

TMT Predictions 2026
Australia

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Foreword



Every year, Deloitte's Australian TMT Predictions sets out to do something ambitious: spotlight 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.

Last year, we called it a 'gap year'. A pivotal moment where the choices made today would define the competitive landscape of the decade ahead. That framing proved accurate in ways we anticipated – and a few we did not. In 2026, the conversation shifts. The era of breathless announcements and generative AI pilots is giving way to something more consequential: the hard, often unglamorous work of making AI scale inside real organisations. New foundation models continue to impress.

But the leaders pulling ahead are those who have moved beyond the proof-of-concept – investing in data hygiene, workflow integration, governance, and the cultural change required to capture lasting value.

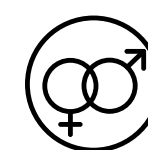
Globally, TMT now represents more than half of S&P 500 market capitalisation – a share that has nearly tripled since 2008. In Australia, the sector is navigating its own distinct pressures and opportunities: a data centre build-out racing against energy infrastructure constraints, a telco market rebalancing around loyalty and lifestyle rather than network speed, and a media landscape reshaped by video consumption, social media, and algorithm-driven discovery. The conditions are different from any prior cycle. The stakes are potentially higher.

This edition covers 13 global predictions, over half of which follow an AI thread. But the signal running beneath all of them is the same: scale, or fall behind.

Where we got it right

Of the predictions made in our 2025 Australian edition, five proved directionally accurate or materially correct within the year. The following table provides a brief account of what we called and what played out.

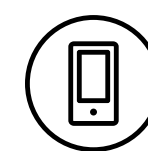
What we predicted



A gender gap in Australian AI adoption – with women significantly less likely to use or trust generative AI in the workplace than men.



Australian data centres would consume 8% of national electricity by 2030, up from 5% in 2024, driven by AI infrastructure build-out.



More than 50% of Australian smartphones would be AI-enabled by 2025, with replacement cycles extending to over four years.



A \$1.2 billion wave of stadium and sports infrastructure investment would begin, anchored by 5G digitisation and new fan experience models.

How it played out

Confirmed. Our data showed 50% of women engaging with gen AI at work versus 70% of men. Through 2025, employer-led programs accelerated adoption among women, narrowing – though not closing – the gap. It remains a material productivity constraint heading into 2026.

The build pipeline has moved faster than our baseline. Hyperscaler commitments and sovereign AI ambitions have accelerated timelines. Energy infrastructure, planning approvals and coordination across levels of government are the major constraints to data centre growth.

With strong sales of new smartphones in 2025 and the switching off of 3G, on-device AI has moved to a standard functionality for many Australians. With shipments of smartphones forecast to drop in 2026, handset replacement cycles look set to extend.

The capital cycle commenced across major codes and venues. Smart ticketing, connectivity upgrades, and real-time experience layers are now genuine commercial differentiators – not aspirational roadmap items.



Where we missed the mark

Not every prediction from 2025 played out as expected, and one warrants a candid reassessment. We forecast that Australian organisations would adopt a cautious approach |to agentic AI, with local AI startup investment likely to remain below \$50 million until 2027.

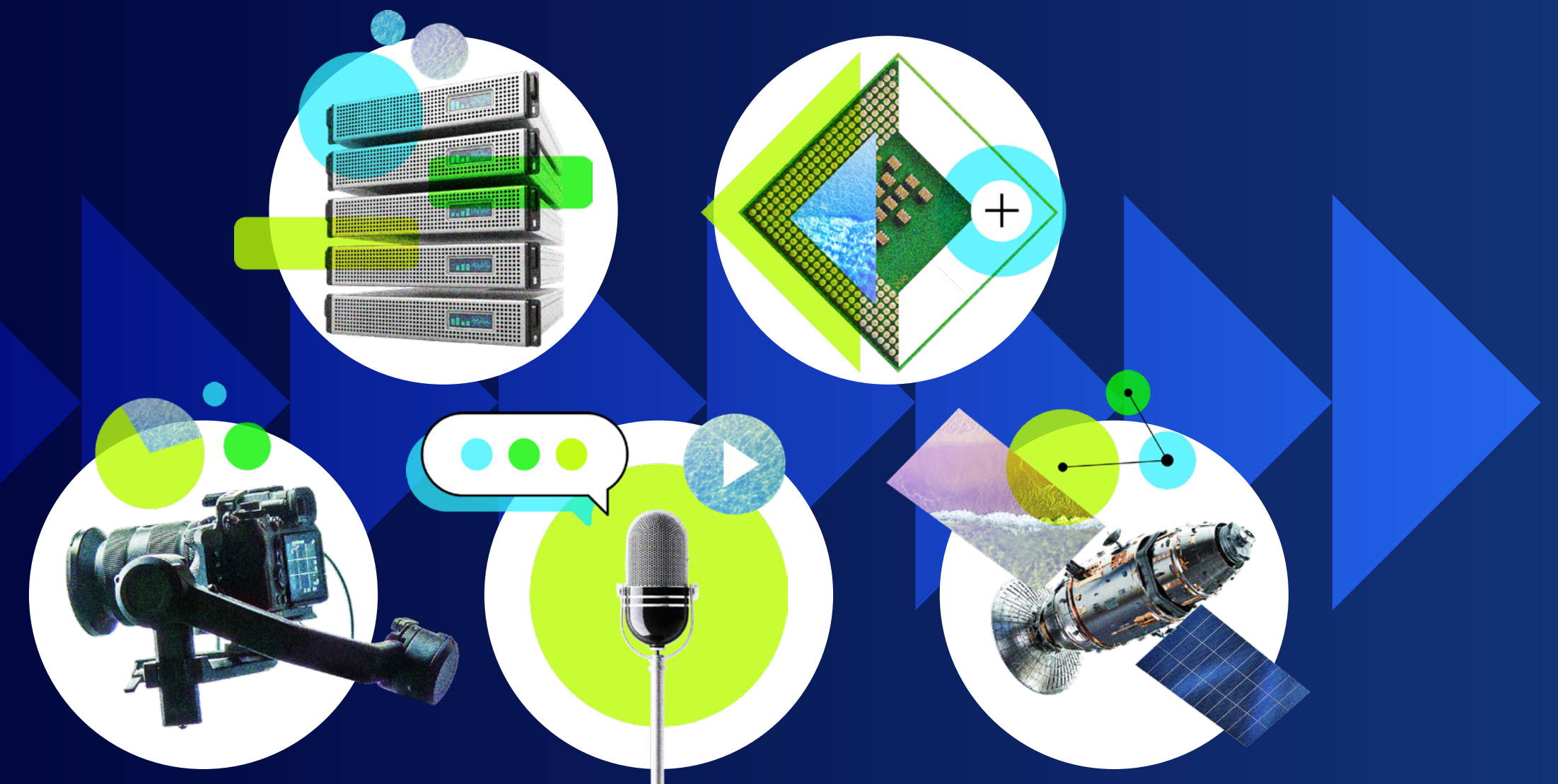
That caution was real. But the pace of global agentic development compressed the opportunity window faster than our models anticipated. Australian enterprises that spent 2025 waiting are now entering 2026 with a shorter runway to build the orchestration capabilities needed to compete. The prediction was accurate; the strategic risk it pointed to was underestimated.

