Media & Entertainment Consumer Insights 2024

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About Media & Entertainment Consumer Insights

Our 13th edition of *Media & Entertainment Consumer Insights* explores the ever-changing media landscape, with a specific focus on:

- The media consumption habits of Australians, and where we spend our time
- The number and cost of our subscriptions, and how we manage them
- Our level of trust in media channels, and how that influences our interactions and perception of news and social media
- The different ways in which we engage with content and advertising
- Our love of sport – an integral part of the Australian media experience

Join us as we unravel the trends, behaviours and shifts defining the Australian media and entertainment consumer landscape in 2024.

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
Gen AI	Generative AI
Subscription stack	The portfolio of media subscriptions an individual or household subscribes to

Our research comprises a nationally representative sample of 2,000 consumers, aged 16–90, weighted for demographics such as age, gender, location and working status. An independent research organisation conducted the survey in July–August 2024. Questions cited in this document may be simplified for the sake of visualisation.

Key takeaways

1

Australians consumed 10% less media and entertainment this year than in 2023. Gen Z cut back the most (-25%), suggesting we may have reached the peak of media consumption.

10% Australians are spending 10% less time on media and entertainment, as young consumers in particular make more conscious choices about how they spend their free time.

- Several factors could be driving this fall in consumption time, including the impact of last year's Hollywood strikes on the production of new content.
- Even so, the average Australian consumes more than six hours of media and entertainment per day. And we start early: 74% of us consume content as soon as we wake up, suggesting the concept of prime time has fundamentally changed to prime *times*.
- Gen Z are spending 17 hours a week watching video content (across SVOD, free-to-air and video platforms), 10 hours on social media and over 11 hours on audio content, showing their attention is increasingly divided between media types, platforms and formats.

2

Subscriptions per household has risen to 3.3 (3.2 in 2023). Average spend has grown from $57 to $63, likely driven by price increases and the launch of more tiers within the SVOD category.

$88 Gen Z households hold an average of 4.7 digital entertainment subscriptions at a monthly spend of $88 ($79 in 2023).

- SVOD and music account for 85% of the average subscription stack (2.8 per household), with the remainder split between sport, gaming, news and magazines.
- Monthly subscription spend has increased to $63 per household ($57 in 2023). Monthly subscription spend reduces as consumers age, with Gen Z spending nearly twice as much as boomers.
- Switching behaviour has increased with 49% of SVOD consumers making a change to their holdings in 2024 (44% in 2023). 75% are worried about the cumulative cost of having multiple subscriptions, but 66% still expect to have the same number in 2025.

3

FTA advertising is still king: 49% of consumers say it somewhat or completely influences their buying decisions. But it may soon lose its crown, with social media ranking highest for younger generations.

56% More than half of consumers (56%) are still willing to pay a premium for ad-free SVOD content.

- Australians continue to resist ad-based video content offered by streaming providers: 56% of consumers are willing to pay for SVOD to avoid ads, compared to 32% for news and magazines.
- Younger consumers say social media advertising is the most effective (Gen Z: 70% somewhat or completely influenced).
- When it comes to devices, advertising power continues to shift from the TV to the smartphone, where 40% of consumers are most comfortable engaging with advertisements (29% in 2023).

Key takeaways *(cont.)*

4

Established major media publishers remain the most trusted source of news. But the rise of AI–generated content, which consumers trust the least, is a growing threat.

40% Two in five Australians think TV broadcasters drive positive change in society.

- Many Australians still get their news from traditional broadcasters: 34% rank TV programs as their top source (33% in 2023), while 17% get most of their news from social media.
- Trust is strongest in major news publishers, with 73% of consumers considering them to be moderately or very trustworthy sources of news.
- In comparison, just 40% consider news published on social media trustworthy, and only 28% feel the same about AI-generated content.

5

Australians are concerned about social media's impact on children, and nearly all consumer would support new restriction(s) for users under 16 years of age.

9 in 10 9 in 10 consumers agree children's access to social media should be restricted.

- 70% of respondents who live with children are concerned about social media's impact on their childrens' wellbeing, and only 33% of this group feel current restrictions and regulations do enough to protect their children online.
- Consumers would support a range of new social media restrictions for users under 16 years of age, including blanket bans on account ownership (56% in favour), restricting how platforms use data, personalisation and algorithms (44%), and regulating the time children can spend on social media (39%).

6

3 in 4 consumers watch sport weekly, but sport fans' wants and needs are changing as they consume content in new and different ways.

1.5x Gen Z are 1.5x more likely to watch sport on a device* other than on TV.

- There's an increasing generational divide in how fans interact with sport: Gen Z watch 4–5 hours per week and mostly engage on their smartphone, while Boomers consume 1–3 hours and prefer to watch on TV.
- Supplementary content is influencing how fans engage with sport, particularly younger consumers. 70% of Gen Z say they have changed their sport viewing behavior after seeing content on social media.
- After surging during the 2023 FIFA Women's World Cup, interest in women's sport has continued to thrive among young Australians: 60% of Gen Z now regularly engage with women's sport and 66% are eager to see more.

*Smartphone, tablet or laptop

CONSUMPTION

Days of our lives

Consuming media is the first thing most Australians do when they wake up and many of us engage with multiple forms of media at once – raising the question, what is 'prime time' in this day and age?

Australians continue to consume content wherever and whenever they like. This is nothing new, but our choices are multiplying exponentially as new devices, platforms and content formats emerge – and some are winning the battle for our attention at various times of the day.

Most Australians engage with some form of media as soon as they wake up.

Around four in five Gen Z (82%) and Millennial (78%) consumers engage with media to start their day, most commonly by browsing social media (28%).

Almost two in three Boomers (66%) also turn to media when they wake up, with radio the most popular (30%).

Eat, play, love: all generations like meals with a side of media.

Consumers are more likely to engage with media over breakfast (78%) than lunch or dinner.

While dinner is historically the most social meal of the day, less than a third of Australians pick conversation over content (27% go without screens at dinner time).

When it's time to commute, we're all ears.

Consumers of all ages love to engage with media as they commute (83%), with audio content being the most popular (60%).

On the clock, but always connected.

67% of Gen Z employees and 67% of Millennials consume content at work, most often by listening to audio content.

In our free time, long-form content steals the show.

Only 5% of consumers forgo screens in their free time; watching TV and movies is by far the most popular activity (42% across age groups).

We bookend our days with content.

Just as media is a popular way to start the day, more than 81% of us engage with it just before we sleep, with 29% choosing to watch TV in bed.

Consumption totals

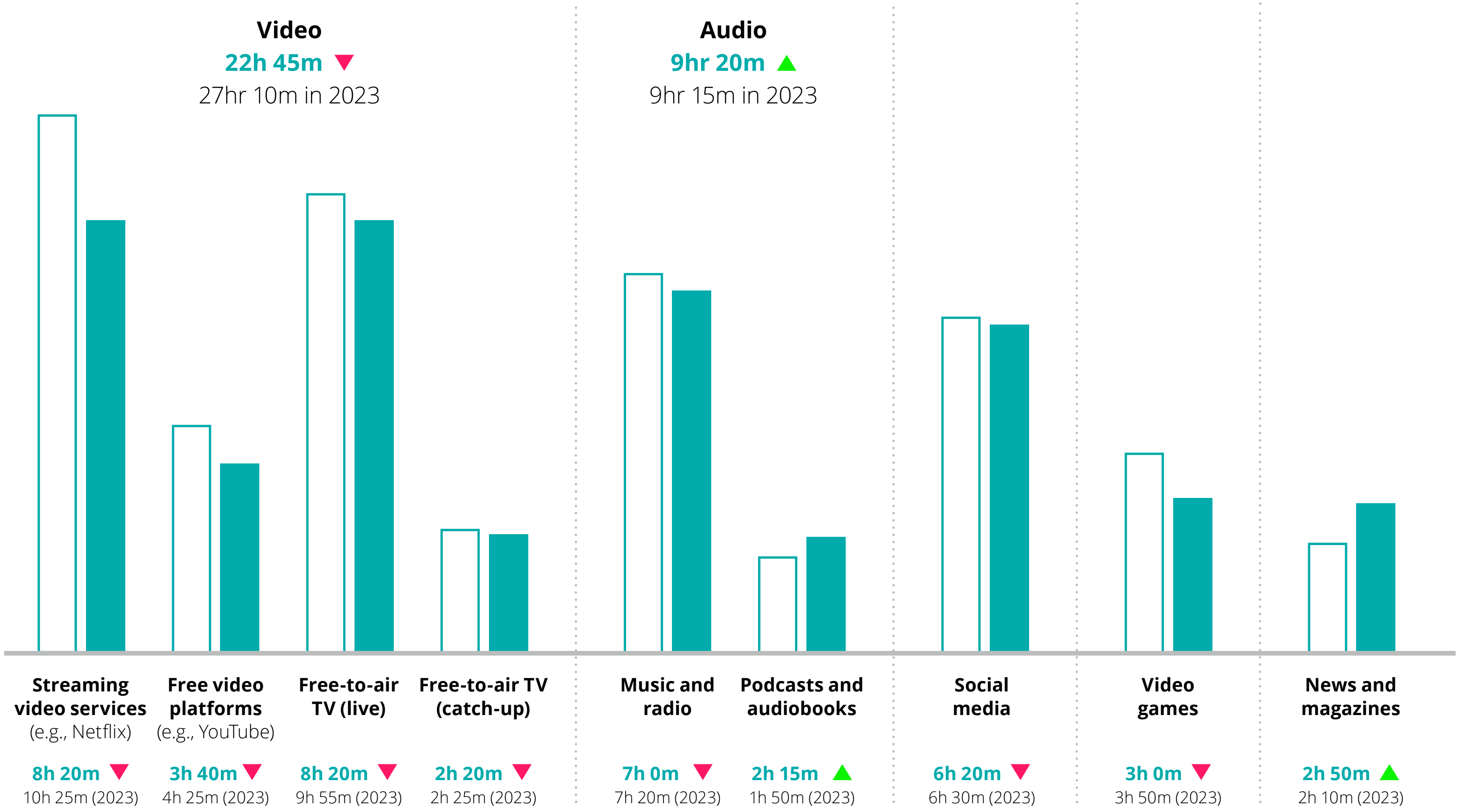
The average Australian consumes more than six hours of digital entertainment per day – slightly less than in 2023. Streaming video services, free-to-air TV, and music and radio are leading the pack.

