Deloitte.

TMT Predictions 2025
Australia

Foreword

Looking back to look ahead: What five years of TMT Predictions reveal

Every year, Deloitte's Australian TMT Predictions sets out to do something ambitious: forecast the trends that will define technology, media, and telecommunications over the next 12 to 24 months.

These predictions are not crystal ball exercises – they are grounded in data, shaped by local and global market intelligence, and informed by direct conversations with operators, innovators, and executives across the sector.

Where we got it right

Looking back over the past five years, it's clear we've had more hits than misses. Of the 60+ predictions made between 2020 and 2024, around 70% proved directionally accurate or materially correct. But beyond the success rate, what matters is how those forecasts helped anticipate disruption, frame investment choices, and spark meaningful strategic conversations.

What we predicted	How we got it right
In 2021, we predicted Australian households would begin to **'churn and return'** between streaming video platforms, due to content fatigue, rising prices and more ad-supported options.	That dynamic is now **embedded in how platforms operate** – and how marketers target audiences.[1]
In 2022, we forecasted a **significant rise in ad-supported video on demand (AVOD)**, noting that global players would need to localise monetisation models.	Within two years, the mainstream subscription video on demand (SVOD) services **all launched multiple AVOD tiers** in Australia, fundamentally shifting the market.
In telecommunications, our 2020 and 2021 editions predicted that **5G would begin to unlock new enterprise use cases**, particularly through private networks, edge computing, and IoT.	Australian airports, ports and energy companies are running live deployments – validating that enterprise **5G is no longer a theoretical opportunity but a competitive differentiator.**
We anticipated a **wave of cybersecurity investment**, well before new regulatory and operational pressures brought it to the forefront.	From the rise in cyber risk quantification to the restructuring of boards around digital resilience, **these shifts are now core to executive agendas.**[2]
We predicted the commercialisation of **women's sport**, the growth of **mobile gaming** and the emergence of **social commerce** in consumer tech.	**Each of these markets has grown** in sophistication, audience size, and advertiser interest – though each still has room to run.[3]

Where we missed the mark

Not every prediction played out as expected. We anticipated a faster ramp-up in podcast ad revenue, expecting it to double in two years. While listener engagement grew, monetisation has lagged, constrained by measurement fragmentation and lower brand investment relative to other formats.[4]

We were bullish on VR and immersive media, expecting broader consumer and enterprise adoption by 2024. But hardware barriers, content gaps, and a lack of clear ROI have held back the market, even as interest in spatial computing continues to build.[5]

Our projections on 5G stand alone rollout and edge data centre expansion were also ahead of the curve. While the demand case was clear, investment cycles were slower – impacted by macroeconomic factors, interest rate pressures, and regulatory complexity.[6]

Why this matters

For CXOs, the value of prediction lies not in precision, but in preparedness. In a sector where three-year strategies are often upended within six months, being roughly right – and early – is more valuable than being perfectly late.

> The purpose of TMT Predictions is not just to signal what's coming, but to help leaders ask better questions: What new behaviours or technologies might affect our cost base or customer relationships? What's hype, and what's an investable shift? What should we test now to be ready later?

We deliberately avoid short-term noise. Instead, we focus on trends with lasting implications: shifts in consumption, monetisation models, infrastructure, and regulation that could reshape how companies create, deliver, and capture value.

Looking ahead

This year's report reflects a TMT landscape in transition. Generative AI is redefining productivity and creativity. Network models are being reimagined through AI optimisation, satellite integration, and fixed wireless innovation. Content discovery is increasingly shaped by algorithms and ecosystems, not channels.

And sustainability, once a side narrative, is now a board-level priority across the sector.

As we move into the next phase of digital evolution, the most resilient companies will be those that can cut through complexity, spot signals early, and move with intent. Our aim is to help you do just that.

We invite you to explore this year's predictions with curiosity and a strategic lens. Use them to pressure-test your roadmap, validate your assumptions, and identify new opportunities for growth and differentiation.

Because in a sector defined by constant change, the best way to navigate uncertainty is not to wait – but to prepare.

Notable abbreviations

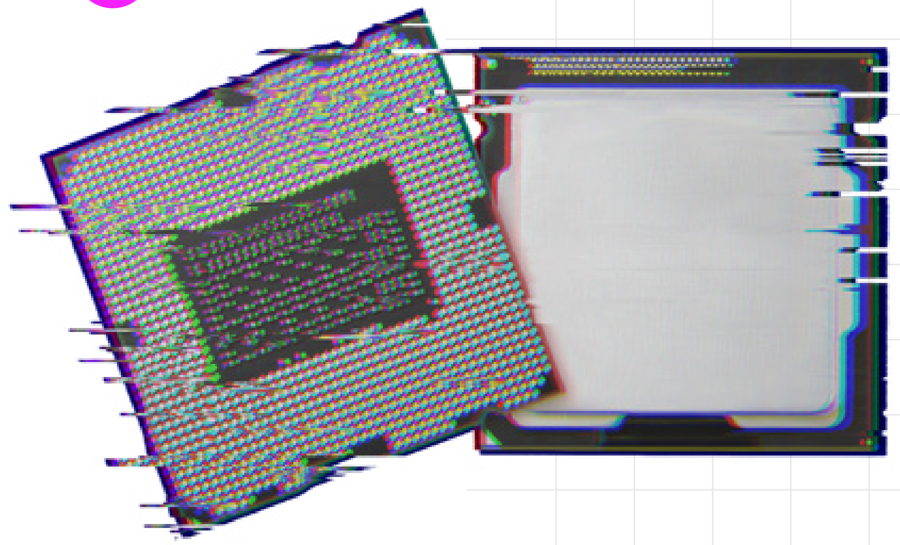
Abbreviation	Full form
AVOD	Advertising Video on Demand
BSS/OSS	Business Support Systems / Operations Support Systems
eSIM	Embedded SIM
FinOps	Financial Operations
FTTP	Fibre to the Premises
FWA	Fixed Wireless Access
5G-SA	5G Standalone
LEO	Low Earth Orbit
mmWave	Millimeter Wave
MNO	Mobile Network Operator
MOCN	Multi-Operator Core Network
MORAN	Multi-Operator Radio Access Network
MVNO	Mobile Virtual Network Operator
NABERS	National Australian Built Environment Rating System
NIST	National Institute of Standards and Technology
SVOD	Subscription Video on Demand

Generative AI

Generative AI

Generative AI data centres

Growth in AI data centres and the additional strain it places on the grid is forcing operators to consider more sustainable and innovative energy solutions.