We also projected that podcast advertising revenue would grow materially through 2024 and 2025. Listener engagement has grown, and global forecasts now put podcast and vodcast ad revenue at nearly \$5 billion in 2026. But Australian monetisation has lagged behind the global curve, constrained by measurement fragmentation and lower brand investment relative to comparable formats. The opportunity is real; the local market is behind where it should be.

Why this matters

For CxOs, the value of prediction lies not in precision, but in preparedness. In an industry where three-year strategies are regularly challenged within six months, being roughly right and early is more valuable than being precisely late. We deliberately avoid short-term noise. Our focus is on shifts with lasting structural implications – in consumption patterns, monetisation models, infrastructure economics, and regulation – that reshape how companies create, deliver, and capture value.

Our 2026 report reflects an industry that is less confused, more consequential, and more demanding than at any point in the past decade. The AI infrastructure race is real and already shaping energy, capital allocation, and sovereign policy. The agentic transition is moving from optional to operational. And in media and telecommunications, the economics of loyalty, distribution, and attention are being rewritten in real time.



Looking ahead

This year's predictions cover five major themes: AI scaling and infrastructure, agentic AI and enterprise software, media and content economics, telecommunications and connectivity, and the hardware reshaping how AI runs at the edge and in the data centre. Each prediction is grounded in Australian market conditions. Where global trends play out differently here – due to market structure, regulation, geography, or competitive dynamics – we have said so. The ambition is not to translate a global report into a local one, but rather to help Australian TMT leaders see what is coming, assess where they stand, and move with intent. In a sector defined by constant change, good preparation is key to navigating uncertainty.



