



Everybody gets it

Revaluing the economic and social
benefits of commercial television

2022

General use restriction

This report is prepared solely for the use of Free TV. This report is not intended to and should not be relied upon by anyone else and we accept no duty of care to any other person or entity. The report has been prepared for the purpose of providing an industry census around commercial television broadcasting. You should not refer to or use our name or the advice for any other purpose.

Definitions

Keyword	Definition
Commercial television (commercial TV)	Commercial TV delivers television programs owned by commercial, privately owned media networks available for free for all viewers. This includes both live linear TV which airs content on a set schedule and broadcast video on demand.
Broadcast video on demand (BVOD)	BVOD contains video content produced and published by commercial broadcasters which is available for free for all viewers, such as 7plus, 9Now and 10Play. BVOD can include live linear TV, live streaming (eg. live sports matches) and video on demand. It relies on an advertising-based business model.
Subscription video on demand (SVOD)	SVOD includes video streaming services using a subscription business model in which users can consume an unlimited amount of ad-free content for a flat monthly rate. Some examples include Stan, Paramount and Netflix.
Advertising video on demand (AVOD)	AVOD provides video streaming services which are available for free and relies on an advertising-based business model, such as Youtube.
Total television (total TV)	Total TV includes all forms of viewing TV content, such as commercial TV and BVOD.

Key findings

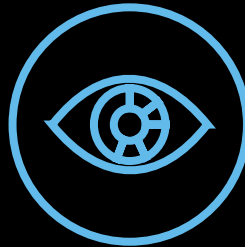
Economic contribution

\$2.5B Economic contribution to GDP in 2021

5% Real increase since 2019

16,200 Full-time equivalent jobs supported

\$161B Brand value supported



Universal access

99% of Australians
Can access commercial TV

92% of Australians
Watch commercial TV every month

22% of Australians
Have insufficient internet connections or
data caps to stream video on demand

58% of Australians
Are concerned about the costs of
subscription services

Community contribution

\$195M From networks to support
communities and charities

100 Hours provided by networks to
broadcast charitable materials

13,000 Volunteering hours dedicated by
networks employees

\$25M Raised through Red Cross Australia
Unites telethon

\$4.9 Of social value for every \$1 invested
in charitable organisations



Audience and content

23,000 Hours of news & current affairs
programs aired in 2021

#1 Commercial TV chosen as the most
useful news source during election

55% of Australians watch sport at least
weekly on commercial TV

175 Minutes watched by commercial
TV viewers per day

85% Of program expenditure is dedicated
to Australian programs

Executive summary

Commercial television provides Australians with access to a vast array of content. Across news and current affairs, live sport, drama and light entertainment, 99% of Australians can access commercial television at the click of a button. Viewers watch commercial television for roughly three hours, on average, each day.

Commercial television reaches 16 million in an average week, with viewers watching around 3 hours per day. While viewer preferences are always changing, alternative services like subscription video on demand (SVOD) are not universal, nor are they free. Modelling for this report finds that 22% of Australians can't access VOD services, meaning there are many Australians who rely on broadcast television.

Commercial television plays an important role in the Australian economy. It generated \$2.5 billion in value added in 2021, an increase in real terms of 5% from when Deloitte last estimated its value in 2019. This increase illustrates the resilience of the commercial television industry as it achieved continued growth despite the difficult circumstances arising from the pandemic over the last two years. For every dollar directly generated by commercial television broadcasters, its purchases support 80 cents of value added in other industries.

Commercial television also employed close to 16,200 Australians both directly and indirectly, with 18% of these employees based in regional and remote areas of Australia. It helps to support the 40,000 Australians currently employed in the screen production industry.

Commercial television has a daily reach of 2.9 million viewers in regional areas, for an average of 3 hours and 11 minutes per day.

Due to its engagement and reach, commercial television helps to grow the brand value of many businesses that advertise on commercial television, with the top 100 Australian brands valued at \$161 billion. Other research has found advertising on television drives three times more sales volume than any other media type.

The benefits of commercial television are very important to consider at a time of change in the media, our economy and society:

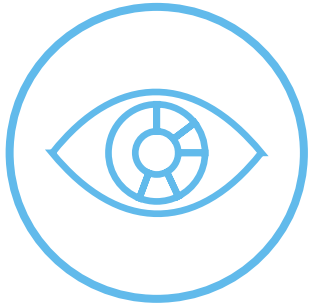
- Inflation in Australia has risen 6.1% in the past year and some Australians are cutting back on their spending, cementing the need for an affordable entertainment service.
- The spread of misinformation and 'fake news' poses a risk to our society and democracy. Commercial television provides a critical service in broadcasting 19.5 million minutes of news and current affairs programs. More than two-thirds (65%) of Australians say it is a trusted source of news essential to society and democracy.
- The recent flooding events throughout NSW and Queensland highlighted the important role that charitable and not-for-profit organisations play throughout Australia. Commercial television networks provided \$195 million in support to these organisations in 2021, which helped catalyse a social impact that could be five times as large.

- The commercial television industry plays an important role in providing timely and accurate information during emergencies and significant events. The coverage of the development of COVID-19 provided health updates and advice across the country helping Australians keep themselves safe amongst the pandemic.
- Viewers value the wider choice of international screen content that has emerged in recent years, but also want continued access to Australian content. Commercial television networks spend more than \$1.5 billion on Australian content ever year, exceeding their regulatory content quotas by 18 percentage points.

More broadly, commercial television plays a critical role in bringing Australians together. More than two million Australians tuned into the AFL and NRL Grand Finals and 76% of Australians agree that commercial television ensures every Australian has access to iconic sporting events. Over 40% of viewers watched television with family or friends in 2021, playing a role in connecting people in society through COVID lockdowns.

Commercial television in Australia is a relatively unique offering globally, with equivalent services overseas often requiring consumers to pay for access via licensing fees. It provides relevant, local content for all Australians, supports the broader screen ecosystem and creates a range of economic and social benefits across the country. The commercial television industry has been able to provide this service consistently over time and is a reflection of its ability to innovate and adapt to the changing consumer preferences across Australia.

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Introduction

Free TV Australia is the industry representative body for commercial television broadcasters.

The Free TV members are the backbone of the local television production industry, and include the Seven West Media, Nine Network, Network 10, Southern Cross Austereo (SCA), WIN, and Imparja Television.¹ This report refers to these members as ‘commercial television broadcasters’, and the associated ‘commercial television industry’.

Free TV Australia has engaged Deloitte Access Economics to prepare an objective report which captures the economic and social contribution of its members to Australia. This is the second edition of the report, with the previous report released in July 2020.

The report draws on data from a range of sources. It uses an economic contribution model, which calculates the economic contribution of the industry using an input-output framework. The report is focused on economic and social impacts and is not an analysis of policy costs and benefits such as broadcasting spectrum policies, the anti-siphoning list, or regulatory requirements (e.g., content quotas, closed captioning, and more).

Industry survey

This report is informed by industry data and a survey, which gathered information from Free TV members for the 2021 calendar year.

All six members provided data and completed the survey over a three-month period. It included data on the financial performance of members, broadcasting, production and content.

The data collected through the survey relates only to television broadcasting, production and distribution businesses, and associated overheads. This includes broadcast video on demand but does not include, for example, activities related to radio publishing or print media.

Compiling statistics

The report synthesises data from over 20 sources to provide a holistic view of the industry.

- Ratings and content data is collected from OzTAM (metropolitan) and Regional TAM.
- Data on viewer/consumer trends is sourced from Deloitte’s 2021 Media Consumer Survey, which collected data from more than 2,000 consumers in June 2021.
- Another data source for viewer/consumer trends is CT Group’s 2021 Federal Election Campaign Research.
- Other data sources include the Australian Bureau of Statistics, Australian Communications and Media Authority (ACMA), Think TV, Australian Competition and Consumer Commission (ACCC), Australian Digital Inclusion Index (ADII), VAST RBA Holdings, CT Group, JWS Research, Productivity Commission, Department of Infrastructure, Transport, Regional Development, Roy Morgan and previous research by Deloitte Access Economics.

The data sources are supplemented by consultations with industry experts.



Economic contribution



\$2.5B

Economic contribution to GDP in 2021



5%

Real increase since 2019



16,200

Full-time equivalent jobs supported



\$161B

Brand value supported

Commercial television supported \$2.5 billion in economic activity in the Australian economic in 2021

The total economic contribution of commercial television increased by approximately \$200 million between 2019 and 2021.

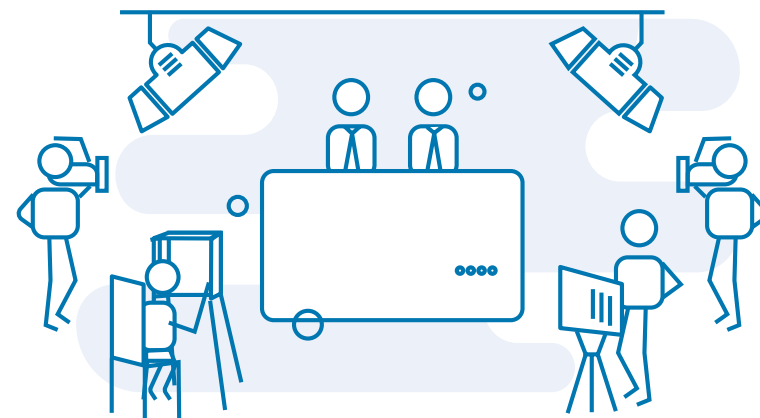
The commercial television industry makes a significant contribution to Australia's economy. In calendar year 2021, the total economic contribution of the commercial television industry was \$2.5 billion. In 2019, the total economic contribution of commercial television was approximately \$2.3 billion. Adjusting for inflation, this is equivalent to an increase of 5%.²

Broadcast Video on Demand (BVOD) consumption across all broadcasters continues to grow, up 33.4% between the first half of 2021 and the second half with *connected TV* (video content streamed via a television) remaining the screen of choice, accounting for 71.5% of screen use when viewing BVOD content.³

The commercial television industry generated \$3.4 billion in advertising revenue in 2021, which accounts for around 83% of Total TV (commercial TV, subscription

TV, and broadcast video-on-demand) ad revenue.⁴ Government policies also supported the sector through COVID-19, including through tax relief and content quota pauses.

The commercial television industry makes its contribution to the Australian economy through a variety of channels. Examples include the production of popular content which engages diverse audiences, working with advertisers to target each demographic, and leveraging the brand value of networks and programs to amplify businesses brands.





Commercial television contributes to the Australian economy through direct and indirect value added and employment

The industry generates value added both directly and indirectly. Direct value added reflects the contributions of labour and capital (measured by wages and gross operating surplus) of the industry's own operations.

The indirect value added captures the flow-on economic activity associated with purchases of intermediate goods and services by the industry. For instance, the industry commissions productions from independent screen producers.

Commercial TV's overall economic contribution has increased by about \$200 million from \$2.3 billion in 2019 to \$2.5 billion in 2021. While the indirect value fell over this period due to a drop in intermediate expenditure (or purchases), this was more than offset by increases in direct value add.

Table 2.1: Breakdown of valued added by the commercial television industry, 2021 (\$ million)

	Direct	Indirect	Total
Total value added	\$1,380	\$1,109	\$2,489
Gross operating surplus	\$684	\$400	\$1,085
Labour income	\$696	\$709	\$1,404
Employment (FTE)	6,234	9,981	16,215

Source: Deloitte Access Economics based on data provided by Free TV members.

Note 1: Where labour expenditure was noted as spent outside of Australia, FTE figures were reduced by the portion of labour expenditure allocated to those imports relative to total labour expenditure.

Note 2: This economic contribution has been calculated based of survey data provided by Free TV members, and refers only to activity related to broadcasting, production and distribution businesses, as well as any associated overheads. It relates to the calendar rather than financial year. As a result, it may not reconcile with data presented in annual reports.

Alongside its contribution through value added, the commercial television industry contributes to the Australian economy by supporting employment.

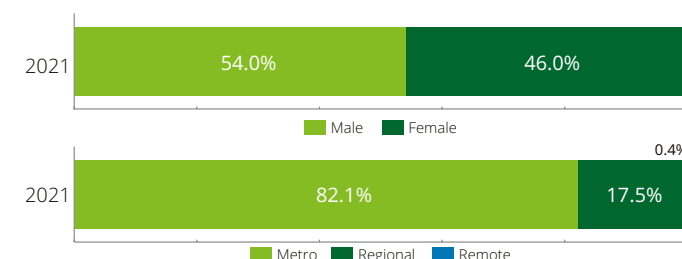
In 2019, the commercial television industry supported over 7,000 FTE jobs directly and almost 9,000 FTE jobs indirectly. In 2021, it supported 6,234 FTE jobs directly and close to 10,000 FTE jobs indirectly, an increase of 14% in total FTE jobs.

Of the 6,234 FTE staff directly employed by the industry in 2021:

- 3,367 (54%) were men and 2,868 FTE jobs (46%) were women.
- 5,119 (82%) were employed in metropolitan areas while 1,115 (18%) were located in regional or remote areas.

Note 3: Total jobs may not match breakdowns by gender or location due to rounding.

Chart 1.1: Breakdown of staff in commercial television industry by gender and location, 2021



Source: Deloitte Access Economics based on data from commercial TV networks

Commercial television helps to support many industries in the wider economy

Commercial television's purchases indirectly support economic activity in a range of other industries.

The largest recipient of this was the *Motion Picture and Sound Recording* industry with almost \$400 million in indirect economic activity produced, which represents 34% of the total indirect contribution. This is similar to 2019, when this industry was again the largest producer of indirect value added from commercial television's economic contribution with a share of 38% of the total.

Following *Motion Picture and Sound Recording* was *Professional, Scientific and Technical services* (\$137.1 million – 12%) and then *Non-residential Property Operators and Real Estate services* (\$68.0 million – 6%).

The indirect economic activity produced through these three industries accounts for more than half (52%) of the total indirect contribution. However, smaller

productions are also made through other industries including *Finance* (\$52.4 million), *Retail Trade* (\$25.3 million) and *Broadcasting (except Internet)* (\$20.4 million).

Commercial television supports the broader screen production industry, which was worth \$1.9 billion in 2020-21 and previous estimates suggest the entire value chain employs 40,000 people across Australia.⁵ Commercial television and screen production businesses are part of the same talent ecosystem with participants often moving between the two over their careers. Because of the high levels of labour mobility within the industry, commercial television plays an important role in developing the pipeline of screen talent, upskilling workers, expanding professional networks and facilitating knowledge transfer throughout the broader screen ecosystem.

Industry	Indirect Value Added	%
Motion Picture and Sound Recording	\$374.8	34%
Professional, Scientific and Technical Services	\$137.1	12%
Non-Residential Property Operators and Real Estate Services	\$68.0	6%
Public Administration and Regulatory Services	\$39.8	4%
Employment, Travel Agency and Other Administrative Services	\$55.9	5%
Finance	\$52.4	5%
Wholesale Trade	\$32.9	3%
Printing (including the reproduction of recorded media)	\$24.6	2%
Retail Trade	\$25.3	2%
Broadcasting (except Internet)	\$20.4	2%
All other	\$277.9	25%

Source: Deloitte Access Economics based on data provided by Free TV members (2021).

Note: The breakdown of indirect value added by industry in 2021 is based on the distribution from 2019 which has been applied to the total indirect value added in 2021.

Innovation helps improve viewers' experience and unlock new commercial opportunities

TV is now consumed on different devices and different platforms. Whether it be terrestrial, an app on a connect TV or mobile phone. With the new platforms and technologies there are new advertising methods help to make advertising on commercial TV more effective while innovation in the industry also contributes to improved viewer experience. The global pandemic accelerated the adoption of new technologies. For example, technologies such as artificial intelligence (AI) and machine learning have been used to provide viewers with optimised and personalised experience. Broadcasters are using AI to generate virtual voice audio of news articles, allowing audiences to hear the article instead of reading, with the voice and at the reading speed they prefer.

The use of digital technologies also helps broadcasters reduce TV production costs. Virtual production, a process which uses graphic engines to produce virtual sets and blend them with physical action, was utilised during the Tokyo Olympics 2020 to reconstruct Tokyo background for broadcasting when travel restrictions were in place, making the filming process cheaper, more flexible and less complicated.

Broadcasters are also employing digital technologies to better meet the needs of advertisers and enhance advertising capabilities and performance:



Seven Network announced 7Interactive in 2021, an interactive advertising product which seeks to deliver dynamic, highly engaging and immersive ad experiences to viewers. 7Interactive allows advertisers to deliver commercial content by means of interactive storytelling and giving viewers the ability to explore branded content through their remote control or video game controller.

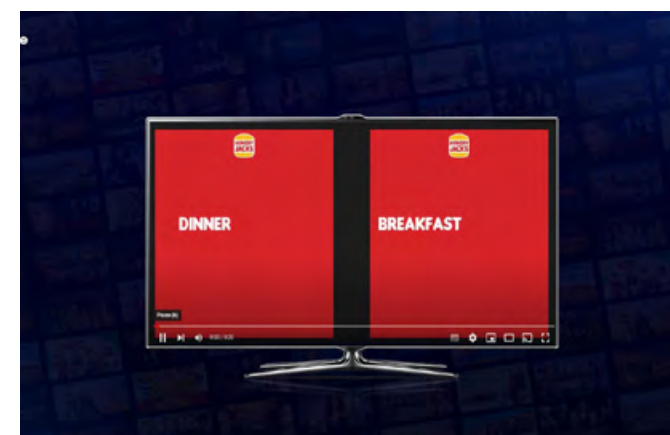


Nine Network launched its cutting edge digital platform for advertising in 2021 named 'Dynamic Ads'. Dynamic Ads is a video creative optimisation product which allows advertisers to create multiple versions of a video ad and dynamically serve the creative messages to the appropriate viewers based on their profile information such as age, sex, and location.



Network 10 continues to innovate its ad-tech capabilities through ongoing optimisation and development of its Buy10 ad platform, and incorporating premium ad features to 10 Play including 'Premium Pause' (ad triggered during pause and disappeared when play), 'The Countdown' (ad triggered at the end of a program before another starts), and 'Dynamic e-Trading' (allows retailer to showcase their inventory and products in real time).

Faced with increasingly sophisticated demand from both viewers and advertisers, and intense competition, the commercial television industry is likely to continue to evolve, with focus on digitisation and upskilling employees.



Commercial TV is one of the most effective channels for advertising

Due to its engagement and reach, commercial television is able to boost the value of Australian brands, the top 100 of which Brand Finance has valued at \$161 billion.⁶

Commercial television is one of the most effective advertising channels for engaging audiences, generating sales in the short term, and building brands in the long run. Deloitte's Media Consumer Survey finds that, where 80% of people tend to skip online video ads, 46% are most willing to engage with ads on TV.⁷ Of course, this doesn't mean all Australians enjoy watching ads. Unsurprisingly, the survey from the previous edition of this report revealed that the majority of Australians (75%) would prefer to watch less than 10 minutes of ads per hour.⁸

Research from Monash University models the effectiveness of marketing across nine media types including Total TV*, Search, Digital Video, Social Media (Facebook), and Radio⁹. Over 850 observations of return-on-investment (ROI), provided by 60 brands across 10 product categories were considered¹⁰. The results demonstrated the effectiveness of Total TV relative to other advertising forms.

