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Towards a More United Nation

The economic and social benefits of commercial TV

Free TV Australia
2026

Deloitte Access Economics

ACKNOWLEDGEMENT OF TRADITIONAL OWNERS

Deloitte Access Economics and Free TV Australia acknowledge the Traditional Custodians of the lands and pay our respects to their Elders past and present.

Image source: Imparja Television.

Key findings

SUPPORTING ECONOMIC ACTIVITY AND ADVERTISING

$2.4 billion
to Australia's Gross Domestic Product

15,600
Full-time equivalent (FTE) roles supported in 2024-25

2.2
FTE jobs supported across the economy per network FTE job

46%
are more likely to trust brands advertised on commercial TV

61%
growth in commercial TV's BVOD revenue from 2021-25, amid declines in broadcast revenue

ENABLING SOCIAL COHESION & DEMOCRACY

78%
of Australians say commercial TV creates shared experiences

7.6 million
Australians were reached by election coverage

87%
consider commercial TV very or moderately trustworthy

70%
agree commercial TV contributes positively to community connection

69%
agree commercial TV brings people from different backgrounds together

SUPPORTING AUSTRALIAN STORIES

$15.6 billion
invested in Australian content over 10 years

25,300+ hours
of Australian content aired by metropolitan broadcasters in 2024

DISTINCTIVE ROLE IN THE MARKET

91%
of Australians agree that commercial TV is accessible and easy to use

78%
of Australians see value in an Australian-owned and regulated broadcast sector

CONNECTING REGIONS

65%
of regional Australians agree commercial TV spotlights regional communities

15%
of direct FTE roles in commercial TV live and work in the regions

Executive summary

Commercial TV is a significant part of Australia's media landscape, with around 78 per cent of Australians watching each month in 2025 and the average commercial TV viewer watching more than 11 hours each week. It continues to occupy a distinctive position in the media ecosystem through its combination of free access, Australian content, live sport, news and broad audience reach.

Free TV Australia is the industry body representing Australia's commercial TV sector and its member broadcasters: Southern Cross Media Group, Nine, Network 10, WIN Television and Imparja Television.* Free TV Australia engaged Deloitte Access Economics to prepare an objective report to capture the social and economic contribution of the commercial TV industry to Australia. The report, which is an update on two previous editions, draws on data from a range of sources including a consumer survey, industry data and operational data provided by each of Free TV's member networks. The report seeks to understand and quantify the economic and social contribution of commercial TV, recognising that media consumption can involve a range of broader societal considerations that are outside the scope of this study.

This report comes at a time of significant change for Australia's media landscape. The rapid growth of digital platforms and increasing audience fragmentation have intensified pressure on the commercial TV business model, particularly through the decline of traditional advertising revenues while the digital advertising market grows. At the same time, policymakers have placed renewed emphasis on supporting Australian screen content, recognising its contribution to national identity, social cohesion and cultural expression. Despite these changes, commercial TV remains a resilient and important part of Australia's media landscape. It continues to attract large audiences, invest heavily in Australian content and deliver substantial cultural, social and economic benefits.

78%

of Australians watch commercial television each month[1]

11+ hours

average viewing per commercial TV viewer each week[2]

Economic contribution and advertising

Commercial TV contributes to the Australian economy through its direct operations, including the profit they generate and wages paid to staff. In 2024-25, the industry supported 4,900 direct FTE jobs and contributed $1 billion to GDP through wages and gross operating surplus.

The industry also generates economic activity through its supply chain, purchasing goods and services such as screen production, professional services and broadcasting inputs. This indirect activity contributed a further $1.4 billion in value added and supported 10,750 FTE jobs across the economy in 2024-25. Together, direct and indirect activity contributed $2.4 billion to GDP in 2024-25.

