



## Communications and media in Australia

### Trends and developments in viewing and listening 2024–25

March 2026

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## Acknowledgement of Country

The Australian Communications and Media Authority acknowledges First Nations peoples as the Traditional Owners and Custodians of Australia.

We respect and celebrate First Nations peoples as the original storytellers and content creators of the lands on which we work, and honour the enduring strength and commitment of Aboriginal and Torres Strait Islander peoples to the land, waters and their communities. We pay our respects to Elders past and present.

# Introduction

How do Australians use, watch and listen to different types of content?

Using both industry data and our annual consumer research, we provide an overview of developments in the Australian media sector from June 2024 to September 2025. We examine the drivers that underpin and shape how communications technology is adopted and highlight relevant developments.

## ACMA's annual consumer surveys

This report references our annual consumer surveys collected from 2017 to 2025. The survey provides information on Australian adults' use of communications and media services. Unless otherwise noted, results relate to Australians aged 18 and over.

Information about survey questions is included in the chart notes. All data comparisons in this report reflect statistically significant increases or decreases at the 95% confidence level. Findings from ACMA's annual consumer survey referenced in this report are also available as part of our *Communications and media in Australia* series. Please note some findings presented in this report are based on ACMA analysis of data that is not reflected in publicly available material.

## researchacma

Our research program makes an important contribution to the ACMA's work as an evidence-based regulator. It informs our policy development, regulatory reviews and investigations, and helps us to support a media and communications environment that works for all Australians. The research from which this report is drawn forms part of the ACMA research program.

Our research focus helps us to fulfil the regulatory functions in the *Australian Communications and Media Authority Act 2005* and legislation related to our telecommunications, radiocommunications, broadcasting and online content functions.

## Executive summary

This report considers Australians' viewing and listening behaviours as of June 2025, drawing insights from the ACMA's annual consumer surveys, supplemented by industry data that explores market trends and developments.

### Viewing behaviours – trends and industry developments

#### ***Popularity of paid subscription streaming services continues***

The most popular way to view content continues to be paid subscription streaming services. After multiple years of growth, 2025 saw viewership stabilise at 68%.

#### ***Free-to-air TV, excluding catch-up viewership, increases***

After years of decline, viewership of free-to-air TV, excluding catch-up, increased to 52% (from 46% in 2024). Despite this, overall viewership levels remain well below those observed in 2017 (71%). In considering free-to-air catch-up TV, 2025 saw increased viewership for 7plus and 9Now, while ABC iView saw a decline in use.

#### ***Shift away from user-generated or short form online videos***

Viewership of user-generated or short-form online content, popular on platforms such as YouTube and TikTok, declined in 2025 (52%, down from 59% in 2024), marking the first decline after years of steady growth. It is uncertain whether this is a temporary shift or the start of a new trend.

#### ***Online video services have stabilised***

The proportion of Australian adults watching online video content in a given week has remained steady at 91%, with viewership of the top services also stabilising after a prolonged period of growth. YouTube remains the most popular, closely followed by Netflix.

#### ***Sport continues to attract Australian audiences***

Despite a shift away from traditional TV towards online watching, sport continues to drive large audiences on both types of services. Many of the most-watched free-to-air TV programs in 2024–25 were sporting events. Online streaming services also use sports to attract subscribers. Netflix, Prime Video, Disney+, Paramount Australia and others now stream sporting events and have signed multi-year agreements with sports associations.

#### ***Smart TVs become most popular way to watch videos at home***

Australians have moved away from watching videos on mobile phones, desktop or laptop computers and Google Chromecast, with the most common method of viewing now being via a smart TV. This aligns with increased smart TV ownership, which has doubled to 62% from 31% in 2019 when tracking first started.

#### ***Artificial Intelligence (AI) is reshaping how Australians engage with video content***

Large streaming services (such as Netflix and Amazon) and Australian broadcasters (such as Nine and Seven) are rolling out features using AI to boost viewership and advertising. This is expected to change how Australians watch videos, with personalised recommendations and context-aware advertising.

### ***Advertising revenue continues to shift to digital***

TV advertising continues to shift to digital, with TV advertising spend expected to keep falling despite growth in catchup and adsupported streaming, alongside industry restructuring and consolidation in regional broadcasting. TV revenues were mixed in 2024–25, with Nine up slightly, Seven and Network 10 down, and regional broadcasters declining as Southern Cross Austereo exited TV.

## **Listening behaviours – trends and industry developments**

### ***FM and AM steady in 2025 following long-term decline***

In 2025, for the first time in several years, radio listenership has remained stable compared with the previous year. However, the long-term trend shows FM and AM radio listenership falling. This decline reflects industry trends, with digital and streaming services taking an increasingly larger share of the audience.

### ***Overall radio ownership increases in 2025***

After years of decline, overall radio ownership increased to 43% (from 40% in 2024). Digital radio ownership also rose (from 23% in 2024 to 26%), suggesting early signs of a potential upward trend.

### ***Music streaming usage remains high***

72% of Australian adults listened to music through an online streaming service in a given week, having grown substantially since 2017 (37%) when tracking first started. Spotify was the most popular music streaming service.

### ***Shift towards combining audio, video and digital distribution***

A trend is emerging where streaming services are integrating features from competitors to keep users on their services. For example, services such as Spotify now show music videos and TV channels such as Network 10 upload podcasts to Spotify.

### ***Podcast listenership remains stable***

The majority (52%) of Australian adults continue to listen to podcasts in 2025, with Spotify remaining the most popular service. Podcast listeners typically multitask while listening, often while relaxing (52%), driving (39%), doing household or yard chores (36%), or exercising (36%).

### ***Revenues remain steady with AI use expected to increase***

Audio revenues increased modestly in 2024–25 for major Australian audio companies. Total audio advertising spend fell to about \$1.1 billion but is forecast to recover gradually, driven mainly by growth in audio on demand as broadcast radio advertising remains flat. AI is increasingly shaping the audio sector by personalising listening, efficiencies and enabling new advertising models.

## Viewing behaviours at a glance

In the previous 7 days to June 2025:

- **52% viewed free-to-air TV** excluding catch-up TV.
- **91% used an online service** to watch video content.
- **62% used a smart TV** to stream video content at home.



**52%**



**91%**



**62%**

**YouTube** and **Netflix** remained the most widely used online video services, watched by more than half of Australian adults in a given week.

YouTube

**56%**

Netflix

**51%**

# Viewing behaviours – trends and industry developments

## Streaming remains more popular than free-to-air TV

Figure 1 presents the viewing habits of Australian adults from 2017 to 2025. While overall patterns have remained relatively consistent over the previous 5 years, several notable changes in 2025 diverge from trends observed in previous years.

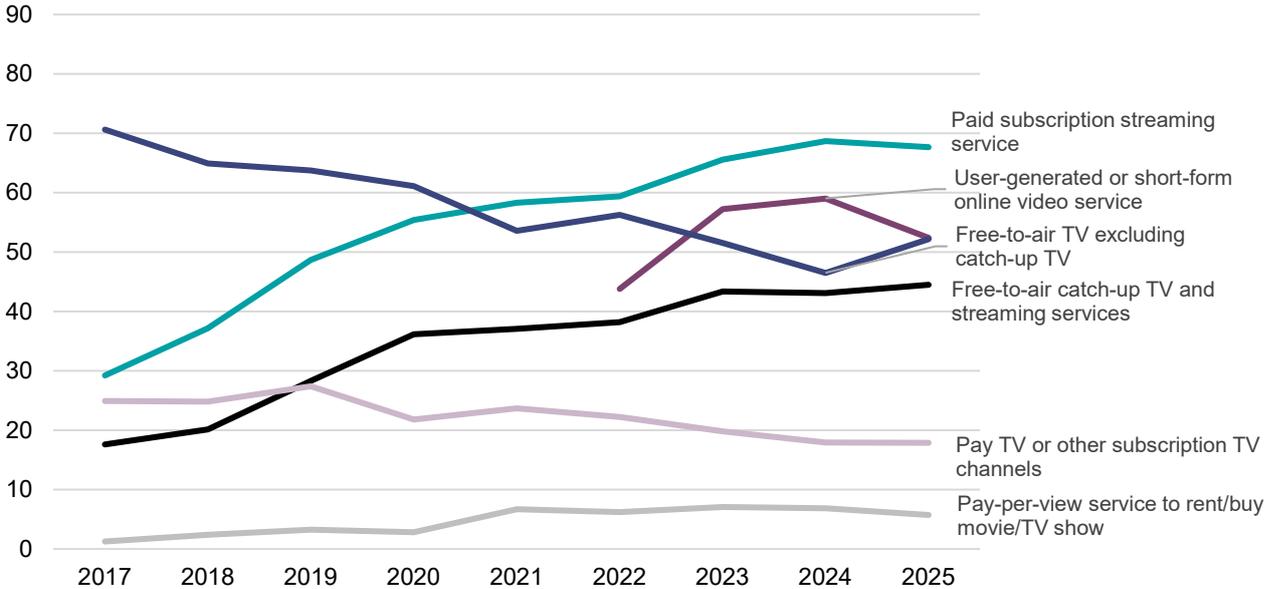
Paid subscription streaming services (such as Netflix, Stan and Binge) remain the most popular way to view content and have led all other formats since 2021. In 2025, viewership stabilised at 68%, but over the longer term, this category experienced substantial growth, increasing from 29% in 2017 to its current level.