Total TV drives **3X** more sales volume than any other media type

Every dollar invested in TV advertising generates **\$4.30 in return within three months**

Every dollar invested in TV advertising generates **\$18.30 in return in the long term**

Given the returns from advertising in the long term, it is to be expected that businesses would set brand building as a strategic priority. Tony Hale, CEO of the Ad Council, suggests that this is not the case. TV is a great channel to capture attention and developing brands:

“Many businesses tend to adopt a short-term approach to advertising. However, the real benefit for advertisers is from long-term, sustainable brand building. This has a substantial impact on the value of brands that tends to be ignored or is overshadowed by short-term activation.”



Case study: MasterChef Australia and Coles – The Purple Cauliflower campaign

As a direct result of Australia's unsung hero of the vegetable patch – the purple cauliflower – featuring in a Mystery Box challenge, Coles experienced a 430% increase in the volume of Purple Cauliflower sold in store, proving that the MasterChef effect is as strong as ever.

Coles' sponsorship of MasterChef Australia in 2021 saw another year of successful results, including:

- The highest sponsorship recall of any MasterChef Australia sponsor.
- 77% of committed viewers could recall seeing the Purple Cauliflower integration.
- MasterChef viewers are 7.8 times more likely to intend to purchase Purple Cauliflower than non-viewers

The Purple Cauliflower is an example of where well executed product placement with the organic use of the product can steer viewers towards a product. MasterChef has been at the forefront of this as they consistently integrate product placement in a well-received fashion through the unique challenges within the show.

Coles' chief marketing officer, Lisa Ronson, said:

"We're so proud of our 13-year association with MasterChef Australia. It is one of the most successful and enduring partnerships in Australia. Each and every year, the show continues to support the Coles brand in creative and innovative ways. We look forward to continuing our partnership with the MasterChef Australia brand into the future."



Source: Edentify, 10 Insights, 2021 MasterChef Australia study, Coles

Case study: Strengthening brand recall with Optus and The Voice

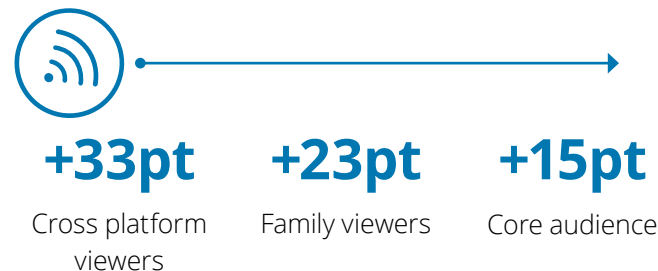
Optus chose to partner and integrate with The Voice program on Channel 7 to drive long-term impact for their brand value and recall. Optus naturally and seamlessly integrated itself and its brand values by leveraging the program's key 'Yes' moments when contestants successfully auditioned for the show.

The Voice is well aligned with Optus' brand positioning of 'It starts with yes'. Optus' Chief Marketing Officer, Melissa Hopkins, said:

"Every contestant on The Voice demonstrates that raw optimism by saying 'Yes'. It felt like a natural partnership and integration, allowing us to be part of the content in an authentic way. We didn't talk about any product or service; rather it was about the brand and DNA of Optus and what we stand for."

The Voice not only complements Optus' brand value, it also draws in a habitual audience who are highly engaged with the program. This results in higher engagement with Optus' brand and increased brand association when consumers are at the stores. The Voice artists' real stories played a role in increasing brand recall (+20pt) and mobile (+12pt) and broadband consideration (+15pt).

This integration was enabled by Optus' relationship with Channel 7. Optus was able to open conversations with the programs' executive producers and talk about their intentions and ambitions for this campaign. This meant that they could partner together and achieve their respective outcomes.



Note: Brand consideration in marketing is whether the target audience will consider purchasing a product as an option to resolve their problem.

Source: Gemba The Voice effectiveness study – Optus 2021



Case study: Nine and NRMA Insurance – A Fire Inside

In response to the Black Summer bushfires of 2019-20, the Nine network and NRMA launched the docufilm 'A Fire Inside' to drive awareness of the changing climate. The campaign has been successful in shifting attitudes towards climate change with a 23 percentage point increase in people aged 40+ that have 'actively looked into how (they) can do (their) part to tackle Climate Change'.

The campaign has also led to brand association with 'where there's fire there's help' increasing by 40%, which shows the effectiveness of partnerships with Commercial TV networks in addressing the key issues impacting Australians.

The campaign was delivered through four channels:

1. Broadcast for reach,
2. Publishing for visual impact,
3. Radio for longer-form content, and
4. Digital to extend reach and impact.

The docufilm was first released in selected cinemas and promoted by a geo-targeted campaign through the channels above. Australians were then encouraged to watch the docufilm on Channel Nine in both metro and regional markets. Following the launch, people were encouraged to watch the film on demand from 9Now. Editorial teams worked closely with NRMA to find relevant content angles across platforms.



+23 percentage points

People aged 40+ looked into tackling climate change



+40%

Brand association with 'where there's fire there's help'

Source: A Fire Inside, Nine <https://www.nineforbrands.com.au/case-studies/nine-nrma/>





Community contribution



\$195M

Total value provided by networks to support communities and charities



100

Hours provided by networks to broadcast charitable content



13,000

Volunteering hours dedicated by networks employees



\$25M

Raised through Red Cross telethon



\$4.9

Of social value for every \$1 invested in charitable organisations

Supporting communities through broadcasting

Commercial television's impact to the economy extends further than just the industry's direct and indirect economic contribution. Networks within the industry provide support for community and charitable organisations through community service announcements (CSAs), cash donations, in-kind support and broadcast airtime.

This support is provided to a wide range of organisations, which support the community in various ways. Charities contribute to improving social outcomes throughout Australia, including in health, employment, safety, community engagement and more.



The estimated \$55 million worth of support provided by Southern Cross Austereo (SCA) to Beyond Blue has helped them to promote their mental health and suicide prevention services. CEO Georgie Harman was appreciative of the support SCA acknowledging: *"the partnership between SCA and Beyond Blue had made a significant difference in the lives of people in Australia".*



More than \$457 million has been raised and donated over the 55 years of Channel 7's telethon to ensure children live a healthy and safe life. Telethon7 is a Perth institution, with over 26 hours of entertainment, the telethon helps children in hospitals, those with disabilities and disadvantaged kids to live a high quality life now and in the future.



The 'Make a difference' program "establishes a direct link between First nations peoples and corporate Australia" according to Imparja CEO Alistair Feehan. The program is designed to provide tangible outcomes to Aboriginal communities such as a dialysis machine for a health centre, sponsoring a children's ward or funding a community sports coordinator.



Contributing to community organisations through donations, airtime and sponsorships

In 2021, a total value of \$195 million was provided by networks to support communities and charitable support

The vast majority of this was made up of in-kind donations and community service announcements through broadcast airtime provided by networks.

Over 13,000 volunteering hours were dedicated from employees of networks to support communities and charitable organisations, worth \$600,000, whilst just over 100 hours were provided by networks to broadcast program material from charitable organisations.

Relative to the industry's total revenue of \$3.6 billion in 2021, the networks' community and charitable support makes up approximately 5% of this figure. In other words, for every \$1 million that the industry produces, \$50,000 provided to communities and charitable organisations.

A report from Strive Philanthropy looking into the corporate giving by Australian corporations in 2021 found that across the top 50 corporate givers, a total of \$1.2 billion was provided in philanthropic efforts¹¹. This figure places the \$195 million worth of (in-kind) value provided by networks into perspective.

Table 2.1: Breakdown of charitable financial contributions by the commercial television industry, 2021

Community and charitable support	\$ million
Community service announcements	\$93.9
Value of in-kind donations (e.g. equipment, office space)	\$99.6
Donations	\$0.6
Sponsorships	\$0.6
Volunteer support (e.g. editorial, media, marketing support)	\$0.6
Total	\$195.3

Source: Deloitte Access Economics based on data provided by the networks.
Due to data availability these figures may be understating network's contributions.

Table 2.2: Breakdown of time contributions by the commercial television industry, 2021

Community and charitable support	Hours
Program material	105
Volunteer support (e.g. editorial, media, marketing support)	13,016
Total	13,121

Source: Deloitte Access Economics based on data provided by the networks.
Due to data availability these figures may be understating networks' contributions.

Case Study: Australia Unites – Red Cross Flood Appeal

Commercial television has supported the efforts of the Red Cross Appeal through the broadcast airtime and donations that individual networks provide to the organisation. Broadcast airtime allows the Red Cross to increase the reach of its advertisements and community service announcements.



The Red Cross is one of Australia's largest not-for-profit charitable organisations. To date the organisation has helped millions of people in Australia through their support to those facing emergencies and disaster situations.

In 2022, networks Seven, Nine and 10 joined together and presented Australia Unites: Red Cross Flood Appeal in an effort to support the communities who were impacted by the devastating floods across Queensland and New South Wales.

The telethon featured Australian music legends, celebrities and popular news and entertainment personalities from across the three networks. Together, Australians raised over \$25 million for the Red Cross flood appeal with over 18,000 calls made to the organisation as well as more than 340,000 visits to the Red Cross's website during the broadcast. Over the five hours of broadcast, the telethon reached over three million Australians with approximately one-third of these viewers in regional areas.

Kym Pfitzner, CEO of Australian Red Cross appreciated the support and effort of the three networks:

*"Thank you to Channel seven, nine and ten for coming together – the result was beyond our expectations. We witnessed the spirit of humanity in action. I'd like to thank everyone who donated for your incredible generosity."*¹²

Using the funds raised, the Red Cross was able to support flood victims with:

- \$1.6 million for 24/7 support from trained emergency response team members and volunteers.
- \$41.1 million in flood relief grants to next-of-kin of those who died and households experiencing financial hardship due to the flood impact on their home.
- \$8.6 million on a three-year recovery program through community outreach, psychosocial support, community recover, etc.



Over \$25 million raised



More than 18,000 calls made to the Red Cross



340,000 + visits to the Red Cross website

Amplifying the impact of community organisations

In 2022, there were 46,455 registered charities in Australia with total revenue of \$173 billion.

Source: Productivity Commission, Contribution of the Not-for-Profit Sector

Australia's charitable organisations make direct contributions to the Australian economy through paid employment of staff and other expenditure. But they also serve as catalysts of additional support by activating the volunteer community, government and private donations, and/or sales.

Analysis by Deloitte finds that the Social Return on Investment (SROI) for charitable organisations in Australia is around five dollars for every dollar invested, on average (see Appendix for further details).¹³ The \$195 million contributed by commercial TV networks in 2021 is therefore amplified by the not-for-profit sector into a much larger social impact.

The Productivity Commission has developed a measurement framework which maps the contributions of not-for-profit organisations to their social impact.¹⁴ The framework measures the contribution on four levels: the resources used ('inputs'), the activities undertaken ('outputs'), the direct costs and benefits

to participants ('outcomes'), and the longer-term net benefits to participants and the broader community ('impacts').¹⁵

Charities contribute to improving social outcomes including health, employment, safety, community engagement, cultural heritage, biodiversity, and many more.¹⁶ Charitable organisations achieve these outcomes by providing services to clients and members, facilitating connection to the community, influencing policy-makers through lobbying and research, and community endowments by developing natural, built and cultural assets.¹⁷

Research from the Productivity Commission suggests that the not-for-profit sector employs 23 FTE paid staff for every million dollars of income that is not self-generated (i.e. sales).¹⁸ This means that commercial TV's contribution may support the employment of 4,470 FTE staff in the sector.

\$195 million is contributed to charitable organisations by commercial TV networks

Supporting employment in the not-for-profit sector

For each dollar invested into charitable organisations in Australia generates around \$5 in social value.

Everybody gets it. Revaluing the economic and social benefits of commercial television.





Available to everyone



99%

of Australians

Have access to commercial TV



22%

of Australians

Have insufficient internet connections or data caps to stream video on demand



92%

of Australians

Watch commercial television every month



58%

of Australians

Are concerned about the costs of subscription services

Access to video on demand and commercial television in Australia

At least 5.6 million (22%) Australians can't access live streaming and video on demand (VOD). In comparison, just 219,000 (0.9%) Australians can't access commercial TV.

For most Australians, the internet is part and parcel of everyday life. It is integrated into the way we shop, socialise, communicate, do business, access information and more, creating substantial benefits for businesses and individuals alike.

While the internet is widely used in Australia, it is not universal, the quality and access varies significantly, and it is not free. Furthermore, internet connectivity tends to be less reliable and slower in regional and remote areas, compounding existing disadvantage faced by individuals in these areas, due to lack of access to infrastructure and essential services.

Analysis of access to broadband and quality of broadband across Australia has revealed roughly 1.4 million Australians (6%) don't have access to internet.¹⁹ Of those that do have access, a further 4.1 million (16%) don't have sufficient data caps required to stream VOD.²⁰ **This suggests that at least 5.6 million Australians (or 22% of the population) can't access VOD either because they don't have internet access or have restrictive data allowances.**²¹

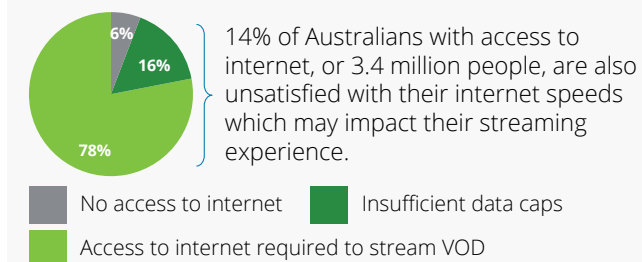
VOD consists of broadcast video on demand (BVOD) and streaming video on demand (SVOD). While both require reliable internet access and sufficient data caps, they operate under different models. SVOD consumers pay subscription fees to access content behind paywalls, while BVOD operates under an advertising model and is available to consumers for free. Some may not be able to access SVOD because it is cost prohibitive. Viewers may also experience quality issues when streaming such as buffering or drop outs, given that 14% of Australians say they are dissatisfied with their internet speeds and the same proportion need to pay more than 10% of their household income to have quality, reliable internet.

For these individuals having access to broadcast delivered commercial television is especially important as a free and universal service. Commercial television in Australia is more widely accessible with 92% of Australians watching it every month.²² As many as 25.2 million (99%) Australians

can access commercial TV either through digital terrestrial TV (DTT) or viewer access satellite television (VAST), which is support by government.²³

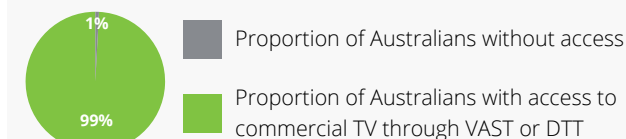
Chart 3.1: Access to VOD via broadband compared to commercial television in Australia

Access to VOD via broadband



Source: Deloitte Access Economics (2022) based on ACMA and ACCC data.

Commercial television



Source: Deloitte Access Economics (2022) based on OzTAM, Regional TAM, ABS and RBAH VAST data.

1.5 million Australians don't have access to the internet

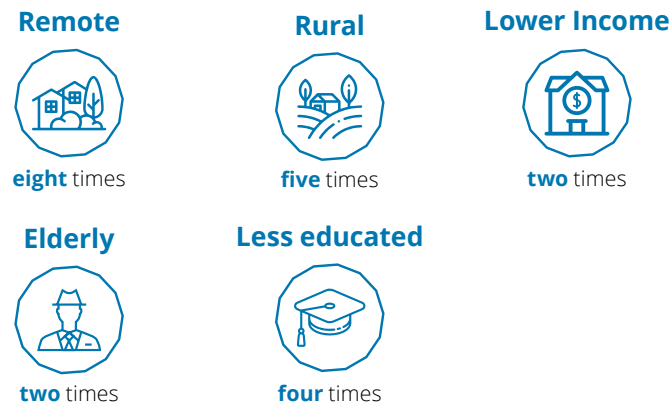
The latest figures from the Australian Communications and Media Authority (ACMA) suggest that 91% of Australian households could access the internet in 2021 (via the NBN, a fixed or wireless internet service, mobile broadband or satellite), while 9% of households don't have access to the internet through any of these means.²⁴

At the population level, this equates to roughly 1.5 million Australians without internet access (or nearly 6% of all Australians). This estimate takes into account compositional differences between households with and without internet access, as households with internet access tend to have more household members.²⁵

Household access to internet varies significantly by region and socioeconomic characteristics (see Figures 1.1 and 1.2). For example, in the local government areas (LGAs) of Belyuen, Northern Territory (NT) and Maralinga Tjarutja, South Australia (SA) as many as 87% and 76% of households couldn't access the internet, respectively. By jurisdiction, the NT had the highest proportion of households without access to internet at 42% on average, followed by Queensland at 27%. A full breakdown by LGA is provided in the Appendix.

Figure 1.1: Proportion of households without internet access, by LGA types, 2021.

Households in local government areas that are:

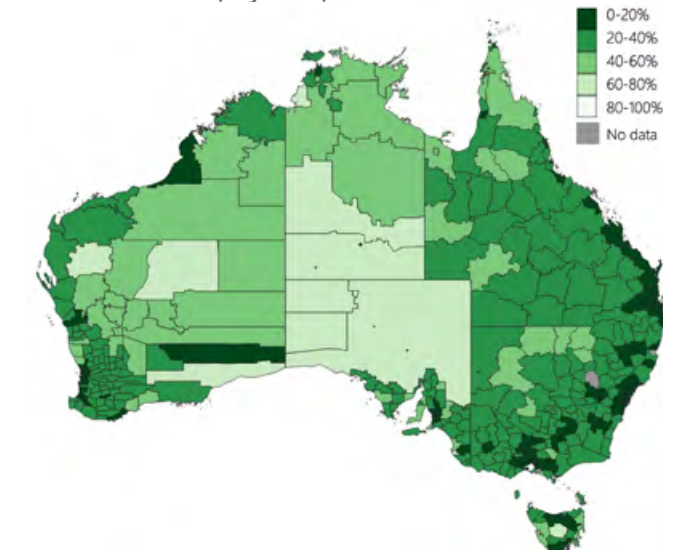


...more likely to have no internet access

Source: Deloitte Access Economics calculations (2022) based on ACMA and ABS data.

Note: Comparisons have been made to relative to households that are based in metropolitan areas, have a higher income, have a larger proportion of its population aged under the age of 55 and attained higher education, respectively. Remote/rural LGAs are defined as LGAs with a majority of dwellings located in a remote/rural area. Lower income LGAs are defined as those with the majority of households with a weekly income of below \$1,000. Elderly LGAs are defined as those with a majority of its population aged 55 and over. Less educated LGAs are defined as those where the majority of the population have not attained higher education (including university, TAFE Certificates III and IV).