$2.4 billion

GDP contribution · 15,600 FTE jobs

The media sector continues to face structural change as audiences and advertising spending fragment across streaming, social media and digital platforms. Online viewing (BVOD) increased from 12 per cent to 15 per cent of total commercial TV viewing between 2024 and 2025. While commercial TV continues to attract large audiences, broadcasters are operating in an increasingly competitive environment as consumers spread their viewing across a growing range of platforms and services. Despite these shifts, commercial TV has remained comparatively resilient, with its economic contribution declining 2.4 per cent in real terms since 2021, compared with an 11.9 per cent decline across the broader linear TV and radio broadcasting sector. Notably, audience reach has remained relatively stable despite advertising market pressures, with ACMA data showing the share of the population viewing free-to-air television growing by 2.5 per cent over the same period.

The commercial TV model creates a unique economic dividend, with advertising funding the production of Australian content, news and sport while helping businesses reach audiences at scale, strengthen competition and drive innovation across the economy. Consistent with this, 46 per cent of Australians are more likely to trust brands advertised on commercial TV than through other media, and consumers are less willing to pay to avoid advertising during news and sport, two genres central to the commercial TV offering. These findings highlight television's ongoing effectiveness in building awareness, trust and long-term demand.

*Seven West Media merged with Southern Cross Media Group in January 2026. However, prior to this, Seven West Media was operating as a separate entity during the time period of this analysis and therefore is included in the report.

Despite a nearly 10 per cent decline in traditional broadcast television's share of advertising revenue between 2024 and 2025, growth in BVOD advertising has partially offset these losses, moderating the overall decline in advertising revenue across the sector.

Commercial TV supports social cohesion and democracy

In an increasingly fragmented media environment, social cohesion helps foster a sense of connection, belonging and shared understanding across the Australian community. Commercial TV contributes to social cohesion by bringing large and diverse audiences together through shared experiences, Australian stories and major national moments. More than three-quarters (78 per cent) of Australians agree commercial TV helps create shared experiences and 69 per cent say it brings people from different backgrounds together.

Through its combination of news, sport, entertainment and Australian content, commercial TV provides common reference points that support connection and a shared understanding of Australian society. Reflecting these benefits, 70 per cent of Australians agree commercial TV contributes positively to family and community connection. Social cohesion supports democratic participation and economic prosperity. While many industries contribute to these outcomes, this report explores the role of commercial TV.

78%

agree commercial TV helps create shared experiences

69%

agree commercial TV brings people from different backgrounds together

Commercial TV also plays an important democratic role by providing access to trusted news and information. As misinformation and AI-generated content become increasingly prevalent, trusted and widely accessible journalism remains important to informed public debate and civic participation. Coverage of the 2025 Federal Election reached approximately 7.6 million Australians, demonstrating the continuing reach of commercial TV news.

Commercial TV invests in Australian content and sport

Commercial broadcasters invested $15.6 billion in Australian content between 2014–15 and 2023–24, consistently exceeding Australian content requirements. Through its investment in news, entertainment, drama and sport, commercial TV helps ensure Australian stories, voices and experiences remain visible on screen, with 77 per cent of Australians agreeing it is a key source of Australian content.

$15.6 billion

invested in Australian content from 2014–15 to 2023–24

Alongside its investment in Australian content, commercial TV continues to provide free access to major sporting events. Nearly nine in ten Australians watched a major sporting event on commercial TV in 2025, while major broadcasts, such as the AFL Grand Final and the NRL State of Origin, continue to attract some of the largest audiences in Australia and help create shared moments on a national scale.

Commercial TV occupies a distinctive position in Australia's media landscape, combining broad reach with free access to trusted local news, Australian content and major sporting events across both broadcast and online platforms. It continues to play an important public interest role, with 77 per cent of Australians agreeing that commercial TV is a valuable service.

This is particularly essential in the regions, where commercial TV remains an important source of news, information and local storytelling. In many regional and remote communities, commercial broadcasters remain the only provider of local television news bulletins. 65 per cent of regional Australians agree commercial TV helps spotlight regional communities.