By 2030

Energy demand goes up

National electricity consumption by data centres

5% — 2024

8% — By 2030

Data centres will consume 8% of national electricity, up from 5% in 2024, driven by the increasing use of AI and the digital economy.[7]

In 2025

90% **of data centres** currently in development will seek to attain NABER's 5-star rating.[8]

Australian data centre operators will reduce their Scope 2 carbon emissions through using liquid cooling solutions.[9]

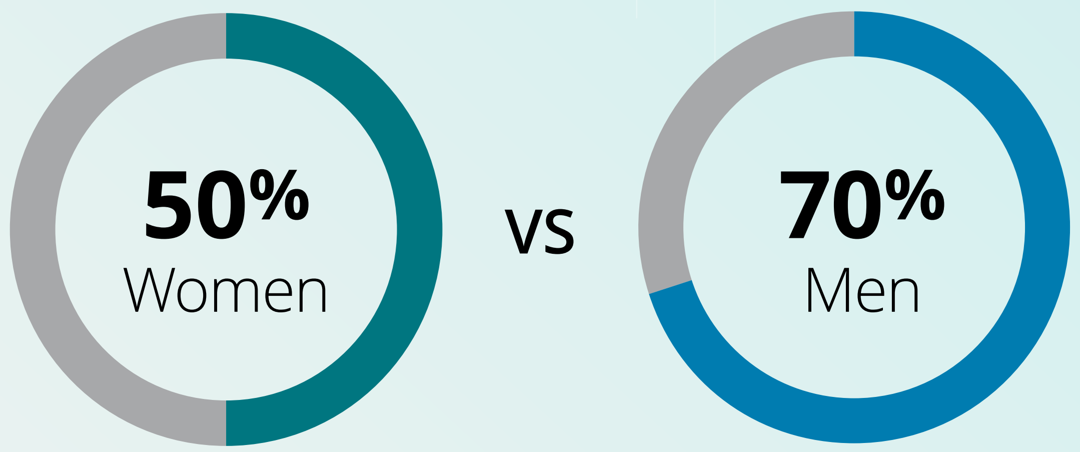
Up to 10% reduction in energy usage

Women in generative AI

The gender gap in AI adoption persists – lower trust, education and employment participation driving the shortfall.

In 2025

Gender gap in AI trust



50% of women vs **70% of men** use and trust generative AI in the AU workplace.[10]

Australian women will account for 40% of AI related educational enrolment and 20% of AI employment participation.[11]

Autonomous generative AI agents

Agentic AI uptake likely to be slow.

In 2025

Australian businesses will take a cautious 'wait-and-see' approach to AI agent deployment, mirroring slow national generative AI adoption.[12]

In 2025

Agentic AI will have the largest impact across the healthcare, professional and financial services, retail trade, accommodation and food services, and public administration sectors.[13]

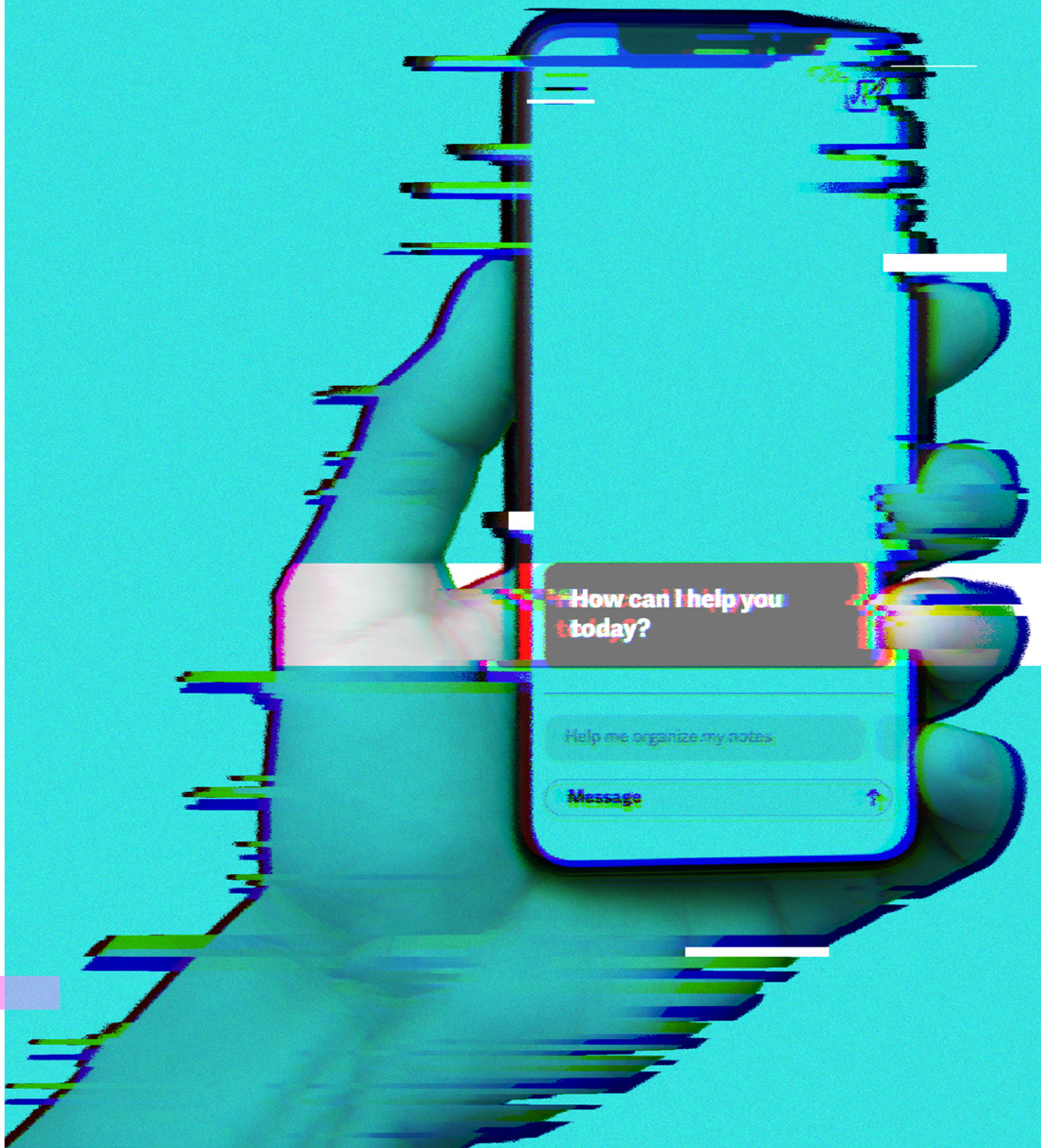
By 2027

Despite the hype for AI agents, investment in local start-ups is expected to remain subdued.