Figure 3.2: Proportion of households without internet access, by LGA, 2021.



Source: Deloitte Access Economics modelling (2022) based on the ACMA (2021) and ABS Census (2016).

4.1 million Australians don't have sufficient data caps to enable streaming VOD

A key consideration with streaming VOD is that it requires a considerable amount of data. In fact, the average consumer of VOD requires a data cap of at least 200GB per month,²⁶ with some sources suggesting a minimum of 300GB per month is required.²⁷

This means that consumers with internet plans with restrictive data caps or who cannot afford to be on an unlimited plan, they may not be able to access VOD services. **Modelling for this report finds that 4.1 million Australians can't access VOD due to restrictive data caps.**

Data from the ACCC suggests approximately 21% of households with access to the internet have a data cap (see Chart 3.1). Specifically, this estimate is informed by ACCC data on the proportion of household internet plans by speed tier (see Table 3.1). We make assumptions around the data caps associated with each speed tier based on a broad review of internet plans in recent years. In general, we find that higher speeds are associated with larger data caps and vice versa, with an estimated 17% of household internet plans with data caps that are insufficient to enable streaming VOD.

Applied to the number of individuals with internet access, this suggests that approximately 4.1 million individuals or 16% of all Australians can't access VOD due to insufficient data.²⁸

It is possible that the existence of a data cap in and of itself (regardless of the actual data cap) may act as a deterrent against streaming videos or performing other data-heavy tasks. In fact, a household survey found that 30% of households worry about their data allowance when watching online videos.²⁹ This suggests the estimates in this report may be conservative.

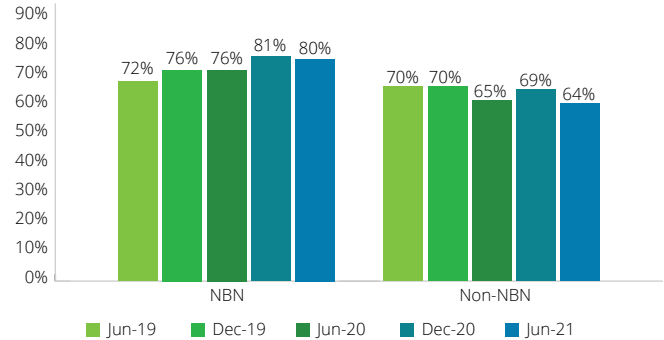
Furthermore, given the Multi Technology Mix (MTM) approach taken by the NBN in the rollout of broadband across Australia, changes to speed and price may require fundamental changes to underlying technologies. On the other hand, recent initiatives such as NBN Co's enhancements to Sky Muster Plus satellite services will allow customers to access streaming services without it counting towards their monthly data allowance,³⁰ which could make VOD services more accessible over time.

Table 3.1: Proportion of internet plans in households by speed tier

Speed for	Proportion of plans by speed (ACCC)	Data cap (Assumed)
12 Mbps	10%	100 GB
25 Mbps	14%	200 GB (7%)
		500 GB (4%)
		Unlimited (3%)
50 Mbps	63%	Unlimited
100 Mbps or greater	13%	Unlimited

Source: ACCC Internet Activity Report (2021). Speed tiers are listed above as a method to inform assumptions on data caps.

Chart 3.2: Proportion of retail NBN and non-NBN fixed services without data caps



Source: ACCC Internet Activity Report (2021).

3.4 million Australians are dissatisfied with their broadband speeds

Internet speeds will also greatly influence individuals' ability to access VOD and the quality of stream.

Ookla publishes open datasets related to global fixed broadband and mobile speeds globally. On its Speedtest Global Index, Australia's fixed broadband is currently ranked 66th out of 181 countries globally.³¹

Other sources indicate Australian consumers often experience issues with the quality of their internet stream. In fact, a survey of Australian consumers found that:

- more than one-third (36%) of Australians experience buffering issues at least once a week
- 16% experience drop outs daily
- 14% are dissatisfied with their broadband speeds. Applied to the population with access to internet, this is equivalent to 3.4 million Australians.³²



36%

Australians experience buffering issues at least once a week



3.4 million

Australians (14%) are dissatisfied by with their broadband speeds

The increasing reliance on internet during COVID placed pressure on network congestion, as more people worked, studied or accessed entertainment online. In 2020, several video streaming companies deliberately reduced the speed and quality of their streams to alleviate pressure on network congestion.^{33, 34} This is particularly relevant for households relying on satellite or wireless technologies which are more likely to be impacted by weather events and network congestion, reflecting roughly 5% of all NBN connections in Australia.³⁵

This can compromise viewer experience, particularly for live sporting events such as the AFL Grand Final, which can place significant strain on networks' bandwidths.³⁶ This has happened in the past with livestream American football finals and international soccer games which have both experienced outages, constant buffering, technical glitches and dropouts.^{37,38,39}

Similar issues have also arisen during other sporting matches demonstrating that live streaming services can at times struggle to cope with extremely high viewership, compromising viewer experience.

The analysis in this section shows that VOD services over the internet are not as widely accessible as commercial television. However, it is important to note that VOD access has increased over time – 60% of Gen Z and Millennials have more subscriptions now than a year ago.⁴⁰ As broadband services improve in the future, it's likely that more households will access VOD services.

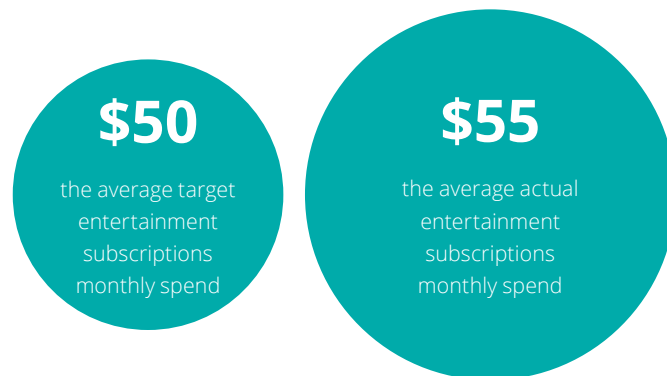
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Australians are spending more on subscription video on demand (SVOD)

With the exception of broadcast VOD (BVOD) services, most VOD services are paid subscription models. In addition, internet plans are often costly for households, especially given the rising cost of living in Australia.

Most households subscribe to multiple subscription services to access the content they want. In fact, the average number of paid TV/movie services in each household is 2.3.⁴¹ Multiple subscription services puts pressure on household budgets, with the average monthly spend on entertainment subscriptions growing to \$55 in 2021,⁴² equivalent to \$660 per year. This is despite most households aiming to spend \$50 on subscriptions each month, reflecting an overspend of \$5 each month or roughly 10% of their expenditure.⁴³



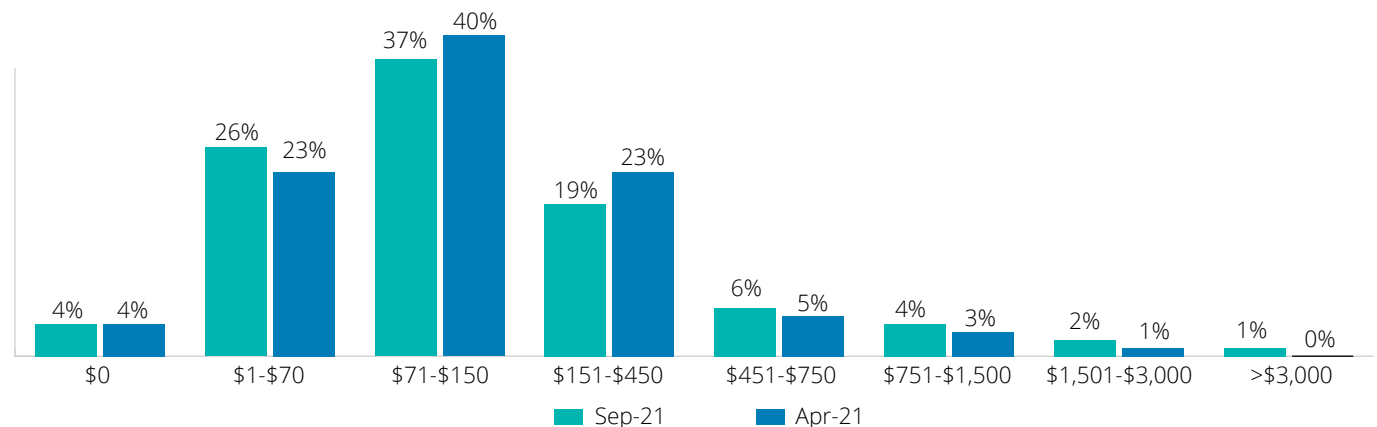
58% of Australians are concerned about the costs of multiple services

The costs of streaming SVOD are growing. Streaming services in Australia have increased prices or are hinting at a future price increase within the next 12 months.⁴⁴ According to Deloitte's Global State of the Consumer Tracker, the number of Australians budgeting to spend \$150 to \$450 AUD for their internet, mobile phone, cable TV and streaming services increased by 18% in the six months to April 2022 (see Chart 1.4). The younger generations have already shown declined interest in SVOD services, with recent report showing that the share of under 25-year-olds accessing SVOD services in Q2 22 dropping by 4%.⁴⁵ More broadly, 666,000 SVOD services were cancelled during Q2 22, with a further 16% of viewers planning to cancel a service.⁴⁶

These costs are particularly burdensome for lower income households. Around 14% of Australians, and 67% of Australian households in the lowest income quintile, will need to pay more than 10% of their household income to access quality, reliable internet.⁴⁷

Households in regional and remote areas where internet connectivity is typically poorer can also incur significant costs in order to access reliable internet. For example, the setup of the Starlink satellite service can cost more than \$900, which is in addition to shipping costs and ongoing service fees.⁴⁸

Chart 3.3: Proportion technology, media & entertainment spend, Sept-21 and Apr-22.



Source: Deloitte Global State of the Consumer Tracker (2022).



Free TV audiences



16M

Australians

Watch commercial television in an average week



175

Minutes

Of commercial television watched by metro viewers per day



31%

Weekly audience base

Of commercial television is made up by regional audiences



8.5

Hours

Of family time is estimated to be provided by commercial TV each week

Who watches commercial television?

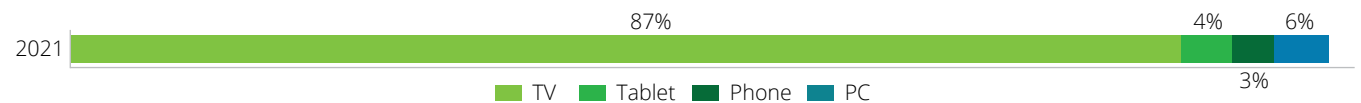
Television is the go-to method of staying updated with the latest news or winding down with light entertainment. In an average week, over 64% of the population or 16 million Australians tune in linear commercial television.⁴⁹ Viewers watch three hours of commercial television per day on average, with regional viewers add additional reference to Regional TAM⁵⁰

Commercial television was the top home entertainment activity across all generations, according to Deloitte's Media Consumer Survey.⁵¹ Even though there was a shift for younger generations towards other digital entertainment services such as music or browsing social media, commercial television outperformed them. OzTAM data shows that commercial TV accounts for around half of home viewing, ahead of public broadcast, VOD, pay TV, and social media. TV is also the device of choice for home viewing, accounting for 87% of commercial BVOD viewing at home.⁵² There were clear generational differences in TV viewing habits. Matures and Boomers preferred to watch live commercial television, while Millennials and Gen Z consumed more catch-up or BVOD TV.⁵³ Over the longer term, the trend has been a decline in commercial TV's relative share of audiences as the media landscape has attracted more players.

BVOD continues to grow strongly, particularly among the younger generations.⁵⁴ The total number of commercial TV BVOD minutes in 2021 amounted to 34 billion, averaging a daily viewing time of 94 million minutes and daily reach of 938,000.⁵⁵ The growth in BVOD consumption also reached 35% from the second half of 2020 to 2021 for all

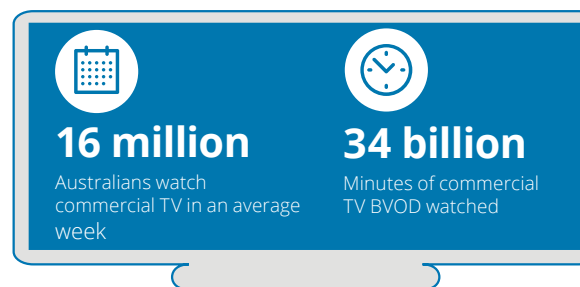
broadcasters.⁵⁶ Ongoing evolution and innovation in the BVOD space will ensure that broadcasters continue to appeal to audiences of every age and generation.

Chart 4.1: Share of Commercial TV BVOD home viewing across devices



Source: OzTAM National Streaming Meter and TAM Panels, weighted to National E/S estimates of TV, BVOD, SVOD and PayTV usage; all figures based on total people.

Figure 4.1: Commercial television audience and viewership



Source: Consolidated 28 day combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. Daily reach is based on the average of the survey day cumulative 1-minute reach audience (0200-2600) within the period for Total People.

Chart 4.2: Share of home viewing by broadcaster group



Source: OzTAM National Streaming Meter and TAM Panels, weighted to National E/S estimates of TV, BVOD, SVOD and PayTV usage; all figures based on total people.

Note: Regional TAM, Combined Aggregate markets, 1st Jan-31st Dec 2021, Consolidated 28, Sun-Sat 0200-2600, Total People.

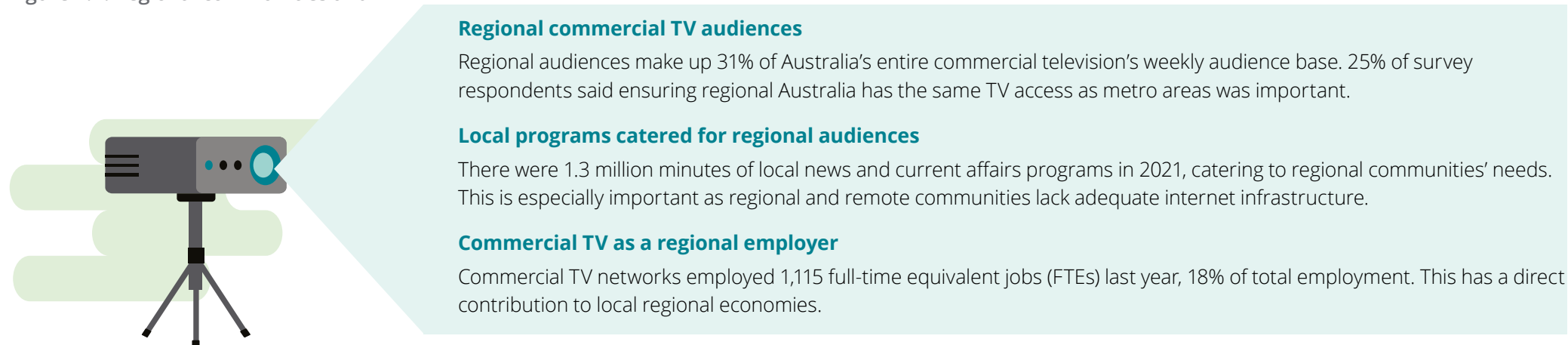
Commercial TV for regional communities

Commercial television is an important source of news, entertainment and employment for regional and remote communities. Audiences from these communities represent 31% of total commercial television viewership.⁵⁷ Regional audiences watch more television daily, especially for certain groups. Specifically, regional viewers above the age of 55 or households earning below \$30,000 watch 1.2 times and 1.6 times more television respectively, compared to the daily average regional viewer.⁵⁸ Latest figures suggest there are 9.1 million people living in regional Australia, representing a valuable audience base for commercial networks and an attractive, uncluttered market for brands to tap into.³ This highlights the role of commercial television in ensuring regional residents have free access to news, entertainment and sport.

Broadcast services are a critical way that local residents receive news and information that is relevant to them. This is particularly the case in areas without reliable broadband, where it is vital that authorities are able to disseminate information to local residents. This underscores the importance of the news and current affairs programming broadcast to regional audiences. In 2021, these programs make up 16% of total broadcast minutes or 19.5 million minutes (including re-runs).⁵⁹ Commercial broadcasters also aired a total over 23,000 hours (1.3 million broadcast minutes) of news and current affairs programs that directly relate to local regional areas.⁶⁰ Top programs by viewership were dominated by sports, with NRL, AFL, Rugby League and the Olympics featuring heavily on the list.

Commercial TV supports regional and remote economies through providing a valuable source of employment. Networks employed 1,115 full time equivalent jobs in 2021 (this figure accounts for regional and remote employment).⁶¹ Hiring local ensures programs and news bulletins are relevant to the local area and meet the needs of communities.

Figure 4.2: Regional communities and TV



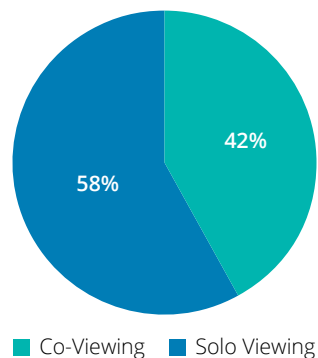
Source: Deloitte Access Economics based on data Regional TAM, commercial broadcasters & Deloitte's Media Consumer Survey.

Post-pandemic trends in co-viewing

During the pandemic, Australians had to find ways to entertain themselves within their own homes. One of the most frequent home entertainment activities in 2021 was watching television (63%).⁶² It presents an opportunity for families and friends who live under the same roof to participate in co-viewing by watching television together. To that end, broadcasters produce family-suitable content suitable for co-viewing.

In fact, 41.5% of metropolitan viewers and 40.1% of regional viewers watched television (all broadcasters) with family or friends in 2021.⁶³ Australians in metro areas watch an average of 20 hours a week. Although not every co-viewing hour involves family bonding, it provides an estimated 8.5 hours of family time.⁶⁴

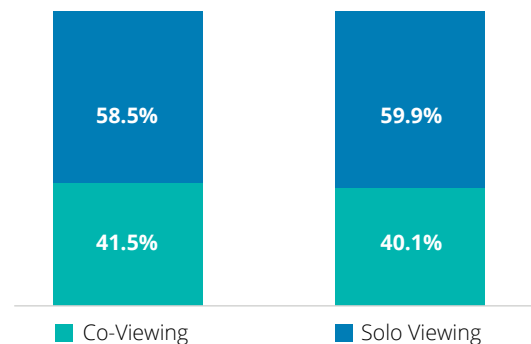
Chart 4.1: Proportion of co-viewing and solo-viewing of television (all broadcasters) in Australia



Source: Deloitte Access Economics modelling based on Think TV Data.