An ongoing role in Australian society

Looking ahead, commercial TV's contribution will be shaped by how well the sector and policy settings adapt to a more digital, fragmented and AI-enabled media environment. As trust becomes increasingly valuable and 77 per cent of Australians report concerns about what is real or fake online, ensuring sustainable access to trusted local news, Australian content and emergency information across platforms will play a role in enabling Australia's social and economic wellbeing.[3]

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Mel Tracina, Big Brother 2025
Image Source: Network 10.

01

Introduction

Introduction

Free TV Australia is the united voice for commercial TV broadcasters

Commercial TV remains a key part of life in Australia. Approximately 70.6 per cent of Australians watched free TV each week in 2025 across its broadcast and streaming delivery platforms, collectively consuming 264 million hours per week.[1] The commercial TV broadcasters in Australia encompass the private, advertising-funded television networks that have been operating across the nation since September 1956, with the release of this report coinciding with the 70th anniversary of free television in Australia.

Free TV Australia is the peak body for the commercial TV sector in Australia, and its members are, Nine Entertainment, Network 10, Southern Cross Media Group, WIN and Imparja Television.[*] Collectively they form the cornerstone of the Australian media industry. Throughout this report these member organisations are referred to as 'commercial TV broadcasters' and the associated 'commercial TV industry'.

Free TV Australia engaged Deloitte Access Economics to prepare an objective report to capture the social and economic contribution of the commercial TV industry to Australia. This is the third report in the series; the first was released in July 2020, and the second in September of 2022.[†]

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 not a cost-benefit analysis of the commercial TV sector or of media consumption. Rather, it focuses on understanding the economic and social benefits of commercial TV in Australia.

Industry engagement

This report is informed by industry data and data provided by each of Free TV's members. The data is relevant to the 2024-25 financial year.

All Free TV members provided data to Deloitte that was used to inform this report. The data provided included information on the financial performance of members, broadcasting, production and content.

All data collected from members relates only to television broadcasting, production and distribution businesses, including digital distribution activities, and associated overheads from these activities. This includes broadcast video on demand but does not include other activities the members might undertake (e.g., radio broadcasting or print media).

Compiling the evidence base

Alongside data provided by the industry, the report also utilises a number of other sources that, together, provide a holistic view of the industry. These sources include:

- a consumer survey of n=1,005 Australians to understand consumer trends, perspectives and behaviours
- OzTAM's VOZ data to provide another source for viewer and consumer trends
- data from the Australian Communications and Media Authority (ACMA) which was used to understand industry trends and policy impacts
- a literature review to inform a social cohesion analysis, including The Scanlon Foundation Research Institute, OECD, World Bank, and ACMA
- consultations with leading social cohesion experts Dr Rebecca Huntley and Chief Executive Officer at The Scanlon Foundation Research Institute, Anthea Hancocks
- consultations with Amy Graham (CEO Imparja Television), Dr Rob Nicholls (University of Sydney, Centre for AI, Trust, and Governance) and international advertising expert Andrew Tindall, in addition to consultations, input was provided by Townsville Mayor Nick Dametto and Netball Australia CEO Mark Falvo
- other public data sources from the Australian Bureau of Statistics and previous research conducted by Deloitte Access Economics and other relevant Deloitte publications
- a desktop review of academic sources and news media to incorporate relevant findings and to allow for comparative analysis.

*Southern Cross Media Group was merged with Seven West Media in January 2026. However, Seven West Media was operating during the time period for this analysis and was therefore included within the analysis.

†2020 report: https://www.freetv.com.au/wp-content/uploads/2020/07/Free-TV-Industry-Report-Everybody-Gets-It-20-July-2020.pdf. 2022 report: https://www.freetv.com.au/wp-content/uploads/2022/09/Everybody-gets-it-2022.pdf

02

Economic contribution

$2.4 billion

to Australia's Gross Domestic Product

15,600

full-time equivalent jobs

2.2

indirect FTE jobs supported for every direct FTE job

Commercial TV has remained resilient despite a disrupted media sector

Commercial TV supported $2.4 billion in economic activity in the Australian economy in 2025.