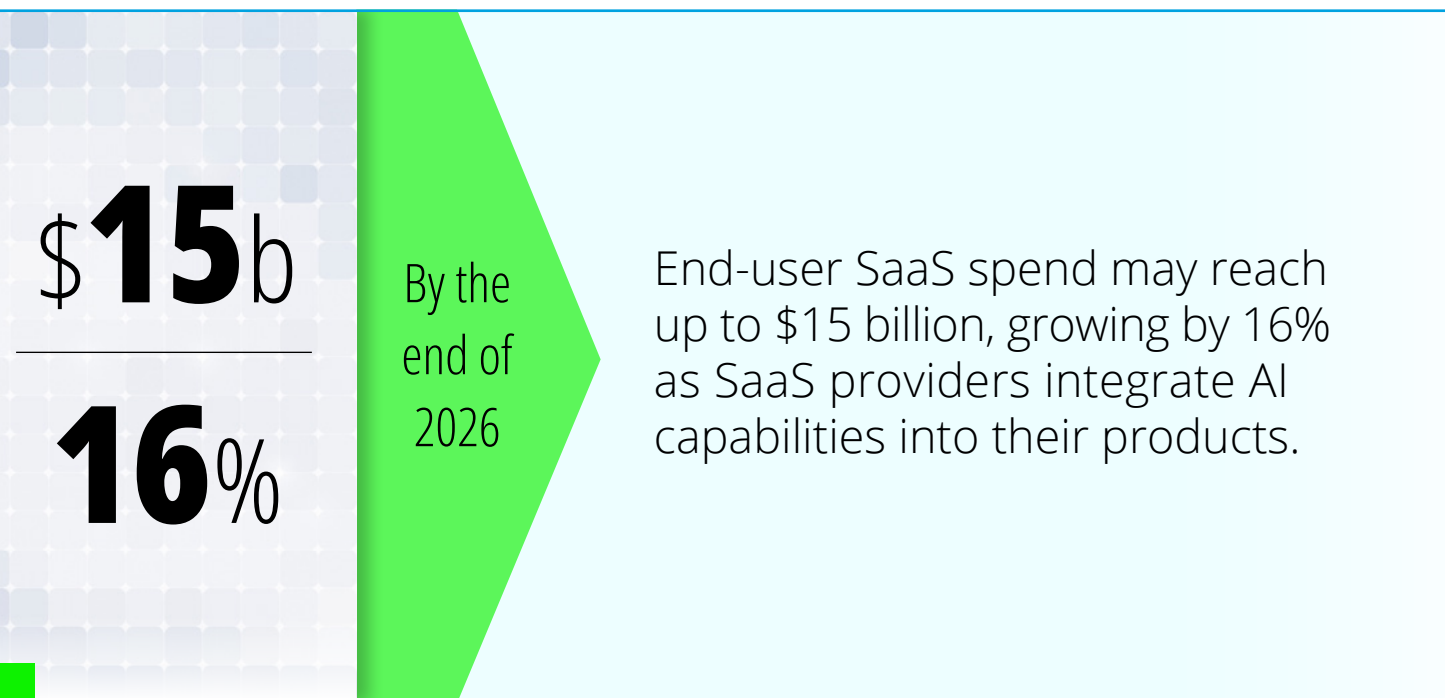
Technology

Software and Platforms



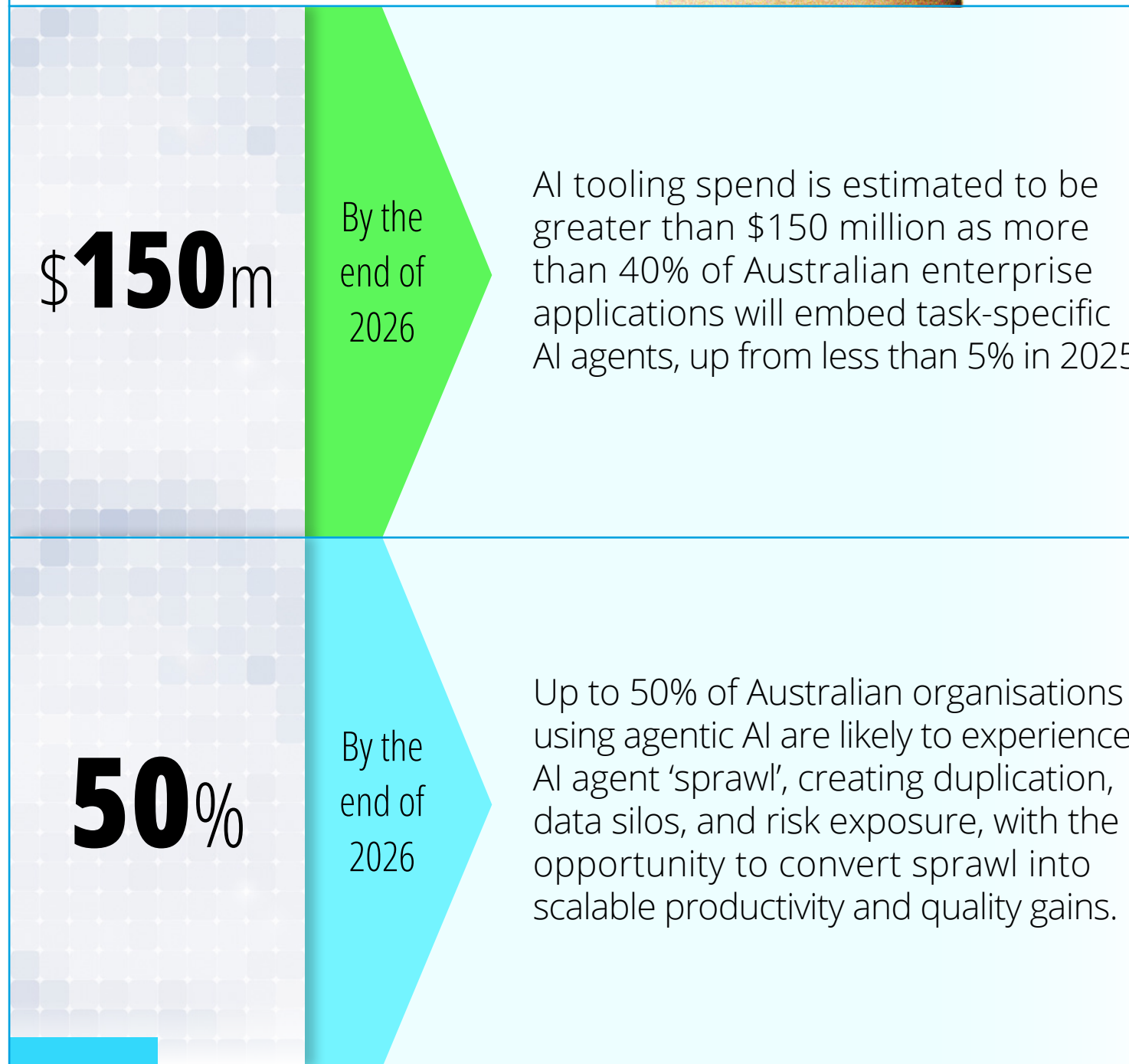
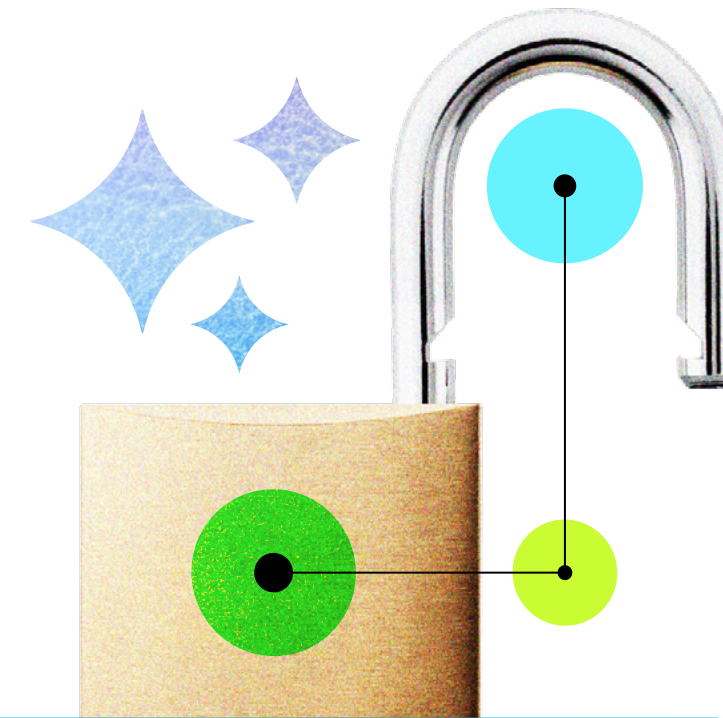
1