Larger households can lead to more people participating in co-viewing, which is the current trend in the post-COVID world. In 2016, over 75% of Australian households consisted of two or more residents.⁶⁵ According to a Domain survey, 13% of respondents changed their living arrangements such that household sizes increased since the pandemic.⁶⁶ These changes include moving back with parents, moving in with their partner, or taking on flatmates.

Chart 4.2: Proportion of co-viewing and solo viewing (all broadcasters) in metro and regional areas



Source: Deloitte Access Economics modelling based on Think TV Data.

Benefits of co-viewing for children's learning and development

While screen time for young children has sparked debate, research has documented benefits for children's learning and development when screens are used purposefully.⁶⁷ Parents should select programs which are educational in nature and actively engage with their children by talking about what they're watching or to ask questions.⁶⁸ This will help to maximise the social aspect of co-viewing and reap the benefits of watching TV together.

While parent interaction can enhance children's learning, research has shown that the mere presence of a parent (without any form of communication) can help kids to learn better.⁶⁹ Children can also learn more than just maths or language skills from TV programs. They can also pick up on emotional self-regulating methods and gain exposure to a wider range of people, social situations, places and cultures.⁷⁰

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Australia's democracy



23,000

Hours

Hours of news and current affairs relating to local regional areas aired in 2021



#1

Source of news

Commercial TV chosen as the most useful news source during election campaign



2,000

FTE Staff

directly involved in the in-house production of news and current affairs programs



65%

of Australians

Say commercial TV is a trusted source of local news essential to democracy

Commercial TV as an important news source for all Australians

Television news continues to be the most frequently used news source in 2021. It is consistently in the top three news sources across generations, from the Digital Natives of Gen Z to the Digital Immigrants of Baby Boomers and Matures.⁷¹

Free TV's members collectively employed over 2,000 full-time equivalent (FTE) employees directly involved in the in-house production of news and current affairs programs, 58% of the total number of FTEs.⁷² They also broadcast more than 3,600 unique news and current affairs programs in 2021.⁷³

Commercial television plays an important role for the communities living in regional Australia. It provides an effective method of informing the public about local issues and creating a sense of belonging to regional communities. In 2021, the member networks collectively broadcast a total of 1,381,272 minutes (23,000 hours) of news and current affairs that directly relates to a local regional area.⁷⁴

Figure 5.1: Commercial TV news industry in 2021



2,000

FTE staff in news and current affairs



23,000

Hours of local news and current affairs programs aired



3,600

Unique programs for news and current affairs



#1

Commercial TV chosen as the most useful source of news and information during the election campaign

Source: Deloitte Access Economics (2022) based on data request from commercial television networks.

Commercial TV during events of national and international importance

Since 2020, every year had its fair share of newsworthy events. This led to 96% of Australians keeping themselves up to date by consuming news.⁷⁵ A survey by CT group found **75% of respondents agreed that commercial TV plays as important role as an information source during times of crisis** such as the pandemic or natural disasters.⁷⁶

Other than commercial TV, Australians also rely on the Australian Broadcasting Corporation (ABC) and Special Broadcasting Corporation (SBS) for trusted news.

Commercial TV networks are also responsible for reporting on important national events like the 2022 election. **A recent survey found that commercial broadcasters (35%) were the most useful source of news and information during the election campaign.**⁷⁷ Commercial broadcasters' leaders debates between Scott Morrison and Anthony Albanese captured over 900,000 viewers.⁷⁸ This was just above the national broadcasters' viewership on election night.⁷⁹



Trust in commercial television

Commercial television helps to support Australia's democracy. CT group's recent 2021 survey revealed 65% of respondents agreed that commercial television is a 'trusted source of local news, current affairs and information which is essential to Australian society and our democracy'.⁸⁰ The most prominent media issue, according to 39% of respondents, was maintaining fair and balanced reporting in news and current affairs. In fact, Roy Morgan research found that 33.4% (or nearly seven million) Australians said commercial television was the most trusted and objective source of local news, current affairs and other information.⁸¹

In contrast to commercial television, other sources of news, in particular social media, may be viewed as less trustworthy. In the 2022 Edelman Trust Barometer Study, 24% of Australians said social media was trustworthy compared to 48% for traditional media such as TV, newspapers and radio.⁸² Younger generations (18-24 years old) who tend to rely on social media more for their news, have the most distrust in social media.⁸³

People's perception around what is a trustworthy source of news depends on a number of factors. For example a survey conducted for the Digital News Report found:⁸⁴

- Respondents who believed that the media was independent from political (76%) or commercial influence (80%) reported that they trusted news.
- Additionally, respondents who think media put what's best for society ahead of their own commercial (71%) or political interests (64%) have higher trust in media compared to those who think media act in its own self-interest.

These findings highlight the importance of media independence and ownership in gaining viewers' trust.

Figure 5.2: Trust in commercial television



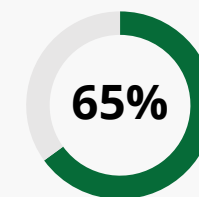
Independent from political or commercial influence



Putting society's interests first

3rd

Maintaining fair and balanced reporting ranked third among the most prominent issues relating to the Australian media industry



...of Australians say commercial television is a trusted source of local news essential to society and democracy

Source: Deloitte Access Economics (2022) based on data from CT group, Eli Noam and University of Canberra.

The process of making news objective, factual and reliable

Viewers of commercial television generally all have access to the same news and information as other viewers. The commercial television industry is subject to its industry Code of Practice which regulates the accuracy, fairness and impartiality of news.⁸⁵ As a result, the Code promotes fair and impartial news services that help to address the dissemination of misinformation. Networks have also taken additional steps to support diverse views in the media, such as funding scholarship programs for emerging journalism talent.⁸⁶

Viewers can complain to respective broadcasters about content on commercial TV that they think breaches the industry Code of Practice.⁸⁷ In the case of an unsatisfactory response, viewers can then lodge a complaint to the regulatory authority, the Australian Communications and Media Authority (ACMA). Roughly nine complaints were lodged in 2021 to the ACMA, five of which were ruled as a breach of the relevant standards.⁸⁸ This demonstrates that there are processes and measures in place to hold commercial TV broadcasters accountable.

By contrast, the nature of news in social media is different and its regulations are less mature. Algorithms and other AI technologies play a role.⁸⁹ In general,

these technologies track which types of content a user engages in and continually shows them content which are similar to their interests, which may reinforce or amplify existing beliefs, known as a 'filter bubble'.⁹⁰ For example, to retain users' attention and maximise advertising revenues, websites will recommend content which interests users.⁹¹ **This may create an obstacle for media plurality by only exposing users to content they agree with, rather than a diverse range of ideas and perspectives.**

73% of Australians are concerned about false information or fake news being used as a weapon.⁹² The ACMA found that four in five Australian adults have seen COVID-19 misinformation online.⁹³ This independent government agency oversaw the development of a voluntary Australian Code of Practice for Disinformation and Misinformation to address digital platforms' online misinformation and news quality concerns.⁹⁴ Additionally, users can protect themselves from online misinformation by accessing a variety of news sources and interacting with people of different perspectives to broaden viewpoints.⁹⁵



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Australian culture on screen



85%

of program expenditure

Of commercial broadcasters is dedicated to Australian programs



55%

of Australians

Watch sport at least weekly, with the majority preferring to watch sport on commercial TV



34%

of Australian viewers

Agree that important to have Australian content on SVOD



3M

Viewers

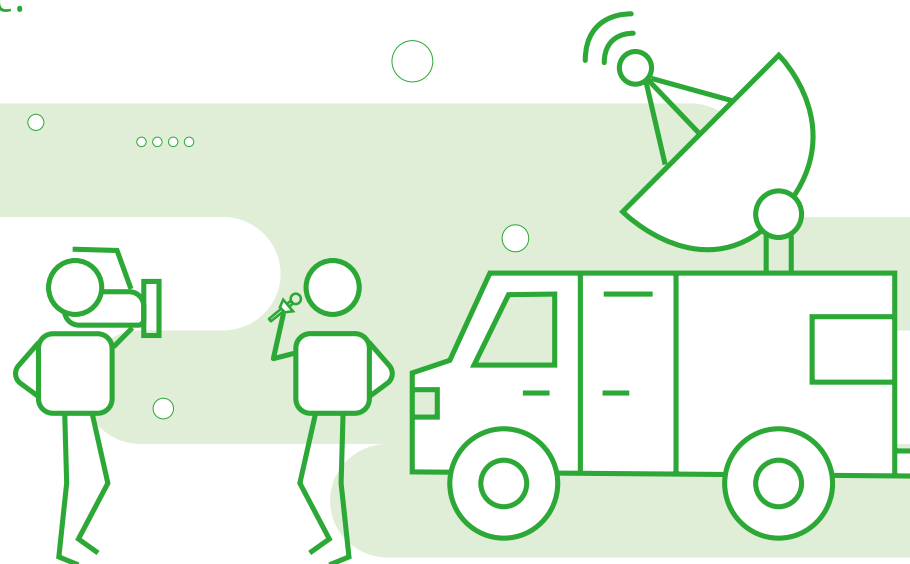
In major cities watched the AFL Grand Final in 2021

Australian culture on screen

Featuring Australian culture on screen is critical to commercial television. The sector plays an important role in creating and commissioning Australian content which directly contribute to a shared sense of Australian identity. Programs such as light entertainment (e.g. MasterChef), men's and women's sports (e.g. Wimbledon finals), dramas, documentaries, educational programs and local news are key to the unifying effect of television.

All broadcasters met and regularly exceeded their Australian content quota of 55%, in line with the Broadcasting Services Act 1992 which requires commercial TV licensees to meet this quota between 6am and midnight on their primary channel (see Chart 6.2).⁹⁶ The proportion of Australian content on our screens has increased every year since 2014 (with the exception of 2020 where commissioning of new content was reduced due to COVID restrictions), reaching 73% in 2021.⁹⁷

As a whole, commercial broadcasters dedicated 85.4% of their program expenditure to Australian programs, equating to over \$1.5 billion in 2021.⁹⁸ Regional broadcasters specifically spent \$28 million on commissioning local content.



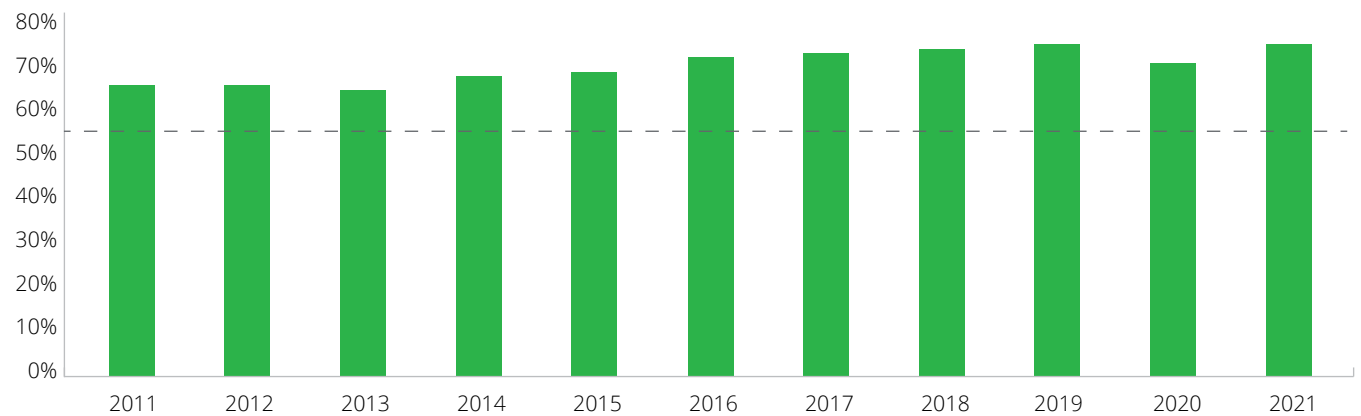
Some platforms such as SVOD services do not have the same regulatory requirements to commission or broadcast Australian content. The recent implementation of the Streaming Services and Reporting Scheme by the government promises to improve the current regulatory framework and foster more data about Australian content. Governments need to consider the amount of Australian content produced and accessible to audiences over time, taking into account audience/public expectations, sector capacity and prospects to grow in the future.

Chart 6.1: Program expenditure by, program origin and genre, 2021



Source: Deloitte Access Economics calculations (2022) based on data from ACMA.

Chart 6.2: Content quotas for metro networks ACMA quota of 55%, 2021



Source: Deloitte Access Economics calculations (2022) based on data from ACMA.

Case study: Home and Away

First broadcast on Channel Seven on 17 January 1988, Home and Away is the second longest-running drama series in Australia television history with 7,863 episodes produced. The drama series follows the lives of the residents in Summer Bay, a fictional seaside town inspired by Palm Beach in Sydney's Northern Beaches district.

The stories in the show mainly revolve around nurturing children, family, teenager problems, school problems and romances, although some of the more adult-themed and controversial topics such as alcoholism, domestic violence, bullying and miscarriage were also covered. Using these stories, Home and Away offers millions of viewers in Australia and across the globe a peek into Australian contemporary culture and social issues through a family lens.

Home and Away's cultural and social impact has a far reaching effect on Australia's national identity. The characters and stories of Summer Bay reach over one million Australians each week.

Over three decades of broadcasting, Home and Away has brought many economic and social benefits to Australia. The show is estimated to have contributed a total of \$7.5 billion in real income to Australian economy, generated \$1 billion in export revenue, Home and Away created 1,500 to 2,000 job opportunities per year, from casuals and part-timers through to full-time cast and crew. The show also spreads Australian culture across 145 countries and made Australia a more attractive destination in the eyes of global tourists.⁹⁹ The show has also produced many talented actors, directors and writers which later established themselves as pillars of the Australia creative industry. Home and Away is a prime example of how important commercial television is to shaping our national identity.



Figure 6.1: An infographic on Home and Away's impact



Source: ACIL Allen Economic and Global Impact of Home and Away 1988-2021.

Case study: The Block

It's the great Australian dream – to own and renovate your own home. This dream is the foundation stone for the Nine Network's home-grown hit reality franchise, The Block. Now in its 18th season, The Block has been part of the Australian television landscape since its debut in 2003.

The Block showcases a diversity of gender, age, sexual orientation and ethnicity and a variety of relationships spanning married, single, gay, straight, families, and mates/friendship. Beyond this diversity, The Block remains topical by embracing the experiences and concerns of everyday Australians. For example, in The Block – Decades (2020) featured the impact of the COVID-19 pandemic, while the current series of The Block: Tree Change (2022) embraces the key themes of resilience and environmental sustainability.

The Block continues to be a proven ratings performer with broad appeal across metropolitan and regional, and all demographics particularly co-viewing with children and their families. This continues to be the case in 2022 with the launch episode reaching a massive Total TV average audience of 1.345M, representing a significant year-on-year growth in Metro (+16% YoY) and Regional (+27% YoY).

The Block is also an export success story, showcasing Australian stories and the depth of Australian production talent. The franchise has achieved sales in 170 territories and has inspired 14 international versions of The Block format.

As well as generating huge audience engagement and international sales, The Block delivers direct and immediate economic benefits. Over its 18 seasons, The Block has directly created thousands of FTE television-related jobs and has been the training ground for production crews that have worked on countless other productions. In addition to its contribution to the screen sector, The Block has also triggered significant property construction, as well as employing hundreds of skilled workers within the construction and property industries both on the program itself and from Australian home owners who have been inspired to buy and renovate their own spaces.

Source: Channel Nine



Case study: On-screen diversity with Hunted on Channel 10

Hunted was the show that had everyone across the country talking as it followed 9 diverse pairs of ordinary Australians who become 'fugitives'. The fugitives must remain undetected for 21 days from a team of expert 'hunters', including some of the world's best investigators. They consist of former Australian Federal Police Officers, Australian Defence Force and British Intelligence Officers, skilled cyber analysts, special ops and private security.

Filmed in Melbourne and regional Victoria, and in partnership with Visit Victoria, the fugitives had to be at the top of their game to evade capture. This brought the state's attractions into the spotlight, in the hopes of reinvigorating the tourism industry.

CEO of production partner Visit Victoria, Brendan McClements said:



We're all about doing things differently at Visit Victoria, so as soon as we heard the premise of this exciting new format, we wanted to be part of it – to support the state through its recovery and encourage Australians to return.



Hunted's casting demonstrated rich diversity across both the hunter and fugitive teams. Positive representation across various communities was a recurring theme and featured organically throughout the series, including the Sikh community, the LGBTQIA+ community and First Nations Peoples. Discussion of surrogacy for male same-sex partners, positive body image and self-belief were also raised.

The series debuted as Australia's #1 new show of 2022, premiering with a total national audience of 1.25 million and averaging 1.09 million total national viewers across all episodes. It continued to break records on broadcast and video on demand and captured key advertising demographics. Hunted also took off on social media, with over 550,000 total multi-platform engagements across its nine-episode run.



22,000
Followers across
all platforms



#HuntedAU
Trending on
Twitter every
night of TX

Sports on commercial TV brings Australians together

Most Australians watch commercial television for sporting programs. Deloitte's Media Consumer Survey found that 55% of Australians watch sport at least weekly, with the majority of Millennials (58%), Gen X (78%) and Boomers (92%) preferring to watch sport on linear commercial TV.¹⁰⁰

Despite recent innovations and entrants in the sport streaming services market, Australians are still hesitant to pay for sport. More than half (56%) of Australians are not willing to pay at all for sport content.¹⁰¹ This is echoed in the CT group survey which recorded that 76% of respondents agreed commercial TV ensures every Australian has access to iconic sporting events like the Olympics or AFL without having to pay.¹⁰² The anti-siphoning list policy plays an important role in supporting commercial TV's and the public's access to sport.

Watching sport can have positive, cohesive effects on society and add to national pride. For example, 70% of Australians say that commercial television contributes to our national unity by broadcasting major sporting events like the Olympics (70%).¹⁰³

Respondents from the CT group survey agreed that commercial TV is not only inherently egalitarian because it is free for all (67%), but it can also contribute to our national unity by broadcasting major sporting events like the Olympics (70%).¹⁰⁴

Australian sport continues to draw significant audiences across the nation, including sports such as the AFL and NRL. The AFL Grand Final in particular garnered national attention, clocking in a record-breaking 3.1 million viewers in major cities.¹⁰⁵ The international sporting event of the year, the Tokyo 2020 Olympics, brought 2,654,000 metropolitan Australians together during its Opening Ceremony.¹⁰⁶ Every event and match of the Games was also available on Seven's 7plus app, recording a total of 4.6 billion viewer minutes.¹⁰⁷ This large viewer base can be attributed to the pandemic's effect on live sporting events, as 36% of sporting event goers attended fewer events in 2021 compared to previous years.¹⁰⁸

Apart from bringing Australian and overseas sports into living rooms, commercial television broadcasters can also influence the diversity of the broader sporting community. The 2021 Wimbledon Women's Final between Ashleigh Barty and Karolina Pliskova gained a sizeable metropolitan audience of 1.5 million and another half million in regional areas.¹⁰⁹

Table 6.1: Top sport programs broadcast by metropolitan broadcasters, 2021

Sport event	Audience
AFL Grand Final: Melbourne v. Western Bulldogs	3,051,000
NRL Grand Final Day: Match	2,206,000
Tokyo 2020 Olympic Games: Day 9 – Night	2,077,000
State of Origin Rugby League QLD v. NSW 1st Match	1,933,000
State of Origin Rugby League QLD v. NSW 2nd Match	1,873,000
State of Origin Rugby League NSW v. QLD 3rd Match	1,742,000
2021 Wimbledon D12: Women's Final – Barty v. Pliskova	1,547,000
Melbourne Cup Carnival: Melbourne Cup – Race	1,217,000
2021 Australian Open D14 – Men's Final	1,173,000
2021 Australian Open D5 – Night Session 2	1,103,000



AFL Grand Final was watched by
3,051,000 viewers

Source: OzTAM, 5 City Metro, 1st Jan-31st Dec 2021, Consolidated 28, Sun-Sat 0200-2600, Total People. Commercial TV



The future of commercial television



34%

Growth in BVOD market

The BVOD market is expected to grow by 34% by 2026.