Free-to-air catch-up TV and streaming services have also held steady for the previous 3 years. However, growth since 2017 has been substantial, rising from 18% to 44% in 2025, reflecting Australians’ increasing preference for accessing free-to-air content online.

Meanwhile, traditional free-to-air TV (excluding catch-up) remains the leading method for watching free-to-air content, with viewership rising to 52% in 2025 from 46% in 2024. This growth contrasts with the decline observed in earlier years. However, overall viewership is still well below 2017 levels (71%). It remains unclear whether this growth marks the start of a sustained recovery or is simply a single-year fluctuation.

Similarly, the proportion of Australian adults watching user-generated or short-form online videos declined to 52% in 2025, down from 59% in 2024, reversing this category’s long-term growth trend. This unexpected decline may represent a temporary anomaly, which will be important to monitor in future reporting periods. Even so, viewership remains well above 2022 levels, with this category expected to grow over time.

**Figure 1: Viewing behaviours in the previous 7 days to June 2017 to June 2025 (%)**



Base: Australians aged 18 and over, 2020 (n=2,009), 2021 (n=3,586), 2022 (n=3,580), 2023 (n=3,572), 2024 (n=3,530), 2025 (n=5,990).

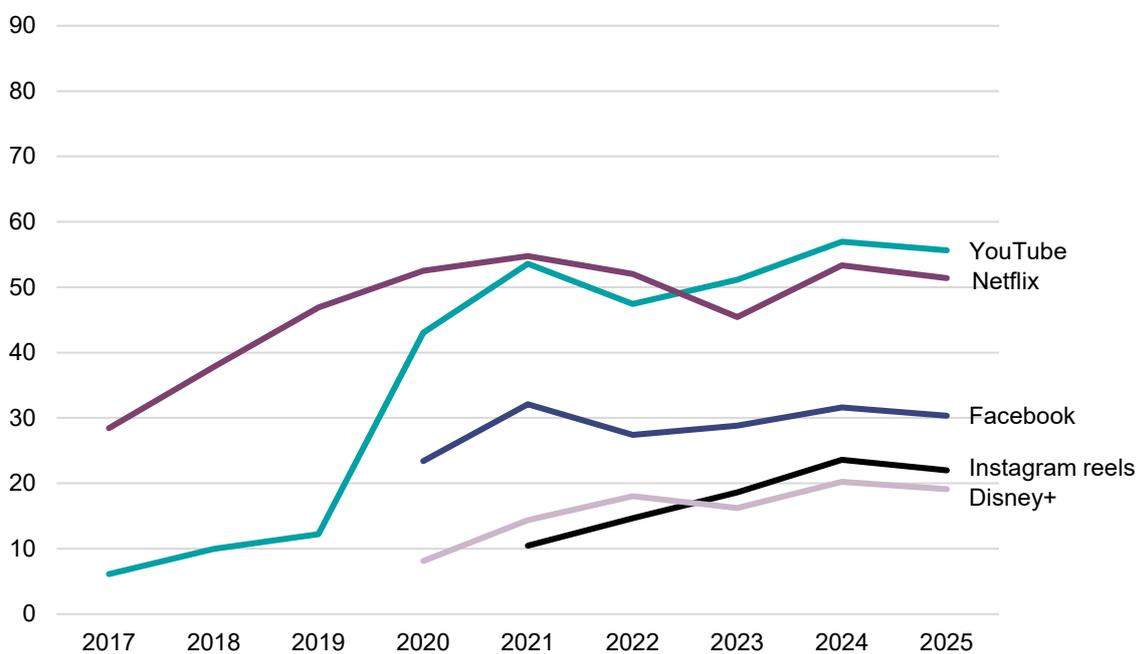
Source: Communications and media in Australia: How we watch and listen to content, March 2026.

## Rapid rise in online video services gives way to stability

In 2025, 91% of Australian adults used an online service to watch video content in a given week. This figure is unchanged from the previous 12 months, but represents a significant increase from 2017, when only 37% used online video services. While this rise partly reflects the growing number of providers in the market, viewership of the top services – YouTube and Netflix, which have dominated for the past 8 years – has also increased substantially since 2017 (see Figure 2). YouTube usage jumped from 6% in 2017 to 56% in 2025, while Netflix increased from 28% to 51% over the same period.

Interestingly, viewership of the top 5 online services has stabilised in 2025 after a prolonged period of growth. Whether this signals market saturation remains an important trend to monitor in the coming years.

**Figure 2: Top 5 online services used to watch content in the previous 7 days to June 2017 and June 2025 (%)**

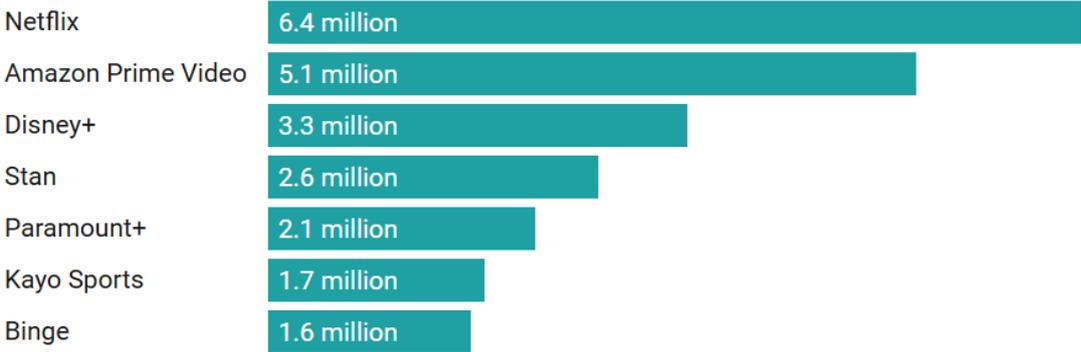


Base: Australians aged 18 and over, 2017 (n=2,227), 2018 (n=2,106), 2019 (n=2,067), 2020 (n=2,009), 2021 (n=3,586), 2022 (n=3,580), 2023 (n=3,572), 2024 (n=3,530), 2025 (n=5,990).

Source: Communications and media in Australia: How we watch and listen to content, March 2026.

In March 2025, Warner Bros. Discovery launched its streaming service, HBO Max, in Australia.<sup>1</sup> The company expects the service will become financially sustainable in the local market within 2 to 3 years.<sup>2</sup> The launch has implications for Binge and Foxtel Now, which previously licensed shows and movies from Warner Bros. Discovery. That content is now available on HBO Max.<sup>3</sup> HBO Max enters a competitive Australian market, with at least 7 streaming services operating, each with more than one million subscribers (Figure 3).

**Figure 3: Number of subscribers for selected subscription video-on-demand services in Australia, June 2025**



Source: S Buckingham-Jones, *Netflix, Amazon Prime, Disney+ extend lead over Australian streamers* [news article], *Australian Financial Review*, 5 October 2025.

## Spotlight: Sport shaped TV and streaming strategies during 2024–25

### Why sport matters

Sport remains one of the few types of content that brings large audiences together at the same time. While more Australians are watching video online and fewer are watching live free-to-air TV, major sporting events still attract large viewing audiences. Deloitte research shows that 3 in 4 Australians watched sport every week in 2024<sup>4</sup>, a reason why broadcasters and streaming services continue to invest in sports rights.