SaaS meets AI agents:
Transforming budgets, customer
experience, and workforce dynamics



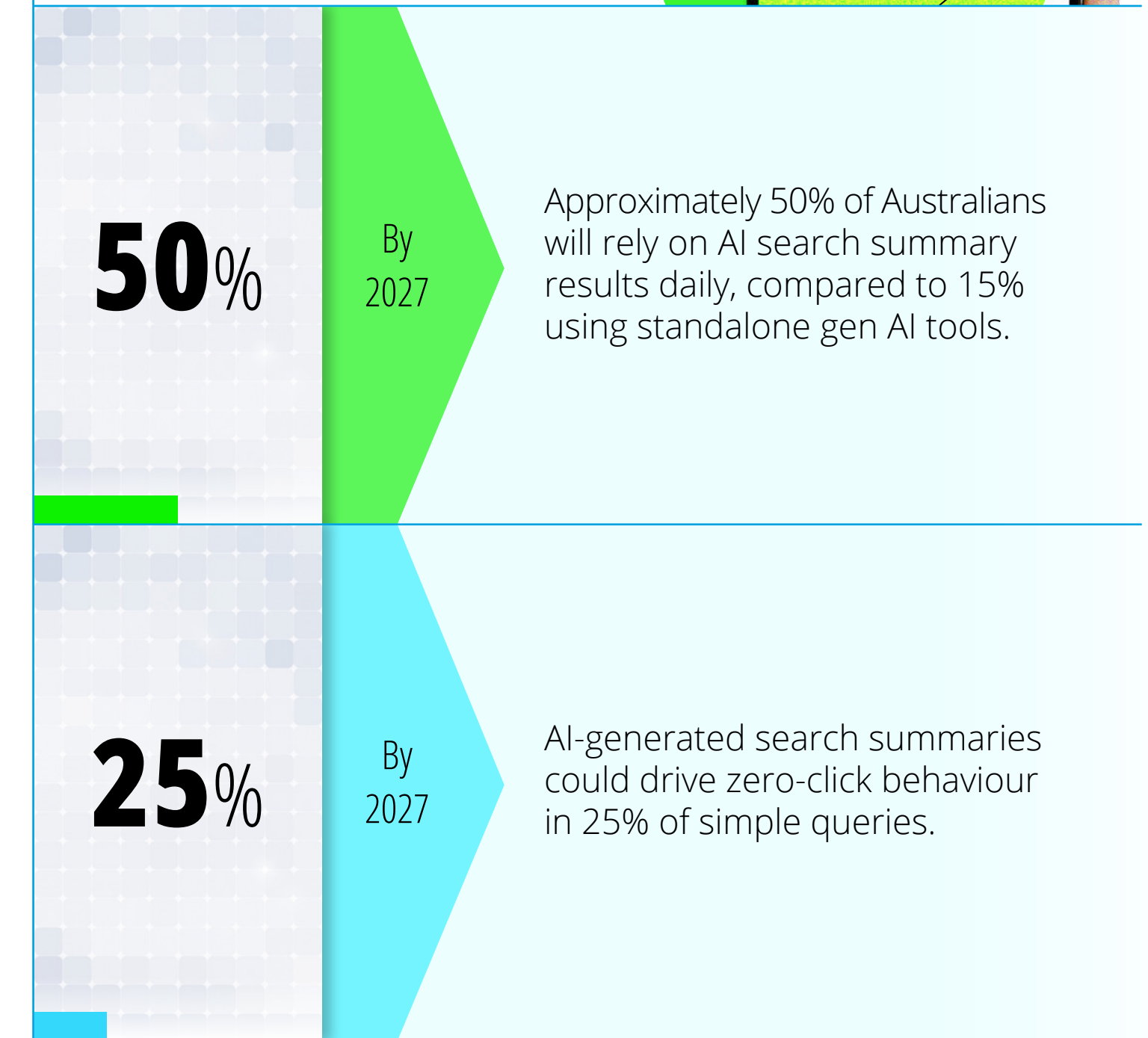
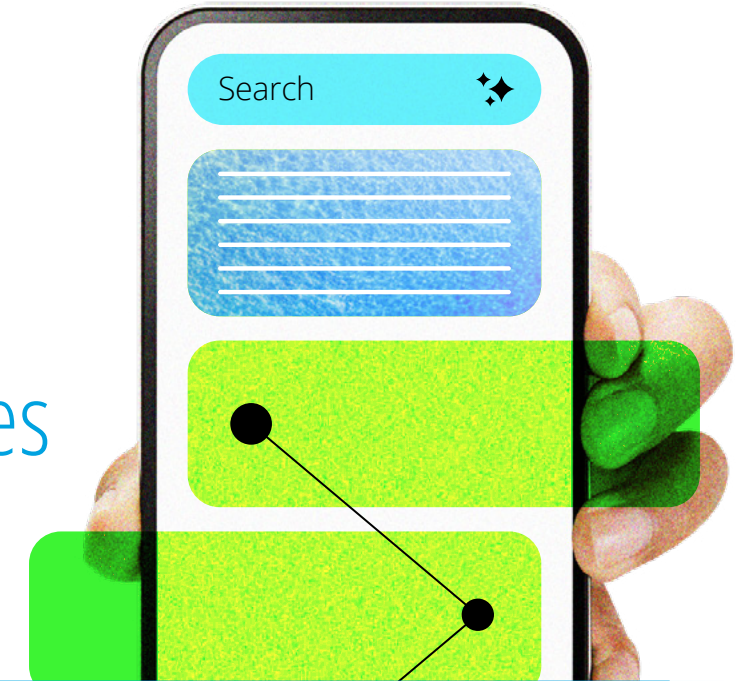
2