3%

Decline in linear television

Linear TV is expected to decline 3% on average each year until 2026



3.7%

Growth in TV ads market

The TV advertising market expected to grow by 3.7% each year

The future of commercial television

Significant changes in Government policy affecting commercial television are expected in coming years. The Albanese Government has committed to ensure the prominence of Aussie content on connected TVs and to secure the future of the anti-siphoning list. These changes, along with potential SVOD quotas and greater regulation of news content across all media platforms have the potential to influence the media landscape of the future.

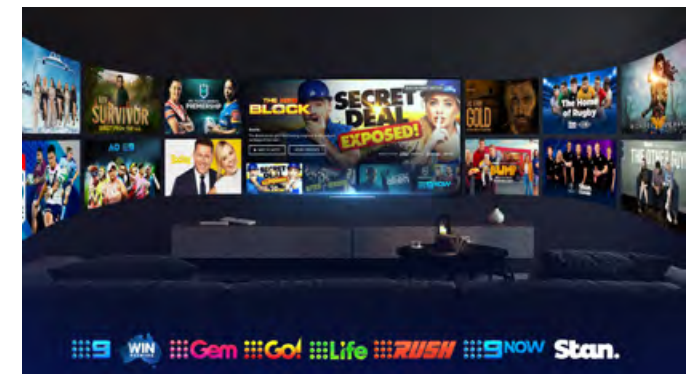
Changes in how we consume content and low barriers to entry have seen the arrival of new players in the market and more competition for viewer attention. Despite this, commercial television viewing has held up well, with 92% of Australians watching commercial TV every month. These trends can be expected to continue over the next few years. As a result we expect to see broadcast delivered television viewing decline by 3% on average each year to 2026 and at the same time a 34% increase in BVOD consumption over the same period.¹¹⁰

Technological change is also likely to play a role in the future of commercial television; impacting not just viewer experience but also how content is produced, distributed and recommended to viewers. Better connectivity has the potential to support viewers in consuming content online and on-the-go, while artificial intelligence could improve how content is recommended to viewers.

The availability of contextual data about viewers continues to strengthen the ability for advertisers to target specific audiences through commercial television. In particular, this could drive advertisers to shift from targeting program audiences to targeting individual viewers, with the TV advertising market expected to grow by 3.7% each year.¹¹¹

The need for reform of the media landscape has been the subject of considerable discussion over the last decade. Initially brought into focus by the ACCC's Digital Platforms Inquiry, regulators have since produced various research reports into the changing industry including on audience expectations for content safeguards.

The media landscape will undoubtedly face more disruption and change in coming years and the challenge will be to harness the opportunities from innovation while also preserving the strengths of the sector and its contributions to the economy and society.





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Economic contribution methodology

Economic contribution methodology

Economic contribution studies are intended to quantify measures such as value added, exports, imports and employment associated with a given industry or firm, in a historical reference year. The economic contribution is a measure of the value of production by a firm or industry.

A 1. Value added

Value added is the most appropriate measure of an industry's economic contribution to gross domestic product (GDP) at the national level, or gross state product (GSP) at the state level. Other measures, such as total revenue or total exports, may be easier to estimate than value added, but they 'double count'. That is, they overstate the contribution of a company to economic activity because they include, for example, the value added by external firms supplying inputs or the value added by other industries.

A.2. Measuring the economic contribution

There are several commonly used measures of economic activity, each of which describes a different aspect of an industry's economic contribution. Value added measures the value of output (i.e. goods and services) generated by the entity's factors of production (i.e. labour and capital) as measured in the income to those factors of production. The sum of value added across all entities in the economy equals GDP. Given the relationship to GDP, the value added measure can be thought of as the increased contribution to welfare.

Value added is the sum of:

Gross operating surplus (GOS), which represents the value of income generated by the entity's direct capital inputs, generally measured as earnings before interest, tax, depreciation and amortisation (EBITDA).

Labour income, which represents the value of output generated by the entity's direct labour inputs, as measured by the income to labour.

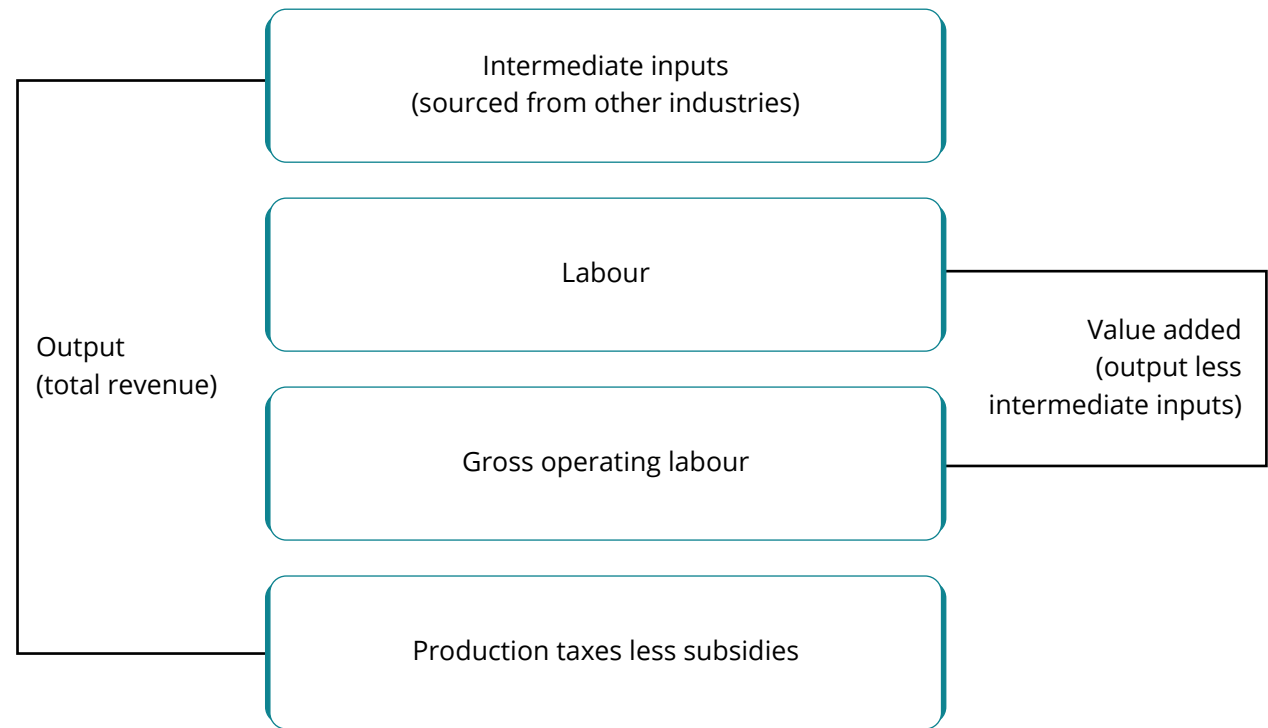
Tax on production less subsidy provided for production, which generally includes company taxes and taxes on employment (given the returns to capital before tax (EBITDA) are calculated, company tax is not included or this would double count that tax). Gross output measures the total value of the goods and services supplied by the entity. This is a broader measure than value added because it is an addition to the value added generated by the entity. It also includes the value of intermediate inputs used by the entity that flow from value added generated by other entities. Employment is a fundamentally different measure of activity to those above. It measures the number of workers that are employed by the entity, rather than the value of the workers' output.

Figure A.1 shows the accounting framework used to evaluate economic activity, along with the components that make up gross output. Gross output is the sum of value added and the value of intermediate inputs. Value added can be calculated directly by summing the payments to the primary factors of production, labour (i.e. salaries) and capital (i.e. GOS, or profit), as well as production taxes less subsidies. The value of intermediate inputs can also be calculated directly by summing up expenses related to non-primary factor inputs.

A.3. Direct and indirect contributions

Direct economic contribution is a representation of the flow from labour and capital within the sector of the economy in question. Indirect contribution is a measure of the demand for goods and services produced in other sectors as a result of demand generated by the sector in question. Estimation of the indirect economic contribution is undertaken in an input-output (IO) framework using Australian Bureau of Statistics input-output tables, which report the inputs and outputs of specific sectors of the economy (ABS 2010). The total economic contribution to the economy is the sum of the direct and indirect economic contributions.

Figure A.1: Economic activity accounting framework





Social Contribution Appendix

Social Return on Investment

Social return on investment can be defined as a systematic way of measuring the social, non-market benefits of programs and initiatives, to provide a more holistic measure. Desktop research was conducted by Deloitte to find the Social Return on Investment (SROI) of Australian charitable programs. SROI estimates are inherently difficult to quantify given the lack of data available and no universal standard for estimation. As an approximation, Deloitte has collated the SROI of ten charitable programs in Australia which are comparable to the programs run by the charities to which commercial TV networks provide donations. In cases where the return on investment is reported in a range, the average of the upper and lower bounds has been taken. On this basis, the average social return determined is \$4.90 per dollar invested.

Report	Author	SROI
Kids Under Cover: Social Return on Investment report	EY	4.2
National Community Hubs Program SROI Evaluation Report	Deloitte	2.2
Social Return on Investment Forecast	Net Balance for Foresters Community Finance and National Australia Bank	2.1
Fair Game & UWA Social Return on Investment	Fair Game Academy	2.2
The impact of youth programs in remote central Australia: a Social Return on Investment (SROI) analysis	Nous Group	4.5
Skyline Education Foundation: a Social Return on Investment (SROI) evaluation	Think Impact	11.4
Making an impact: Social return on investment	Deloitte for Canteen	6.0
Beat It: The Social Return on Investment (SROI)	The Incus Group	4.4
Ronald McDonald House Charities: Social Return on Investment	Social Ventures Australia	3.6
Social Return on Investment forecast of the Lifeline Online Crisis Support Chat Service	Net Balance for Lifeline	8.4
Average		4.9



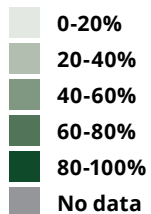
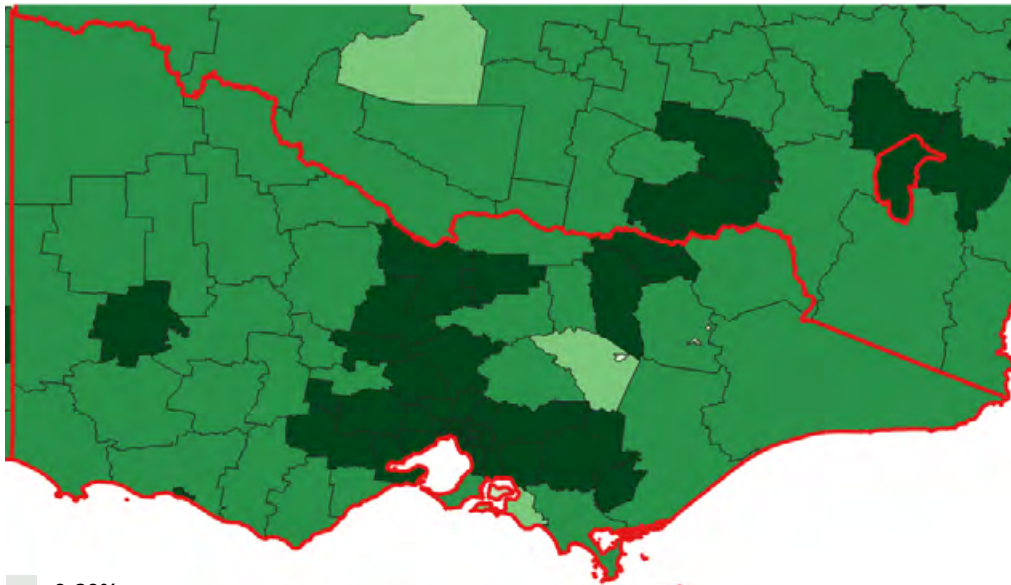
Broadband Appendix

Households without internet access

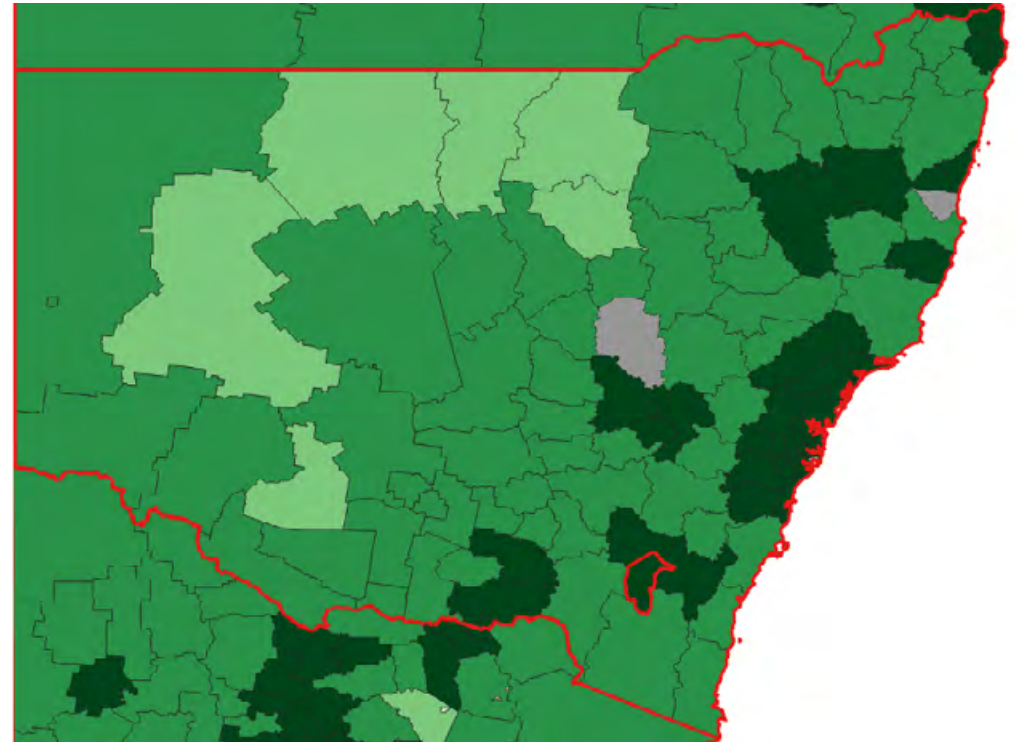
Methodology

To arrive at the breakdown of estimates of internet access by LGA, Deloitte Access Economics used information relating to the growth in overall internet access (using data from the ABS Census in 2016, and the ACMA in 2021) and applied it to the breakdown by LGA based on the ABS Census. The breakdown by State of households without internet access is shown below and on subsequent slides.

Victoria

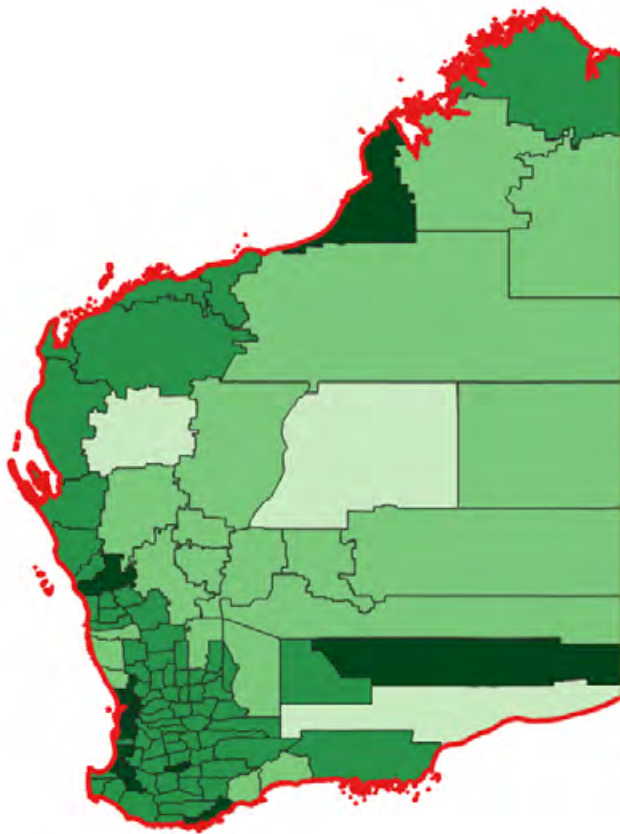


New South Wales

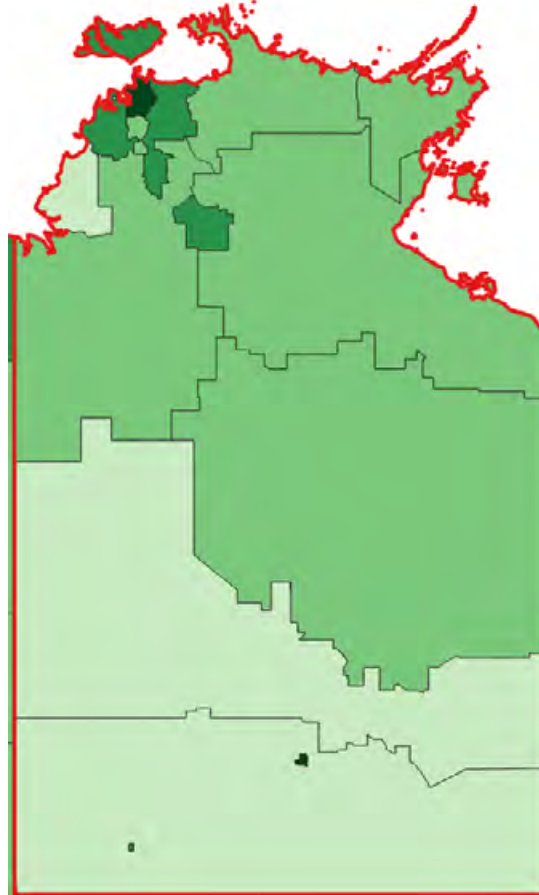


Households without internet access (cont.)