Below

$50m

of total funding for AI agent local start-ups[14]

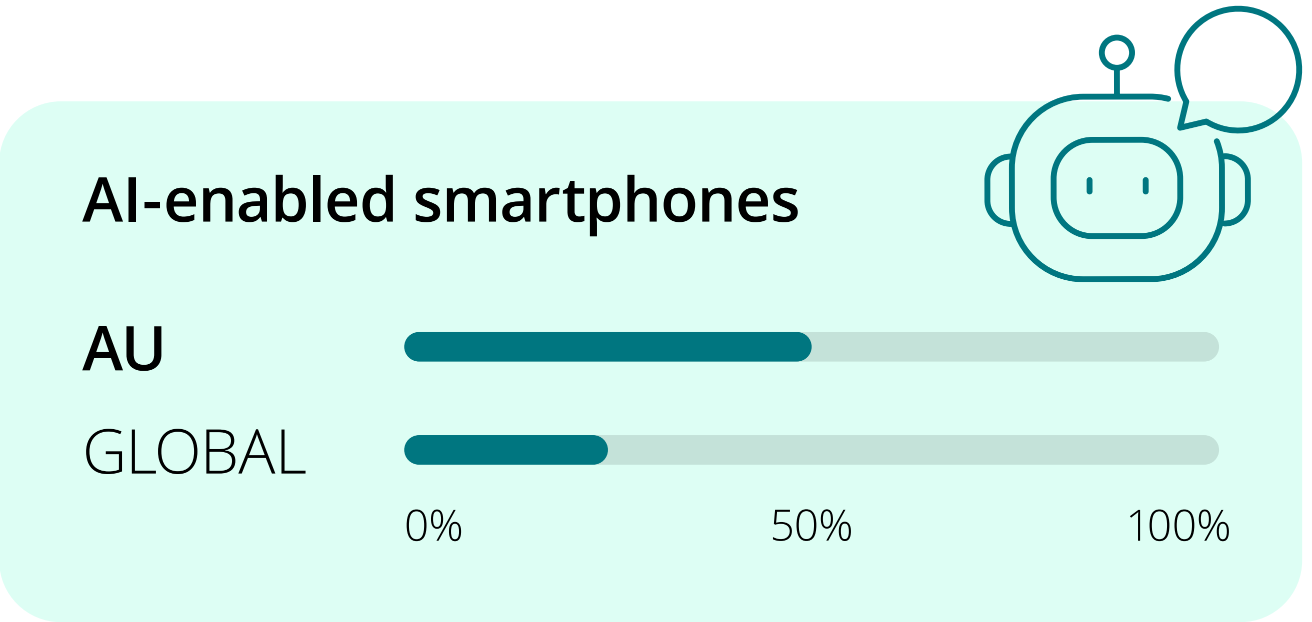


On-device generative AI

Growing adoption of AI-embedded smartphones will push out device upgrade cycles even further.

In 2025

Over 50% of Australian smartphones will be AI-enabled



The local market is heavily influenced by premium brands like Apple, which holds a 55% share here versus 25% globally.[15]

7m+ smartphones sold compared to 8m in 2024.[16]

Beyond 2025

The average premium smartphone replacement cycle will extend to over four years, an increase of six months from 2023.[17]

2023 3.5 years

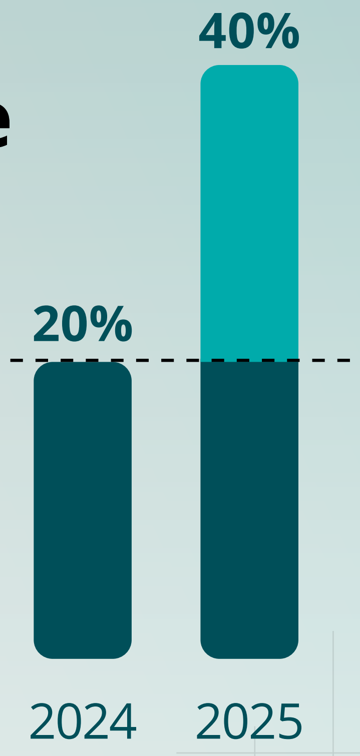
> 2025 4 years

Deepfake challenges

Now more than ever, Australians are at risk of succumbing to deepfake attacks.

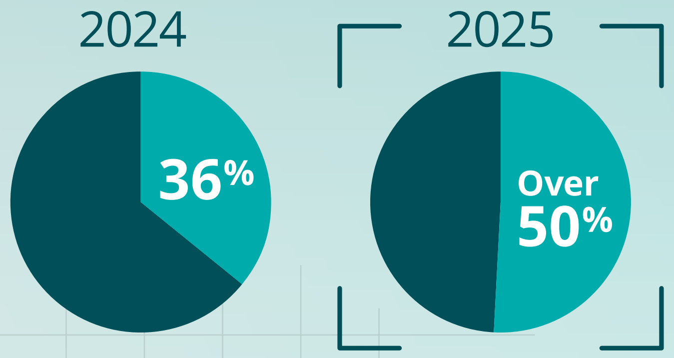
In 2025

Deepfake attacks are expected to double, impacting over 40% of Australian businesses, with increased use of social engineering tactics to bypass human controls.[18]



Deepfakes will increasingly influence political discourse, fueled by the Australian federal election, lagging policy and slow detection tool uptake.[19]

Consumers targeted by deepfake scams[20]



90% women impacted

Deepfake harassment will increase, disproportionately affecting women, with over 90% of incidents targeting females.[21]