Unlocking exponential
value with AI agent
orchestration



3

Gen AI inside existing
search engines overtakes
standalone gen AI

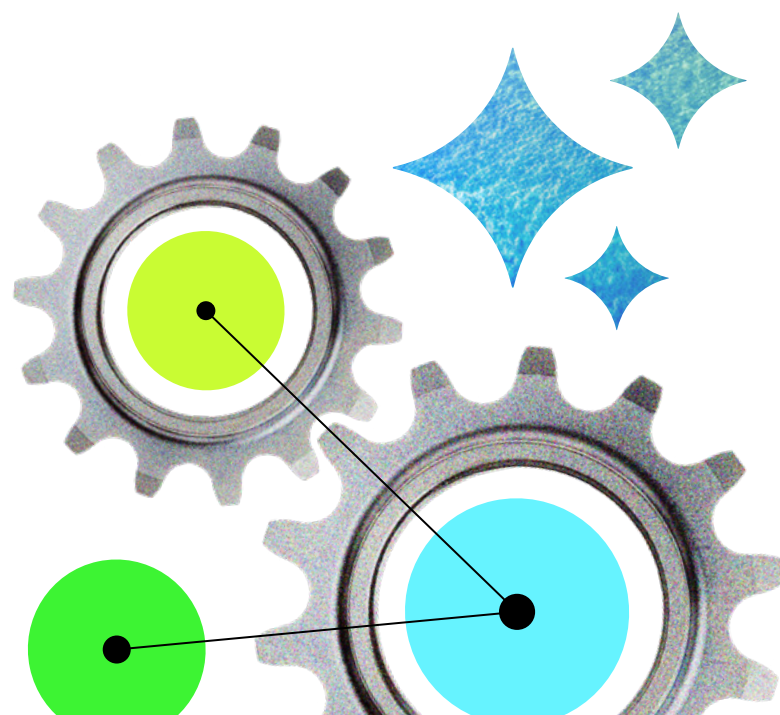


Hardware and Semiconductor



4

AI for industrial robotics, humanoid robots, and drones



\$60m

In 2027

The robotics as a service (RaaS) market in Australia may reach up to \$60 million, likely driven by uptake in logistics, manufacturing, and agriculture sectors.

9,500

By 2027

Australian installations of industrial robots will exceed 9,500, a growth of nearly 10% YoY.