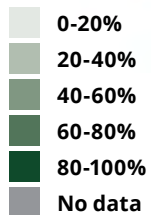
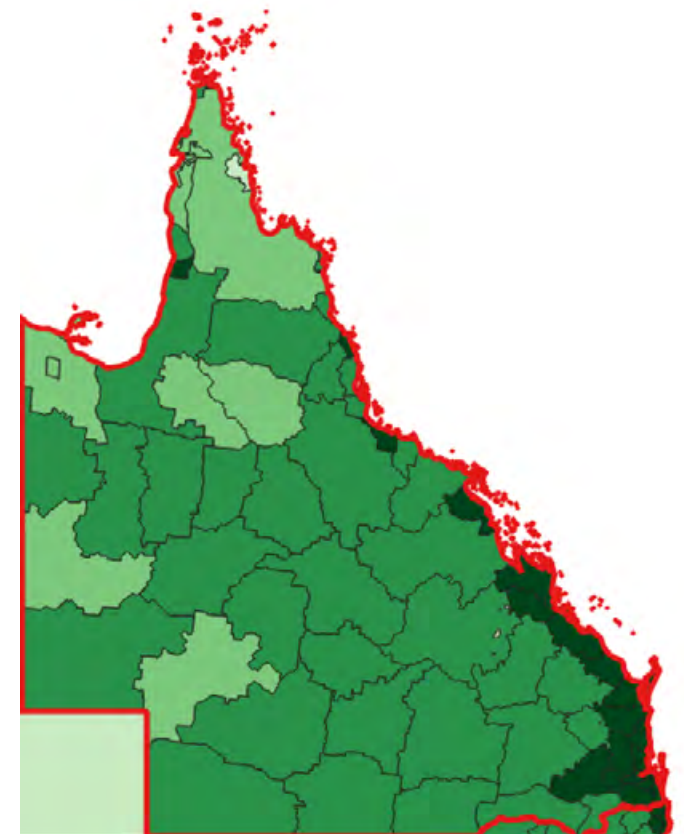
Western Australia



Northern Territory

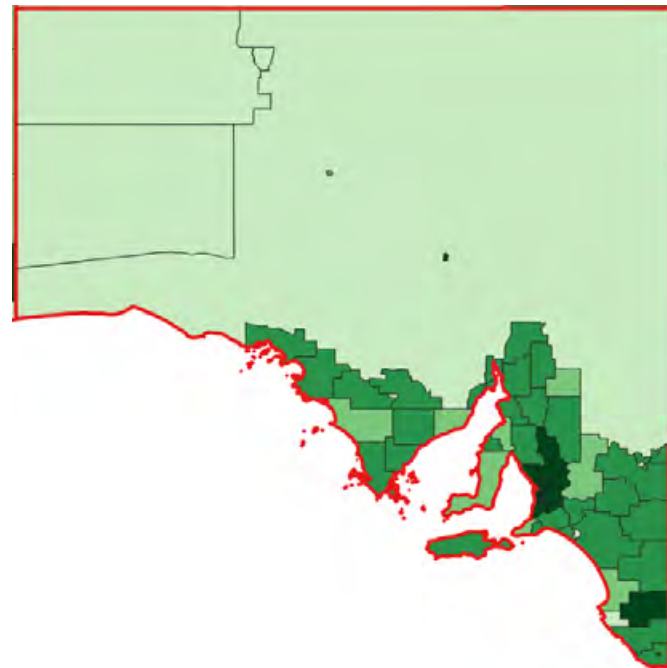


Queensland

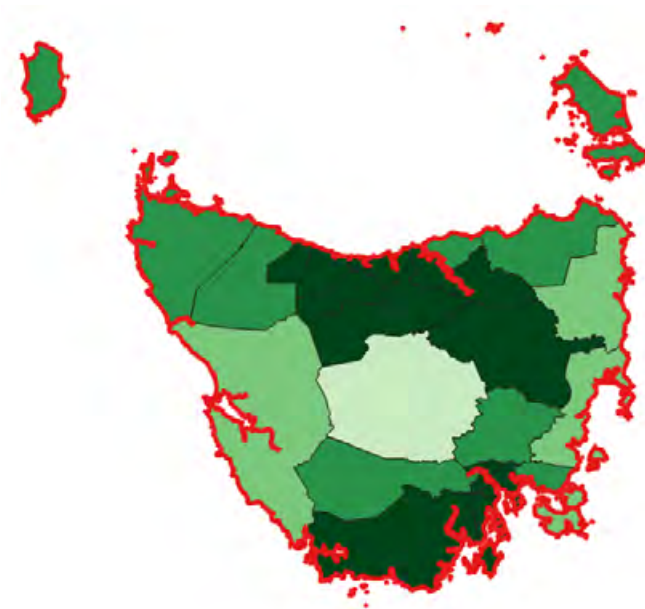


Households without internet access (cont.)

South Australia



Tasmania



ACT

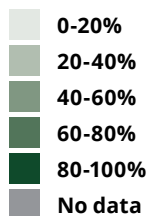


Table of LGAs sorted by household internet connection: NT

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
NT	Belyuen	87%	176	14%	4.0	42%	98%	0%	100%
NT	Central Desert	70%	4,241	14%	4.2	37%	90%	0%	100%
NT	MacDonnell	66%	6,939	16%	3.8	45%	90%	0%	100%
NT	West Daly	60%	3,735	9%	5.2	46%	93%	0%	100%
NT	Victoria Daly	56%	3,175	18%	3.4	43%	84%	0%	100%
NT	Barkly	49%	7,453	16%	3.4	37%	82%	0%	100%
NT	Coomalie	49%	1,356	42%	2.2	44%	75%	0%	100%
NT	East Arnhem	49%	10,369	9%	5.2	33%	93%	0%	100%
NT	West Arnhem	45%	6,860	12%	4.2	29%	87%	0%	100%
NT	Roper Gulf	45%	7,458	13%	4.2	44%	89%	0%	100%
NT	Unincorporated NT	35%	7,421	22%	2.3	23%	63%	8%	92%
NT	Wagait	30%	524	38%	2.2	36%	55%	0%	100%
NT	Katherine	27%	10,617	20%	2.8	27%	71%	0%	100%
NT	Tiwi Islands	27%	2,743	14%	3.7	58%	91%	0%	100%
NT	Alice Springs	19%	26,448	23%	2.6	23%	63%	0%	100%
NT	Litchfield	13%	25,566	25%	2.9	20%	66%	100%	0%
NT	Darwin	12%	82,030	22%	2.6	18%	59%	100%	0%
NT	Palmerston	9%	39,032	13%	2.9	17%	65%	100%	0%

Note: Remote/rural LGAs are defined as LGAs with a majority of dwellings located in a remote/rural area. Lower income LGAs are defined as those with the majority of households with a weekly income of below \$1,000. Elderly LGAs are defined as those with a majority of its population aged 55 and over. Less educated LGAs are defined as those where the majority of the population have not attained higher education (including university, TAFE Certificates III and IV).

Table of LGAs sorted by household internet connection: TAS

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
TAS	Central Highlands (Tas.)	72%	2,166	45%	2.1	58%	74%	57%	43%
TAS	Tasman	58%	2,479	53%	2.0	61%	67%	100%	0%
TAS	Glamorgan-Spring Bay	58%	4,750	52%	2.0	57%	68%	44%	56%
TAS	Break O'Day	46%	6,346	52%	2.1	64%	69%	98%	2%
TAS	West Coast	42%	4,132	36%	2.1	51%	73%	0%	100%
TAS	Flinders (Tas.)	39%	1,004	51%	2.0	48%	61%	0%	100%
TAS	Dorset	36%	6,685	43%	2.2	57%	74%	100%	0%
TAS	George Town	30%	7,117	41%	2.3	56%	74%	100%	0%
TAS	Circular Head	26%	8,152	33%	2.4	46%	75%	88%	12%
TAS	King Island	26%	1,612	39%	2.1	43%	66%	0%	100%
TAS	Southern Midlands	24%	6,400	35%	2.5	48%	75%	100%	0%
TAS	Waratah-Wynyard	21%	13,900	40%	2.3	52%	69%	100%	0%
TAS	Derwent Valley	21%	10,518	35%	2.4	50%	74%	100%	0%
TAS	Sorell	21%	16,030	34%	2.4	44%	67%	100%	0%
TAS	Huon Valley	20%	17,966	37%	2.4	50%	65%	100%	0%
TAS	Northern Midlands	19%	13,598	38%	2.3	48%	71%	100%	0%
TAS	Latrobe (Tas.)	18%	11,961	41%	2.3	46%	68%	100%	0%
TAS	Devonport	17%	25,747	35%	2.3	52%	70%	100%	0%
TAS	Burnie	17%	19,701	32%	2.3	50%	70%	100%	0%

Note: Remote/rural LGAs are defined as LGAs with a majority of dwellings located in a remote/rural area. Lower income LGAs are defined as those with the majority of households with a weekly income of below \$1,000. Elderly LGAs are defined as those with a majority of its population aged 55 and over. Less educated LGAs are defined as those where the majority of the population have not attained higher education (including university, TAFE Certificates III and IV).

Table of LGAs sorted by household internet connection: TAS (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
TAS	Kentish	17%	6,393	40%	2.4	49%	69%	100%	0%
TAS	Central Coast (Tas.)	17%	22,157	40%	2.3	49%	68%	100%	0%
TAS	Glenorchy	17%	47,963	30%	2.3	49%	71%	100%	0%
TAS	Brighton	14%	18,123	25%	2.6	45%	76%	100%	0%
TAS	Meander Valley	14%	20,037	38%	2.4	48%	68%	100%	0%
TAS	Launceston	14%	68,813	30%	2.3	48%	67%	100%	0%
TAS	West Tamar	11%	24,423	38%	2.4	44%	63%	100%	0%
TAS	Clarence	6%	58,729	34%	2.4	38%	63%	100%	0%
TAS	Hobart	5%	55,250	30%	2.3	33%	51%	100%	0%
TAS	Kingborough	5%	38,628	33%	2.5	36%	58%	100%	0%

Note: Remote/rural LGAs are defined as LGAs with a majority of dwellings located in a remote/rural area. Lower income LGAs are defined as those with the majority of households with a weekly income of below \$1,000. Elderly LGAs are defined as those with a majority of its population aged 55 and over. Less educated LGAs are defined as those where the majority of the population have not attained higher education (including university, TAFE Certificates III and IV).

Table of LGAs sorted by household internet connection: NSW

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
NSW	Central Darling	57%	1,829	31%	2.4	53%	83%	0%	100%
NSW	Walgett	47%	5,828	38%	2.3	58%	78%	0%	100%
NSW	Coonamble	46%	3,907	34%	2.4	50%	79%	12%	88%
NSW	Bourke	45%	2,625	27%	2.5	41%	78%	0%	100%
NSW	Brewarrina	44%	1,553	26%	2.6	56%	82%	0%	100%
NSW	Hay	41%	2,943	39%	2.3	45%	76%	80%	20%
NSW	Balranald	39%	2,306	34%	2.5	42%	80%	82%	17%
NSW	Unincorporated NSW	38%	961	33%	2.5	37%	68%	0%	100%
NSW	Lachlan	36%	6,089	34%	2.4	48%	78%	50%	50%
NSW	Cobar	36%	4,417	30%	2.4	36%	73%	0%	100%
NSW	Warren	36%	2,716	36%	2.4	45%	75%	68%	33%
NSW	Upper Lachlan Shire	36%	8,274	40%	2.4	43%	67%	100%	0%
NSW	Tenterfield	35%	6,470	50%	2.1	61%	72%	100%	0%
NSW	Warrumbungle Shire	35%	9,209	42%	2.3	55%	74%	91%	9%
NSW	Gwydir	35%	5,299	42%	2.3	53%	75%	100%	0%
NSW	Bogan	35%	2,529	31%	2.4	44%	75%	0%	100%
NSW	Eurobodalla	35%	38,952	49%	2.2	52%	64%	100%	0%
NSW	Moree Plains	34%	13,077	29%	2.5	40%	75%	87%	13%
NSW	Walcha	34%	3,105	43%	2.3	47%	71%	100%	0%
NSW	Murrumbidgee	33%	3,916	34%	2.4	41%	74%	100%	0%
NSW	Snowy Monaro Regional	33%	20,997	35%	2.3	39%	63%	100%	0%
NSW	Gilgandra	32%	4,229	38%	2.4	49%	74%	100%	0%

Table of LGAs sorted by household internet connection: NSW (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
NSW	Oberon	32%	5,419	37%	2.4	40%	71%	100%	0%
NSW	Broken Hill	32%	17,269	38%	2.2	51%	72%	100%	0%
NSW	Bland	32%	5,937	36%	2.4	44%	75%	97%	3%
NSW	Narrandera	31%	5,858	37%	2.4	49%	75%	100%	0%
NSW	Carrathool	30%	2,796	29%	2.4	38%	74%	34%	66%
NSW	Glen Innes Severn	30%	8,873	42%	2.2	57%	73%	100%	0%
NSW	Liverpool Plains	29%	7,853	39%	2.3	48%	75%	100%	0%
NSW	Weddin	29%	3,596	46%	2.2	54%	72%	100%	0%
NSW	Shoalhaven	29%	107,191	41%	2.3	50%	65%	100%	0%
NSW	Narrabri	29%	13,049	32%	2.5	40%	74%	94%	6%
NSW	Snowy Valleys	28%	14,412	38%	2.3	44%	71%	100%	0%
NSW	Narromine	28%	6,460	35%	2.5	47%	73%	100%	0%
NSW	Wentworth	28%	7,090	38%	2.4	48%	72%	87%	13%
NSW	Parkes	28%	14,728	34%	2.4	46%	72%	100%	0%
NSW	Federation	27%	12,598	44%	2.3	48%	71%	100%	0%
NSW	Hilltops	27%	18,617	37%	2.4	50%	71%	100%	0%
NSW	Kyogle	27%	8,788	46%	2.2	58%	70%	100%	0%
NSW	Berrigan	27%	8,784	45%	2.2	51%	71%	100%	0%
NSW	Kempsey	27%	29,921	41%	2.4	55%	71%	100%	0%
NSW	Forbes	27%	9,920	34%	2.4	46%	72%	100%	0%
NSW	Gundagai	26%	11,225	41%	2.3	51%	71%	100%	0%
NSW	Murray River	26%	12,330	43%	2.3	46%	71%	99%	1%
NSW	Mid-Western Regional	26%	25,367	33%	2.4	44%	69%	100%	0%
NSW	Mid-Coast	26%	94,395	48%	2.2	55%	68%	100%	0%

Table of LGAs sorted by household internet connection: NSW (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
NSW	Edward River	25%	9,083	38%	2.3	45%	71%	100%	0%
NSW	Cowra	25%	12,730	39%	2.3	51%	72%	100%	0%
NSW	Inverell	24%	17,780	35%	2.4	52%	72%	100%	0%
NSW	Temora	24%	6,274	40%	2.4	48%	72%	100%	0%
NSW	Lithgow	24%	21,516	38%	2.3	50%	70%	100%	0%
NSW	Upper Hunter Shire	24%	14,167	33%	2.4	40%	70%	100%	0%
NSW	Gunnedah	24%	12,690	31%	2.5	40%	71%	100%	0%
NSW	Richmond Valley	23%	23,490	38%	2.4	52%	73%	100%	0%
NSW	Leeton	23%	11,343	32%	2.5	42%	74%	100%	0%
NSW	Lockhart	23%	3,259	39%	2.5	45%	70%	99%	0%
NSW	Goulburn Mulwaree	23%	31,554	33%	2.4	42%	67%	100%	0%
NSW	Clarence Valley	22%	51,730	43%	2.3	54%	69%	100%	0%
NSW	Bega Valley	22%	34,727	45%	2.2	50%	64%	100%	0%
NSW	Junee	22%	6,676	31%	2.5	44%	76%	100%	0%
NSW	Nambucca	21%	19,861	46%	2.3	57%	68%	100%	0%
NSW	Griffith	21%	27,155	29%	2.7	37%	73%	100%	0%
NSW	Coolamon	21%	4,291	37%	2.5	43%	72%	100%	0%
NSW	Muswellbrook	21%	16,355	26%	2.5	38%	72%	100%	0%
NSW	Port Stephens	19%	74,506	39%	2.5	42%	65%	76%	0%
NSW	Greater Hume Shire	19%	10,841	37%	2.5	42%	68%	100%	0%
NSW	Tamworth Regional	19%	62,545	31%	2.5	42%	68%	100%	0%

Table of LGAs sorted by household internet connection: NSW (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
NSW	Cabonne	19%	13,677	35%	2.6	39%	67%	100%	0%
NSW	Blayney	18%	7,382	35%	2.5	41%	67%	100%	0%
NSW	Dungog	18%	9,664	37%	2.5	40%	65%	100%	0%
NSW	Western Plains Regional	18%	54,044	29%	2.5	39%	68%	100%	0%
NSW	Byron	17%	35,773	34%	2.4	43%	58%	100%	0%
NSW	Uralla	17%	5,944	40%	2.4	47%	64%	100%	0%
NSW	Armidale Regional	17%	29,704	29%	2.4	43%	63%	100%	0%
NSW	Cessnock	16%	61,256	28%	2.6	42%	71%	69%	0%
NSW	Orange	15%	42,503	28%	2.5	38%	65%	100%	0%
NSW	Bathurst Regional	15%	43,996	28%	2.5	38%	65%	100%	0%
NSW	Tweed	15%	98,382	40%	2.4	47%	65%	13%	0%
NSW	Bellingen	14%	13,141	43%	2.3	50%	61%	100%	0%
NSW	Albury	14%	55,055	31%	2.3	42%	64%	100%	0%
NSW	Port Macquarie-Hastings	14%	85,952	42%	2.3	48%	64%	100%	0%
NSW	Lismore	13%	43,667	35%	2.4	47%	63%	100%	0%
NSW	Central Coast (NSW)	12%	345,809	34%	2.5	40%	64%	2%	0%
NSW	Singleton	12%	23,380	27%	2.7	29%	67%	100%	0%
NSW	Kiama	11%	23,685	40%	2.5	32%	55%	100%	0%
NSW	Wagga Wagga	11%	65,770	27%	2.5	36%	64%	100%	0%
NSW	Coffs Harbour	11%	77,648	36%	2.4	45%	64%	100%	0%
NSW	Ballina	10%	45,217	41%	2.3	43%	61%	100%	0%