Media, entertainment and sport

Media, entertainment and sport

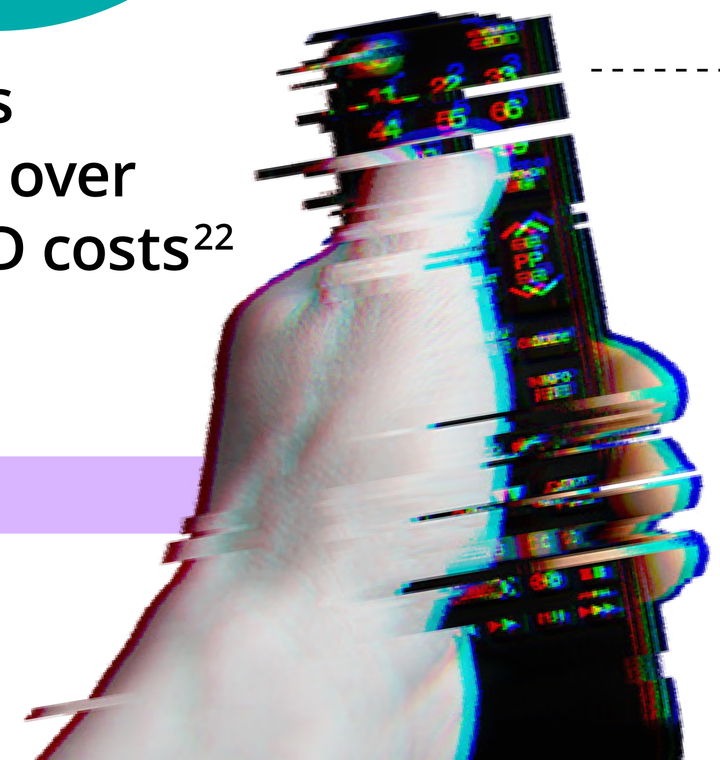
Streaming video bundling

Demand for SVOD services will remain stable; bundling and ad-tiers will play an important role.

In 2025

75%

Australians concerned over rising SVOD costs[22]



15%

of non-bundling consumers will bundle subscriptions due to rising subscription costs and subscription fatigue.[23]

A cheaper alternative to bundling

Growth in ad-supported streaming plans[22]

11% 2024

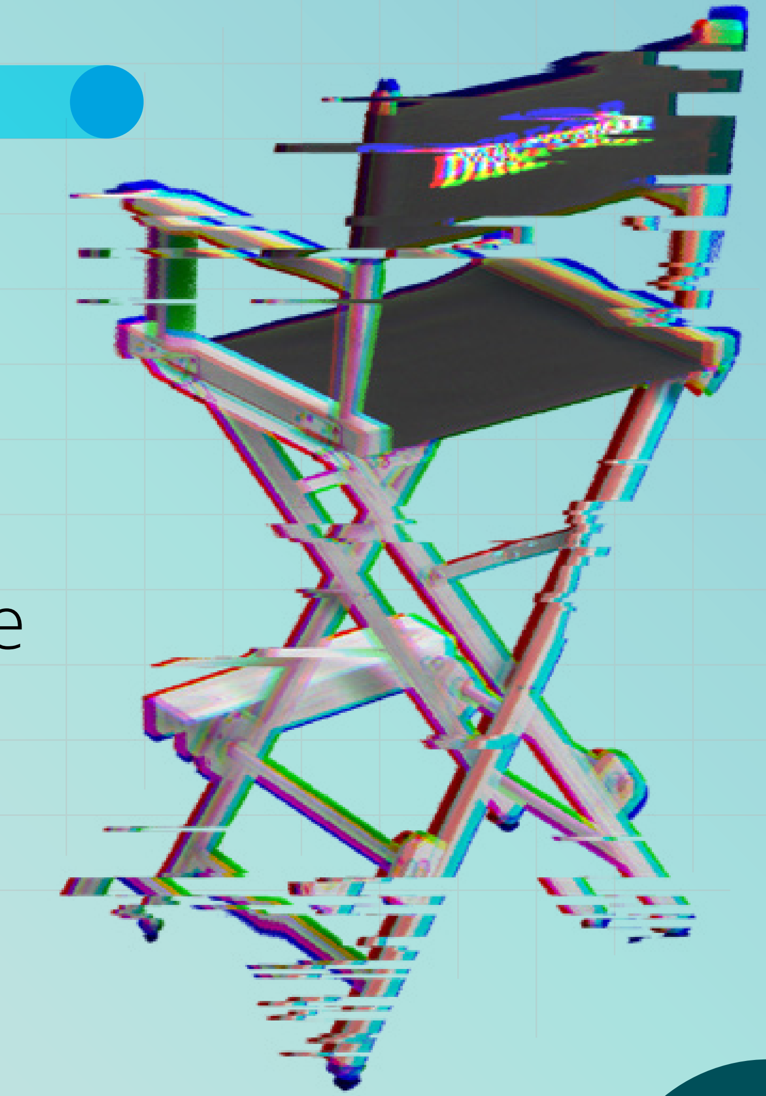
18% 2025

2.6 **average SVOD subscriptions per household**

Growth in bundling and ad-supported offerings offset customer desire to churn.[24]

Generative AI in studios

Generative AI will help drive efficiencies and unlock value for studios but IP concerns will limit content use cases.



In 2025

Less than 5%

studio production budgets to be allocated to AI tools due to tightening regulations on AI in content creation, such as intellectual property and screen practitioners' rights.[25]

10%

operational budgets to be allocated to AI driven by the studios' smaller scale and focus on efficiency.[26]

25%

potential efficiency gain in pre-production, storyboarding and animation through AI-assisted creative processes.[26]

Sport infrastructure evolution

Digitisation of stadiums will be key to unlocking private investment into sport in Australia.

Over the next 3 years

Around

$1.2bn

invested nationally in new stadium development and upgrade of existing ones.[27]