2023 2024

Weekly media and entertainment consumption:
44h 15m in 2024 ▼
48h 55m in 2023

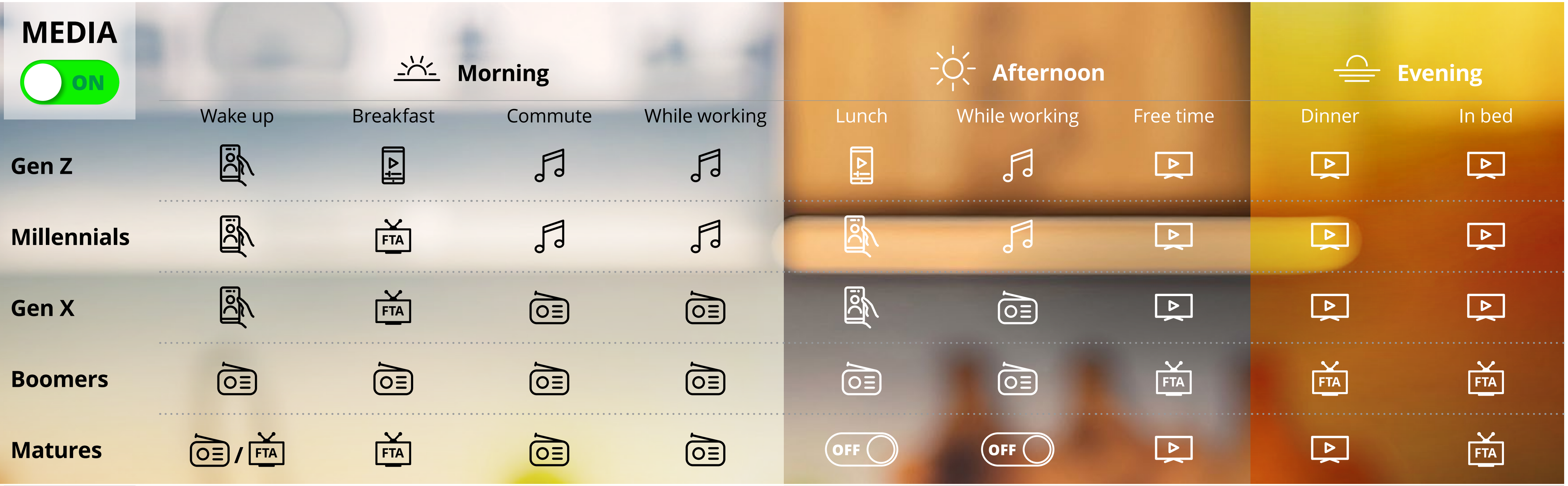
Australians are reshaping their relationship with media. Our weekly consumption has fallen, driven by falling video consumption across multiple categories. Could this downward trend be reflective of media supply (and the impact of last year's Hollywood strikes), or are we more actively reducing the time we spend watching short and long-form content?

Gen Z spends 3h 45m more on social media content than the overall average (10h 5m vs. 6h 20m).



Daily consumption patterns

What's a typical day in the life of the Australian media and entertainment consumer?
The following personas reflect our favourite ways and content types by generation and time of day.



Key

- Browsing static posts on social media
- Watching UGC on social media
- Listening to radio
- Streaming music
- Watching free-to-air
- Watching TV shows or movies (e.g. Netflix)

OFF

But we're not always choosing to engage with media

Proportion of consumers not engaging with digital entertainment (by time of day):

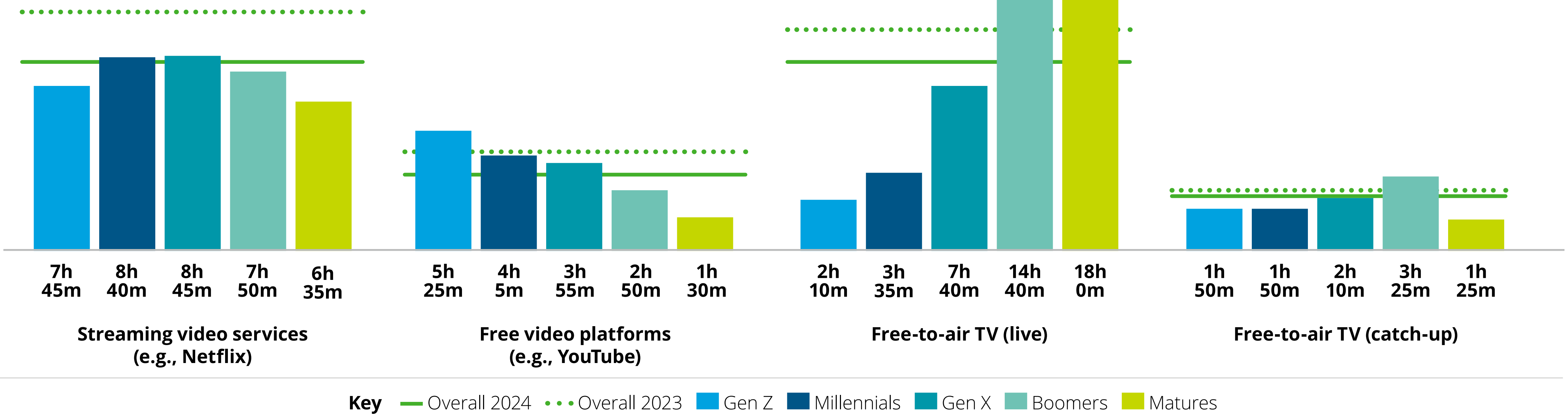
Wake up	Breakfast	Commute	While working	Lunch	While working	Free time	Dinner	In bed
26%	**22%**	**17%**	**43%**	**26%**	**46%**	**5%**	**27%**	**19%**

Video spotlight

Around half our digital entertainment consumption time is spent on video, with streaming services now level with free-to-air TV.

We're spending less time watching video content than in 2023, with streaming services seeing the steepest drop. Several factors could be driving this change, including: the increase in price of many SVOD providers, the proliferation of ad-based tiers, the draw of live sport, a diminishing appetite for long-form video content or a temporary dip in quality content following last year's Hollywood strikes. Whatever the cause, this evolving dynamic is one to watch closely.

Overall weekly video consumption: **22h 45m in 2024** ▼ 27h 10m in 2023



Social media spotlight

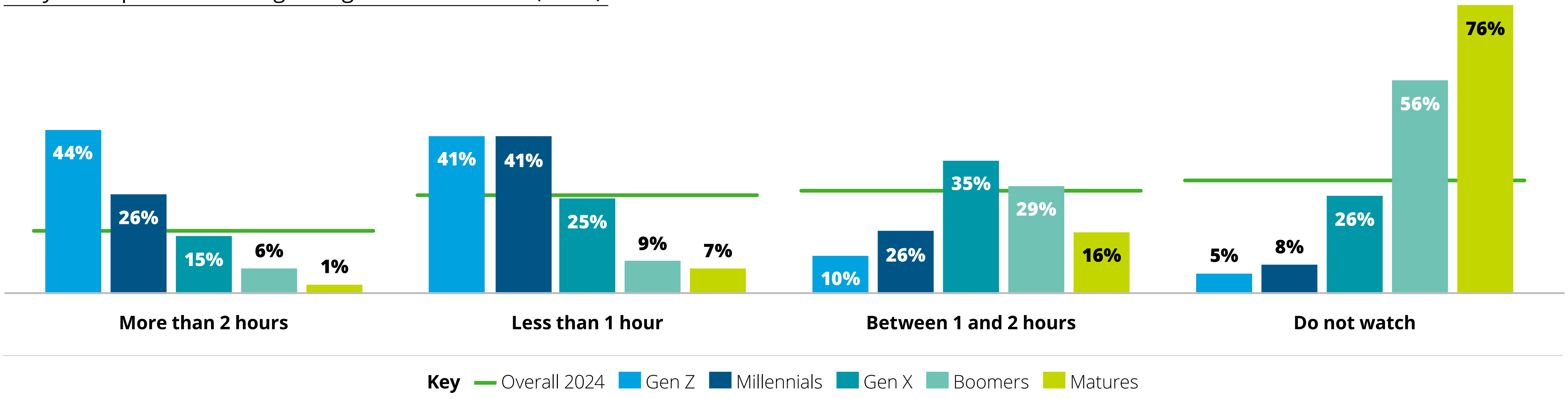
Time spent on social media has plateaued as Gen Z, the top consumers, start to cut back.

While social media remains incredibly popular, the time we spend on socials has stabilised amid a pivotal shift in consumption habits. Younger consumers in particular, appear increasingly mindful of how much of their day is spent scrolling feeds and are cutting back as a result.

Weekly time spent consuming social media:

Overall	6h 20m ▼	6h 30m in 2023
Millennials	7h 45m ▲	7h 40m in 2023
Boomers	4h 30m ▲	3h 55m in 2023
Gen Z	10h 5m ▼	12h 45m in 2023
Gen X	6h 5m ▲	5h 50m in 2023
Matures	2h 40m ▼	3h 55m in 2023

Daily time spent consuming user-generated content (video):



Social media spotlight *(cont.)*

Despite social media's continued popularity, only one in four Australians believe it positively impacts their wellbeing.

Despite the perceived negative impact, almost two-thirds of respondents (64%) spend more than one hour per day on social media, slightly up from last year (60%).

Social media providers will need to address these concerns, while also balancing their efforts to grow their audiences and maintain retention – a challenging conflict.

46% regularly spend more time on social media than planned

Views are mixed on how much time we spend on socials:

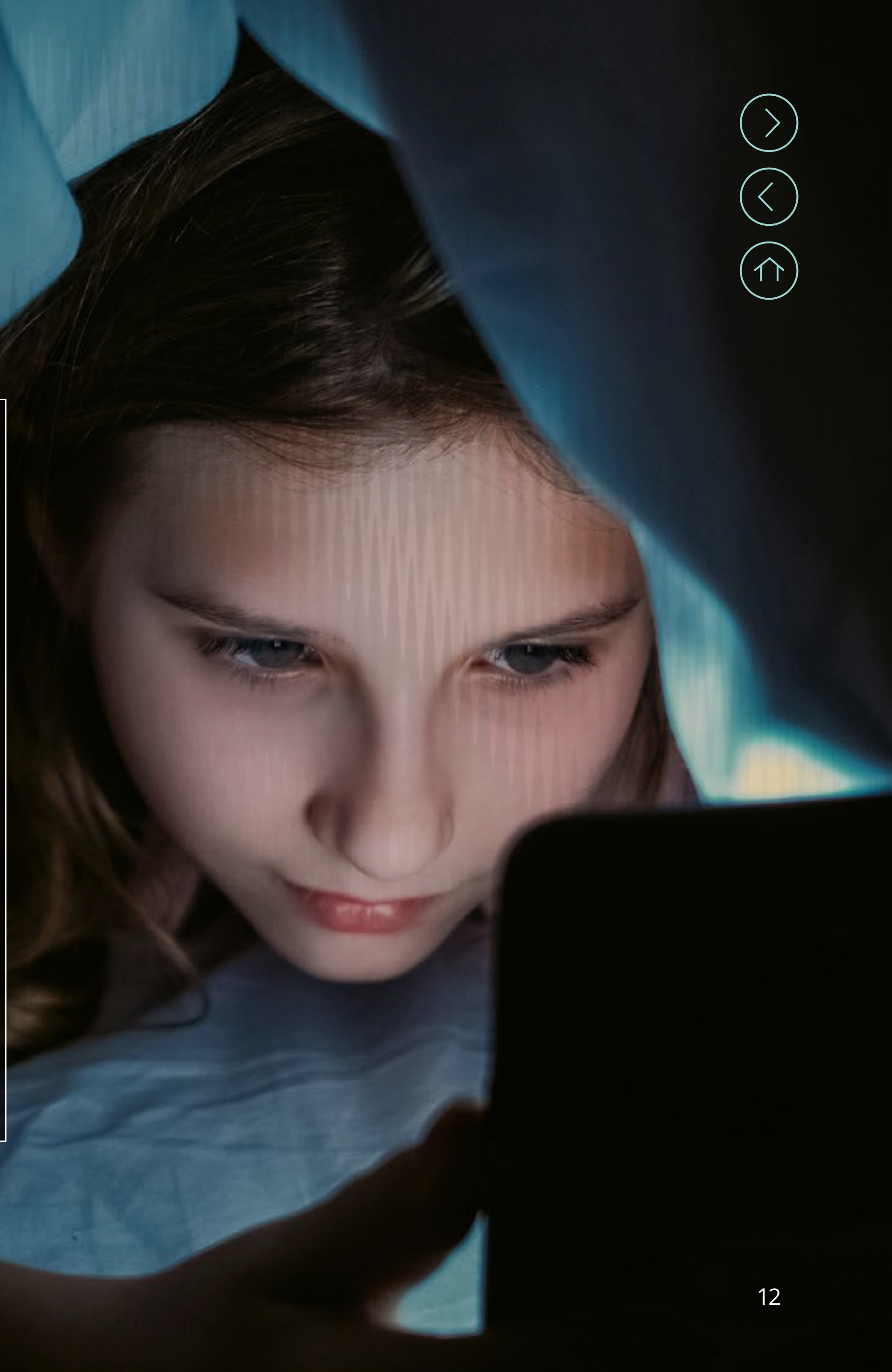
33% are concerned

33% are not concerned

33% are neutral, or declined to answer

Time spent per day on social media:

None	10%
Less than an hour	26%
1–2 hours	34%
3–5 hours	22%
6–10 hours	6%
10+ hours	1%



Social media spotlight *(cont.)*

Our favourite social media platforms and social media activities have remained largely the same

Top social media platforms*:

	#1	#2	#3
Overall	Facebook 74%	YouTube[1] 69%	Instagram 51%
Gen Z	Instagram 66%	YouTube[1] 59%	TikTok 57%
Boomers	Facebook 87%	YouTube[1] 77%	Instagram 37%

Nearly three in four consumers rank Facebook within their top three platforms by weekly time spent.

While the top three social media platforms remain unchanged, YouTube is closing the gap on first place. This growth is an interesting development: as we become increasingly mindful of our social media usage, YouTube's mix of short and long-form video content could make it more appealing than platforms solely focused on bite-sized video.

How we spend time on social media is linked to the nature of our favourite platforms.

Australians spend most of their social media time browsing feeds, passively consuming the content each platform serves them. But with many choosing to cut back, particularly among Gen Z (20% year-on-year reduction), platforms will need to be increasingly creative in how they capture attention.

Top three ways we spend time on each platform:

	Overall	Facebook	YouTube[1]	Instagram	TikTok	LinkedIn
#1	**Browsing feeds**	Browsing feeds	Watching videos	Browsing feeds	Watching videos	Reading/ watching news (updates, articles, etc.)
#2	**Watching videos**	Messaging with friends	Browsing feeds	Watching videos	Browsing feeds	Browsing feeds
#3	**Messaging with friends**	Looking at photos	Messaging with friends	Messaging with friends	Messaging with friends	Messaging with friends

*By % who ranked the platform within their top three. 1. Free video platforms (e.g., YouTube) are included as both a video content provider and social media platform

Social media spotlight *(cont.)*

UGC is as popular as ever – especially among younger Australians – and continues to win territory against SVOD and other media categories.

While we're becoming more mindful of how we spend our media time, short-form UGC remains as alluring as ever. Its effortless, lean-back experience allows us to switch off as we scroll – even if just for a moment.

One in five people create content on social media sites to generate income, with Gen Z taking the lead.

Gen Z	40%
Millennials	35%
Gen X	17%
Boomers	5%
Matures	2%

38% Spend more time viewing UGC online than they did six months ago

Gen Z	58%	Boomers	19%

36% Share UGC online as a way to communicate with friends and/or family

Gen Z	62%	Boomers	15%

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

Gen Z	63%	Boomers	13%

29% Would, if given the choice, prefer watching UGC online instead of streaming movies and TV shows

Gen Z	59%	Boomers	13%

Audio spotlight

Audio content remains a staple of the Australian media diet, accounting for the second-largest share of our media consumption time.

Even as we become more deliberate with how we spend our time, the passive, hands-free nature of audio will continue to make it a convenient and lasting media category for commutes, as well as morning and work routines.

We're listening to slightly less music and radio than last year, though the opposite is true of podcasts, particularly among older Australians.

42% of Australians consume podcasts and audiobooks at least once per week

Most popular audio type when commuting:

Gen Z	**Streaming music**
Millennials	**Streaming music**
Gen X	**Listening to radio**
Boomers	**Listening to radio**
Matures	**Listening to radio**

Weekly time spent consuming audio:

9h 20m

▲ 9h 15m in 2023

7h 0m

Radio/music

▼ 7h 20m in 2023

2h 20m

Podcasts

▲ 1h 50m in 2023

SUBSCRIPTIONS

Subscription holdings

The subscription stack continues to grow, albeit slowly, driven by a slight uptick in SVOD and music subscriptions, which together represent 85% of the average subscription stack.

Average number of subscriptions per household:

2021	2022	2023	2024
2.3	3.1	3.2	3.3

Average subscriptions per media category (all respondents):

2.1 SVOD
▲ 2.0 in 2023

81% of respondents hold a SVOD subscription

Gen Z 2.8 | **93%** hold a subscription

Boomers 1.4 | **67%** hold a subscription

Music
0.7 ▲ 0.6 in 2023
47% hold a subscription

Sport
0.3 = 0.3 in 2023
25% hold a subscription

Pay TV
0.1 = 0.1 in 2023
15% hold a subscription

Gaming
0.1 = 0.1 in 2023
6% hold a subscription

News
0.1 = 0.1 in 2023
3% hold a subscription

Magazines
0.1 = 0.1 in 2023
1% hold a subscription

Subscription holdings *(cont.)*

Music and SVOD subscriptions remain more popular among younger consumers, while news, magazines and pay TV skew towards older generations.

Share of respondents with a subscription and the average number they hold (subscribers only):

Key

##%	Proportion who subscribe
#.#	Average subscriptions per subscriber*
##%	Largest share of subscribers per category

Category		Overall 2024		Overall 2023	Gen Z	Millennials	Gen X	Boomers	Matures
SVOD	%	81%	▲	77%	93%	92%	82%	67%	59%
	Avg.	2.6		2.6	3.0	3.0	2.5	2.0	1.6
Music	%	47%	▼	49%	78%	69%	44%	22%	13%
	Avg.	1.4		1.2	1.5	1.6	1.3	1.2	1.6
Sport	%	25%	▲	23%	34%	35%	24%	16%	13%
	Avg.	1.2		1.1	1.3	1.3	1.1	1.2	1.0
Pay TV	%	15%	▲	11%	11%	13%	12%	20%	28%
	Avg.	0.1		0.1	0.1	0.1	0.1	0.1	0.1
Gaming	%	6%	=	6%	12%	11%	5%	1%	0%
	Avg.	1.3		1.3	1.3	1.1	1.5	1.6	0.0
News	%	3%	▼	5%	1%	1%	2%	6%	6%
	Avg.	1.4		1.4	1.0	1.3	1.3	1.5	1.4
Magazines	%	1%	▼	3%	0%	0.4%	2%	1%	6%
	Avg.	1.7		1.6	0.0	2.0	1.4	2.1	1.6

The proportion of consumers who subscribe to specific media categories – and the average number of subscriptions they hold within them – has remained steady since last year, suggesting we're approaching a saturation point.

If this is the case, media providers must explore how they can innovate to capture and retain attention, and drive growth when consumers reach their limit.

*i.e. excluding those with 0

Subscription spend

We're spending more than ever on digital entertainment, but most of us are worried about the cumulative cost.

Media spend is increasing, partly fuelled by major SVOD providers raising prices and launching ad-based tiers (increasing subscription volume).

Consumers continue to view video subscriptions as a top priority – even as they tighten their belts – suggesting many of us are swapping expensive nights out for the comfort and value of streaming and other digital entertainment content.

$63 ▲ Average spend in 2024

$57	2023
$62	2022
$55	2021

75% are worried about the cumulative cost of having multiple subscriptions, an indicator that could drive cutbacks next year

Digital entertainment spend decreases with age:

Gen Z	Millennials	Gen X	Boomers	Matures
$88	$82	$55	$48	$42

Gen Z are around twice as likely to share accounts than the average consumer, with 42% accessing at least one SVOD account paid for by friends or family (23% across all ages).

Subscription spend *(cont.)*

More than one in three Australians are overspending on their digital entertainment budget, which is likely to drive future switching behaviour.

Media spend, budgeting and cost concerns by generation:

	Overall	Gen Z	Millennials	Gen X	Boomers	Matures
Average media spend ($ per month)	**$63**	**$88**	**$82**	**$55**	**$48**	**$42**
Proportion who overspent relative to their budget (%)	**35%**	**54%**	**45%**	**34%**	**22%**	**17%**
Worried about cumulative costs of their media spend (%)	**75%**	**72%**	**78%**	**78%**	**73%**	**65%**

The generation with the highest spend, **Gen Z**, were also overspending more frequently relative to other generations.

While concern about cumulative costs is significant across all age groups, **Millennials** and **Gen X** were more likely to be worried than others.