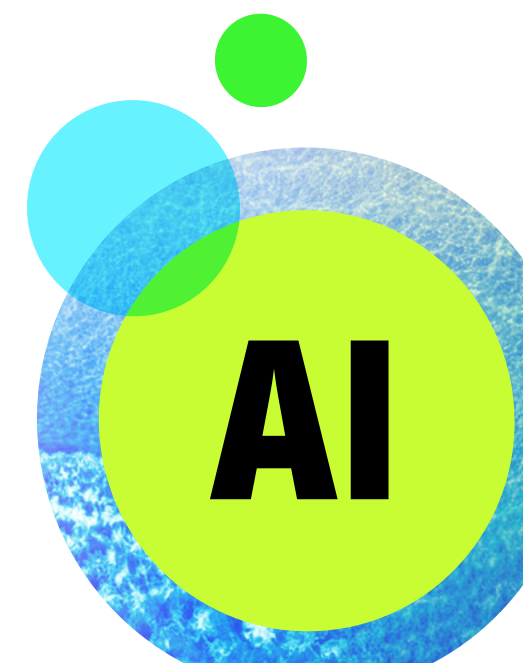
40%

By 2027

Australia's mining industry will continue to be a leader in autonomous robotics adoption globally, with 40% of mining companies having fully implemented drones for activities including site exploration and inspection.

5

Why AI's next phase will likely demand more computational power, not less



x1.7

By the end of 2026

Power consumption by AI servers in data centres will increase by x1.7, accounting for up to one third of data centre energy demand.

2.5%

In 2026

Data centres will consume more than 2.5% of Australia's energy supply, fuelled by the ramping up of new and existing centres and increasing investment as the AI landscape evolves.

6

A new era of self-reliance: Navigating technology sovereignty



6.5GW



3.3GW

By 2030

Australia's data centre capacity will more than double from 1.6 GW today to over 3.3 GW under organic growth (16% p.a. CAGR), requiring the construction of approximately 15–25 new facilities. If Australia pursues a digital infrastructure ambition, capacity could reach 6.5 GW, requiring 30–45 additional data centres and \$52 billion in private investment.

55%

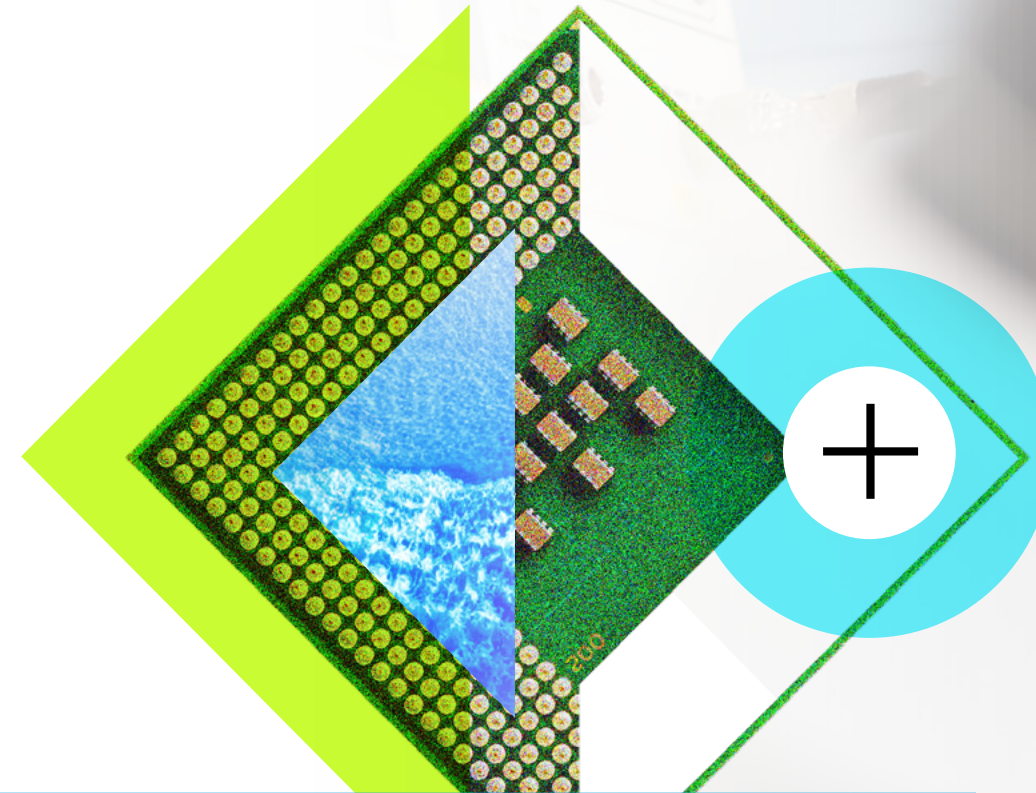
Hyperscalers will account for more than 55% of Australian data centre electricity consumption in 2026 and will remain the dominant driver of new capacity through to 2030.

Hardware and Semiconductor



7

New technologies and familiar challenges could make semiconductor supply chains more fragile



15%

In
2026

Rising global semiconductor prices and constrained AI chip supply will increase total compute costs for Australian organisations by 15%, with no substantial domestic fabrication planned.

\$46b

By
2029

Australia's data centre investment will reach \$46 billion, lifting semiconductor-intensive infrastructure spend by 10–15% in 2026.

10–12

By
2027

Australia will have expanded its active bilateral critical minerals supply agreements to at least 10–12 partners (up from 6 formal agreements in 2024), with new commitments in cobalt, lithium, nickel, and rare earths targeted at semiconductor and EV battery supply chains.