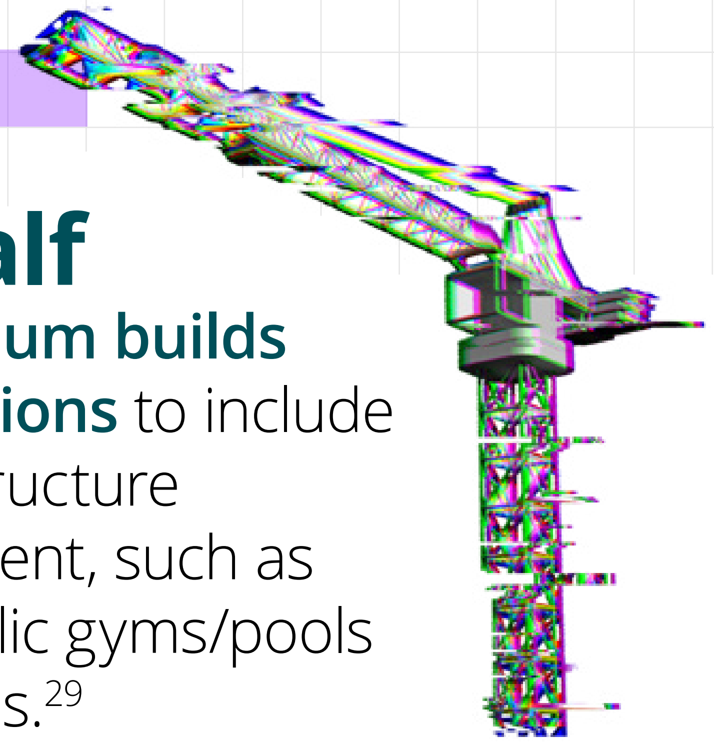
In 2025

Stadiums enabled with 5G mmWave

3 stadiums → **6 stadiums**

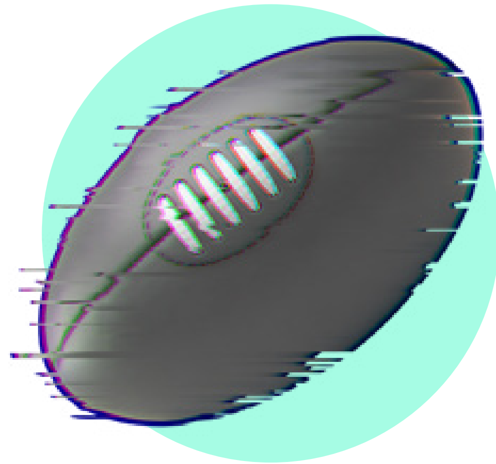
will increase from 3 to more than 6 to support the growth of handheld device usage.[28]

Stadium owners will prioritise leveraging 5G mmWave to enhance core fan experiences, across F&B and merchandise ordering, wayfinding navigation and biometric IDs for smart congestion surveillance. Investment in novel experiences like AR/VR is unlikely to be a short-term focus.[30]