$2.4 billion

to Australia's Gross Domestic Product (GDP).

Table 2.1 Breakdown of value added by the commercial TV industry, 2024-25 financial year ($ million)

	Direct	Indirect	Total
Total value added	$1,022	$1,409	**$2,431**

Source: Deloitte Access Economics, *based on 2025 data provided by Free TV members (2026)*

The commercial TV industry makes a significant contribution to Australia's economy. In the 2025 financial year, the total economic contribution of the commercial TV industry was **over $2.4 billion. This is equivalent to more than half (50.8 per cent) of the combined Broadcasting (except Internet) and Internet Publishing and Broadcasting industries**, highlighting the commercial TV industry's substantial role within Australia's broader broadcasting sector.

This contribution consists of gross operating surplus (returns to capital owners) and wages paid to labour, which collectively determine the industry's value added.

The industry generates value added both directly and indirectly. Direct value added captures the 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.

In 2025, $1.4 billion of the total economic contribution of the commercial TV industry was through indirect value added.

More broadly, Australia's screen and broadcasting sector has undergone significant structural change as audiences and advertising expenditure become increasingly fragmented across streaming, social media and digital platforms. Consumption is also shifting online, with online viewing increasing from 12 per cent to 15 per cent of total commercial TV viewing between 2024 and 2025. This highlights the ongoing evolution in how audiences are engaging with commercial TV in an increasingly digital world, while terrestrial delivery will remain important for some time to come.

Against this backdrop, commercial TV has remained relatively stable. While the commercial TV industry's economic contribution declined by 2.3 per cent since 2021, this was less pronounced than the 11.9 per cent decline recorded across the broader Australian linear TV and radio broadcasting sector over the same period.*

*Converting this to real terms, the commercial TV's economic contribution declined by 18.2% since 2021, while the broader Australian linear TV and radio broadcasting sector declined by 26.0% over the same period.

Ally Langdon (Nine), Matt Shirvington (Seven) and Julia Morris (10) at the Free TV Australia Parliamentary Showcase, September 2025

Image Source: Free TV Australia.

Commercial TV is a significant employer in the Australian economy

Commercial TV supported more than 15,600 full-time equivalent jobs in 2025

15,600

full-time equivalent (FTE) jobs.

2.2

indirect FTE jobs supported for every direct FTE job

8% increase in indirect FTE jobs compared to 2021

Table 2.2 Employment supported by the commercial TV industry, 2024-25 financial year

	Direct	Indirect	Total
Employment (FTE)	4,885	10,750	**15,635**

Source: Deloitte Access Economics, *based on 2025 data provided by Free TV members (2026)*

The commercial TV industry not only contributes to the Australian economy via value added, it also does so through employment. The commercial TV industry creates a range of skilled jobs for creative and innovative professionals. Commercial broadcasters are a significant Australian employer, directly supporting 4,885 full-time equivalent (FTE) roles in 2025. This reflects a 4 per cent decline relative to 2021.

Beyond the staff it employs directly, the indirect economic activity generated by the commercial TV industry also helps to support Australian jobs. The commercial TV industry indirectly supported around 10,750 FTE roles in other sectors of the economy in 2025. This means that for every network employee directly employed by the commercial TV industry, 2.2 additional FTE jobs were supported throughout the economy. This represents an 8 per cent increase in indirect FTE jobs compared to 2021 figures, illustrating the growing employment benefits generated throughout the industry's supply chain and wider economic activity.

Some of the key industries that the commercial TV industry supported through jobs include:*

- Film, Television and Content Production (4,950 FTE jobs)
- Professional Services (1,000 FTE jobs)
- Broadcasting (except Internet) (650 FTE jobs)
- Business, Administrative and Employment Support Services (550 FTE jobs)
- Printing (350 FTE jobs).

