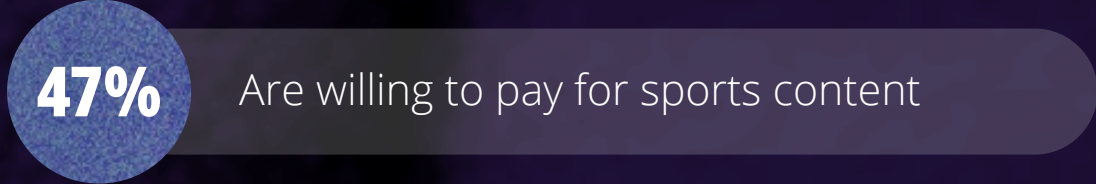
TIME SPENT ON SOCIAL MEDIA



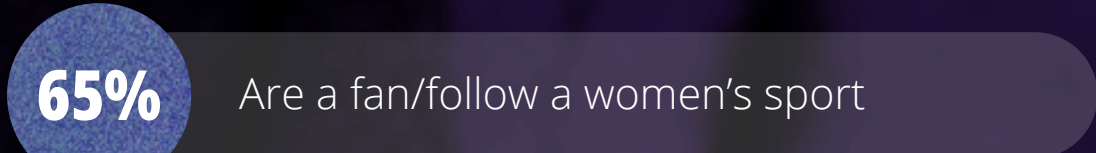
SPORTS FANS (% OF RESPONDENTS)



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



MOST POPULAR WOMEN'S SPORTS (% OF RESPONDENTS)



Matures



\$35

(\$44 in 2024)