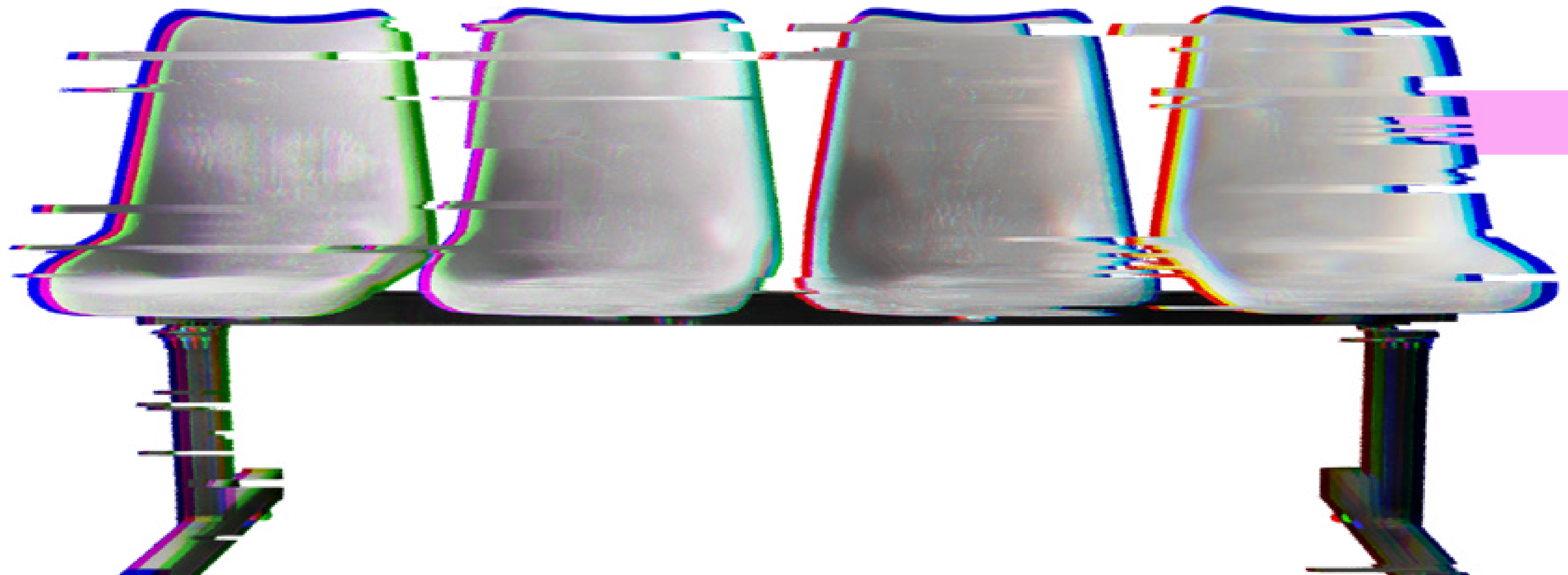


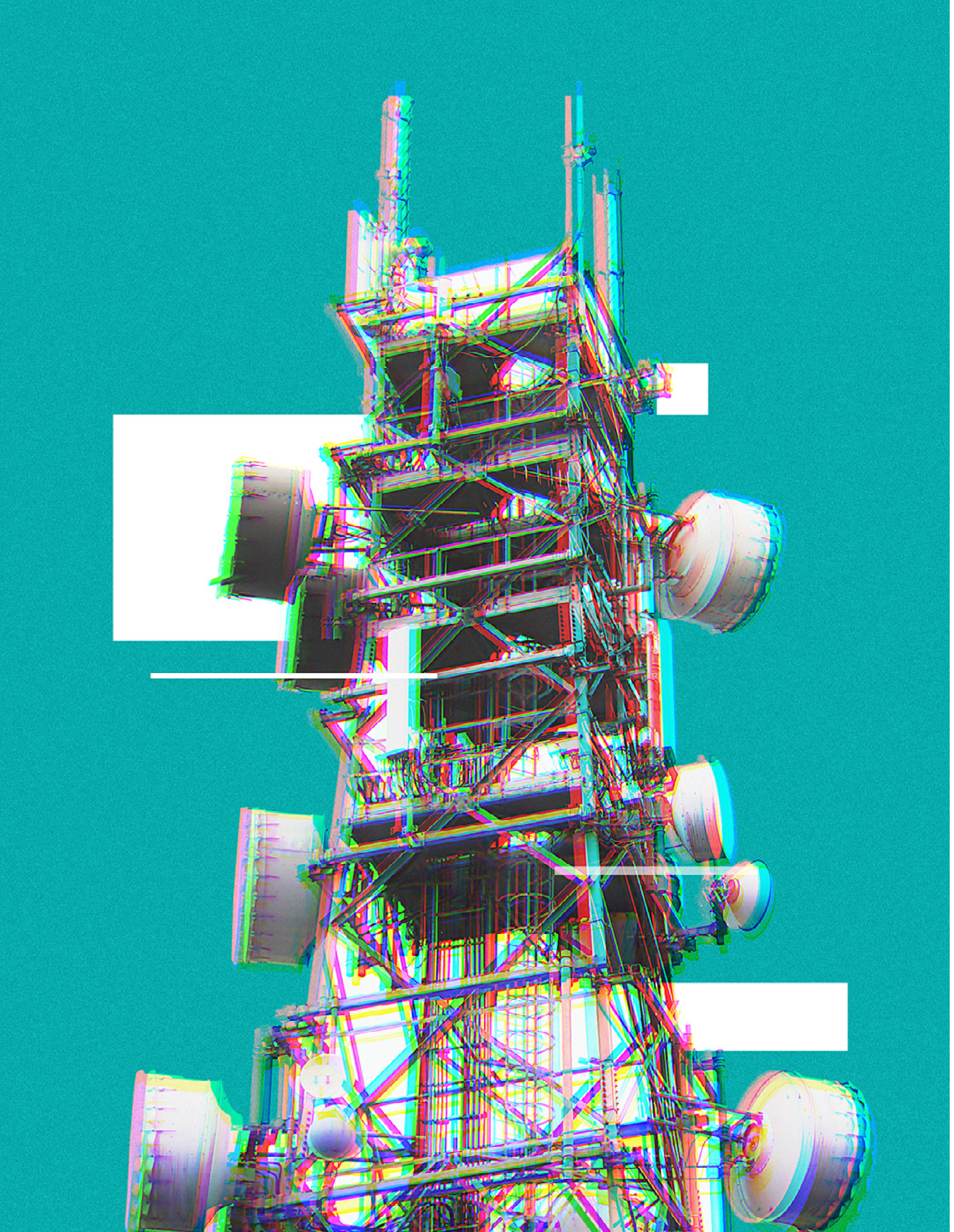
Over half

of new stadium builds and renovations to include social infrastructure co-development, such as housing, public gyms/pools and parklands.[29]



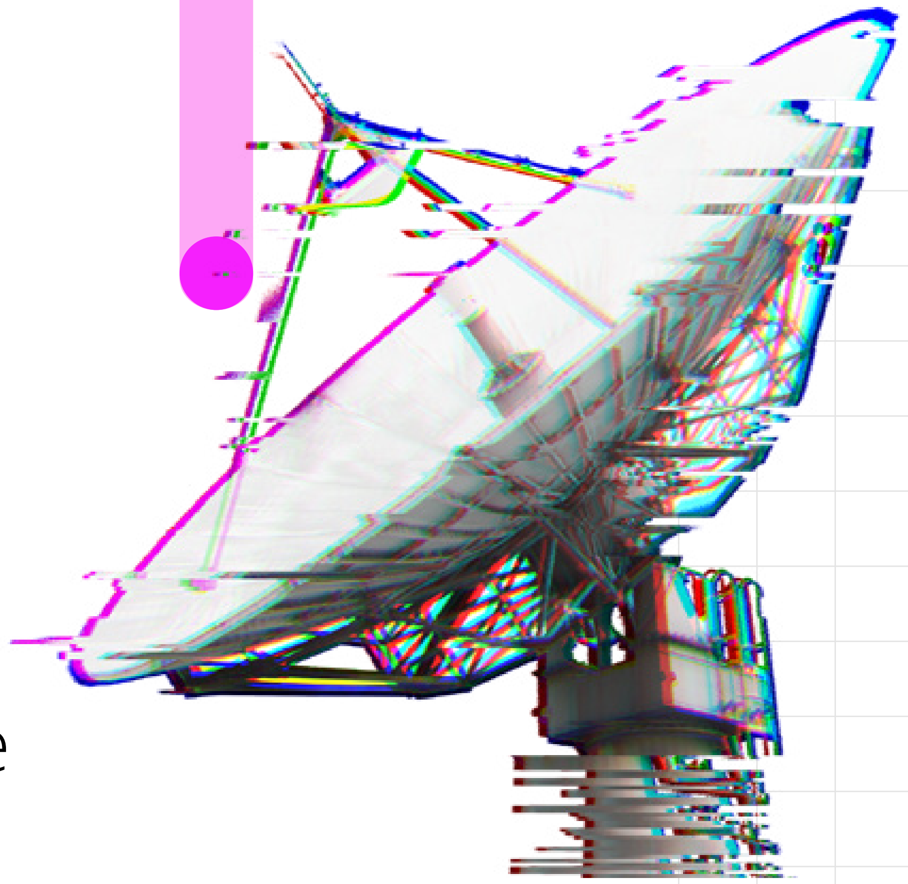
Increased private ownership of clubs across Australia's four major sporting leagues, with stadium ownership likely being a key driver of private investment.[29]





Telecom and technology

Telecom and technology



Telco consolidation

Deals between telcos will provide better coverage to customers and improve the bottom line.

In 2025

300 new 5G sites

This results from network sharing arrangements, enabling access to more subscription options and enhancing connectivity for regional Australians.[31]

Australian telcos will explore active MOCN and MORAN network sharing deals, potentially enabling

30% **savings in OPEX and CAPEX**

through optimised utilisation and infrastructure spend, and lower servicing costs.[32]

20-30%

Australians will adopt eSIMs due to their convenience and the anticipated release of an eSIM-only iPhone, likely challenging MVNOs and MNOs to differentiate or consolidate.[33]

Cloud spending efficiency

Widespread adoption of FinOps strategies will allow organisations to optimise cloud expenditures and improve ROI.

In 2025

Over 95%

organisations will embed FinOps practices in an attempt to overcome the continual rise in cloud expenditure spending.[34]

There will be a stronger focus on FinOps to manage costs effectively and maximise value.