*Note: Industry categories shown are simplified descriptions of ABS Australian and New Zealand Standard Industrial Classification (ANZSIC) categories

Sylvia Jeffreys, Today Extra
Image Source: Nine Entertainment.

Supporting economic activity and workforce capability across the screen sector

Commercial TV helps to support many industries in the wider economy

Commercial TV's purchases indirectly support economic activity in a range of other industries. The film, television and content production industry captured the largest share of indirect economic activity, generating over $450 million in indirect economic activity, which represents 33 per cent of the total indirect contribution. This is consistent with 2021, when the industry also accounted for the largest share of indirect value added arising from commercial TV's economic contribution, representing 34 per cent of the total. Following the film, television and content production industry was professional services ($160.4 million – 11 per cent) and then broadcasting (except Internet) ($130.8 million – 9 per cent).

The indirect economic activity produced through these three industries accounts for more than half (53 per cent) of the total indirect contribution. However, smaller contributions are also made through other industries including Finance ($52.4 million), Wholesale Trade ($41.1 million) and Printing (including the reproduction of recorded media) ($35.4 million).

Commercial TV and the broader screen production industry operate within a shared labour market, with workers frequently transitioning between the two over the course of their careers. As a result, commercial TV plays a significant role in developing the industry's workforce by fostering skills development, expanding professional networks, and enabling the exchange of knowledge and expertise across the wider screen production ecosystem.

Advertising creates value beyond the television industry

Commercial TV's economic contribution extends beyond its direct operations and supply chain. By connecting businesses with consumers at scale, television advertising helps build brand awareness, support competition and promote new products and services across the economy.

These broader benefits are not captured in the GDP and employment estimates presented in this chapter, which focus on the economic activity generated by the commercial TV industry itself. The role of advertising as an economic enabler is explored further in the following chapter.

Table 2.3 Breakdown of indirect value added of the commercial TV industry, 2024-25 financial year ($ million)

Industry*	Indirect value added
Film, Television and Content Production	458.8
Professional Services	160.4
Broadcasting (except Internet)	130.8
Commercial Property and Real Estate Services	75.1
Business, Administrative and Employment Support Services	59.8
Government and regulatory services	57.5
Finance	52.4
Wholesale Trade	41.1
Printing	35.4
All other	337.8

Source: Deloitte Access Economics, *based on 2025 data provided by Free TV members (2026)*

* Note: Industry categories shown are simplified descriptions of ABS Australian and New Zealand Standard Industrial Classification (ANZSIC) categories

03

Benefits of advertising on commercial TV

46%

of Australians are more likely to trust brands advertised on commercial TV

$3 billion

advertising revenue recorded in 2025

The economic importance of advertising

Commercial TV continues to play a central role in Australia's advertising ecosystem, delivering mass reach, premium environments and the ability to build brands at scale

Commercial TV's investment in content is not only culturally significant - it also underpins the ability to attract large audiences and advertisers.

Advertising makes a significant contribution across the economy. A study found that advertising contributed $53 billion to the Australian economy and directly employed 85,900 Australians in 2021.[1] Beyond direct contributions to GDP and employment, advertising plays a crucial role in promoting price competition and enabling more informed consumer decision-making in the broader market. This, in turn, improves market competitiveness and increases economic productivity.[2]

Commercial TV is a key platform for advertising that delivers well-recognised benefits for brands, driving increased revenue, improving engagement and communicating brand value through association with a trusted platform.

Enhanced competition driven by advertising benefits consumers through three main channels:

- **Lower prices:** By providing no-cost information to consumers, advertising improves market efficiency and intensifies competition between businesses. This additional competition leads to lower prices for consumers.
- **Expanded consumer choice:** Advertising lowers barriers to market entry by providing new firms with a platform to publicise their products and prices, expanding the range of options available to consumers.
- **Greater innovation:** A strong advertising industry encourages businesses to continually improve their practices and services to differentiate themselves from competitors, contributing to technological advancement and improved products.