Table of LGAs sorted by household internet connection: NSW (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
NSW	Sydney	10%	248,736	17%	2	24%	46%	0%	0%
NSW	Wingecarribee	10%	51,760	40%	2.4	37%	60%	100%	0%
NSW	Wollongong	9%	219,798	29%	2.6	38%	61%	1%	0%
NSW	Newcastle	8%	167,363	27%	2.4	37%	59%	0%	0%
NSW	Queanbeyan-Palerang Regional	8%	62,239	26%	2.6	25%	60%	32%	0%
NSW	Canterbury-Bankstown	8%	380,406	25%	3	38%	69%	0%	0%
NSW	Fairfield	8%	210,825	28%	3.3	40%	76%	0%	0%
NSW	Waverley	8%	74,276	22%	2.4	20%	49%	0%	0%
NSW	Yass Valley	7%	17,321	31%	2.7	25%	61%	97%	0%
NSW	Lake Macquarie	6%	207,775	34%	2.5	38%	62%	2%	0%
NSW	Botany Bay	6%	58,771	21%	2.7	30%	60%	0%	0%
NSW	Shellharbour	6%	74,622	30%	2.7	37%	66%	1%	0%
NSW	Rockdale	6%	145,918	27%	2.7	30%	60%	0%	0%
NSW	Cumberland	6%	242,674	22%	3.2	35%	68%	0%	0%
NSW	Maitland	5%	87,395	26%	2.7	35%	65%	3%	0%
NSW	Liverpool	5%	231,296	22%	3.2	31%	70%	1%	0%
NSW	Blue Mountains	5%	79,195	35%	2.5	33%	54%	12%	0%
NSW	Woollahra	4%	59,431	30%	2.3	16%	48%	0%	0%
NSW	Randwick	4%	156,619	23%	2.5	26%	54%	0%	0%
NSW	Campbelltown (NSW)	3%	174,078	24%	3	32%	68%	0%	0%
NSW	Hawkesbury	3%	67,749	27%	2.8	28%	64%	33%	0%
NSW	Inner West	3%	201,880	23%	2.4	23%	50%	0%	0%

Table of LGAs sorted by household internet connection: NSW, ACT

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
NSW	Burwood	3%	40,866	25%	2.9	30%	56%	0%	0%
NSW	Penrith	2%	216,282	23%	2.9	28%	67%	0%	0%
NSW	North Sydney	2%	75,094	26%	2	16%	40%	0%	0%
NSW	Strathfield	1%	47,767	22%	3	26%	55%	0%	0%
NSW	Mosman	1%	30,785	33%	2.4	17%	48%	0%	0%
NSW	Canada Bay	..*	96,550	26%	2.6	22%	53%	0%	0%
NSW	Hunters Hill	..*	14,962	32%	2.7	22%	55%	0%	0%
NSW	Blacktown	..*	382,831	21%	3.2	27%	66%	0%	0%
NSW	Camden	..*	107,806	18%	3.1	20%	64%	0%	0%
NSW	Georges River	..*	160,272	28%	2.9	28%	58%	0%	0%
NSW	Hornsby	..*	152,419	29%	2.9	22%	52%	4%	0%
NSW	Ku-ring-gai	..*	127,603	30%	2.9	16%	50%	0%	0%
NSW	Lane Cove	..*	40,534	24%	2.5	17%	46%	0%	0%
NSW	Northern Beaches	..*	274,041	29%	2.7	21%	54%	0%	0%
NSW	Parramatta	..*	260,296	23%	2.8	25%	55%	0%	0%
NSW	Ryde	..*	133,224	25%	2.7	26%	52%	0%	0%
NSW	Sutherland Shire	..*	232,369	30%	2.7	24%	57%	2%	0%
NSW	The Hills Shire	..*	183,791	25%	3.2	17%	55%	4%	0%
NSW	Willoughby	..*	81,196	25%	2.7	19%	50%	0%	0%
NSW	Wollondilly	..*	54,005	26%	3	25%	64%	89%	0%
ACT	Unincorporated ACT	..*	431,380	24%	2.5	20%	53%	0%	0%

*In some cases, applying the annual average growth rate to 2016 levels resulted in 100% of households having access to the internet in particular LGAs. We note that there will be some households within these LGAs that do not have access to the internet, however it is likely to be a small number.d

Table of LGAs sorted by household internet connection: QLD

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
QLD	Lockhart River	63%	810	16%	3.8	42%	89%	0%	100%
QLD	Woorabinda	61%	995	13%	3.4	68%	89%	0%	100%
QLD	Cherbourg	59%	1,335	12%	4	61%	91%	100%	0%
QLD	Barcoo	53%	263	42%	2	34%	74%	0%	100%
QLD	Croydon	51%	285	26%	2.7	42%	82%	0%	100%
QLD	Etheridge	47%	794	39%	2.2	58%	79%	0%	100%
QLD	Boulia	47%	416	29%	2.4	37%	80%	0%	100%
QLD	Napranum	47%	1,099	14%	3.7	59%	90%	0%	100%
QLD	Mornington	45%	1,231	15%	3.8	48%	86%	0%	100%
QLD	Cook	43%	4,595	33%	2.4	43%	69%	0%	100%
QLD	Yarrabah	42%	2,933	12%	4.7	44%	88%	100%	0%
QLD	Burke	42%	354	28%	2.1	44%	79%	0%	100%
QLD	Aurukun	42%	1,370	14%	4.2	49%	88%	0%	100%
QLD	Doomadgee	40%	1,534	10%	4.5	42%	92%	0%	100%
QLD	Cloncurry	39%	3,004	26%	2.5	34%	72%	0%	100%
QLD	Diamantina	38%	286	24%	2.6	27%	70%	0%	100%
QLD	Paroo	38%	1,554	37%	2.2	56%	75%	0%	100%
QLD	North Burnett	37%	10,656	39%	2.3	53%	77%	98%	2%
QLD	Mapoon	36%	339	23%	3.4	43%	80%	0%	100%
QLD	Balonne	34%	4,321	30%	2.5	39%	74%	0%	100%
QLD	Flinders (Qld)	34%	1,512	34%	2.3	43%	77%	0%	100%
QLD	Pormpuraaw	33%	856	17%	3	55%	85%	0%	100%
QLD	Winton	32%	1,135	35%	2.1	48%	73%	0%	100%
QLD	Isaac	32%	20,987	18%	2.7	21%	71%	60%	40%
QLD	McKinlay	32%	823	29%	2.5	46%	71%	0%	100%

Table of LGAs sorted by household internet connection: QLD (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
QLD	Palm Island	32%	2,684	13%	4.3	44%	88%	0%	100%
QLD	Torres	31%	3,924	18%	3.2	24%	75%	0%	100%
QLD	Maranoa	31%	12,688	28%	2.5	36%	71%	55%	45%
QLD	Murweh	30%	4,220	32%	2.3	45%	75%	0%	100%
QLD	Carpentaria	30%	1,970	28%	2.6	44%	77%	0%	100%
QLD	Richmond	29%	813	30%	2.3	43%	74%	0%	100%
QLD	Wujal Wujal	29%	316	18%	3.3	67%	86%	0%	100%
QLD	Torres Strait Island	29%	5,178	15%	3.7	54%	82%	0%	100%
QLD	Charters Towers	29%	11,731	33%	2.4	48%	76%	79%	21%
QLD	Bulloo	28%	324	38%	2.2	29%	70%	0%	100%
QLD	Western Downs	28%	34,579	29%	2.5	41%	73%	93%	7%
QLD	Hinchinbrook	27%	10,645	46%	2.3	48%	71%	70%	30%
QLD	Longreach	27%	3,407	34%	2.3	39%	69%	0%	100%
QLD	Blackall Tambo	27%	1,845	40%	2.2	48%	75%	0%	100%
QLD	Quilpie	26%	774	31%	2.3	47%	72%	0%	100%
QLD	Central Highlands (Qld)	26%	28,727	21%	2.7	27%	71%	68%	32%
QLD	Goondiwindi	26%	10,817	31%	2.4	40%	73%	95%	5%
QLD	Mareeba	25%	23,116	34%	2.5	47%	72%	95%	5%
QLD	Burdekin	25%	16,953	38%	2.4	43%	73%	98%	1%
QLD	Hope Vale	25%	1,140	15%	3.4	57%	79%	0%	100%
QLD	Banana	25%	14,065	29%	2.6	32%	73%	88%	12%
QLD	Barcaldine	24%	2,814	34%	2.3	46%	73%	0%	100%
QLD	Whitsunday	24%	35,927	29%	2.4	42%	68%	91%	9%

Table of LGAs sorted by household internet connection: QLD (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
QLD	Mount Isa	24%	18,578	18%	2.6	21%	69%	0%	100%
QLD	Douglas	24%	12,426	35%	2.3	40%	65%	92%	8%
QLD	Cassowary Coast	23%	29,964	37%	2.4	46%	71%	93%	7%
QLD	Northern Peninsula Area	23%	3,224	12%	3.7	41%	78%	0%	100%
QLD	South Burnett	21%	32,632	39%	2.4	53%	72%	100%	0%
QLD	Tablelands	21%	25,667	41%	2.4	50%	68%	94%	6%
QLD	Southern Downs	21%	35,407	39%	2.4	50%	71%	100%	0%
QLD	Kowanyama	18%	1,003	13%	3.3	49%	88%	0%	100%
QLD	Gympie	18%	52,935	40%	2.4	52%	70%	100%	0%
QLD	Bundaberg	18%	96,364	39%	2.4	51%	70%	100%	0%
QLD	Rockhampton	17%	81,999	27%	2.5	40%	70%	100%	0%
QLD	Somerset	17%	26,279	35%	2.6	45%	72%	100%	0%
QLD	Gladstone	17%	63,861	25%	2.6	33%	67%	99%	1%
QLD	Livingstone	17%	38,617	34%	2.5	39%	67%	98%	2%
QLD	Fraser Coast	16%	108,183	44%	2.3	54%	69%	100%	0%
QLD	Weipa	16%	4,445	15%	2.9	8%	63%	0%	100%
QLD	Mackay	14%	117,902	28%	2.5	34%	68%	100%	0%
QLD	Noosa	14%	56,587	42%	2.4	41%	60%	28%	0%
QLD	Lockyer Valley	13%	42,267	29%	2.7	41%	72%	100%	0%
QLD	Scenic Rim	12%	43,625	36%	2.6	40%	68%	80%	0%
QLD	Cairns	12%	168,449	26%	2.5	36%	64%	100%	0%
QLD	Toowoomba	11%	170,356	30%	2.5	39%	66%	100%	0%
QLD	Townsville	10%	196,800	24%	2.6	34%	65%	100%	0%

Table of LGAs sorted by household internet connection: QLD (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
QLD	Gold Coast	7%	635,191	28%	2.6	34%	62%	1%	0%
QLD	Sunshine Coast	6%	336,482	34%	2.5	38%	61%	18%	0%
QLD	Ipswich	5%	229,845	21%	2.8	33%	68%	5%	0%
QLD	Logan	3%	341,985	23%	2.9	33%	69%	5%	0%
QLD	Moreton Bay	1%	479,639	28%	2.7	34%	65%	11%	0%
QLD	Redland	1%	160,331	32%	2.6	32%	62%	8%	3%
QLD	Brisbane	..*	1,272,999	23%	2.6	27%	55%	0%	0%

*In some cases, applying the annual average growth rate to 2016 levels resulted in 100% of households having access to the internet in particular LGAs. We note that there will be some households within these LGAs that do not have access to the internet, however it is likely to be a small number.

Table of LGAs sorted by household internet connection: SA

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
SA	Maralinga Tjarutja	76%	64	23%	4	0%	82%	0%	100%
SA	Anangu Pitjantjatjara Yunkunytjatjara	65%	2,590	13%	3.8	41%	88%	0%	100%
SA	Unincorporated SA	64%	3,453	34%	2.1	46%	72%	1%	99%
SA	Robe	62%	1,472	45%	2.1	45%	65%	100%	0%
SA	Cooper Pedy	56%	1,820	35%	1.9	54%	71%	0%	100%
SA	Yorke Peninsula	54%	11,331	52%	2.1	57%	72%	58%	42%
SA	Mid Murray	50%	9,143	46%	2.1	57%	72%	100%	0%
SA	Barunga West	46%	2,550	52%	2.1	56%	74%	100%	0%
SA	Elliston	44%	1,011	40%	2.2	49%	73%	0%	100%
SA	Kingston (SA)	44%	2,380	46%	2.2	51%	74%	91%	9%
SA	Franklin Harbour	44%	1,304	43%	2.2	46%	74%	22%	78%
SA	Peterborough	43%	1,668	50%	2	70%	80%	100%	0%
SA	Yankalilla	43%	5,679	51%	2.2	52%	65%	100%	0%
SA	Kangaroo Island	40%	5,021	42%	2.2	51%	69%	0%	100%
SA	Karoonda East Murray	38%	1,101	39%	2.3	57%	77%	100%	0%
SA	Copper Coast	37%	15,128	45%	2.2	55%	73%	100%	0%
SA	Streaky Bay	36%	2,204	36%	2.3	46%	72%	0%	100%
SA	Flinders Ranges	34%	1,688	42%	2.1	51%	70%	100%	0%
SA	Tumby Bay	34%	2,733	45%	2.2	51%	73%	0%	100%
SA	Ceduna	34%	3,423	32%	2.4	35%	76%	0%	100%

Table of LGAs sorted by household internet connection: SA (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
SA	Orroroo Carrieton	33%	844	46%	2.2	49%	72%	100%	0%
SA	Southern Mallee	32%	2,089	37%	2.3	42%	74%	14%	86%
SA	Coorong	32%	5,415	41%	2.3	53%	76%	100%	0%
SA	Wudinna	32%	1,307	35%	2.4	42%	77%	0%	99%
SA	Port Augusta	31%	13,697	31%	2.3	45%	74%	100%	0%
SA	Kimba	31%	1,056	34%	2.4	40%	74%	0%	100%
SA	Mount Remarkable	30%	2,913	46%	2.2	51%	70%	100%	0%
SA	Victor Harbor	30%	15,724	54%	2.1	59%	65%	100%	0%
SA	Alexandrina	29%	27,876	46%	2.3	50%	65%	100%	0%
SA	Goyder	28%	4,170	44%	2.3	54%	73%	100%	0%
SA	Whyalla	27%	21,506	32%	2.2	50%	71%	100%	0%
SA	Cleve	27%	1,780	35%	2.3	43%	72%	2%	98%
SA	Port Pirie	26%	17,576	36%	2.3	54%	74%	100%	0%
SA	Wattle Range	25%	12,060	39%	2.3	48%	73%	100%	0%
SA	Lower Eyre Peninsula	24%	5,814	33%	2.5	38%	70%	0%	100%
SA	Renmark Paringa	23%	9,926	35%	2.3	48%	74%	100%	0%
SA	Northern Areas	23%	4,625	41%	2.3	47%	70%	100%	0%
SA	Loxton Waikerie	22%	11,737	39%	2.3	49%	72%	100%	0%
SA	Grant	22%	8,619	34%	2.6	34%	72%	100%	0%
SA	Berri Barmera	22%	10,836	37%	2.3	51%	73%	100%	0%
SA	Murray Bridge	21%	22,847	33%	2.4	51%	74%	100%	0%

Table of LGAs sorted by household internet connection: SA (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
SA	Port Lincoln	21%	14,750	33%	2.3	46%	70%	0%	100%
SA	Tatiara	20%	6,827	33%	2.4	42%	73%	92%	8%
SA	Wakefield	20%	6,773	36%	2.4	47%	75%	100%	0%
SA	Roxby Downs	19%	3,948	13%	2.8	7%	64%	0%	100%
SA	Mount Gambier	18%	27,433	31%	2.3	47%	71%	100%	0%
SA	Clare and Gilbert Valleys	17%	9,470	40%	2.3	44%	67%	100%	0%
SA	Naracoorte Lucindale	17%	8,574	32%	2.4	41%	72%	100%	0%
SA	Adelaide	13%	26,177	24%	1.9	36%	51%	0%	0%
SA	Adelaide Plains	12%	9,441	31%	2.7	35%	73%	100%	0%
SA	Port Adelaide Enfield	12%	129,530	28%	2.4	43%	65%	0%	0%
SA	Charles Sturt	12%	120,733	32%	2.4	40%	63%	0%	0%
SA	Playford	12%	96,547	23%	2.6	49%	75%	3%	0%
SA	Holdfast Bay	11%	37,784	40%	2.2	36%	55%	0%	0%
SA	Gawler	10%	24,718	33%	2.4	45%	68%	0%	0%
SA	West Torrens	10%	61,735	29%	2.3	40%	59%	0%	0%
SA	Norwood Payneham and St Peters	9%	37,462	33%	2.2	38%	53%	0%	0%
SA	Campbelltown (SA)	7%	53,082	32%	2.5	39%	60%	0%	0%
SA	Barossa	7%	25,245	35%	2.5	38%	65%	98%	0%
SA	Walkerville	7%	8,094	35%	2.4	31%	52%	0%	0%
SA	Salisbury	6%	144,872	26%	2.6	43%	70%	0%	0%
SA	Marion	6%	94,879	30%	2.4	39%	60%	0%	0%

Table of LGAs sorted by household internet connection: SA (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
SA	Prospect	4%	21,827	27%	2.5	31%	55%	0%	0%
SA	Onkaparinga	3%	174,575	31%	2.5	41%	64%	3%	0%
SA	Unley	3%	39,416	32%	2.4	31%	51%	0%	0%
SA	Light	1%	15,501	29%	2.8	32%	67%	75%	0%
SA	Burnside	1%	46,127	35%	2.5	28%	51%	0%	0%
SA	Adelaide Hills	..*	40,162	34%	2.7	28%	55%	45%	0%
SA	Mitcham	..*	67,907	32%	2.6	30%	53%	0%	0%
SA	Mount Barker	..*	37,744	28%	2.6	34%	62%	100%	0%
SA	Tea Tree Gully	..*	100,862	32%	2.5	34%	61%	0%	0%

*In some cases, applying the annual average growth rate to 2016 levels resulted in 100% of households having access to the internet in particular LGAs. We note that there will be some households within these LGAs that do not have access to the internet, however it is likely to be a small number.