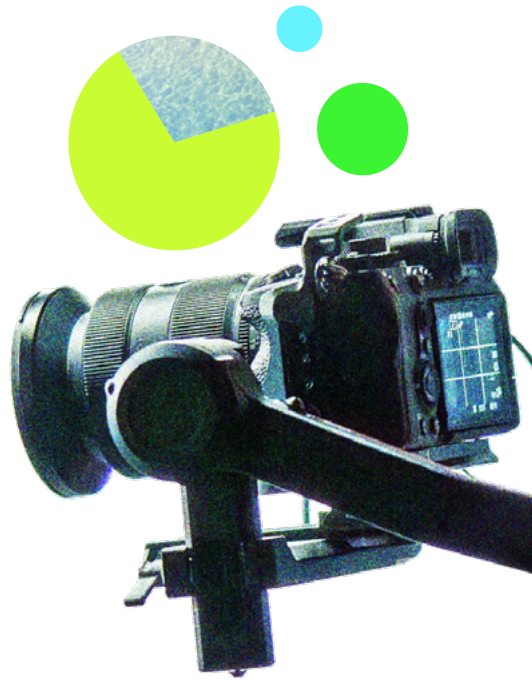




Telecommunications, Media & Entertainment

Advertising, Publishing and Social Platforms

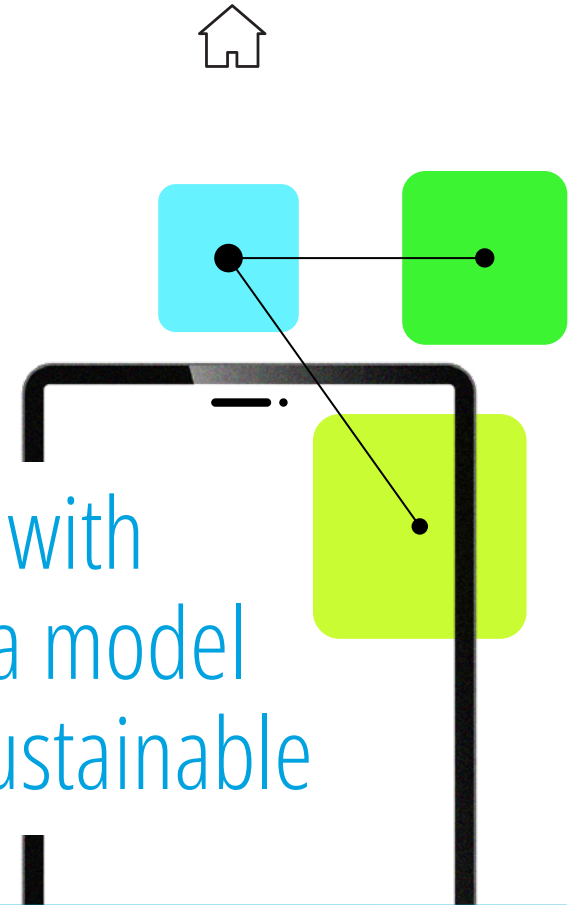
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9 Generative AI video is perfect for social media, but could disrupt social media companies



10 Public media partnerships with streaming giants could be a model for making traditional TV sustainable



| | | |
|-------------|---------|--|
| 8% | By 2028 | More than 8% of Australians aged 18–34 will be regular viewers of micro-drama apps with 30% of Gen Z and millennials already familiar with the format. |
| 40 | By 2028 | International micro-drama platforms will commission or localise up to 25 micro-series set or produced in Australia, as global operators replicate their US localisation strategy in English-speaking markets. Domestic production of micro-series will remain nascent, with independent and studio productions unlikely to exceed 15 seasons annually. |
| 400k | By 2028 | Micro-series apps, such as DramaBox and ReelShort, may reach over 400,000 cumulative downloads in Australia. |

| | | |
|-----------------------------|---------|--|
| DIGITAL DUTY OF CARE | By 2027 | The Australian government will introduce a 'digital duty of care' law or broader regulatory regime, specifically aimed at holding social media platforms accountable for harmful AI-related content and system harms beyond the current age restriction. |
| 1/5 | By 2028 | One in five Australian adults will have seen a deepfake of someone they personally know (friend/relative/colleague/classmate/local community figure) on social media or messaging. |
| 40% | By 2029 | More than 40% of paid social video ad impressions will be dynamically personalised (i.e., assembled, edited, varied at serve-time or near serve-time, using a combination of dynamic creative optimisation and/or gen AI video generation/enhancement). |

| | | |
|----------------------|---------|--|
| SVOD | In 2026 | The 'Australian Content Requirement for SVOD Services' amendment will not materially increase streaming platform investment in Australian programs but will set an industry floor. |
| FTA | | Free-to-air (FTA) broadcasters embrace YouTube and social media as distribution channels, focusing on short-form content (e.g. 'shorts'/'reels') and uploading full episodes of shows and films to drive younger audiences to their platforms. |
| \$1m | In 2026 | To meet the ever-increasing preferences of fans for more premium content, we will see the cost-per-hour of public and commercial FTA broadcaster drama titles eclipse \$1 million. |
| CONTENT COSTS | | To manage rising content costs, co-productions will comprise a larger proportion of programming for public and commercial FTA broadcasters and streaming platforms alike. |

Entertainment

11

Video podcasts dominate:
Opportunity for brands,
competition for traditional video



40min
75%

In
2026

Up to 75% of Australian podcast listeners will engage with video podcasts on a monthly basis, with those viewers averaging 40 minutes of video podcast consumption per week. Much of this will be passively consumed on video-first platforms favoured as default podcast destinations.