Monthly spend on media subscriptions

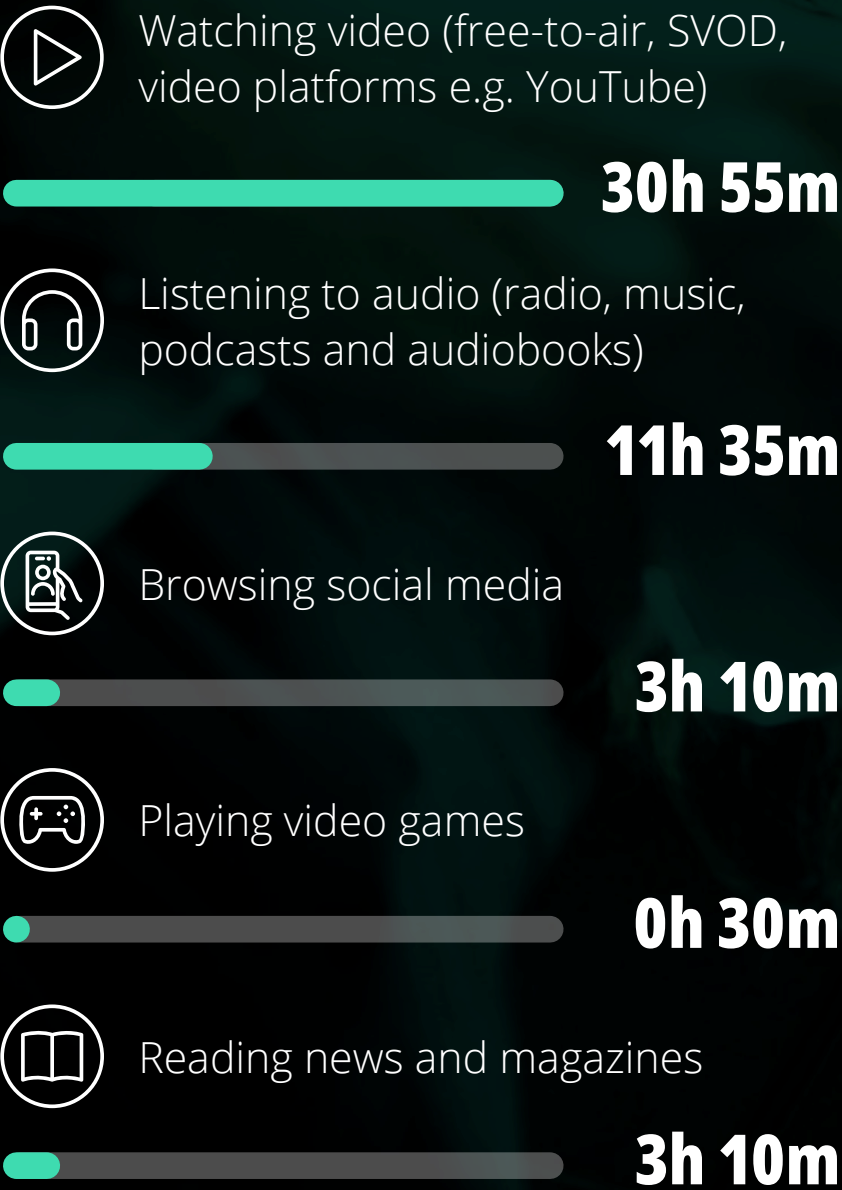


49h 19m

(38h 52m in 2024)

Total time spent across media and digital entertainment

TOP 5 HOME ENTERTAINMENT ACTIVITIES (WEEKLY CONSUMPTION)



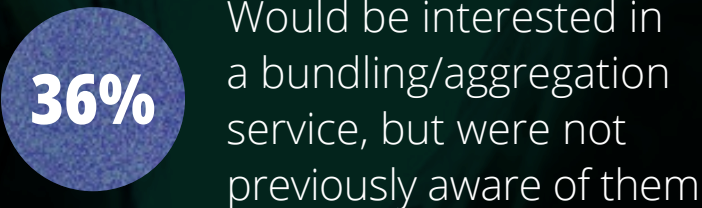
SUBSCRIPTIONS (PER HOUSEHOLD)



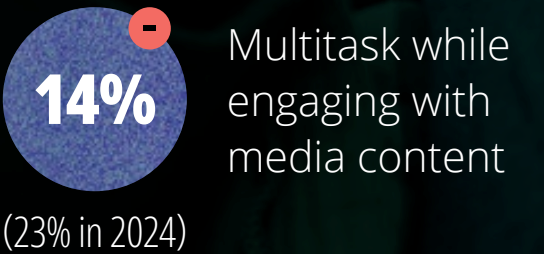
SPEND (% OF RESPONDENTS)



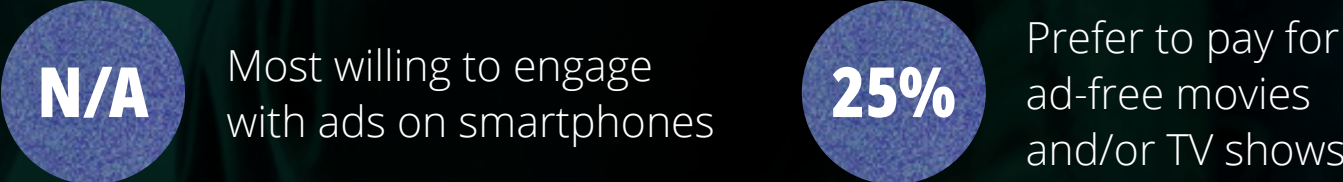
AGGREGATION (% OF RESPONDENTS)



MULTITASKING (% OF TOTAL RESPONDENTS)



ADVERTISEMENT (% OF RESPONDENTS)



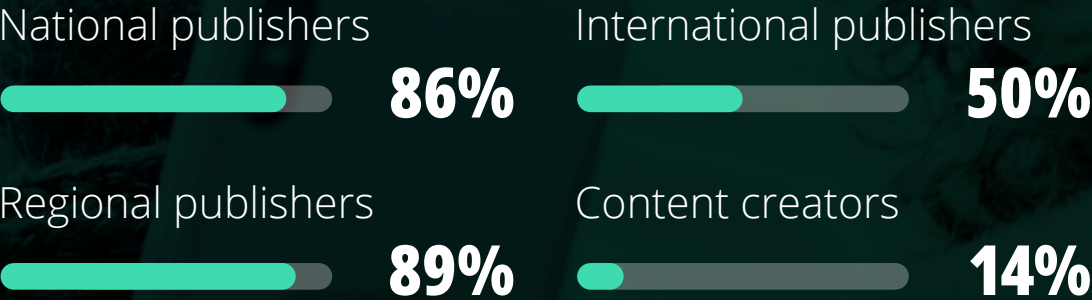


43%

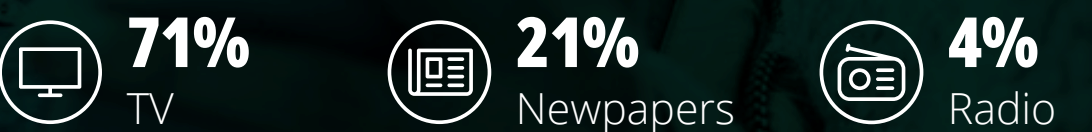
(26% in 2024)