### Free-to-air TV and catch-up TV

Many of the most-watched free-to-air TV programs in 2024–25 were sporting events, including the AFL grand final and coverage of the Paris Olympics. These events drew large audiences across free-to-air TV and catch-up TV. Seven launched its dedicated sports catch-up TV service, 7plus Sport, in the lead-up to the 2024 AFL grand final.<sup>5</sup> This grand final reached about 4 million people on TV and 655,000 watched on 7plus, the highest streaming audience to date for an AFL match.<sup>6</sup> Nine provided coverage of the 2024 Olympic Games in Paris over 2 weeks across Channel 9, 9Gem and its catch-up TV service, 9Now.<sup>7</sup> The Olympic Games reached around 9.9 million people per day over the 2 weeks across Nine's free-to-air TV and catch-up TV services, according to VOZ.<sup>8</sup>

### Streaming services

Streaming services used sport to attract subscribers. Some developments were:

- Prime Video streamed the Women's one-day international World Cup in September 2025.<sup>9</sup> This follows Amazon's agreement in 2023 securing rights to all International Cricket Council global events through to 2027.<sup>10</sup> Prime Video also streamed the Men's T20 World Cup in June 2024.<sup>11</sup>
- Nine Entertainment secured a 3-year agreement with Optus for soccer rights.<sup>12</sup> These include the English Premier League, Japan's J League, the US National Women's Soccer League and UEFA Women's Championship. Matches moved from Optus Sport to Stan Sport over July and August 2025.
- DAZN bought Foxtel in April 2025, which could change how Foxtel packages its sports content in the future.<sup>13</sup>
- Disney+ added ESPN content in March 2025, giving subscribers access to live ESPN channels and on-demand sport.<sup>14</sup> In August 2025, ESPN signed a multi-year agreement with the NBL to stream the NBL finals and season live across Australia and New Zealand.<sup>15</sup>
- Paramount Australia, the parent company of Network 10, signed a multi-year agreement with Football Australia in August 2024.<sup>16</sup> This means matches of the Australian national football teams, the Matildas and the Socceroos, will appear on both free-to-air TV and Paramount+.
- BINGE added live and on-demand sports from Kayo Sports and added live news channels at no extra cost in August 2024.<sup>17</sup>
- Kayo signed a multi-year agreement with ESPN to continue streaming major US sports such as the NBA, NHL and NFL.<sup>18</sup>

### Cross-service distribution

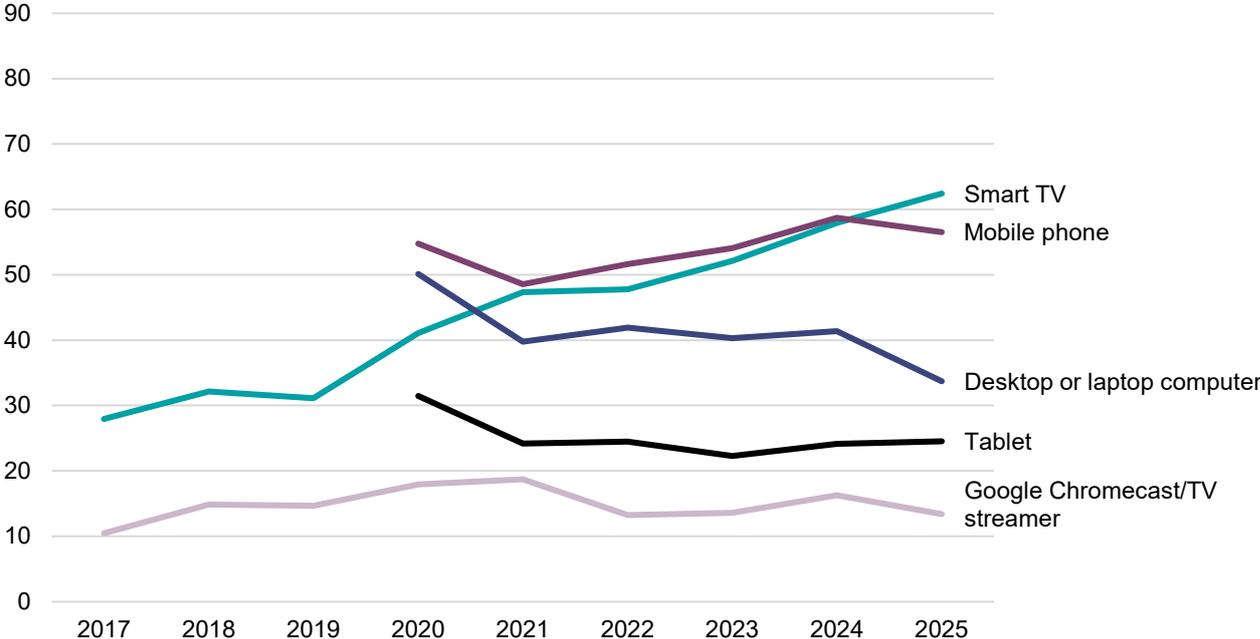
Some broadcasters who have a SVOD service alongside their free-to-air TV and catch-up TV services use a mix of free and paid access for sports. For example, Network 10 broadcasts certain football matches on free-to-air TV and 10 play<sup>19</sup> (its catch-up TV service) while others were only on Paramount+.<sup>20</sup> This approach gives viewers free access to some games while encouraging them to subscribe to Paramount+ for more coverage.

## We're choosing to stream video on smart TVs and mobile phones

In 2025, 95% of Australian adults used a device to watch video content at home. The top 5 devices used for streaming video at home are shown in Figure 4. While usage of most devices is trending downward, smart TVs have diverged from this overall trend, rising from 28% in 2017 to 62% in 2025. A similar pattern is seen in ownership, with 74% of adults with only a smart TV in their households, up from 40% in 2020. Conversely, standard TV ownership continues to decline, with just 12% of households relying solely on a standard TV in 2025.

In contrast, although mobile phones are the second most popular way Australian adults stream video content, usage has been relatively stable since data collection began in 2020, (57% in 2025 compared to 55% in 2020.)

**Figure 4: Main devices used to stream video content at home, June 2017 to June 2025 (%)**



Base: Australians aged 18 and over, 2017 (n=2,227), 2018 (n=2,106), 2019 (n=2,067), 2020 (n=2,009), 2021 (n=3,586), 2022 (n=3,580), 2023 (n=3,572), 2024 (n=3,530), 2025 (n=5,990).

Source: ACMA, Communications and media in Australia: How we watch and listen to content, March 2026.

Samsung reports that one-third of new Samsung smart TVs sold in Australia are not connected to an antenna.<sup>21</sup> This reflects a broader shift towards screens exclusively connected to the internet.

## ABC iview remains the top free-to-air catch-up TV and streaming service

Figure 5 shows the services used to watch free-to-air catch-up TV and streaming among viewers who accessed free-to-air catch-up TV in the previous week.

After years of stability, ABC iview usage declined in 2025, dropping from 62% in 2024 to 52% however it remains the dominant service. Meanwhile, 7plus and 9Now viewership increased, reaching their highest recorded levels (45% and 39% respectively).

The decline in ABC iview usage was evident across all age groups, suggesting it was not age-related. In contrast, the growth in 7plus and 9Now was driven by Australian adults under 55, with significant year-on-year increases. For those aged 18–54, 7plus viewership rose from 35% in 2024 to 46% in 2025, while 9Now increased from 36% to 43% over the same period.

**Figure 5: Services used to watch free-to-air catch-up TV in the previous 7 days to June 2017 to June 2025 (%)**



Base: Australians aged 18 and over who watched free-to-air catch-up TV in past 7 days, 2017 (n=464), 2018 (n=498), 2019 (n=765), 2020 (n=813), 2021 (n=1,546), 2023 (n=1,797), 2024 (n=1,737), 2025 (n=2,826).

Source: ACMA, Communications and media in Australia: How we watch and listen to content, March 2026.

In 2025, the ACMA's annual consumer survey examined the use of free ad-supported streaming TV (FAST) services. Over the previous 6 months, 20% of adults had used a FAST service, with Samsung TV Plus being the most common (10%). Other services included Tubi (8%), Plex (4%), and TLC (3%). Additionally, 25% of adults reported having used a FAST service at some point, but not in the past 6 months, while more than half (54%) had never used one.

Younger Australians were more likely to use FAST services, with 22% of adults aged under 55 having used a service in the previous 6 months, compared to 15% of those aged 55 and over.

## Spotlight: How AI is changing viewing

Artificial intelligence (AI) is reshaping how Australians discover and engage with video content. Services and broadcasters say they are using AI to help audiences discover content, improve the relevance of advertising and streamline production. These changes are part of a wider global shift, with analysts expecting media and entertainment to be among the sectors most reshaped by generative AI in the near term.<sup>22</sup> These developments are being shaped by several converging factors.