70%

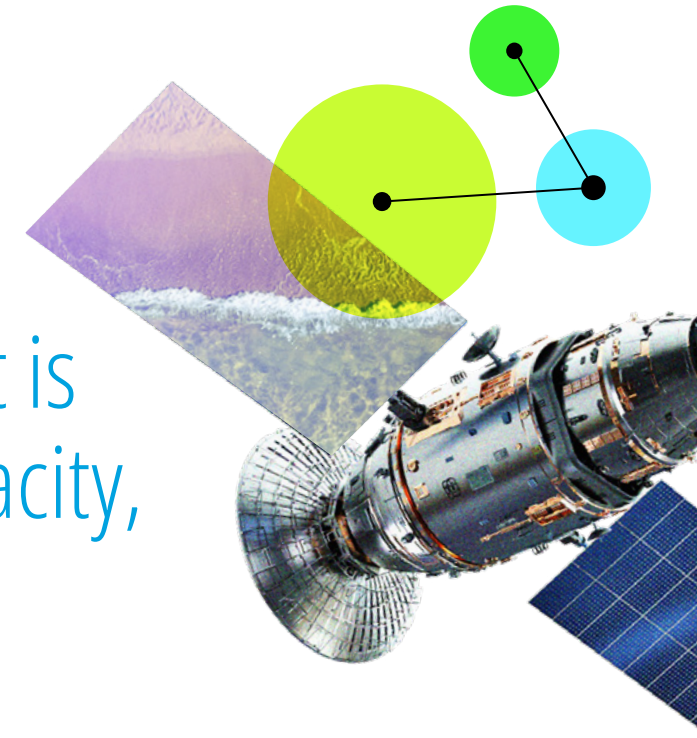
By
2026

Vodcast advertising will be the fastest-growing segment within digital audio, with nearly 70% of audio ad buyers planning to increase podcast investment and three-quarters having considered vodcast placements for the first time. While the total digital audio market grew 8.2% in 2025, intent signals suggest podcast advertising specifically will outpace this rate in 2026.

Communication Service Providers

12

Next-gen satellite internet is
transforming pricing, capacity,
and regulation worldwide



\$650m

By
2026

Australia's low Earth orbit satellite connectivity spend will reach \$650 million, driven by rising adoption of satellite broadband as both a primary and resilience connectivity layer.

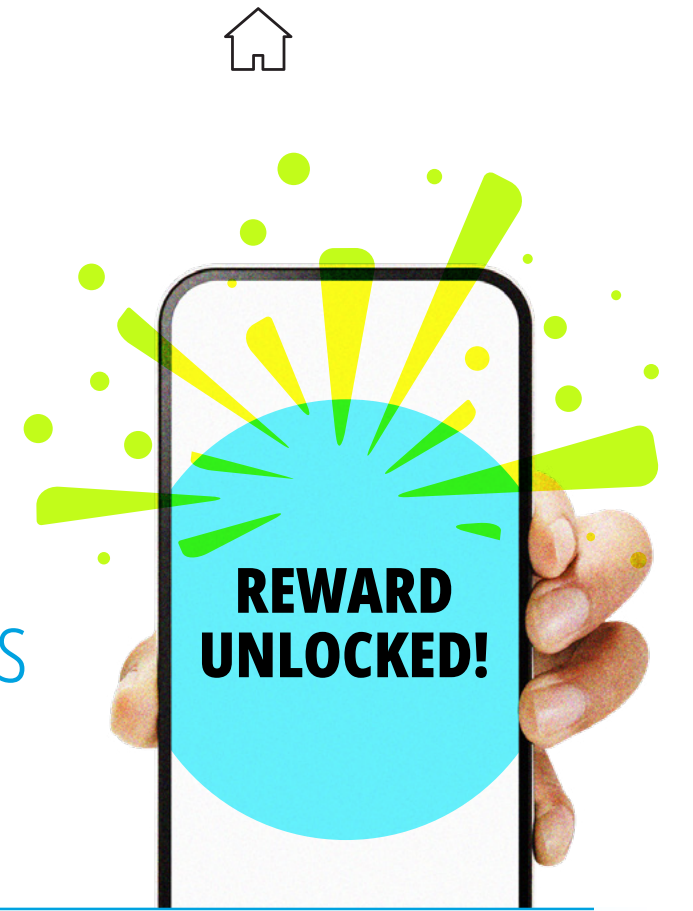
2m

By
2030

2 million Australians will rely on satellite connectivity, enabled by more than 1,200 direct-to-device (D2D) satellites in orbit.

13

Gifts beat gigabits: Some
mobile users rank rewards
over network upgrades



1/4

By
2028

Nearly one quarter of Australian mobile customers could rate rewards and perks as important as network performance when choosing a provider.

30%

By
2028

Almost 30% of Australian mobile customers are expected to engage with their telco rewards ecosystem monthly.

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