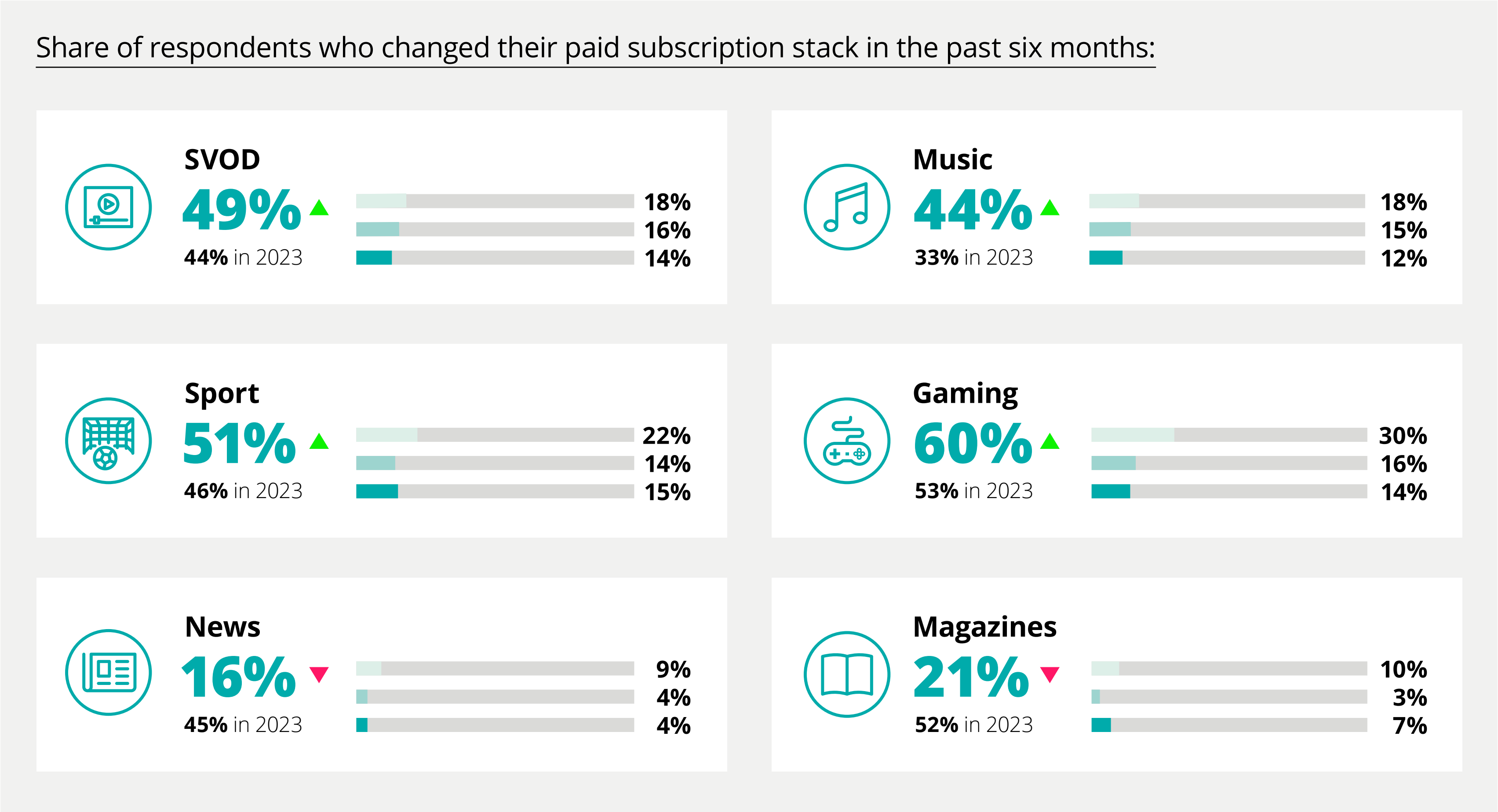
Switching behaviour

Switching behaviour has risen across the major categories as consumers grapple with the cost of living squeeze.

SVOD and music, the most dominant subscription categories, have seen a rise in switching behaviour in 2024.

Consumers are adding and/or cancelling subscriptions at relatively similar rates, suggesting they want to maximise the value of their stack.

The most striking trend is in gaming: of the 60% of subscribers who made a change, nearly half added a new subscription(s) without cancelling another. Gaming's appeal to younger demographics is a likely driver, given younger generations are more inclined to explore new options and switch subscriptions to find the best fit.



Key

- Added a subscription
- Added and cancelled a subscription
- Cancelled a subscription

Subscription outlook (SVOD)

However, for SVOD, most Australians expect to have the same number of subscriptions in 2025 despite the rise in switching behaviour.

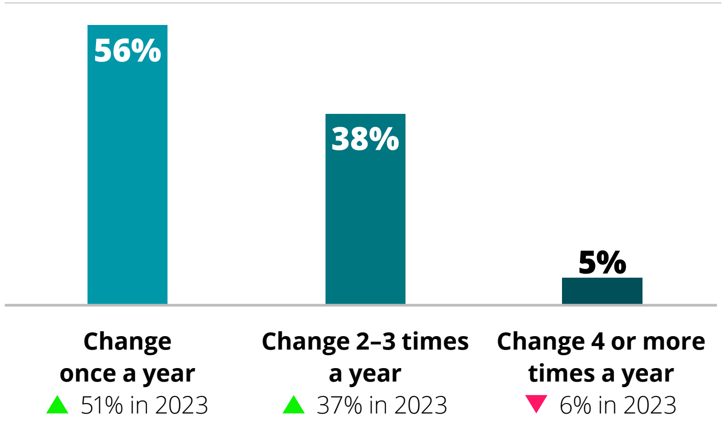
Most people still periodically review their SVOD stack, but a smaller share than last year.

This could be due to the emergence of cheaper, ad-based tiers which reduce our inclination to periodically assess the value of our subscriptions.

25% Change their SVOD subscriptions occasionally
▲ 20% in 2023

70% Periodically review their SVOD subscriptions
▼ 80% in 2023

Frequency of SVOD subscription switching:



62% Gen Z
▼ 73% in 2023

69% Boomers
▼ 83% in 2023

Despite increasing prices, the crackdown on account sharing, and the introduction of ad-based tiers, most of us expect to have the same number of SVOD subscriptions next year.

Expectations of subscription stacks in 12 months' time:

10% expect to hold more subscriptions than now
▲ 7% in 2023

12% expect to hold fewer subscriptions than now
= 12% in 2023

66% expect to hold the same number of subscriptions
= 66% in 2023

12% expect to hold no subscriptions
▼ 15% in 2023

SVOD retention plays

Quality content is king for retention, but there are perks that would keep consumers subscribing for longer.

We have stronger relationships with TV shows than the streaming providers we watch them on, proving that nothing retains subscribers like quality content.

From *Star Wars* to *Fallout*, our loyalty to the shows and characters we love has inspired new series and fuelled the rise of super franchises. These sticky franchises help content creators and streaming platforms retain consumer attention in a fiercely competitive market, while driving growth in merchandise and over revenue streams.

Consumers' strongest relationships with content and brands:

#1 Individual shows that I watch

#2 The studio that develops the TV shows that I watch

#3 The streaming TV provider and/or broadcaster that I watch TV shows on

Certain perks would prevent some consumers from cancelling their SVOD subscription.

35% access to first run movies (e.g. recent releases)

30% access to loyalty programs with discounts on other offerings

30% no ads or restrictions on what they can watch (e.g. # of screen limits)

What matters most differs by generation.

Gen Z and Millennials are the most likely to keep subscriptions because of a retention offer with additional features.

- Gen Z: **85%**
- Millennials: **82%**

would retain a subscription based on retention offers

38% of Gen Z would be interested in access to another gaming, music, or video streaming service as a retention offer, the highest of any generation

Boomers and Matures are far less likely to be convinced to retain a subscription through retention offers.

- Boomers: **59%**
- Matures: **53%**

would cancel a subscription in spite of retention offers

39% of Boomers say price is all that matters

AUDIENCES AND ADVERTISING

Media diversity

We value Australian stories, content and media providers, but they aren't always our first choice.

Value having access to Australian content on video streaming services **72%**

Would prefer to watch content produced in Australia or featuring Australian stories over international media **48%**

62% would prefer to subscribe to an Australian-owned media service

Gen Z	Boomers
55%	64%

Most consumers feel the content they access is sufficiently diverse.

More than two-thirds

believe they get diversity in tone, opinion and cultural representation from content providers.

Generally, those who seek diversity in content report better access to it.

Actively seek diverse voices and representation in the content they consume		Believe that they get diversity in tone, opinions, and cultural representation across the content providers they access
64%	Gen Z	74%
58%	Millennials	74%
51%	Gen X	71%
36%	Boomers	61%
23%	Matures	45%

Engagement (multi-channel)

Consumer engagement is multi-dimensional and media providers need to think beyond primary and social channels to create cohesive consumer experiences.

We like to supplement content with a side of social media.

Share of respondents who followed an official social media account for content they consume:

Gen Z	65%
Millennials	52%
Gen X	34%
Boomers	11%
Matures	11%

54% of Gen Z searched for (and 52% followed) a fan account for content they consume

Across all generations, we're least interested in active engagement.

22% discussed a media brand on a forum

14% attended an event related to content they consume

11% hosted a social event around a premiere

But preferences vary between genders.

		Women	Men
Passive	Followed a social media site for video or audio content they like	37%	31%
	Followed a fan account for a TV series, movie, book or game they like	32%	23%
	Searched for fan-made content for a media brand they follow	28%	27%
Active	Engaged in forum discussions for a media brand they follow	20%	23%
	Attended an event for a TV series, movie or game they like	11%	16%
	Hosted a social event around a premiere	8%	14%

Engagement (multitasking)

Multitasking most often involves browsing friends' social media while engaging with other content.

52% engage with multiple content types at the same time

59% Women

44% Men

72% of **Gen Z** often or always multitask when engaging with media content

Favourite ways to multitask (secondary media):

	Overall		Gen Z	
#1	61%	Browsing friends' social media	58%	Browsing friends' social media
#2	49%	Social media or messaging to interact with others	58%	Watching short-form UGC
#3	46%	Looking up something related to primary content	47%	Watching online videos

Discovery

Family, friends and new release lists are our go-to methods of SVOD content discovery, but there's no clear frontrunner.

This year's survey shows there's no single dominant method of SVOD content discovery. Given the sheer volume of content on offer, we need a quick and easy way to decide what to watch. We most often turn to recommendations from friends and family, suggesting current algorithms still fall short in helping us find new content we like across and within platforms. SVOD providers have a major opportunity to refine these algorithms and better capture and retain viewers' attention in an increasingly crowded market.

While we prefer recommendations from friends and family, we are still reliant on recommendations and new releases surfaced by our SVOD platforms.

Top five methods for SVOD content discovery:

1 — **20%** (**21%** in 2023)
Suggestions and recommendations from friends and family

2 — **19%** (**25%** in 2023)
List of new releases or newly added content on the service or platform

3 — **13%** (**15%** in 2023)
List of most popular/trending titles on the service or platform

4 — **12%** (**12%** in 2023)
Personalised recommendations the service or platform gives me

5 — **10%** (**9%** in 2023)
Coverage of TV/movies on social media

Younger Australians are most likely to search for content through alternate means.