As a key enabler of advertising, commercial TV plays an instrumental role in realising these benefits. It also operates within a well-established regulatory framework that places guardrails on what can be advertised to help manage any potentially negative impacts of advertising. For broadcast television, these rules also cover where and when ads can be shown.

Advertising restrictions apply to a number of different types of products and services including alcohol, gambling, intimate products as well as films and games rated for mature audiences.[3] Such rules are formulated to reflect community expectations and ensure the benefits of advertising are realised responsibly, although there is ongoing public and policy debate about the appropriate level of regulation in areas, such as gambling advertising in August 2026.

Figure 3.1: Advertising consumer benefits

Lower prices
Decreased prices for goods/services driven by increased competition between firms

Greater choice
Access to a wider range of goods/services as barriers to entry are lowered

Innovation
Improved goods/services as a result of innovation, driven by increased competition

Source: Deloitte Access Economics, 'Advertising Pays: Second Edition'

Commercial TV's role in Australia's advertising landscape

Despite a rapidly evolving media landscape, commercial TV remains one of Australia's most effective advertising platforms, offering a unique combination of reach, trust and cultural impact

The advertising landscape has undergone a significant shift in the last several years and has become more fragmented across multiple platforms. Across the advertising market, broad internet advertising made up 76 per cent of total advertising revenue in 2025.[1]

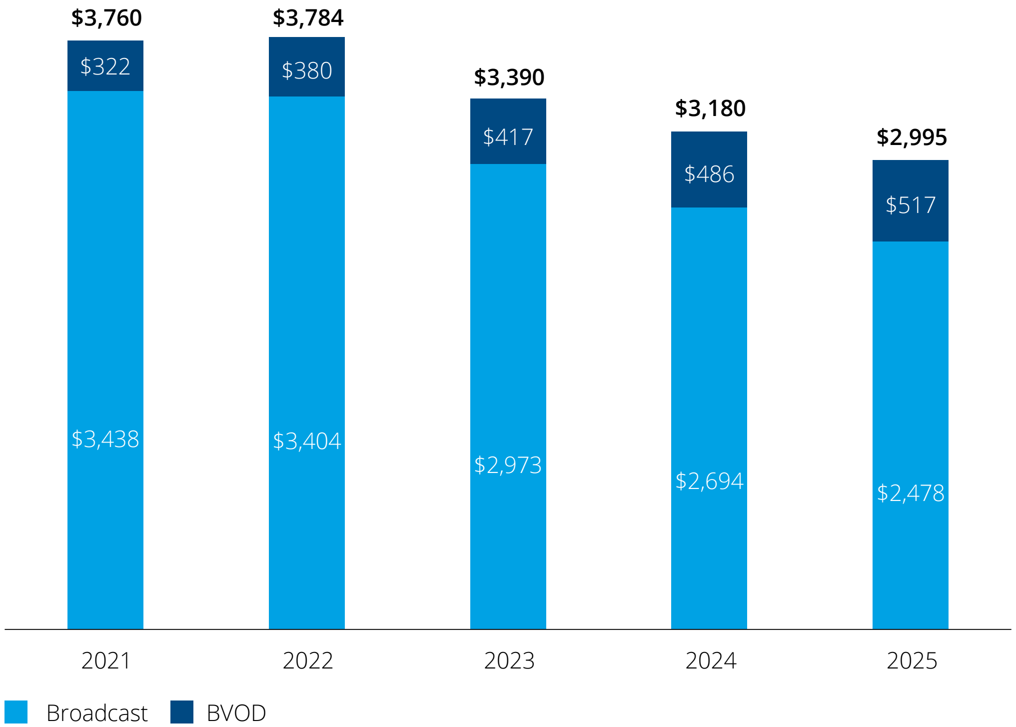
Within this evolving landscape, free TV networks have faced some pressure. Traditional TV's share of advertising revenue was 13 per cent in 2023 and is forecast to fall to 7 per cent by 2028.[2] Despite these pressures, the commercial TV sector has been resilient. While overall commercial TV advertising revenue fell 20 per cent from 2021 to 2025, BVOD revenue grew by 61 per cent in the same period (see Chart 3.1).[3] Additionally, ACMA data shows that total viewership remained stable over this same period, with the share of the population viewing free-to-air television increasing by 2.5 per cent.[4]