### How AI is being used

Competition for viewer attention continues to drive innovation across viewing services. AI can help by tailoring recommendations to individual viewing habits, which can increase time spent watching and reduce churn.<sup>23</sup> At the same time, advertising models are evolving, with providers trialling context-aware formats that align advertisements with scene content or tone.<sup>24</sup>

Behind the screen, AI can lower costs by automating tasks such as editing, captioning, metadata creation and localisation. These tools can speed up delivery and expand access to new markets through automated dubbing and translation using AI.<sup>25</sup>

### Global developments

International providers are rolling out AI across the viewing experience. Netflix has redesigned its TV interface to support natural-language search, enabling users to find content using everyday phrases. Additionally, discovery features using AI are also in development.<sup>26</sup> Amazon has added a range of AI capabilities to Prime Video, from audio description to episode recaps created using AI.<sup>27</sup> Both companies, along with Disney, are also testing new advertising formats that use AI to analyse scene content or pausing moments to deliver more relevant advertisements.<sup>28</sup>

Australian broadcasters and services are adopting similar approaches, tailored to local audiences and operations.

### Australian developments

Australian broadcasters are adopting AI to improve audience insights and operations. Seven West Media created an 'AI factory' to accelerate products, personalise experiences and refine ad strategies across 7plus and 7NEWS digital services.<sup>29</sup> Nine has reported using AI to repurpose broadcast segments into online articles and to speed up editing workflows, citing efficiency gains across its digital publishing.<sup>30</sup>

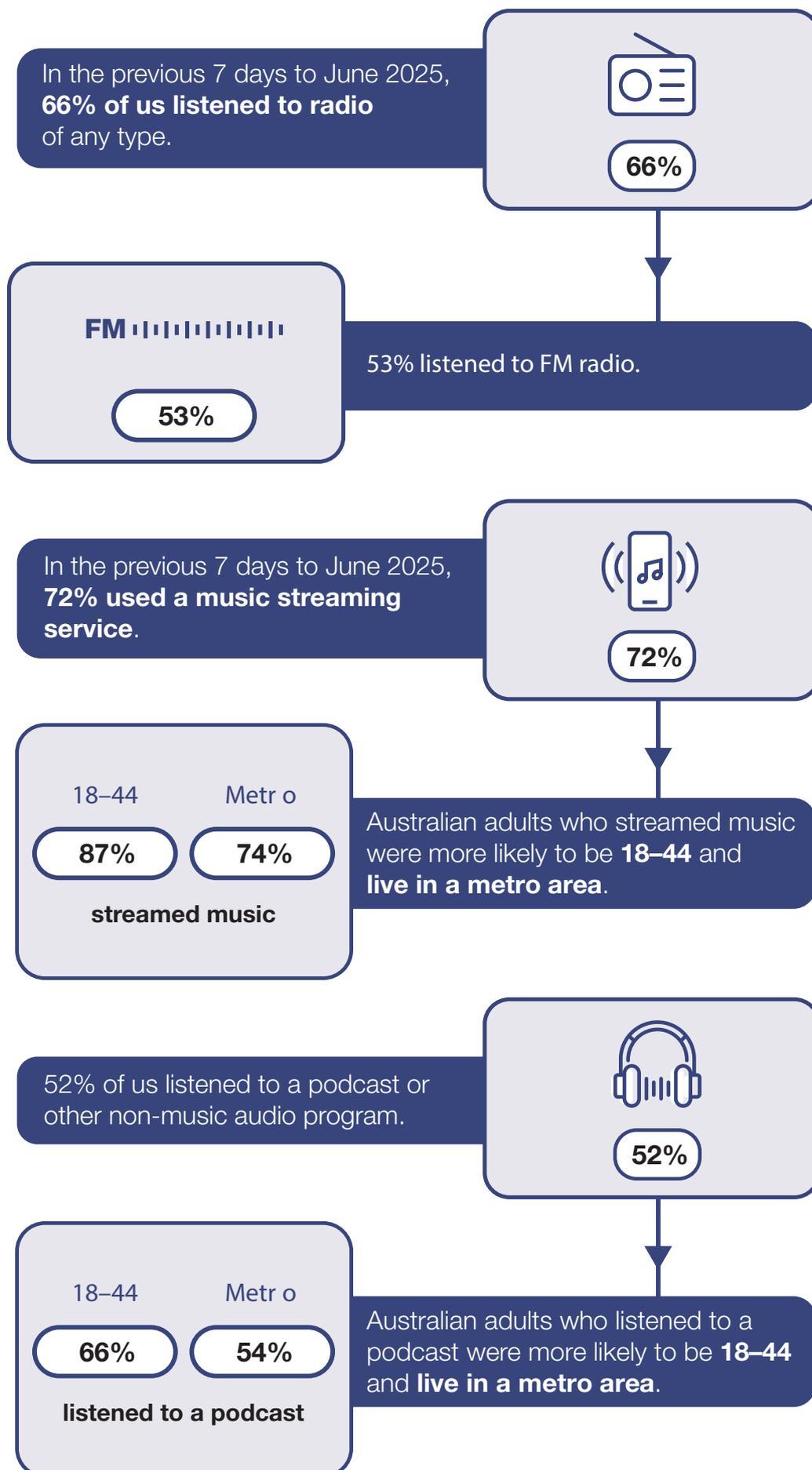
Global services popular in Australia are also deploying AI locally. Netflix is introducing search and discovery tools, including natural-language queries and personalised recommendations. Amazon and Disney are piloting context-based advertising products that rely on scene analysis and machine learning for placement decisions.<sup>31</sup>

## Emerging trends and risks

AI is driving innovation across advertising, production and content discovery, but also raising new challenges around visibility, attribution and trust:

- Evolving ad models. Contextual ad formats that integrate with the visual environment of a scene are emerging as a new approach to targeted advertising. Supporters of these formats argue they offer greater relevance and reduced disruption, though they rely on automated scene analysis and safety controls.<sup>32</sup>
- Production and post-production. AI is increasingly used in different stages of production, including visual effects. Recent examples include shots created using AI to accelerate sequences that would otherwise be slow or costly to produce, which has sparked debate about creative control, credit and the impact on crew roles.<sup>33</sup> OpenAI has also released Sora 2, which can generate short video sequences with synchronised audio and is publicly accessible.<sup>34</sup>
- Discoverability and traffic. As search services summarise information with AI, news and entertainment links can fall lower on results pages. This may reduce referral traffic to publishers and change how audiences navigate to original sources, with implications for revenue and audience measurement.<sup>35</sup>
- Trust, transparency and copyright. Industry bodies have raised concerns about AI models trained on copyrighted material without permission, as well as the rise of synthetic or manipulated media (deepfakes). Concerns around transparency and content authenticity are prompting discussions on how AI-generated media is labelled and monitored.<sup>36</sup>

## Listening behaviours at a glance



# Listening behaviours trends and industry developments

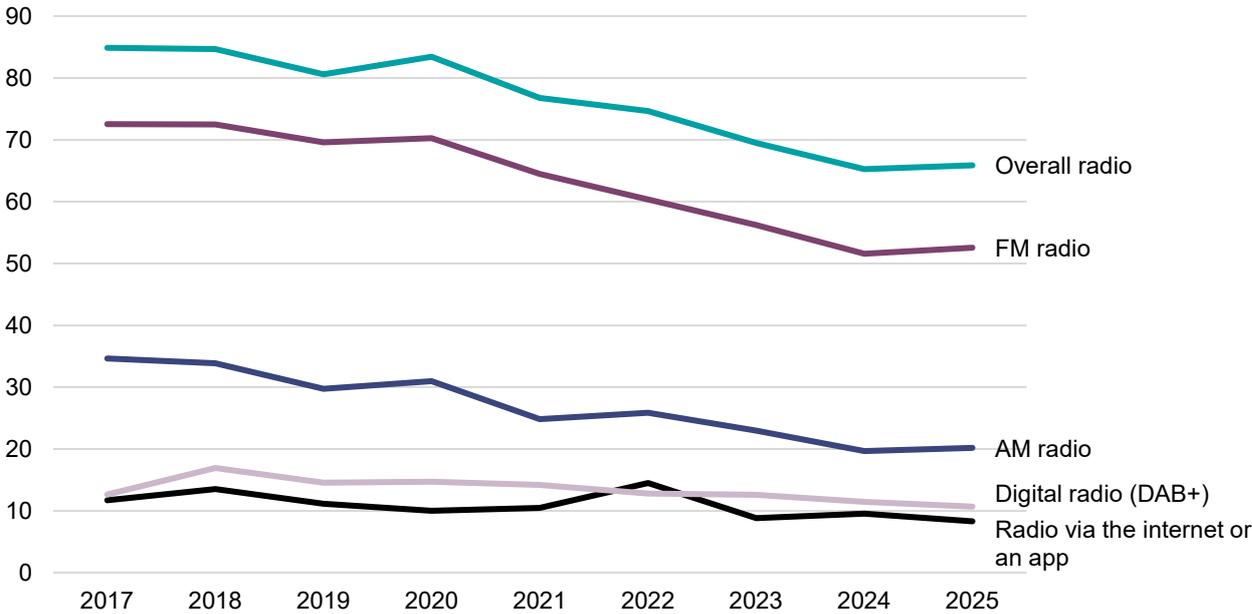
## FM and AM steady in 2025 following long-term decline