In the last 12 months:

1 in 4 — **Gen Z** consumers used VPN to access TV shows or movies not available in their country

1 in 6 — **Gen Z** consumers used a pirating site to access paid media content in any category, compared to 1 in 10 overall

Factors most likely to convince pirating users to pay for that content:

Access to a greater range of similar content as part of subscription	60%
Better quality video	59%
Same day global releases	57%

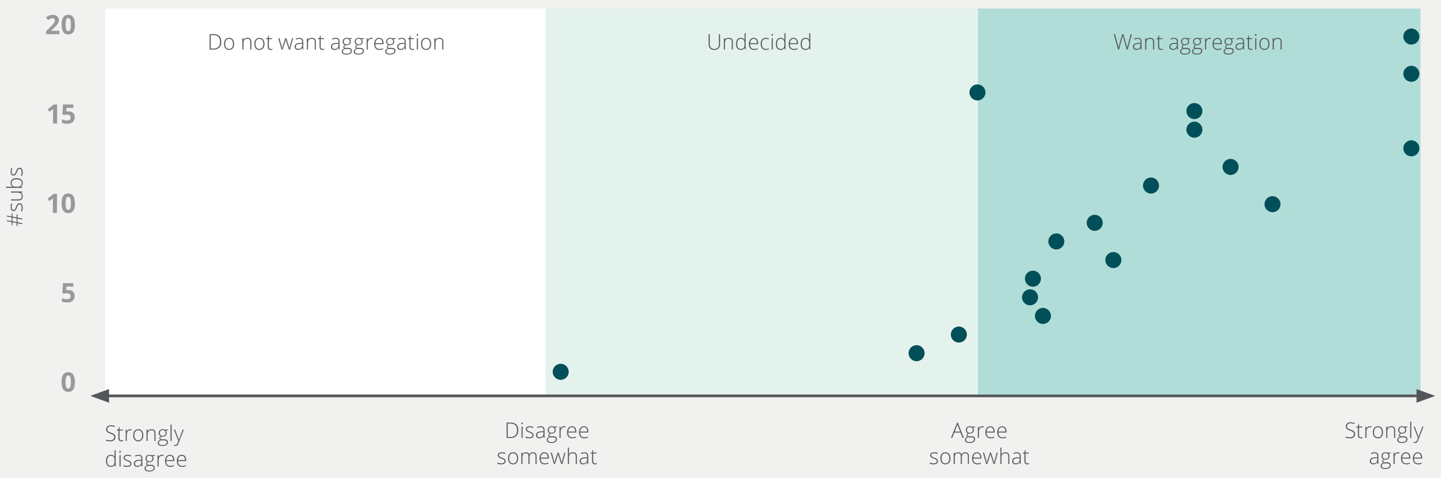
Aggregation

Subscribers have a strong appetite for aggregation and bundling, which may help content providers improve stickiness.

The launch of platforms like Foxtel's Hubbl shows there's growing interest in content aggregation as a way to boost retention, and potentially average revenue per user, by giving consumers more seamless ways to discover, access and consume content across subscriptions.

Consumers are clearly on board: around three in four wish they could use a single platform to manage multiple subscriptions (74%) and search and discover content across numerous services (77%). Unsurprisingly, this desire is strongest among those with more than three subscriptions. This growing demand underscores a clear opportunity for providers to simplify and improve how consumers interact with their favourite content, forcing them to explore potential partnerships with aggregators.

Interest in aggregation of digital entertainment subscriptions (by # of subscriptions):



77% Would like to be able to search and discover content across all their TV/movie services in one place

Gen Z **85%** Boomers **68%**

55% Find it hard to know what content is available on which streaming service

Gen Z **68%** Boomers **44%**

74% Would find it useful if they could manage multiple subscriptions from one account or place

Gen Z **83%** Boomers **61%**

66% Would prefer to bundle their subscriptions from the one account or service

Gen Z **74%** Boomers **53%**

Advertising

The influence of ads varies dramatically across platforms and generations.

In today's advertising landscape, there's a striking generational divide in the perceived influence of ads and the platforms they appear on. Younger generations report much higher susceptibility to advertising, with Gen Z nearly twice as influenced by their top platform (social media) than Matures (free-to-air).

Share of respondents that are influenced per media type:

	Social media platforms	Sports content
Women	48%	26%
Men	36%	38%

Most influential advertising mediums by generation:

Gen Z	70% Social media platforms	65% Shopping websites	63% Streaming video content
Millennials	63% Social media platforms	56% Shopping websites	55% Search engine websites
Gen X	52% Free-to-air	47% Shopping websites	41% Social media platforms
Boomers	43% Free-to-air	29% Shopping websites	26% Radio
Matures	37% Free-to-air	24% News websites/ newspapers	20% Sports content

Advertising *(cont.)*

Many Australians would pay to avoid ads. But for the ads we do see, how we engage with them varies by device and generation.

Across all platform types, free-to-air remains the most effective platform for ads.

Whilst free-to-air continues to hold the most influence on buying decisions, ads on social media and shopping websites are catching up.

Percentage of respondents who are somewhat to strongly influenced by an ad on their buying decisions:

Free-to-air	**49%** ▲ 42% in 2022	**Shopping websites**	**45%** ▲ 35% in 2022
Social media	**42%** ▲ 34% in 2022	**Search engine websites**	**39%** ▲ 32% in 2022

Most SVOD consumers are willing to pay to avoid ads:

56%

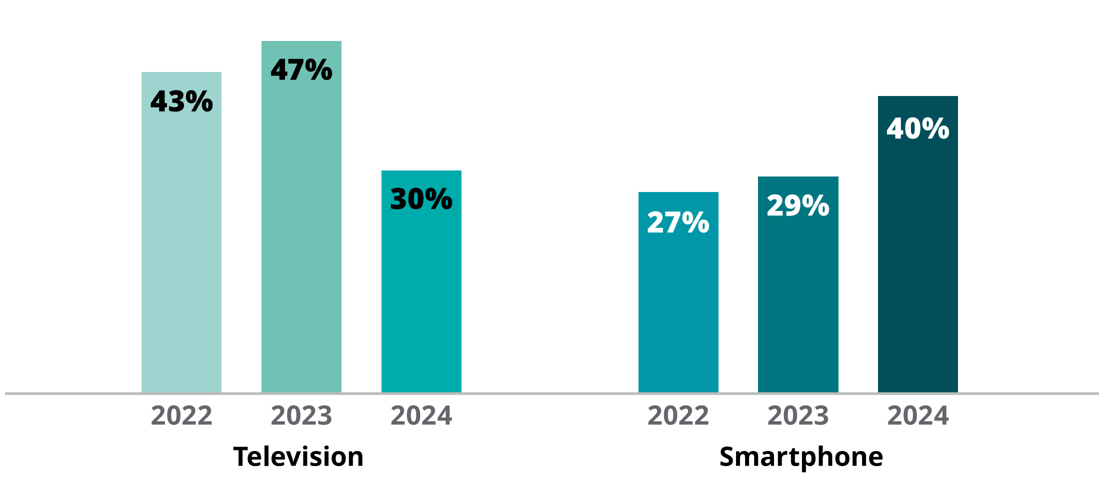
But less willing in other media types:

47% Music
36% Sport
32% News and magazines
31% Games

Advertising power continues to shift from TVs to smartphones.

Australians prefer to engage with ads on their smartphones. Given many consumers also make purchases on their phones, it paves a shorter pathway from ad to sale.

Willingness to engage with ads:



Millennials and Gen Xers are driving this shift, with both generations increasingly engaged with smartphone ads.

Millennials	**57%**	▲ 48% in 2023
Gen X	**44%**	▲ 26% in 2023

TRUST

Media’s role in society

Australians have mixed feelings about the role of media in society.

Less than half

of Australians think media providers drive positive change in society, though Gen Z are more optimistic than older generations

Share of Australians who perceive media providers as drivers of change in society:

		Overall	Gen Z	Boomers
Major publishers	Positive change	35%	45%	30%
	No change	37%	33%	35%
	Negative change	15%	12%	19%
Online media	Positive change	35%	47%	28%
	No change	36%	30%	35%
	Negative change	18%	13%	23%
TV broadcasters	Positive change	40%	44%	39%
	No change	35%	32%	33%
	Negative change	16%	15%	18%
Social media platforms	Positive change	30%	48%	17%
	No change	28%	25%	26%
	Negative change	33%	22%	46%
Video subscription providers	Positive change	33%	45%	22%
	No change	42%	31%	47%
	Negative change	14%	17%	15%
Individual creators	Positive change	29%	49%	16%
	No change	33%	26%	30%
	Negative change	26%	17%	37%

Key
- Positive change
- No change
- Negative change

Trust in news content

Consumers are most trusting of established news publishers, and feel more sceptical about social media and AI-generated content.

73% of consumers consider major publishers to be at least moderately trustworthy, though only 17% view them as very trustworthy – suggesting scepticism when it comes to news sources.

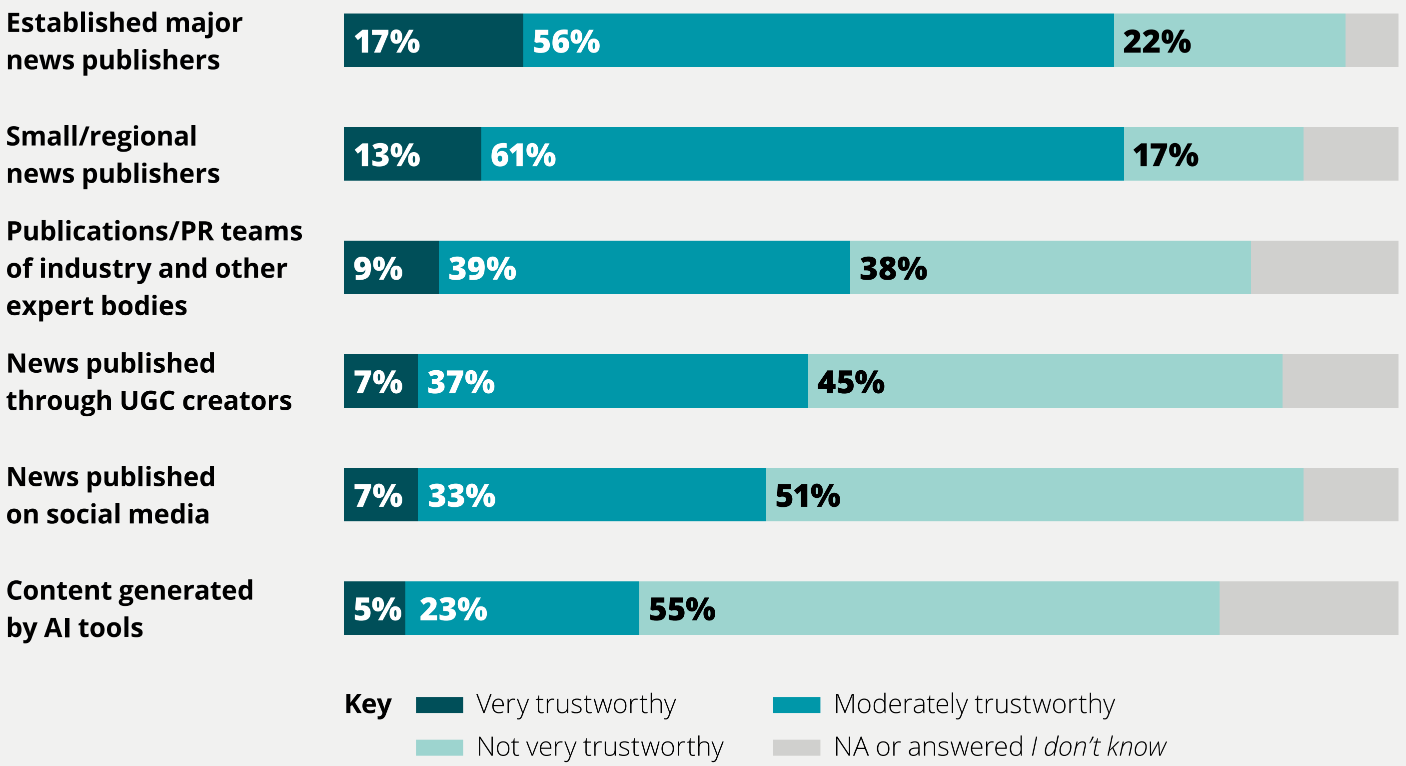
This scepticism is even greater for news published on social media (40% consider it at least moderately trustworthy) and AI-generated/augmented content (28%).