Table of LGAs sorted by household internet connection: VIC

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
VIC	Unincorporated Vic	63%	894	22%	2.1	20%	66%	100%	0%
VIC	Queenscliffe	53%	3,008	58%	2.1	42%	52%	100%	0%
VIC	Bass Coast	47%	37,445	44%	2.2	53%	65%	100%	0%
VIC	Mansfield	44%	9,474	41%	2.3	46%	62%	100%	0%
VIC	Loddon	36%	7,473	47%	2.2	58%	72%	100%	0%
VIC	Surf Coast	35%	34,771	32%	2.6	29%	56%	99%	0%
VIC	Colac-Otway	34%	21,662	38%	2.3	47%	68%	100%	0%
VIC	West Wimmera	34%	3,810	42%	2.2	50%	71%	99%	1%
VIC	Buloke	31%	6,101	45%	2.2	58%	72%	100%	0%
VIC	South Gippsland	30%	30,248	40%	2.4	47%	66%	100%	0%
VIC	Yarriambiack	30%	6,588	45%	2.2	54%	72%	100%	0%
VIC	Hindmarsh	30%	5,592	44%	2.2	54%	72%	87%	13%
VIC	Pyrenees	30%	7,555	44%	2.3	54%	71%	100%	0%
VIC	Mornington Peninsula	29%	168,862	39%	2.4	39%	61%	4%	0%
VIC	Murrindindi	29%	14,661	41%	2.3	46%	63%	100%	0%
VIC	Hepburn	29%	16,157	44%	2.2	49%	61%	100%	0%
VIC	Strathbogie	29%	10,992	46%	2.2	50%	66%	100%	0%
VIC	East Gippsland	29%	47,725	45%	2.2	52%	67%	94%	6%
VIC	Alpine	29%	12,973	41%	2.2	47%	63%	100%	0%
VIC	Gannawarra	27%	10,400	44%	2.3	54%	73%	100%	0%
VIC	Northern Grampians	27%	11,403	42%	2.2	52%	70%	100%	0%
VIC	Towong	27%	6,102	45%	2.2	48%	65%	100%	0%

Table of LGAs sorted by household internet connection: VIC (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
VIC	Central Goldfields	27%	13,092	45%	2.2	62%	72%	100%	0%
VIC	Swan Hill	26%	20,534	33%	2.4	45%	74%	100%	0%
VIC	Wellington	26%	44,770	36%	2.3	45%	67%	100%	0%
VIC	Glenelg	26%	19,621	41%	2.3	47%	70%	100%	0%
VIC	Corangamite	25%	15,929	39%	2.4	47%	71%	100%	0%
VIC	Moyne	25%	17,027	35%	2.5	40%	66%	100%	0%
VIC	Ararat	24%	11,965	39%	2.3	50%	71%	100%	0%
VIC	Moirra	24%	30,018	40%	2.4	49%	71%	100%	0%
VIC	Southern Grampians	22%	16,134	39%	2.3	48%	66%	100%	0%
VIC	Benalla	20%	14,137	43%	2.2	52%	66%	100%	0%
VIC	Mildura	20%	55,937	32%	2.4	47%	72%	98%	2%
VIC	Campaspe	20%	37,675	38%	2.4	46%	70%	100%	0%
VIC	Horsham	18%	20,018	34%	2.3	45%	67%	100%	0%
VIC	Mount Alexander	18%	20,001	43%	2.2	49%	60%	100%	0%
VIC	Wangaratta	17%	29,197	37%	2.3	46%	65%	100%	0%
VIC	Latrobe (Vic.)	17%	75,915	33%	2.3	46%	67%	100%	0%
VIC	Greater Shepparton	15%	67,070	31%	2.5	42%	70%	100%	0%
VIC	Warrnambool	15%	35,533	32%	2.4	42%	65%	100%	0%
VIC	Greater Geelong	13%	264,866	30%	2.4	40%	62%	24%	0%
VIC	Greater Bendigo	12%	119,980	30%	2.4	42%	65%	100%	0%
VIC	Baw Baw	11%	54,884	33%	2.5	41%	64%	100%	0%

Table of LGAs sorted by household internet connection: VIC (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
VIC	Indigo	11%	16,885	38%	2.4	39%	61%	100%	0%
VIC	Ballarat	11%	111,361	29%	2.4	43%	63%	100%	0%
VIC	Port Phillip	10%	116,476	24%	2	25%	46%	0%	0%
VIC	Darebin	10%	166,430	24%	2.5	34%	57%	0%	0%
VIC	Mitchell	10%	47,647	26%	2.7	34%	68%	78%	0%
VIC	Melbourne	9%	183,756	13%	2	30%	47%	0%	0%
VIC	Moorabool	9%	36,013	29%	2.7	35%	65%	44%	0%
VIC	Brimbank	9%	208,247	27%	3	38%	70%	0%	0%
VIC	Greater Dandenong	9%	168,362	26%	2.9	41%	70%	0%	0%
VIC	Wodonga	8%	42,662	27%	2.5	39%	65%	100%	0%
VIC	Moreland	8%	188,762	22%	2.5	32%	56%	0%	0%
VIC	Hobsons Bay	7%	98,189	28%	2.6	31%	60%	0%	0%
VIC	Maribyrnong	7%	94,982	19%	2.5	31%	56%	0%	0%
VIC	Moonee Valley	7%	131,753	27%	2.5	30%	57%	0%	0%
VIC	Stonnington	6%	118,614	25%	2.2	23%	46%	0%	0%
VIC	Yarra	6%	103,125	20%	2.1	25%	45%	0%	0%
VIC	Frankston	5%	143,338	28%	2.5	36%	63%	0%	0%
VIC	Macedon Ranges	4%	50,971	31%	2.7	29%	60%	100%	0%
VIC	Golden Plains	4%	24,249	27%	2.8	32%	64%	100%	0%
VIC	Kingston (Vic.)	3%	167,293	29%	2.5	32%	59%	0%	0%
VIC	Hume	2%	241,188	21%	3.1	34%	70%	0%	0%
VIC	Whittlesea	2%	236,539	22%	3	32%	66%	4%	0%
VIC	Bayside (Vic.)	1%	107,541	33%	2.6	24%	53%	0%	0%
VIC	Banyule	1%	131,940	29%	2.6	29%	55%	0%	0%

Table of LGAs sorted by household internet connection: VIC (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
VIC	Monash	1%	204,936	26%	2.7	31%	56%	0%	0%
VIC	Cardinia	1%	116,193	22%	2.8	30%	65%	19%	0%
VIC	Glen Eira	..*	158,216	26%	2.5	28%	52%	0%	0%
VIC	Yarra Ranges	..*	159,955	29%	2.7	31%	60%	23%	0%
VIC	Whitehorse	..*	180,735	27%	2.6	32%	54%	0%	0%
VIC	Boroondara	..*	183,023	28%	2.6	23%	49%	0%	0%
VIC	Casey	..*	364,600	20%	3.1	28%	66%	1%	0%
VIC	Knox	..*	165,147	29%	2.7	30%	59%	0%	0%
VIC	Manningham	..*	128,929	33%	2.8	29%	57%	0%	0%
VIC	Maroondah	..*	119,401	28%	2.6	31%	58%	0%	0%
VIC	Melton	..*	172,500	18%	3	28%	68%	2%	0%
VIC	Nillumbik	..*	65,219	29%	3	20%	55%	6%	0%
VIC	Wyndham	..*	283,294	16%	3.1	26%	63%	2%	0%

*In some cases, applying the annual average growth rate to 2016 levels resulted in 100% of households having access to the internet in particular LGAs. We note that there will be some households within these LGAs that do not have access to the internet, however it is likely to be a small number.

Table of LGAs sorted by household internet connection: WA

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
WA	Dundas	67%	711	41%	1.8	54%	80%	0%	100%
WA	Upper Gascoyne	64%	290	17%	3	43%	84%	0%	100%
WA	Wiluna	63%	684	21%	3	47%	70%	0%	100%
WA	Laverton	59%	1,215	26%	2.4	48%	69%	0%	100%
WA	Sandstone	58%	78	60%	1.8	45%	65%	0%	100%
WA	Meekatharra	58%	969	27%	2.6	38%	75%	0%	100%
WA	Yalgoo	56%	351	31%	2.4	42%	66%	0%	100%
WA	Mount Magnet	55%	449	37%	2.1	42%	82%	0%	100%
WA	Cue	55%	140	31%	1.5	56%	76%	0%	100%
WA	Dandaragan	54%	3,315	42%	2.2	39%	69%	100%	0%
WA	Halls Creek	54%	3,495	15%	3.2	47%	86%	0%	100%
WA	Ngaanyat-jarraku	53%	1,768	15%	3.8	42%	92%	0%	100%
WA	Murchison	52%	162	28%	2.4	38%	87%	0%	100%
WA	Coorow	51%	961	51%	2	49%	74%	70%	30%
WA	Menzies	51%	525	22%	2.9	34%	74%	0%	100%
WA	Leonora	50%	1,548	21%	2.5	31%	72%	0%	100%
WA	Jerramungup	49%	1,130	33%	2.3	38%	72%	0%	100%
WA	Gingin	49%	5,353	42%	2.5	43%	71%	100%	0%
WA	Ravensthorpe	46%	1,566	42%	2.2	42%	72%	0%	100%
WA	East Pilbara	44%	10,921	16%	3	18%	66%	0%	100%
WA	Yilgarn	44%	1,151	36%	2.1	41%	76%	0%	100%
WA	Derby-West Kimberley	43%	8,211	18%	3	37%	80%	0%	100%
WA	Mount Marshall	40%	512	28%	2.5	40%	81%	0%	100%

Table of LGAs sorted by household internet connection: WA (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
WA	Trayning	40%	347	47%	2	56%	77%	0%	100%
WA	Northampton	38%	2,876	43%	2.2	49%	72%	31%	70%
WA	Port Hedland	37%	15,471	15%	2.7	14%	67%	0%	100%
WA	Kulin	37%	775	37%	2.3	39%	73%	0%	100%
WA	Mingenew	36%	418	39%	2.3	36%	76%	100%	0%
WA	Wyalkatchem	36%	492	48%	2	56%	78%	100%	0%
WA	Wyndham-East Kimberley	35%	7,354	20%	2.7	30%	71%	0%	100%
WA	Nannup	35%	1,422	49%	2.2	51%	67%	100%	0%
WA	Brookton	35%	959	34%	2.3	44%	78%	100%	0%
WA	Carnamah	35%	527	37%	2.2	40%	73%	0%	100%
WA	Pingelly	35%	1,150	42%	2.2	52%	77%	100%	0%
WA	Morawa	34%	661	36%	2.3	43%	77%	0%	100%
WA	Cranbrook	34%	1,044	39%	2.4	47%	75%	100%	0%
WA	Lake Grace	34%	1,286	30%	2.3	33%	72%	0%	100%
WA	Wickepin	33%	727	37%	2.3	44%	77%	75%	25%
WA	Dumbleyung	33%	674	36%	2.2	45%	74%	0%	100%
WA	Manjimup	32%	9,118	37%	2.3	44%	72%	100%	0%
WA	Carnarvon	32%	5,077	31%	2.4	43%	75%	0%	100%
WA	Moora	31%	2,389	32%	2.5	34%	75%	100%	0%
WA	Tammin	31%	393	34%	2.6	45%	79%	100%	0%
WA	Koorda	31%	402	38%	2.2	47%	78%	0%	100%
WA	Three Springs	31%	561	33%	2.4	43%	73%	0%	100%
WA	Broomehill-Tambellup	31%	1,088	32%	2.6	39%	76%	100%	0%
WA	Gnowangerup	30%	1,200	34%	2.4	34%	75%	0%	100%

Table of LGAs sorted by household internet connection: WA (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
WA	Kent	30%	559	31%	2.5	31%	75%	0%	100%
WA	Westonia	30%	305	36%	2.2	40%	68%	0%	100%
WA	Warooka	29%	4,267	37%	2.5	42%	72%	100%	0%
WA	Quairading	29%	988	46%	2.1	53%	78%	100%	0%
WA	Coolgardie	29%	3,348	24%	2.5	29%	75%	71%	29%
WA	West Arthur	29%	782	40%	2.2	44%	75%	100%	0%
WA	Denmark	29%	6,370	43%	2.3	48%	61%	100%	0%
WA	Exmouth	29%	2,935	27%	2.4	35%	63%	0%	100%
WA	Goomalling	29%	991	37%	2.4	44%	75%	100%	0%
WA	Mukinbudin	29%	524	34%	2.5	36%	73%	0%	100%
WA	Boilup Brook	28%	1,771	42%	2.3	44%	72%	100%	0%
WA	Nungarin	28%	246	37%	2.4	57%	77%	0%	100%
WA	Beverley	28%	1,768	48%	2.2	49%	73%	100%	0%
WA	Katanning	28%	4,046	33%	2.5	40%	77%	100%	0%
WA	Ashburton	27%	13,331	18%	2.7	15%	57%	0%	100%
WA	Shark Bay	27%	960	36%	2.1	46%	68%	0%	100%
WA	Kojonup	27%	1,912	38%	2.4	40%	73%	100%	0%
WA	Corrigin	27%	1,132	40%	2.3	37%	76%	0%	100%
WA	Kondinin	26%	872	36%	2.3	39%	74%	0%	100%
WA	Wongan-Ballidu	26%	1,288	36%	2.3	42%	71%	75%	25%
WA	Kellerberrin	26%	1,185	40%	2.4	47%	76%	100%	0%
WA	Wagin	26%	1,776	43%	2.2	50%	77%	100%	0%
WA	Augusta Margaret River	26%	16,701	29%	2.5	38%	61%	100%	0%
WA	Merredin	26%	3,370	32%	2.4	36%	74%	86%	14%

Table of LGAs sorted by household internet connection: WA (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
WA	Perenjori	26%	567	32%	2.3	30%	67%	0%	100%
WA	Dalwallinu	26%	1,397	29%	2.5	33%	75%	0%	100%
WA	Narembeen	26%	850	36%	2.3	39%	79%	0%	100%
WA	Victoria Plains	26%	917	36%	2.4	40%	76%	100%	0%
WA	York	25%	3,623	47%	2.2	48%	69%	100%	0%
WA	Boddington	25%	1,765	33%	2.6	31%	69%	100%	0%
WA	Dowerin	24%	668	35%	2.4	45%	78%	100%	0%
WA	Bruce Rock	24%	949	36%	2.3	45%	73%	0%	100%
WA	Narrogin	24%	4,939	34%	2.4	40%	73%	100%	0%
WA	Plantagenet	24%	5,276	38%	2.4	48%	70%	100%	0%
WA	Irwin	24%	3,594	44%	2.3	45%	70%	100%	0%
WA	Cuballing	24%	853	39%	2.3	46%	74%	100%	0%
WA	Cunderdin	24%	1,408	32%	2.5	37%	76%	100%	0%
WA	Esperance	23%	14,178	31%	2.5	36%	73%	0%	100%
WA	Busselton	23%	40,333	34%	2.5	38%	65%	100%	0%
WA	Karratha	23%	23,118	12%	2.8	13%	66%	0%	100%
WA	Northam	23%	11,013	34%	2.4	42%	74%	100%	0%
WA	Collie	23%	8,601	35%	2.4	45%	73%	100%	0%
WA	Perth	22%	30,971	21%	1.9	25%	47%	0%	0%
WA	Williams	22%	1,015	36%	2.5	33%	72%	100%	0%
WA	Chapman Valley	22%	1,540	32%	2.7	31%	70%	76%	25%
WA	Toodyay	21%	4,461	46%	2.3	42%	66%	100%	0%
WA	Wandering	21%	424	41%	2.5	30%	74%	100%	0%
WA	Broome	20%	16,994	20%	2.7	30%	67%	0%	100%
WA	Woodanilling	19%	430	35%	2.5	47%	71%	100%	0%

Table of LGAs sorted by household internet connection: WA (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
WA	Mandurah	19%	88,080	37%	2.4	43%	67%	0%	0%
WA	Bridgetown-Greenbushes	19%	4,756	44%	2.3	48%	65%	100%	0%
WA	Donnybrook-Balingup	19%	6,157	40%	2.4	43%	67%	100%	0%
WA	Bunbury	18%	31,683	34%	2.3	42%	66%	100%	0%
WA	Greater Geraldton	18%	38,231	29%	2.5	37%	70%	98%	2%
WA	Murray	18%	18,207	37%	2.5	41%	71%	23%	0%
WA	Albany	18%	38,296	35%	2.4	41%	66%	99%	1%
WA	Kalgoorlie-Boulder	17%	29,055	20%	2.7	20%	69%	99%	1%
WA	Belmont	17%	42,806	25%	2.4	34%	62%	0%	0%
WA	Fremantle	14%	31,517	33%	2.2	34%	54%	0%	0%
WA	Victoria Park	12%	37,784	24%	2.3	32%	55%	0%	0%
WA	Harvey	10%	28,299	29%	2.7	33%	68%	100%	0%
WA	Vincent	10%	37,280	22%	2.3	25%	49%	0%	0%
WA	Bayswater	9%	69,038	29%	2.4	32%	58%	0%	0%
WA	Chittering	9%	6,021	33%	2.8	31%	68%	100%	0%
WA	Stirling	8%	223,743	28%	2.4	31%	57%	0%	0%
WA	Mosman Park	7%	9,109	32%	2.4	30%	52%	0%	0%
WA	Subiaco	7%	17,448	32%	2.2	27%	46%	0%	0%
WA	Bassendean	7%	15,971	29%	2.4	33%	60%	0%	0%
WA	Kwinana	7%	46,787	18%	2.7	31%	68%	0%	0%
WA	Cottesloe	7%	8,386	33%	2.5	19%	46%	0%	0%
WA	Rockingham	6%	138,581	24%	2.7	31%	67%	0%	0%

Table of LGAs sorted by household internet connection: WA (cont.)

State	LGA	% households without internet	Total population	% population aged 55 and over	Average number of household members	% households with an average weekly income below \$1,000	% population who haven't attained higher education	% of households in regional areas	% of households in remote areas
WA	South Perth	6%	44,098	30%	2.3	28%	52%	0%	0%
WA	Claremont	5%	11,014	34%	2.3	24%	50%	0%	0%
WA	Dardanup	5%	14,553	28%	2.6	32%	68%	100%	0%
WA	Cockburn	5%	117,352	24%	2.7	27%	62%	0%	1%
WA	Armadale	4%	93,928	21%	2.7	31%	65%	1%	0%
WA	East Fremantle	3%	7,908	32%	2.5	25%	51%	0%	0%
WA	Capel	3%	18,407	25%	2.8	28%	65%	100%	0%
WA	Gosnells	2%	125,919	24%	2.9	31%	66%	0%	0%
WA	Swan	2%	152,372	21%	2.8	28%	67%	6%	0%
WA	Canning	2%	94,130	25%	2.8	30%	58%	0%	0%
WA	Peppermint Grove	1%	1,759	36%	2.8	14%	55%	0%	0%
WA	Melville	..*	103,581	33%	2.6	28%	54%	0%	0%
WA	Cambridge	..*	29,332	29%	2.7	21%	50%	0%	0%
WA	Joondalup	..*	160,718	30%	2.8	24%	57%	0%	0%
WA	Kalamunda	..*	59,328	30%	2.7	28%	63%	1%	0%
WA	Mundaring	..*	39,111	33%	2.7	30%	63%	8%	0%
WA	Nedlands	..*	22,901	32%	2.8	19%	49%	0%	0%
WA	Serpentine-Jarrahdale	..*	33,920	19%	3	20%	66%	20%	0%
WA	Wanneroo	..*	212,768	21%	2.9	27%	66%	2%	0%

*In some cases, applying the annual average growth rate to 2016 levels resulted in 100% of households having access to the internet in particular LGAs. We note that there will be some households within these LGAs that do not have access to the internet, however it is likely to be a small number.



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