After several years of decline, overall radio listenership in a given week – that includes AM, FM, digital radio (DAB+) and radio via the internet or app – stabilised in 2025 at 66%, compared with its 2017 peak of 85%. This decline was not driven by age, with falls recorded across all adults age groups. Future data will indicate whether this recent stabilisation persists or whether longer-term declines resume.

AM and FM listening also stabilised after years of decline, with FM listenership at 53% in 2025 (compared with 52% in 2024) and AM steady at 20% in both years. Despite this short-term stability, both radio formats have experienced long-term decreases. FM radio, while still being the most popular format, has declined from 73% in 2017 to 53% in 2025. AM listenership has similarly declined, from 35% in 2017 to 20% in 2025. Like overall radio listenership, falls were observed across all age groups.

Other radio formats have been relatively stable over time. DAB+ listenership was 11% in 2025 down slightly from 13% in 2017, while listening to radio via the internet was at 8% in 2025, down from 12% in 2017.

Figure 6: Radio listenership in the previous 7 days to June 2017 to June 2025 (%)



Base: Australian s aged 18 and over, 2017 (n=2,277), 2018 (n=2,106), 2019 (n=2,067), 2020 (n=2,009), 2021 (n=3,584), 2022 (n=3,580), 2023 (n=3,572), 2024 (n=3,530), 2025 (n=5,990).  
 Source: ACMA, Communications and media in Australia: How we watch and listen to content, March 2026. ACMA annual consumer survey, QH3. Which of the following have you listened to in the past 7 days? (2017 onwards).

Australian adults living outside of capital cities were heavier radio users. Sixty-eight percent tuned in during a typical week, compared to 65% of capital-city residents. They were also more likely to listen to FM radio (58% compared to 50% in capital cities).<sup>37</sup>

Looking at year-on-year changes, fewer listened to FM radio in the car (90%, down from 94%), while home listenership increased (30%, up from 27%).<sup>38</sup>

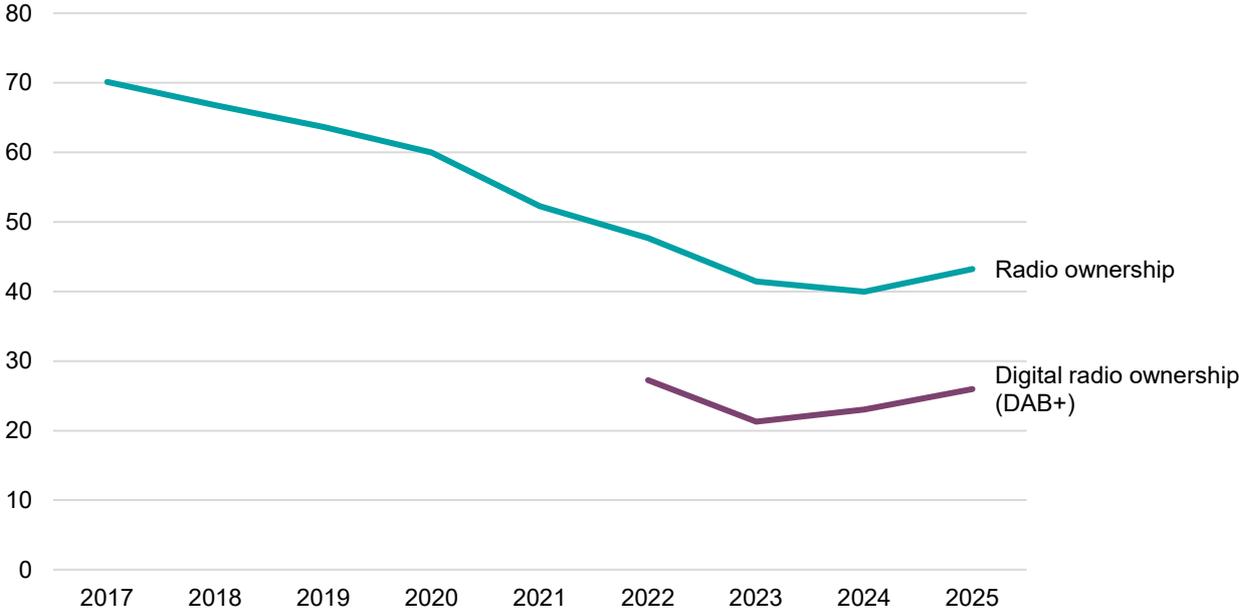
### Overall radio ownership increased in 2025

For the first time since 2017, overall radio ownership rose compared with the previous year, increasing to 43% (from 40% in 2024). Digital radio (DAB+) ownership also grew, reaching 26% (up from 23%) and more devices were capable of running on battery power (55%, up from 49% in 2024).

Increases in both overall radio ownership and digital radio ownership were driven by younger Australians. Compared with 2024, more 18–44-year-olds owned a radio (27%, up from 18%) or a digital radio (21%, up from 14%).

However, increases in both radio ownership and battery-operable DAB+ devices, returned levels back in line with 2023. Considering longer-term trends, ownership remains significantly lower than its peak in 2017 (70%).

**Figure 7: Radio ownership at home 2017 to 2025 (%)**



Base: Australians aged 18 and over, 2017 (n=2,277), 2018 (n=2,106), 2019 (n=2,067), 2020 (n=2,009), 2021 (n=3,584), 2022 (n=3,580), 2023 (n=3,572), 2024 (n=3,530), 2025 (n=5,990).

Source: ACMA, Communications and media in Australia: How we watch and listen to content, March 2026, ACMA annual consumer survey, QH1. Do you have a radio at home/in your car? (2017–2021) H12. Do you have a [radio/digital radio] at home? (2022 onwards).

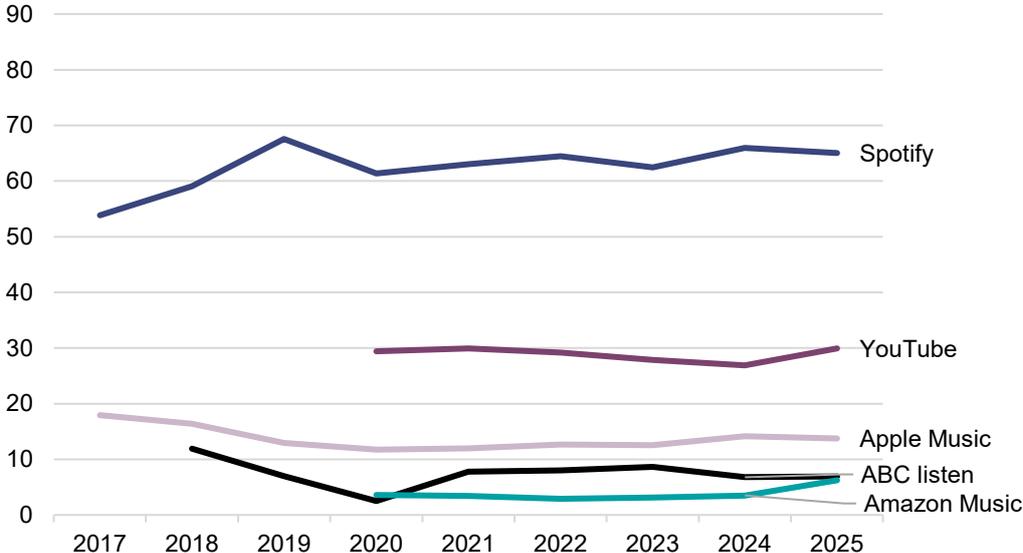
Since 2022, more than 7 in 10 Australian adults listened to music through an online streaming service in a given week. Usage remained high in 2025 at 72%, representing a substantial increase from 37% when tracking first began in 2017.<sup>39</sup> Metropolitan residents were more likely to use a streaming service (74%) than those living in regional areas (70%).