News providers will play a critical role in guiding consumers through the complexities of this era, teaching them how to assess the reliability of AI-generated content and providing clear signposts on their own material to show how it was verified.

Content providers will have to navigate both the challenges and opportunities that come with AI-generated content, including the impact on their business model and appropriate attribution of copyright.

73% of consumers consider major publishers to be at least moderately trustworthy

Trust in news providers and content:



Access to news content

Our preferences for accessing news remain unchanged from 2023, with TV programs still Australia's go-to source of this content.

Top sources of news by share of respondents:

34% ▲ **TV News**
33% in 2023

17% **Social media**
17% in 2023

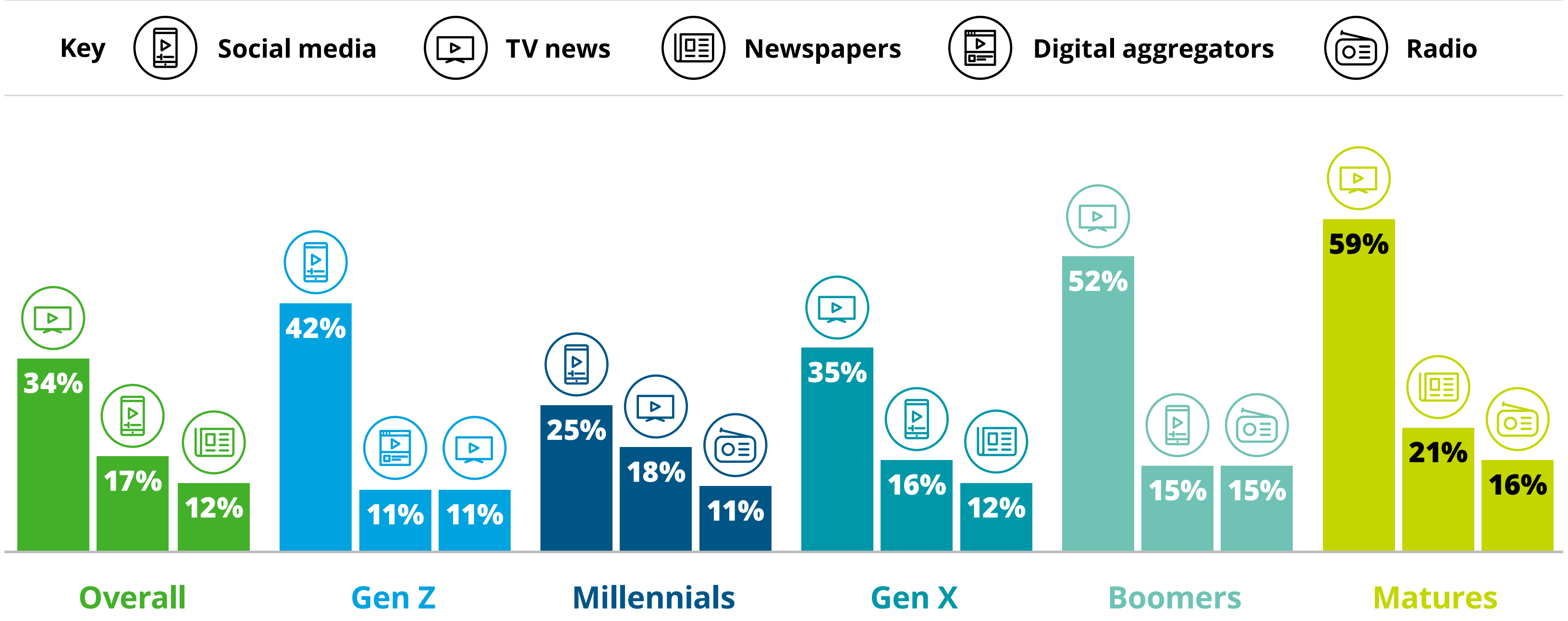
12% **Newspapers**
12% in 2023

11% **Radio**
11% in 2023

8% **Digital news aggregators**
8% in 2023

As the top source of news for Gen Z and Millennials, social media has a significant influence on how consumers perceive the world. As AI-generated content proliferates, the ability to discern reliable information across platforms and recognise the limitations of individual sources will become more crucial than ever.

Top three sources of news (% by generation):



Data protection

Many Australians are concerned about data privacy and take action to protect their data.

43% of respondents agree when asked if they feel confident in their ability to keep their personal data secure online (30% neutral).

	Agree	Neutral	Disagree
Gen Z	51%	29%	20%
Boomers	36%	29%	35%

54% of respondents say they regularly take action to protect their data online

Digital parenting

Australians have even stronger concerns about the effects of social media on individuals under 16 years of age.

9 in 10

consumers agree there should be stronger restrictions on children's access to social media

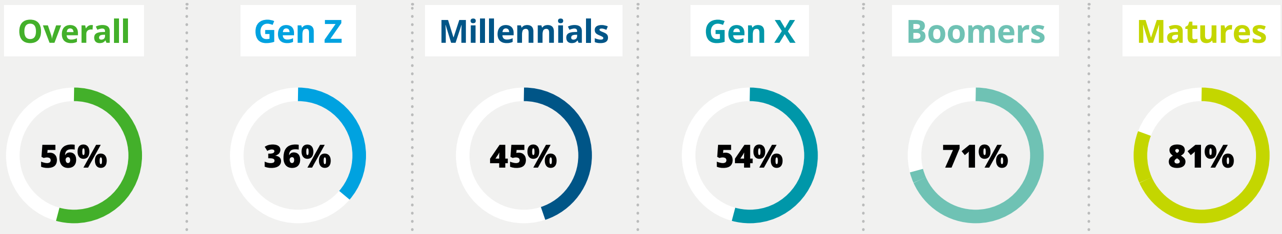
Many consumers are in favour of introducing specific restrictions for users aged under 16.

Most-supported social media restrictions*:

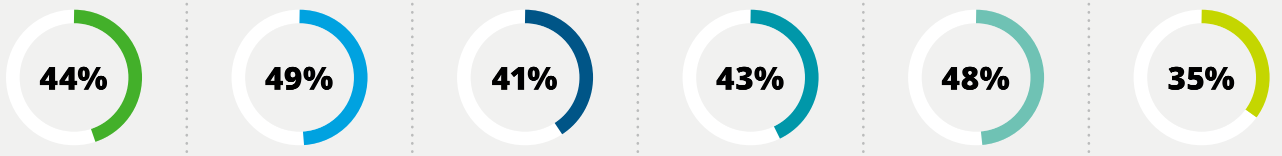
Ban on account ownership	56%
Restrictions on how platforms use data, personalisation, and algorithms to maximise social media use	44%
Regulation on the amount of time they can spend on social media	39%

However, preferences for restrictions differ across generations. Older consumers show strong support for blanket bans, while views are mixed on data, personalisation and algorithms.

Support for blanket bans on account ownership for users aged 16 and under:



Support for restricting the use of data, personalisation and algorithms to maximise social media use for users aged 16 and under:



*By % who ranked it within their three most favoured restrictions.

Digital parenting *(cont.)*

Few consumers believe current regulations do enough to protect children online, and many parents are taking matters into their own hands.

70%

of respondents who live with their children are concerned about the impact of social media on their wellbeing

And only

33%

of respondents who live with children feel that current restrictions and regulations adequately protect their children online

57% **of respondents who live with children have used parental controls to limit what their children can access online, including:**

- Parental controls integrated into a laptop, desktop, or mobile device: **59%**
- Safe search setting or child-friendly search engines on web browser: **57%**
- Parental controls built into a streaming service: **54%**
- Parental controls built into a social media platform: **48%**
- Parental controls integrated into a gaming console: **45%**
- Wi-Fi router with parental control software: **40%**
- Third party software/hardware: **38%**

Still, some are optimistic in their ability to help their children navigate the digital world.

57%

of respondents who live with children are confident in their ability to guide their children to use social media safely

55%

are confident the steps they are taking will give their children the skills they need to navigate social media

SPORT AND LIVE EVENTS

The Australian sports fan

Sport is an integral part of our media experience.
But how we watch, and for how long, varies by generation.

	Overall	Gen Z	Boomers
Hours per week engaging with sport	1–3 hours	4–5 hours	1–3 hours
Amount willing to spend on sports content (weighted average)	$21	$21	$19
Favourite content type	Live sport	Live sport	Live sport
Preferred way to watch live sport	At home, with friends and family	At home, with friends and family	At home alone
Preferred device to watch on	Television	Smartphone	Television

The Australian sports fan *(cont.)*

Sport remains a popular media category for Australians, and live events are an important way for us to connect.

77% watch sport weekly

While Australians prefer to watch live sport at home, many still see it as a social experience. Only 9% watch live sports in public venue or in a stadium.

Preferences for watching live sports:

	#1 At home with friends and family*	#2 At home alone
Overall	51% ▲ 48% in 2023	39% ▲ 35% in 2023
Gen Z	56% ▲ 54% in 2023	35% ▲ 22% in 2023
Boomers	40% ▲ 39% in 2023	49% ▼ 52% in 2023

And when we do attend a live event or performance, being with friends and family is what we value.

Favourite element of a live event or performance, other than the event itself:

45%	Socialisation – spending time with friends or family
18%	Stadium/venue experience
15%	Possibility of seeing something significant or historic happen live
9%	A sense of belonging and being part of a community or fanbase
7%	Social media engagement received from posting about one's attendance
3%	Giveaways, promotions or activities offered by brands sponsoring events
2%	Interacting with individuals involved in the event (e.g., athletes or performers)

Australians are looking for upgraded stadium and venue facilities, along with immersive experiences that extend beyond the event itself. Unsurprisingly, these improvements would amplify some of their favourite things about live sport: soaking up the atmosphere and sharing the experience with others.