See broadcasters as key drivers of positive change

TRUST LEVELS IN DIFFERENT NEWS SOURCES (% OF RESPONDENTS)



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



TIME SPENT ON SOCIAL MEDIA





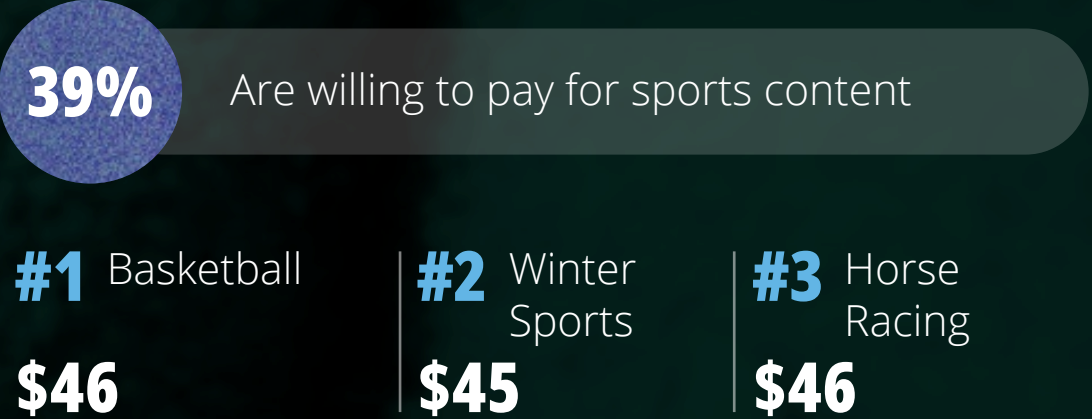
4

Number of sports followed

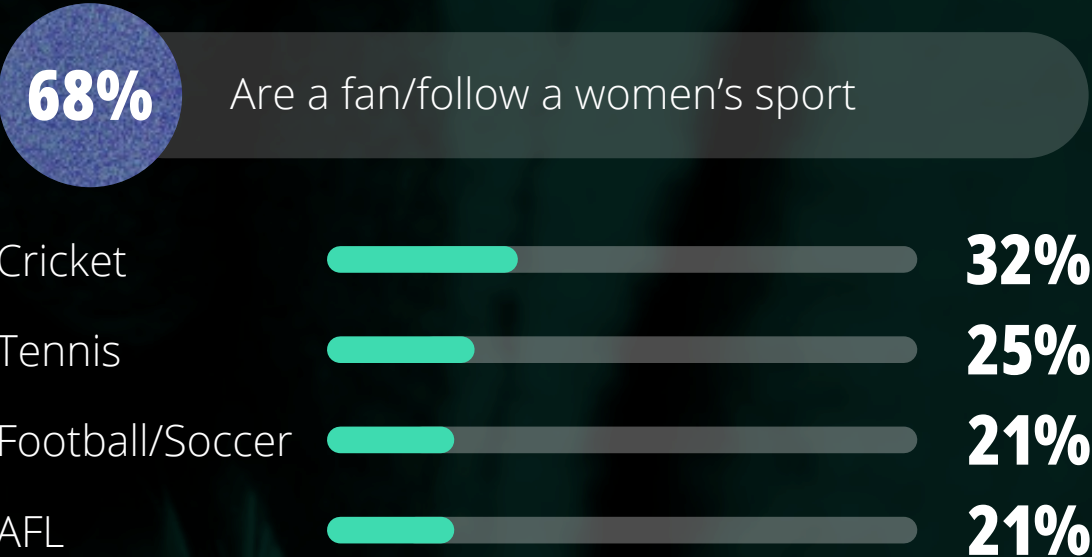
SPORTS FANS (% OF RESPONDENTS)



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



MOST POPULAR WOMEN'S SPORTS (% OF RESPONDENTS)



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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.

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