In 2025, younger Australians were more likely to use music streaming services, with 87% of 18–44-year-olds having streamed music in the previous week, compared with 59% of those aged 45 and over. However, usage has grown across all age groups since 2017. Among 18–44-year-olds, streaming music increased from 60% in 2017 to 87% in 2025. For Australians aged 45 and older, usage rose from 16% in 2017 to 59% in 2025.

As shown in Figure 8, Spotify remains the most widely used service used by those who had streamed music in the previous 7 days, with 65% using the platform, up from 54% in 2017. All other services continue to trail well behind Spotify, which maintains a dominant position in the sector. YouTube Music is the second most popular service, used by 30%, with its usage remaining relatively steady since tracking began in 2020.

Usage of Apple Music and ABC Listen was steady in 2025 compared to recent years, at 10% and 5% respectively. However, both platforms have seen declines from their peak, of 18% for Apple Music in 2017 and 12% for ABC Listen in 2018. Unlike the other smaller platforms, Amazon Music saw increased usage in 2025, rising to 6% from 4% in 2024.

**Figure 8: The top 5 online services used to listen to music in the previous 7 days to June 2017 and June 2025 (%)**



Base: Australians aged 18 and over who streamed music in the past 7 days, 2017 (n=726), 2018 (n=843), 2019 (n=935), 2020 (n=1,153), 2021 (n=2,195), 2022 (n=2,268), 2023 (n=2,332), 2024 (n=2,462), 2025 (n=4,348).

Source: ACMA, Communications and media in Australia: How we watch and listen to content, March 2026, ACMA annual consumer survey, QH5a. In the past 7 days, which of the following online services (or apps) have you listened to for the following? a) Music.

There is a broader trend of streaming services adopting features from competitors. Spotify added video options.<sup>40</sup> The company notes that video helps people discover new artists and stay on its service rather than switching to competitors such as TikTok or YouTube. Spotify introduced music videos in Australia in October 2024.<sup>41</sup> It has also allowed independent podcasters to upload video. As of June 2024, there were 250,000 video podcasts on Spotify. Video viewing hours have grown faster than audio-only listening.<sup>42</sup>

This shift towards combining audio, video and digital distribution is also evident in television news, with Network 10 launching 10News+ across Spotify and YouTube from July 2025.<sup>43</sup> 10News+ is uploaded as a daily, hour-long audio and video podcast on Spotify and simulcast live on YouTube. The podcast on Spotify will reportedly be accessible within minutes of the program ending its broadcast on television. Network 10's strategy is to 'reach as many people' as it can by hosting the program on YouTube and Spotify in addition to free-to-air TV and catch-up TV.

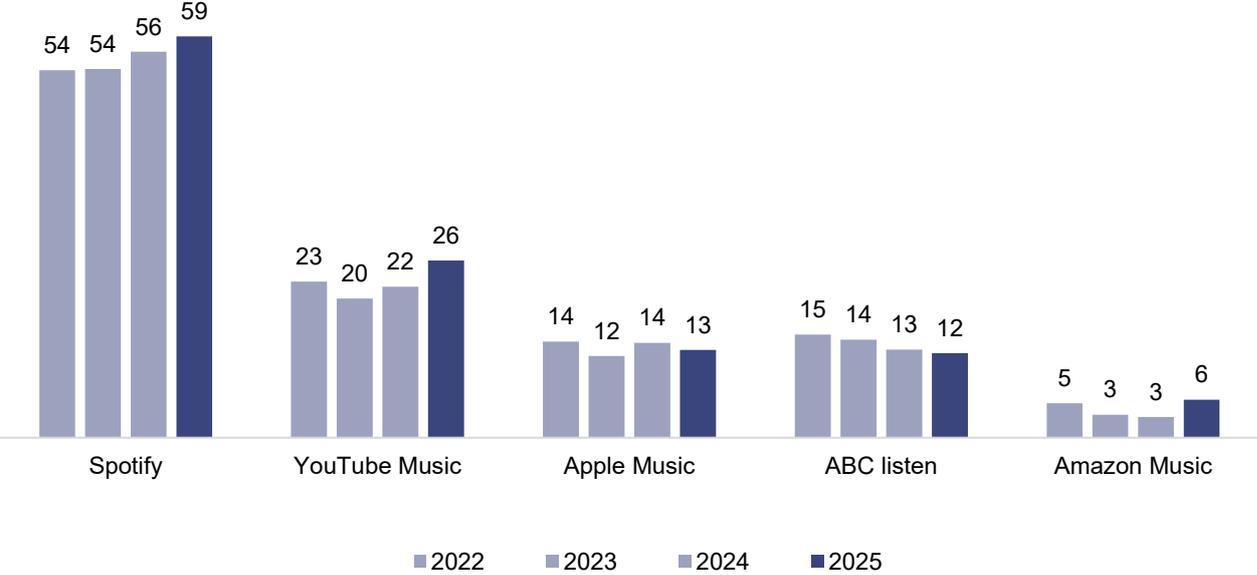
## **Podcast listening remains steady**

In 2025, just over half of Australian adults (52%) used an online service to listen to podcasts (or other non-music audio programs) in a given week, up slightly from 49% in 2022. Metropolitan residents were more likely to listen to podcasts (54%) than those in regional areas (48%).

In 2025, younger Australians aged 18–44 were also more likely to stream podcasts (66%) than those aged 45 and over (39%). Listenership among younger adults continued to grow, rising from 61% in 2022. In contrast, listenership among those aged 45 and over has remained stable over the past 4 years.

As shown in Figure 9, Spotify remains the most popular service used by those who had streamed podcasts in the previous 7 days, with 59% using the platform 2025. While Spotify's usage has grown only slightly since 2022, it continues to be more than twice as popular as the next-most-used service. YouTube Music ranks second at 26%. Usage of other podcast services has also been relatively stable over the past 4 years, with 13% using Apple Music, 12% using ABC Listen and 6% using Amazon Music.

**Figure 9: Top 5 online services used to listen to podcasts\* in the previous 7 days to June 2022 to June 2025 (%)**



Base: Australians aged 18 and over who listened to a podcast or other audio service (not music) in the past 7 days, 2022 (n=1,625), 2023 (n=1,658), 2024 (n=1,761), 2025 (n=3,190).

Source: ACMA, Communications and media in Australia: How we watch and listen to content, March 2026, ACMA consumer survey, QH5b. In the past 7 days, which of the following online services (or apps) have you listened to for the following? b) Podcasts or other audio programs (not music). \*Includes other audio programs (not music).

Industry research shows that podcast listeners often multitask while listening. A 2025 survey found that the most common activities were relaxing (52%), driving (39%), household and yard chores (36%), exercising (36%), commuting (29%), doing hobbies (26%) and working (22%).<sup>44</sup> The same survey reported that the most popular podcast genres in 2025 were comedy (29%), news and current affairs (29%), crime (28%), health and wellbeing (27%), sport (26%) and society and culture (22%).<sup>45</sup> Podcasts cater to a wide range of interests, from entertainment to information.

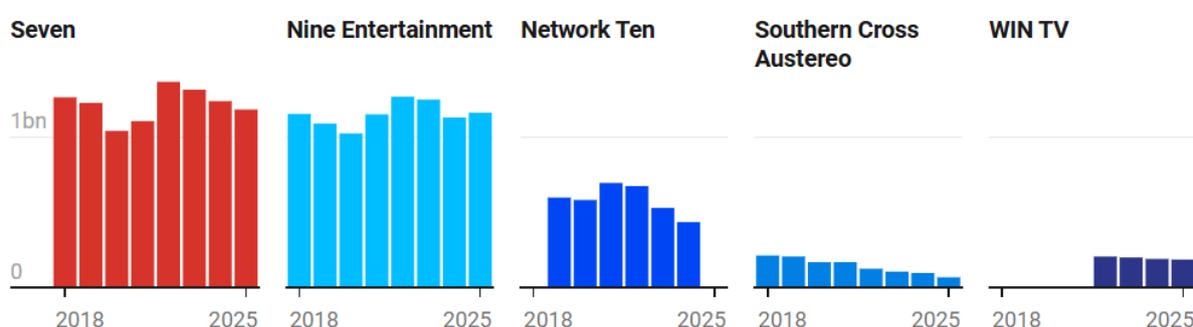
# Market revenues and industry developments

## Viewing market revenues in Australia

Figure 10 shows the publicly available TV-related revenues (broadcast and catch-up TV) for television networks between 2016–17 and 2024–25. Nine Entertainment’s annual TV related revenues (excluding revenues from streaming platform Stan) increased by 3% to \$1.2 billion in 2024–25. Revenues are similar to levels reported in 2017–18. Seven West Media’s TV revenues declined by 4% to \$1.2 billion in 2024–25 and are slightly below the level in 2017–18. Revenues for Network 10 have declined since 2020–21.