48% say upgraded stadium facilities would strongly improve their most recent live experience

Improved digital stadium experience (e.g., wayfinding apps)	19%
More or improved ways to interact	18%
More or improved ancillary events	16%

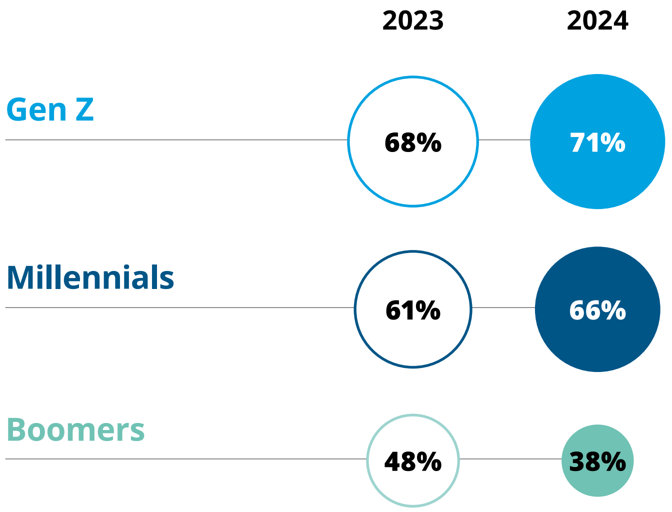
* In person and via live stream

Spend on sport content

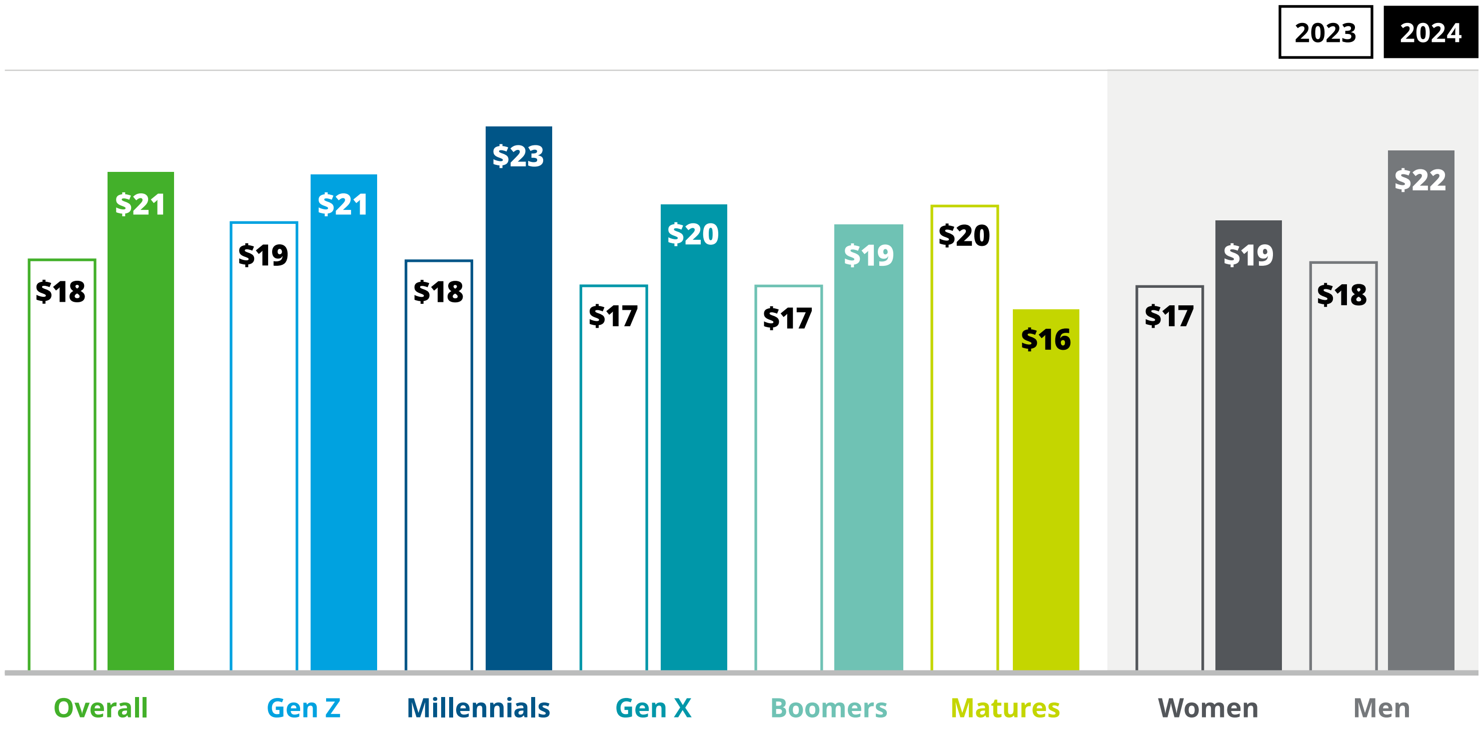
While there's been no change in the proportion of Australians willing to pay for a sport subscription, the amount they are willing to spend has increased.

53% of Australians are willing to pay monthly for sport content, unchanged from 2023, with younger generations being more willing to pay, and older generations less so. This change could be due to the increased availability of sport content on SVOD platforms, like the popular *Drive to Survive* series, or the attention gained through major events like the 2023 FIFA Women's World Cup.

Share of respondents willing to pay for sport content:



How much Australians are willing to spend monthly on sport subscriptions[1]:



1. Calculated as the sum of % willing to pay a certain amount for a sports subscription multiplied by the amount they are willing to pay, across all price points

Consumption preferences

We still watch most of our sport on TV, but the small screen is catching up rapidly.

Gen Z is 1.5x more likely to watch sport on a device than on TV, while the reverse is 9x more likely for Boomers.

Device preferences for watching sport:

Gen Z

TV 40%

Devices (laptop, smartphone or tablet) 60%

Boomers

TV 90%

Devices (laptop, smartphone or tablet) 10%

Gen Z is the most likely to change their sports viewing behaviour* after engaging with documentaries, social media content and other non-traditional sports media.

Impact of sports media on sports consumption:

Sports content created by video subscription providers

	Changed behaviour*	No change
Gen Z	64%	35%
Boomers	16%	82%

Sports/athletes' social media content

	Changed behaviour*	No change
Gen Z	70%	29%
Boomers	17%	81%

Traditional sports content by well-known channels

	Changed behaviour*	No change
Gen Z	67%	30%
Boomers	25%	73%

Key: Changed behaviour* | No change | n/a or answered *I don't know*

*Either now engage with new sport, spend more time watching or more frequently engage with sport already followed

Despite its influence on consumption patterns, sports content isn't convincing viewers to take up new sport.

Share of respondents participated in a new sport after watching:

2% Content created by video subscription providers (e.g., *Drive to Survive*, *The Last Dance*)

1% Sport/athletes' social media content

2% Traditional sports content (e.g., pre-game, post-game and highlights) produced by well-known channels

Women's sport

After surging in popularity during the 2023 FIFA Women's World Cup, women's sport continues to attract significant interest from young Australians.

The rapid rise of women's sport was one of the most thrilling stories of 2023, with the nation rallying behind the Matildas. Young Australians continue to fuel this popularity surge in 2024, with 60% of Gen Z now regularly engaging with women's sport and two-thirds (66%) eager to dive deeper.

This momentum signals a powerful growth trajectory for female sport, bolstered by the incredible success of our female Olympians who dominated the gold medal tally in Paris. With standout stars like Caitlin Clark lighting up the WNBA and the continued passion from young Australians, it's clear the popularity of women's sport is a real game changer.

Interest in women's sports:

% that agree with the following	Overall	Gen Z	Boomers
I currently engage with women's sport regularly	43% = 44% in 2023	60% ▲ 54% in 2023	33% ▼ 40% in 2023
I want to engage more with women's sport	44% ▼ 49% in 2023	66% ▲ 65% in 2023	24% ▼ 38% in 2023
Women's sport is readily available and easily accessible to me	58% ▲ 53% in 2023	54% ▼ 55% in 2023	59% ▼ 57% in 2023

Olympic & Paralympic Games Paris 2024

Australians were incredibly excited about watching the Olympics & Paralympics.

94%

of Australians were excited for Paris 2024, particularly the opening and closing ceremonies, and flagship events

Which events are you most excited to watch?

Flagship men's sports (e.g., swimming, football, gymnastics)	25%
Flagship women's sports (e.g., swimming, football, gymnastics)	21%
Niche men's sports (e.g., equestrian, archery, skateboarding)	7%
Niche women's sports (e.g., equestrian, archery, skateboarding)	8%
Men's Paralympics	5%
Women's Paralympics	5%
Ceremonies (opening and closing)	28%

The Olympics represents an opportunity to engage women in sports.

93% of women were excited for Paris 2024, compared to the 77% of women who watch sport typically

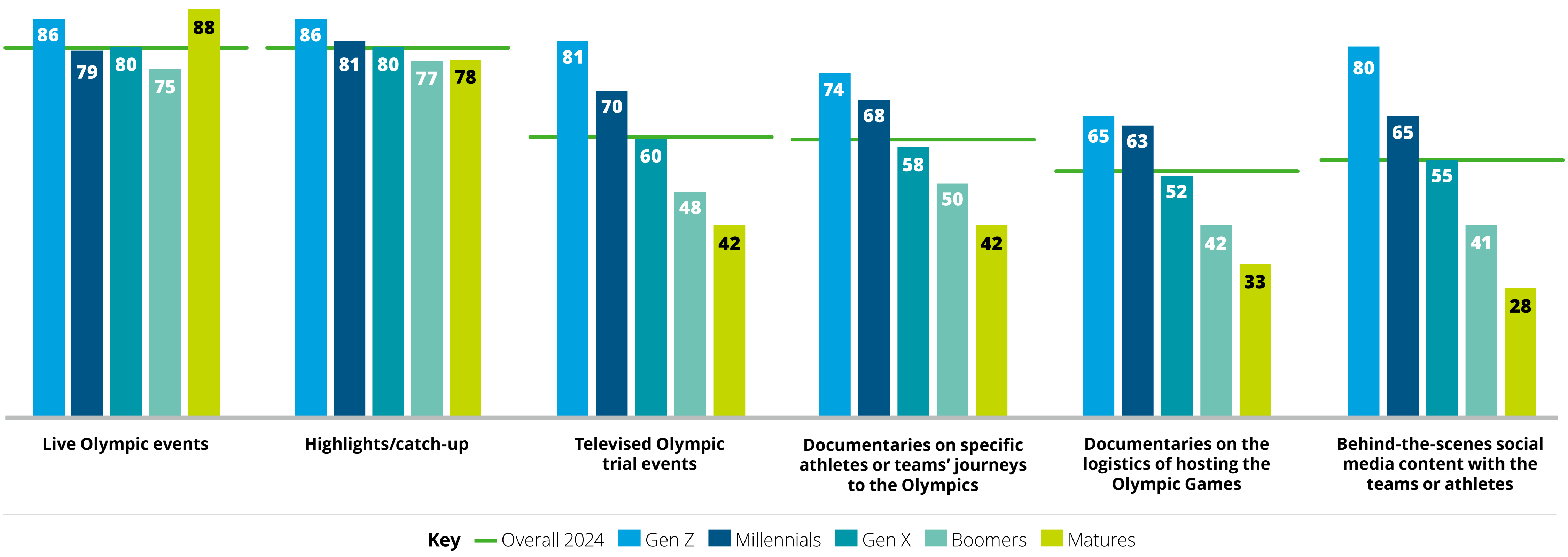
Most of us (70%) planned to select what to watch based on the time of day, but other factors also influenced our choices.