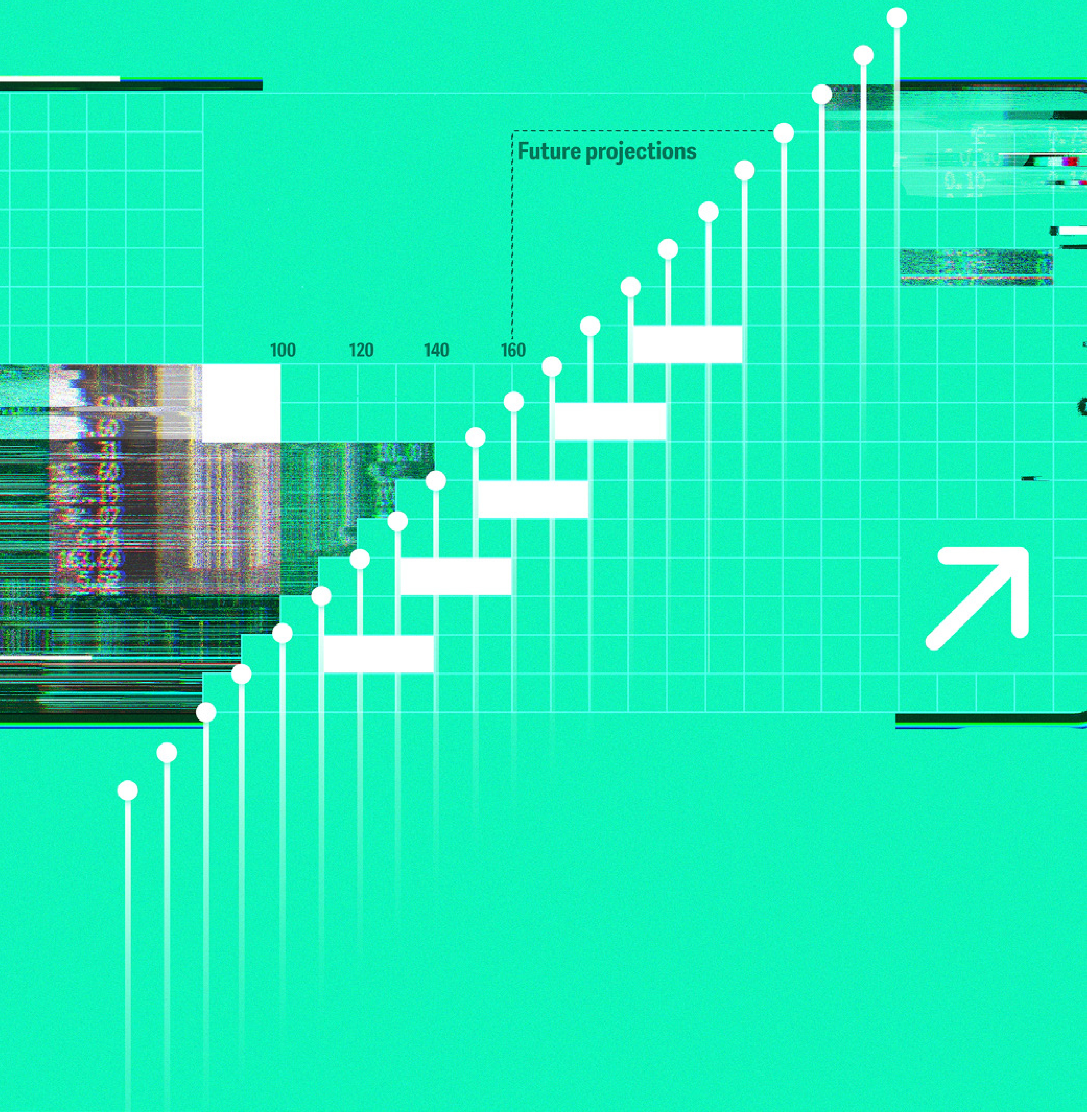
Australian cloud spending **AU$26bn**

a 20% increase from 2024, compared to 16% growth globally[35]

Cloud investments **18%**

of AU IT spending vs 13% globally[35]

The average FinOps team will grow to over 5 FTE, highlighting the need for proactive cost management of cloud expenditure.[36]



Rising trends and updates

Rising trends and updates

Silicon photonics for AI

Silicon photonics will play a role in delivering energy efficiency enhancements for AI data centres.

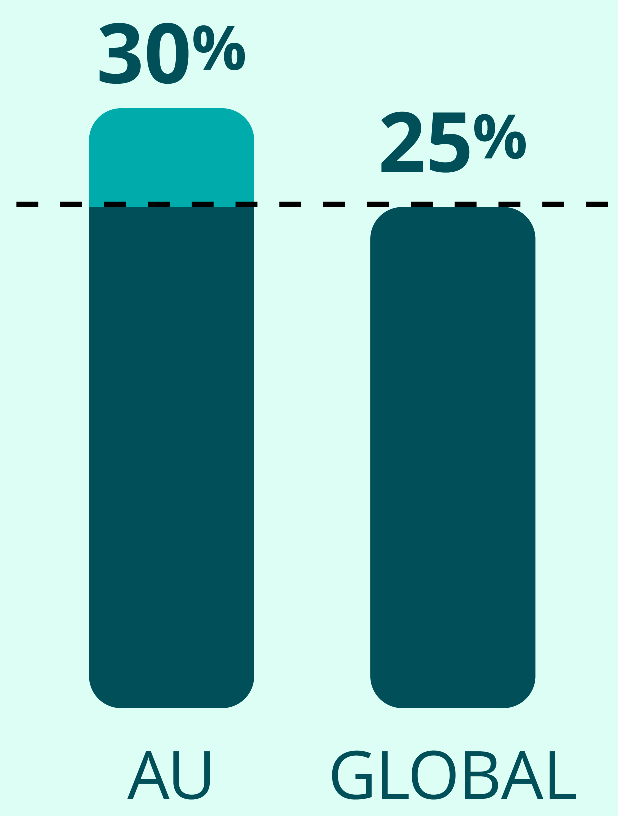
In 2025

Adoption of silicon photonics chips in AU AI data centres to increase

More than
$40m
AU market size[37]

Driven by
13%
expansion in data centre capacity[37]

Predicted growth
in 2025[37]



B/OSS

Telcos will modernise their B/OSS with a view to realising cost savings and enabling the next wave of AI adoption within their organisations.

By 2027

All major AU telcos will have modernised their B/OSS
focusing on system upgrades and new AI features and integrations.