Regional broadcasters, WIN TV and Southern Cross Austereo, also had a decline in revenue in 2024–25. In 2024–25 Southern Cross Austereo sold its regional TV licences (see page 20 for more details) and its TV segment is now classified as discontinued operations.<sup>46</sup>

**Figure 10: TV revenue (\$ billions)**



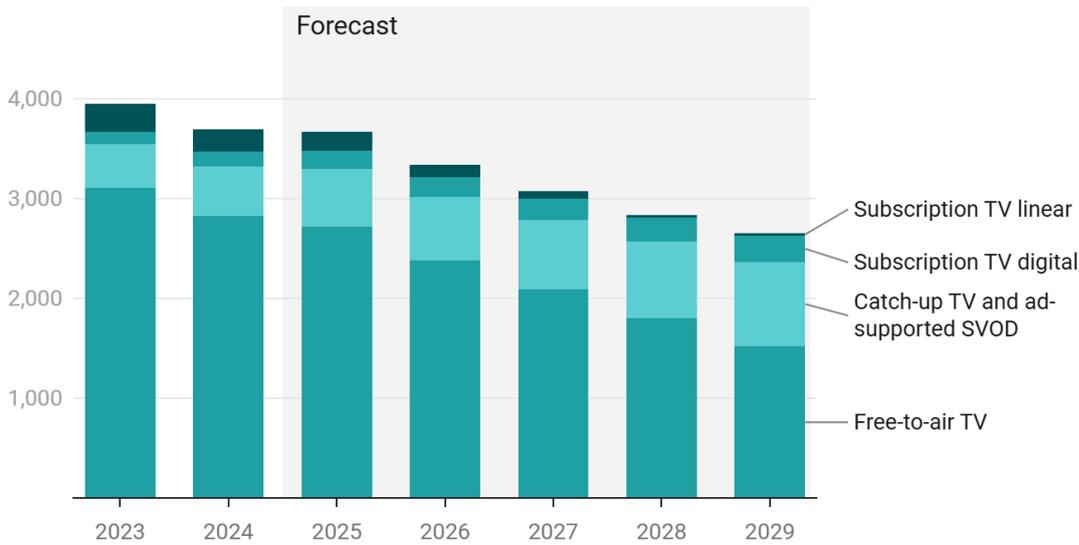
Notes: Figures are for financial years.

Sources: Seven, Nine Entertainment and Southern Cross Austereo figures capture TV (free-to-air TV and catch-up TV) revenues only and are sourced from company reports. Ten and WIN TV figures are sourced from documents filed with the Australian Securities and Investments Commission (accessed via Orbis). WIN’s revenues are only available from 2021–22 onwards.

Advertisers have been shifting their spending away from traditional media, such as free-to-air TV, to digital or online companies or services. The total advertising spending in Australia was about \$28 billion in 2024.<sup>47</sup> Around three quarter of this spending was on digital services (which includes search, social media and digital video), while 12% was on free-to-air TV/catch-up TV and 4% on radio.

Total advertising spending from TV was around \$4 billion in 2024 and is expected to decline over the 5 years to 2029, according to Magna Global (Figure 11). Driving this is continued declines in advertising spending for free-to-air TV, which is forecast to fall by 14% a year from 2025 to 2029. Advertising spending for catch-up TV and ad-supported SVOD is expected to rise by 11% a year from 2024 to 2029.

**Figure 11: Advertising spending, actuals and forecasts (\$ millions)**



Source: S&P Global Market Intelligence with advertising spending and related data provided by © Magna Global 2024. Subscription TV linear includes Foxtel and Fetch TV. Subscription TV digital is Foxtel on Demand.

**Recent changes in regional television broadcasting**

In 2024–25, the regional television sector in Australia experienced several changes involving licence transfers, affiliate realignments and service closures.

Southern Cross Austereo completed its withdrawal from television broadcasting during 2024–25. It transferred its aggregated market licences in Queensland, southern New South Wales and Victoria to Paramount/Network 10 in December 2024.<sup>48</sup> In June 2025, Southern Cross Austereo sold its remaining regional licences (including Tasmania, Spencer Gulf, Broken Hill, Mt Isa, Darwin, and Remote Central and Eastern Australia) to Seven West Media.<sup>49</sup>

Paramount/Network 10 further expanded its regional presence by acquiring the Northern New South Wales licence from WIN Corporation in May 2025.<sup>50</sup>

In July 2025, WIN Network ceased broadcasting Channel 7, 7mate and 7two in Griffith in NSW and Mt Gambier and in the Riverland in South Australia.<sup>51</sup> This change affected long-standing affiliate arrangements and altered the availability of free-to-air TV services in those areas. Viewers needed to access these channels via 7plus, Seven’s streaming service. After 3 days, Network Seven and Win Network reached an agreement and resumed broadcasting Channel 7, 7mate and 7two in these areas.<sup>52</sup>

Additionally, Mildura Digital Television ceased operations in July 2024, contributing to a reduction in regional broadcasting services.

In December 2024, the *Communications Legislation Amendment (Regional Broadcasting Continuity) Act 2024* came into effect, enabling the ACMA to permit regional broadcasters to deliver multiple commercial television services from a single transmitter. Following this change, WIN Television sought approval to provide 2 commercial broadcasting services from a single transmitter in each of Griffith, Mount Gambier and Riverland.<sup>53</sup>

## Other industry developments in the viewing market across 2024–25

On 30 September 2025, Southern Cross Austereo and Seven West Media announced a proposed merger. If approved, the merged company would have interests across free-to-air TV, streaming, audio, digital services and publishing.<sup>54</sup>

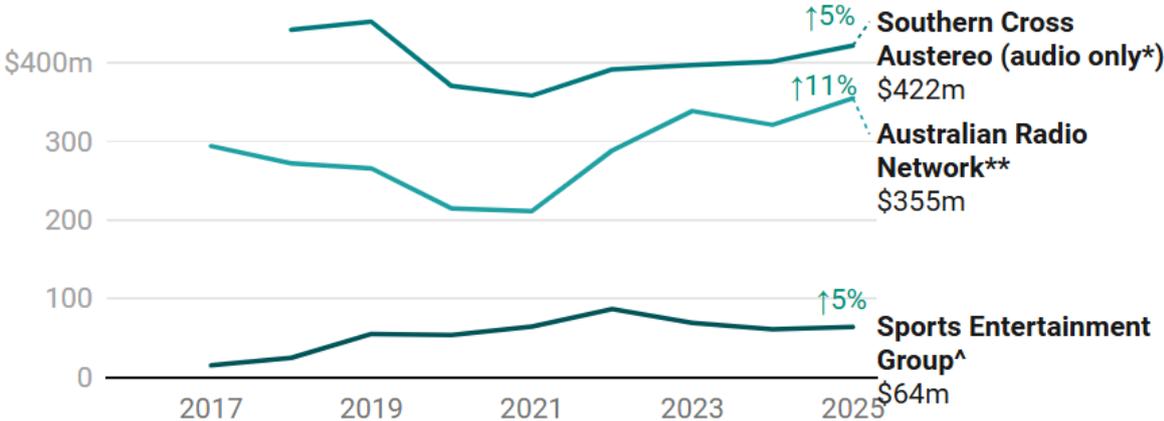
Foxtel and OzTAM announced or introduced new audience measurement tools aimed at improving the visibility and comparability of viewing data across different media:<sup>55</sup>

- In October 2024, Foxtel Media announced it would launch a new measurement system for total audience to better capture and report the viewing habits of the Foxtel Group’s 4.8 million linear and streaming subscribers.<sup>56</sup>
- In May 2025, OzTAM announced that Netflix had joined its audience measurement system.<sup>57</sup>
- In June 2025, OzTAM released its first Streamscape report.<sup>58</sup> The report provided a consolidated view of video consumption on TV sets across free-to-air TV, catch-up TV, SVOD and YouTube based on data from 5,250 households. The report found that from January to March 2025, free-to-air TV accounted for most viewing time (61.5%)<sup>59</sup>, with SVOD/YouTube (30.1%) and catch-up TV (8.4%) making up smaller shares.