Advertising on commercial TV continues to be an important part of the advertising mix with its own unique benefits. International evidence suggests that television advertising continues to be the most trusted form of advertising.[5] Deloitte's 2025 Media Consumer Survey also found that consumers were less likely to pay to avoid advertisements during news and sports compared to most other types of content, reflecting the strong audiences these genres continue to attract on commercial TV.[6] Additionally, nearly half of all Australians stated that they were more likely to trust brands advertised on commercial TV compared to other types of media.[7]

Research using eye-tracking technology found that BVOD and linear TV resulted in four times more active attention compared to the best-performing social media video advertisement format.[8] Additionally, 2024 research from the United Kingdom found that every dollar invested in television, across linear TV and BVOD, generated $5.61 in long-term return-on-investment for businesses.[9] Interim findings from an Australian replication of this research returned broadly aligned results.[10]

These findings demonstrate the distinctive benefits of television advertising in generating brand premium despite the growing influence of digital advertising.

Chart 3.1: Commercial TV advertising revenue ($ million)



Source: Free TV Australia audited results

A conversation with Andrew Tindall — Chief Growth Officer at System1

TV helps brands stay front of mind long before consumers are ready to buy

Andrew Tindall, Chief Growth Officer at international advertising effectiveness firm System1, argues that commercial TV, including both linear TV and BVOD, continues to play a distinct and important role in brand building over the long term. In his view, linear TV is a strong example of lasting brand-building media because it creates impressions that compound and can make other channels work harder over time.

"Linear TV is a perfect example of lasting brand building media. It is a scalable, repeatable way to generate trust and fame."

Tindall believes that TV is one of the most effective ways for advertisers to create future demand by building the memories, trust and fame that influence consumers before they are ready to buy. One of the key benefits of TV is that it can build high brand visibility quickly. Through repeated exposure, TV can help create memories that accumulate over time and increase the likelihood a brand is chosen later.

Watching TV is a shared experience for friends and family. By itself, collective media consumption can strengthen trust, amplify brand recall and enhance ad memorability. Integrated marketing, where brands embed messages into TV shows, can further boost advertising effectiveness by tapping into the emotional connection viewers have with the content. This impact grows significantly when brands leverage big cultural moments (e.g., State of Origin), with a consumer study finding that culturally relevant ads can triple purchase intent.[1]

In 2025, Uber Eats used their broadcast partnership with Channel 9 to creatively promote a "Catch Andy Murray" campaign during the Australian Open, spiking engagement with their brand. As the primary channel in their media mix, TV helped to deliver a 278 per cent revenue ROI over the course of the campaign.[2]

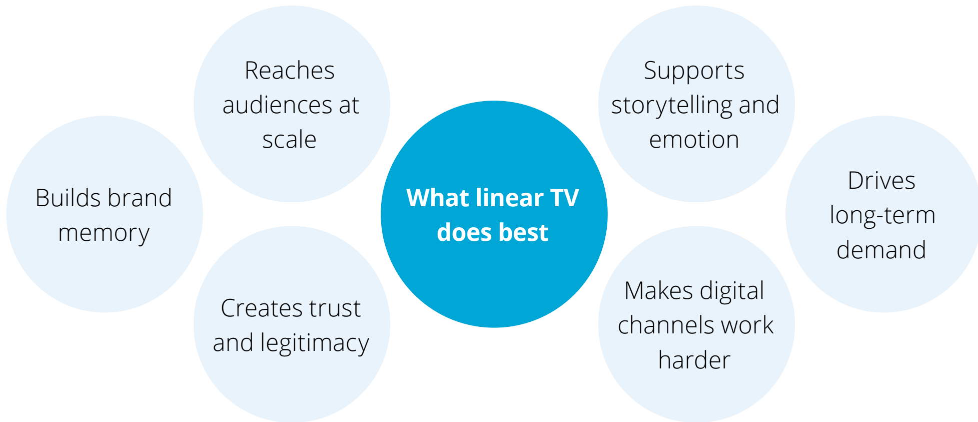
Television also remains among the advertising platforms consumers trust most.[3] Tindall suggests that there is a powerful cultural association between TV advertising and legitimacy, where an 'as seen on TV' label signals a level of credibility. This trust can increase consumers' confidence in a brand, making them more receptive to advertising messages and more likely to engage with or purchase a product or service.