In 2025

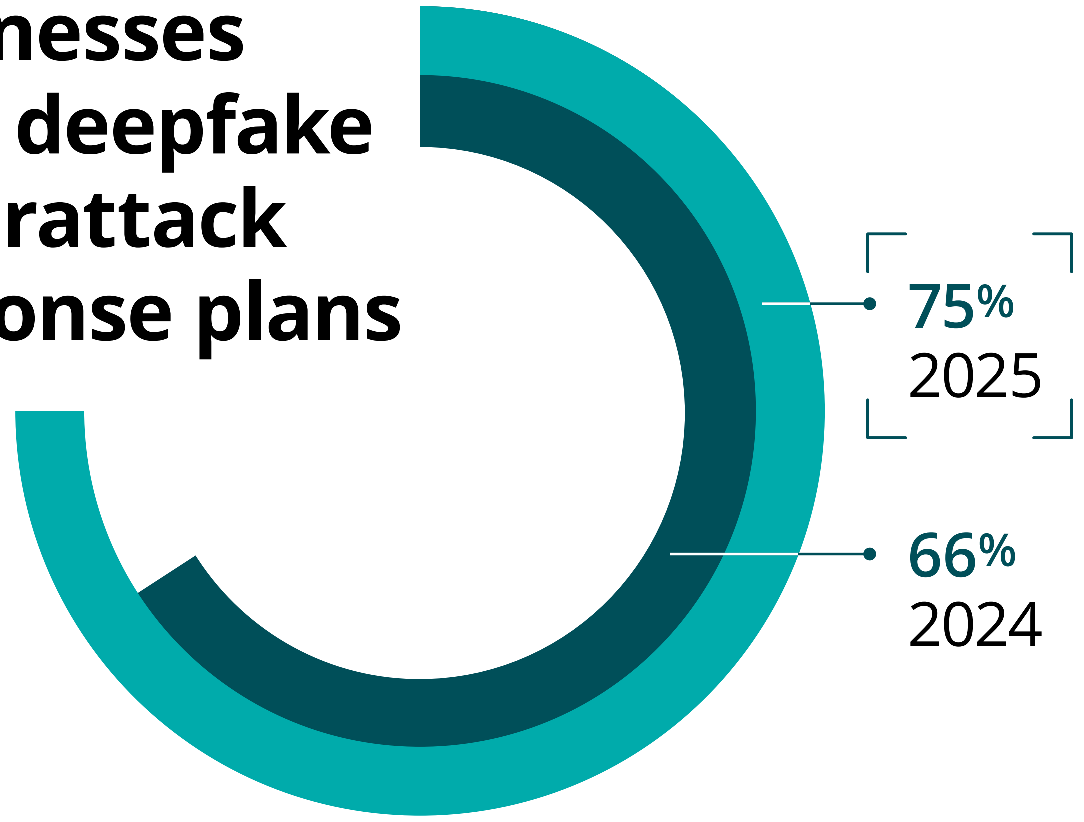
The top driver for B/OSS modernisation in Australia will be cost reduction through business/IT simplification, followed by AI adoption.

Generative AI cybersecurity risks

Defensive AI will be required to meet rising AI-powered cybersecurity threats, amidst talent shortages and budget constraints.

In 2025

Businesses with deepfake cyberattack response plans



Despite this, Australia will remain a top target for AI-enhanced phishing scams, with telcos facing increased pressure to defend against these threats.[38]

A nationwide cyber talent shortage, with 5 out of 6 cyber professions remaining among the 90 ANZSCO occupations facing a national shortage.[39]

AU cybersecurity field to remain male-dominated, with female participation likely staying below 20%.[40]

Participation in cybersecurity by women

Below 20% AU vs **30%** GLOBAL

15%

of Australian companies will experience cybersecurity delivery delays, up from 13% in 2024, due to a focus on regulation and compliance. New regulations will divert resources from proactive security measures and threat detection.[41]

In 2025

There will be minimal cyber budget growth across enterprises, with CISOs facing more pressure than ever to deliver value, cost-out and automation efficiency.

Generative AI comes to the enterprise edge

In 2025

Australian corporations will increase data centre spending by 11% to accommodate AI workloads.[42]

resulting in **$5.7bn** data centre revenue[42]

Over **60%** continuing to invest in on-prem solutions alongside cloud-based AI spending.[42]

Rising women's sport investments

Demand for women's sport and its ability to deliver financial returns has never been higher.

In 2025

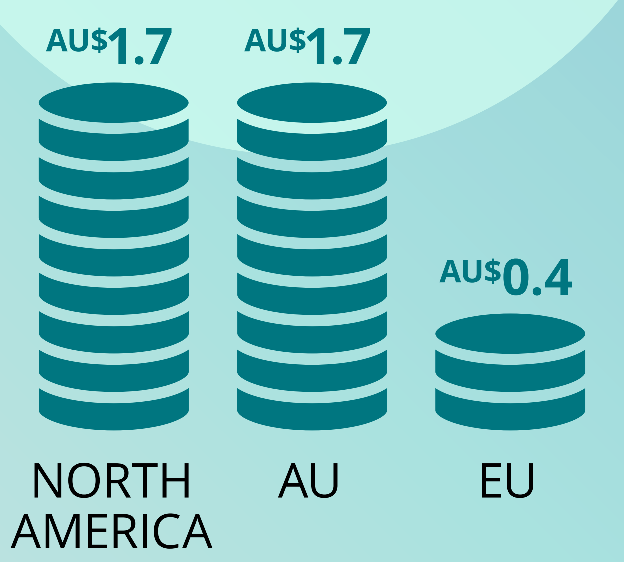
The average Australian Gen Z or Millennial will consume over 1 hour

of women's sports content per week across broadcast, streaming, social media and digital publications.[43]

Australia will be

top 3

highest revenue-generating elite women's sporting economy per capita[44]



Sponsors of Australian women's sports teams will see a

75c higher return on every dollar invested compared to sponsors of men's teams.[45]

In 2025

5G standalone: When will standalone take off?

Nearly 50% of Australians will own a 5G SA-enabled device[46]

0% 50% 100%

Australian access to 5G SA devices will far outpace access to standalone connections.

Fixed wireless access growth

Australia will still witness strong growth despite lagging the global average.

Factors influencing growth include NBN's FTTP upgrades, FWA expansions in regional areas and the continued traction of LEO satellite offerings.[48]

Total fixed wireless usage

20% GLOBAL

16% AU

Open RAN mobile networks

Open RAN at scale in Australia? Not yet.

Australia's interest in Open RAN is projected to remain low, with less than 2% of the global market share and no new deployments expected.[47]

By 2030

Quantum cybersecurity

Organisations will prioritise cryptographic discovery activities to better understand dependencies, and commence plans for cryptographic upgrade.

We anticipate that the ASD's guidance for government agencies to phase out common cryptographic algorithms by 2030 (including SHA-256, RSA, ECDSA, and ECDH) – following related advisories from NIST – will drive an uplift in cryptographic hygiene across both government and private sectors.[49]

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