## Audio market revenues in Australia

Figure 12 shows the publicly available revenues for Australian audio companies between 2016–17 and 2024–25. For Southern Cross Austereo, Australian Radio Network and Sports Entertainment Group, annual revenues increased by 5%, 11% and 5% respectively in 2024–25.

Figure 12: Audio revenues (\$ millions)

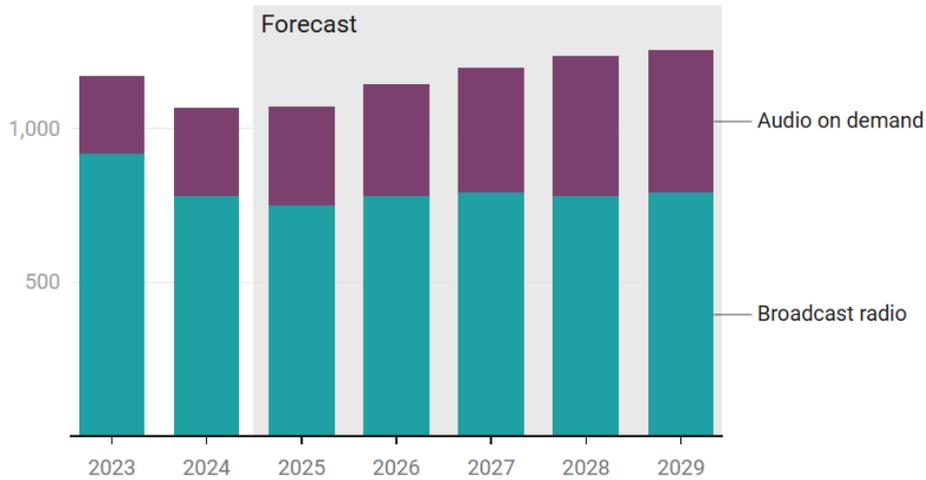


Source: \* Southern Cross Austereo figures include digital radio from 2022-23 and are sourced from annual reports between 2018 and 2025. \*\*Last 12 months as at 30 June 2024 figure to match fiscal year of other companies. Australian Radio Network’s fiscal year is January to December. ^Sports Entertainment Group Australian media advertising revenue only (includes advertising from radio, digital, television and stadium, and excludes New Zealand

media, sponsorship, production, ticketing sales and merchandise revenue).

Advertising spending for all audio formats was about \$1.1 billion in 2024, a decrease from the previous year (Figure 13). Magna Global forecasts show advertising spending for all audio formats will increase to about \$1.2 billion in 2029. Most of this growth is from audio on demand, expected to grow to around \$500 million by 2029. Advertising spending on broadcast radio (AM, FM and DAB+) is forecast to remain flat at around \$800 million.

**Figure 13: Advertising spending: actuals and forecasts for Australian audio on demand and broadcast radio (\$million)**



Source: S&P Global Market Intelligence with advertising spending and related data provided by © Magna Global, 2024. Note that Magna Global used the terms 'audio digital' (we called this audio on demand) and 'audio linear' (we called this broadcast radio).

## Spotlight: How AI is changing listening

AI is reshaping how Australians discover and engage with audio content.

Services and broadcasters are using AI to personalise listening, streamline production and improve advertising relevance.

### Drivers of change

Australians are listening to more audio on demand. They expect it to match their tastes and routines. For example, AI can analyse what people like and suggest music or podcasts.<sup>60</sup> AI is helping audio services and publishers work more efficiently by automating tasks such as playlist creation, transcription and translation.

### Global developments

International companies are using AI tools for the listening experience. Examples include:

- News companies are using AI voice tools to turn written articles into audio versions people can listen to. This includes publications such as the *New York Times*, the *Wall Street Journal* and *Time*.<sup>61</sup>
- Spotify is using AI tools for new features:
  - AI DJ curates music and adds commentary using a synthetic voice.<sup>62</sup>
  - AI playlist (beta) is available to premium users in Australia and the UK, allowing them to create personalised playlists by entering prompts.<sup>63</sup>
  - Multilingual podcasts – Spotify is testing a feature that enables selected podcasters to release episodes in multiple languages using their own voices.<sup>64</sup>
- Audible is working with publishers to create audiobooks using synthetic voices. It also plans to test technology that can translate audiobooks into other languages, with the option for human review to check accuracy.<sup>65</sup>

### Australian developments

Australian broadcasters are adopting AI for operations and audience insights.

In 2024–25, ARN's CADA tested a radio host created using AI on a weekday show. The trial highlighted possible benefits for ARN, but also led to concerns from voice actors about consent, credit and labelling.<sup>66</sup>

Southern Cross Austereo has rolled out LiSTNR's adTech hub, which uses AI to match ads to context such as weather or activity. It also partnered with Super Hi Fi to streamline music curation and station operations.<sup>67</sup>

NOVA has adopted analytics tools that use AI to deepen listener insights and increase engagement across its apps.<sup>68</sup>

News Corporation has introduced a 'listen to this article' function using AI across its digital titles, including *The Australian* and news.com.au.<sup>69</sup>

### Emerging trends and risks

The growing use of AI in audio is prompting industry debate about the impact on artists:

- Voice cloning tools are increasingly capable of imitating tone and delivery. Some industry bodies have raised concerns about consent, remuneration and disclosure, recommending clear labelling and contractual protections.<sup>70</sup>
- Generative AI is producing new compositions using existing musical works with concerns among Australian songwriters, composers and music publishers about potential impacts on their income.<sup>71</sup>

# Glossary

## **AM radio**

A traditional type of radio broadcasting that uses amplitude modulation to transmit audio content over the airwaves.

## **Ad-supported SVOD**

A paid service model where users subscribe to access a library of on-demand content with ads.

## **Application (apps)**

Software programs designed for use on digital devices such as smartphones, tablets or computers. They enable users to perform specific tasks, such as accessing social media, shopping online or streaming content.

## **Artificial intelligence (AI)**

Computer systems that perform tasks normally requiring human intelligence, such as learning, reasoning and problem-solving.

## **Catch-up TV**

A service that allows viewers to watch previously aired television shows as well as live channels through digital applications. Examples include ABC iView and SBS on Demand. Also called broadcast video on demand.

## **DAB/DAB+ digital radio**

A digital radio broadcasting standard. Like AM or FM radio, digital radio is broadcast free-to-air but uses a digital signal requiring a DAB+ digital radio-enabled device.

## **Digital streaming**

The online delivery of video or audio content, where users can watch or listen without downloading the media.

## **Free ad-supported streaming TV (FAST)**

A type of streaming service that allows users to watch live or scheduled programming for free, supported by ads, without the need for a paid subscription. Examples include Tubi and Samsung TV Plus.

## **Free-to-air TV**

Broadcast television services where the signal is delivered without charge to the viewer. Examples include the ABC, SBS, 7, 9, 10, 9Go! and 7mate.

## **FM radio**

A traditional type of radio broadcasting that uses frequency modulation to transmit audio content over the airwaves.

## **Generative AI**

AI that creates new content, such as text, images or code, based on patterns learned from data.

**Linear TV**

The traditional method of broadcasting scheduled television programming via terrestrial, satellite or cable networks. Viewers must tune in at a specific time to watch content on a designated channel, as determined by the broadcaster's programming schedule.

**Music streaming**

The online delivery of audio content, where users can listen without downloading the media.

**Podcast**

An episodic audio program that can be downloaded or streamed, covering a variety of topics including news, storytelling and education.

**Smart TV**

A TV connected to the internet and provides a user interface for accessing audio-visual content – these types of TVs also contain a radiofrequency tuner.

**Subscription video-on-demand (SVOD) (also known in this report as an online subscription streaming service)**

A paid service model where users subscribe to access a library of on-demand content, typically without ads. Examples include Netflix, Stan and Disney+.

**TV (also called standard TV in this report)**

A TV with a radiofrequency tuner connected to an aerial that receives audio-visual content from broadcasters' TV networks.

**User-generated or short-form online video service**

Videos typically under 10 minutes in length that are created and shared by users on online platforms. Examples include YouTube, TikTok and Instagram Reels.

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