Being a passionate follower of a particular sport	37%
Hype for a team or athlete	25%

Olympic & Paralympic Games Paris 2024 *(cont.)*

Younger consumers showed interest in supplementary content like trial events, documentaries and behind-the-scenes content.

Share of respondents interested in content (by type) as a %:



GENERATIONAL SNAPSHOTS

Generational snapshot
Overall

44h 15m ▼ **48h 55m** in 2023 — Total time spent across all media and digital entertainment categories

$63 ▲ **$57** in 2023 — Monthly spend on media subscriptions

35% Are exceeding their target monthly budget

Top 5 home entertainment activities *(in weekly hours:minutes)*

Watching video *(free-to-air, SVOD, video platforms e.g. YouTube)*	22h 45m
Listening to audio *(radio, music, podcasts and audiobooks)*	9h 20m
Browsing social media	6h 20m
Playing video games	3h 0m
Reading news and magazines	2h 50m

3.3 ▲ **3.2** in 2023 — Average number of **paid entertainment subscriptions**

2.1 ▲ **2.0** in 2023 — Average number of **SVOD subscriptions**

Spend most of their social media time on:

#1 Facebook #2 YouTube #3 Instagram

Have **at least one** paid entertainment subscription: **88%**

Have **added one or more** subscriptions in the last 6 months: **37%**

Have **cancelled one or more** subscriptions in the last 6 months: **33%**

Want new social media restrictions for those aged 16 and under: **90%**

Spend more time watching UGC online than planned: **45%**

Would like to manage multiple subscriptions from **one account** or place: **74%**

52% Frequently multitask when using social media

Favourite sports content:
- #1 Live sports coverage (full event)
- #2 Highlights/clips
- #3 Interviews and behind-the-scenes content

Favourite Olympic events:
- **1** Flagship women's sport
- **2** Flagship men's sport
- **3** Opening ceremonies

40% Most willing to engage with advertisements on (smartphones)

56% Prefer to pay for ad-free movies and/or TV shows

Get their news most frequently from:
- #1 Television
- #2 Radio
- #3 Social media

Generational snapshot
Gen Z (age 16–24)

44h 45m ▼ **59h 55m** in 2023 — Total time spent across all media and digital entertainment categories

Top 5 home entertainment activities *(in weekly hours:minutes)*

Watching video *(free-to-air, SVOD, video platforms e.g. YouTube)*	17h 10m
Listening to audio *(radio, music, podcasts and audiobooks)*	11h 0m
Browsing social media	10h 5m
Playing video games	4h 40m
Reading news and magazines	1h 50m

Favourite sports content:
- **#1** Highlights/clips
- **#2** Live sports coverage (full event)
- **#3** Interviews and behind-the-scenes content

Favourite Olympic events:
1. Flagship men's sport
2. Flagship women's sport
3. Opening ceremonies

$88 ▲ **$79** in 2023 — Monthly spend on media subscriptions

4.7 ▲ **4.6** in 2023 — Average number of **paid entertainment subscriptions**

2.8 ▲ **2.7** in 2023 — Average number of **SVOD subscriptions**

97% Have **at least one** paid entertainment subscription

63% Have **added one or more** subscriptions in the last 6 months

53% Have **cancelled one or more** subscriptions in the last 6 months

83% Would like to manage multiple subscriptions from **one account** or place

55% Most willing to engage with advertisements on (smartphones)

77% Prefer to pay for ad-free movies and/or TV shows

54% Are exceeding their target monthly budget

Spend most of their social media time on:
#1 Instagram #2 YouTube #3 TikTok

91% Want new social media restrictions for those aged 16 and under

68% Spend more time watching UGC online than planned

72% Frequently multitask when using social media

Get their news most frequently from:
- **#1** Social media
- **#2** Television
- **#3** Digital news aggregators

Generational snapshot
Millennials (age 25–38)

42h 45m ▼ **48h 35m** in 2023
Total time spent across all media and digital entertainment categories

$82 ▲ **$66** in 2023
Monthly spend on media subscriptions

45% Are exceeding their target monthly budget

Top 5 home entertainment activities *(in weekly hours:minutes)*

Watching video *(free-to-air, SVOD, video platforms e.g. YouTube)*	18h 10m
Listening to audio *(radio, music, podcasts and audiobooks)*	9h 55m
Browsing social media	7h 45m
Playing video games	4h 20m
Reading news and magazines	2h 35m

4.5 ▲ **4.3** in 2023
Average number of **paid entertainment subscriptions**

2.7 = **2.7** in 2023
Average number of **SVOD subscriptions**

Spend most of their social media time on:
#1 Facebook #2 YouTube #3 Instagram

Have **at least one** paid entertainment subscription: **96%**

Have **added one or more** subscriptions in the last 6 months: **54%**

Have **cancelled one or more** subscriptions in the last 6 months: **49%**

Want new social media restrictions for those aged 16 and under: **88%**

Spend more time watching UGC online than planned: **66%**

Would like to manage multiple subscriptions from **one account** or place: **85%**

68% Frequently multitask when using social media

Favourite sports content:
#1 Live sports coverage (full event)
#2 Highlights/clips
#3 Interviews and behind-the-scenes content

Favourite Olympic events:
1 Flagship women's sport
2 Flagship men's sport
3 Opening ceremonies

58% Most willing to engage with advertisements on (smartphones)

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

Get their news most frequently from:
#1 Social media
#2 Television
#3 Digital news aggregators

Generational snapshot
Gen X (age 39–55)

43h 50m ▼ **45h 35m** in 2023 — Total time spent across all media and digital entertainment categories

$55 = **$55** in 2023 — Monthly spend on media subscriptions

34% Are exceeding their target monthly budget

Top 5 home entertainment activities *(in weekly hours:minutes)*

Watching video *(free-to-air, SVOD, video platforms e.g. YouTube)*	22h 30m
Listening to audio *(radio, music, podcasts and audiobooks)*	9h 50m
Browsing social media	6h 5m
Playing video games	3h 0m
Reading news and magazines	2h 30m

3.2 ▲ **3.1** in 2023 — Average number of **paid entertainment subscriptions**

2.0 = **2.0** in 2023 — Average number of **SVOD subscriptions**

- **89%** Have **at least one** paid entertainment subscription
- **35%** Have **added one or more** subscriptions in the last 6 months
- **31%** Have **cancelled one or more** subscriptions in the last 6 months

75% Would like to manage multiple subscriptions from **one account** or place

44% Most willing to engage with advertisements on (smartphones)

55% Prefer to pay for ad-free movies and/or TV shows

Spend most of their social media time on:
#1 Facebook **#2** YouTube **#3** Instagram

88% Want new social media restrictions for those aged 16 and under

43% Spend more time watching UGC online than planned

55% Frequently multitask when using social media

Favourite sports content:
- **#1** Live sports coverage (full event)
- **#2** Highlights/clips
- **#3** Interviews and behind-the-scenes content

Favourite Olympic events:
1. **Flagship men's sport**
2. Flagship women's sport
3. Opening ceremonies

Get their news most frequently from:
- **#1** Television
- **#2** Social media
- **#3** Radio

Generational snapshot
Boomers (age 56–74)

46h 15m ▼ **48h 50m** in 2023 — Total time spent across all media and digital entertainment categories

$48 ▲ **$43** in 2023 — Monthly spend on media subscriptions

54% Are exceeding their target monthly budget

Top 5 home entertainment activities *(in weekly hours:minutes)*

Watching video *(free-to-air, SVOD, video platforms e.g. YouTube)*	28h 35m
Listening to audio *(radio, music, podcasts and audiobooks)*	7h 50m
Browsing social media	4h 30m
Playing video games	1h 30m
Reading news and magazines	2h 30m

2.2 ▲ **2.0** in 2023 — Average number of **paid entertainment subscriptions**

1.4 ▲ **1.2** in 2023 — Average number of **SVOD subscriptions**

Have **at least one** paid entertainment subscription: 78%

Have **added one or more** subscriptions in the last 6 months: 16%

Have **cancelled one or more** subscriptions in the last 6 months: 14%

Would like to manage multiple subscriptions from **one account** or place: 61%

46% Most willing to engage with advertisements on (television)

42% Prefer to pay for ad-free movies and/or TV shows

Spend most of their social media time on:

#1 Facebook #2 YouTube #3 Instagram

Want new social media restrictions for those aged 16 and under: 94%

Spend more time watching UGC online than planned: 28%

30% Frequently multitask when using social media

Favourite sports content:

- #1 Live sports coverage (full event)
- #2 Highlights/clips
- #3 Interviews and behind-the-scenes content

Favourite Olympic events:

1. **Flagship women's sport**
2. Flagship men's sport
3. Opening ceremonies

Get their news most frequently from:

- #1 Television
- #2 Radio
- #3 Newspaper

Generational snapshot
Matures (age 75+)

45h 30m ▼ **46h 10m** in 2023 — Total time spent across all media and digital entertainment categories

$42 ▲ **$39** in 2023 — Monthly spend on media subscriptions

54% Are exceeding their target monthly budget

Top 5 home entertainment activities *(in weekly hours:minutes)*

Watching video *(free-to-air, SVOD, video platforms e.g. YouTube)*	27h 30m
Listening to audio *(radio, music, podcasts and audiobooks)*	6h 20m
Browsing social media	2h 40m
Playing video games	0h 55m
Reading news and magazines	4h 15m

1.7 ▲ **1.6** in 2023 — Average number of **paid entertainment subscriptions**

1.0 ▲ **0.8** in 2023 — Average number of **SVOD subscriptions**

- Have **at least one** paid entertainment subscription: 75%
- Have **added one or more** subscriptions in the last 6 months: 15%
- Have **cancelled one or more** subscriptions in the last 6 months: 16%

Would like to manage multiple subscriptions from **one account** or place: 53%

46% Most willing to engage with advertisements on (television)

34% Prefer to pay for ad-free movies and/or TV shows

Spend most of their social media time on:

#1 Facebook #2 YouTube #3 Instagram

Want new social media restrictions for those aged 16 and under: 93%

Spend more time watching UGC online than planned: 38%

19% Frequently multitask when using social media

Get their news most frequently from:

#1 Television
#2 Newspaper
#3 Radio

Favourite sports content:

#1 Live sports coverage (full event)
#2 Highlights/clips
#3 Interviews and behind-the-scenes content

Favourite Olympic events:

1. Flagship men's sport
2. Flagship women's sport
3. Opening ceremonies

Contacts

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