Few advertising channels can match TV's ability to tell compelling stories. By combining high-quality production with the emotional impact of sound and visuals, TV creates memorable brand experiences that resonate with audiences and drive stronger engagement.

It is no wonder, then, that Tindall sees TV as punching above its weight. Tindall noted that although linear TV receives around a third of media spend it drives nearly half of all incremental profits.

In the age of social media, Tindall proposes that TV and digital channels play different, complementary roles. With digital and social channels being lower attention formats, TV can help prime attention, strengthen memory structures and build familiarity before consumers encounter brands elsewhere.

This means the rise of social media may make TV more important, not less, for advertisers seeking durable brand effects.



From audience attention to consumer action

Embedding brands in Australia's most talked-about entertainment moments

AAMI x AFL: Turning Australia's biggest sporting moment into brand growth

Commercial TV enables brands to connect with audiences through culturally significant moments at scale. AAMI's partnership with Seven and the AFL demonstrates how integrated television advertising can build brand salience and influence consumer preference.

In 2025, AAMI and Seven delivered an integrated AFL Grand Final campaign centred on a humorous "Wrong MCG" storyline, spanning broadcast, social media and live stadium activations. The campaign culminated in a 90-second hero spot during the Grand Final broadcast, attracting a **2.95 million Total TV audience** and **exceeding Gemba benchmarks by 8 per cent**.[1,2]

Image credit: Southern Cross Media Group

The campaign also delivered measurable brand outcomes, increasing preference among all Australians by 4 percentage points (19 per cent) and among AFL fans aged 25-54 by 4 percentage points (11 per cent). The results demonstrate how commercial TV can help brands embed themselves in Australia's most talked-about sporting moments and convert audience attention into consumer action.

Love Island x Subway: Turning cultural relevance into brand preference

Subway's partnership with Nine and Love Island Australia demonstrates how integrated television advertising can build brand awareness, strengthen consideration and influence purchasing behaviour among younger audiences.

Image credit: Nine Entertainment

In 2025, Subway partnered with Love Island Australia to engage Gen Z consumers through integrated broadcast content, social media activations and branded moments embedded within the program.

The campaign delivered a **15 per cent increase** in unprompted brand awareness and generated **5.6 million social views**. According to campaign results, 71 per cent of viewers reported feeling more favourable towards Subway following the partnership, while consideration metrics also improved.

The results strengthened brand connection and consumer intent, demonstrating how commercial TV can help brands move beyond awareness to influence perceptions and purchasing decisions.

MasterChef x LG: Turning audience attention into consumer actions

Commercial TV enables brands to connect with audiences through trusted, culturally significant content. LG's partnership with Ten and MasterChef Australia demonstrates how integrated television advertising can build awareness, strengthen consideration and influence purchasing decisions.

Image credit: Network 10

In 2025, LG showcased its home appliance range through a campaign spanning broadcast, digital and retail channels. The partnership integrated LG products into the MasterChef kitchen and featured product-led storytelling and promotional content.

Aligned with LG's "Life's Good" platform, the campaign connected the brand with audiences in a highly relevant home setting. It **reached 10.9 million Australians**, delivered double-digit growth in LG's cooking category and **increased brand favourability to 72 per cent**.

The campaign also translated into consumer action, with retail partners reporting customers entering stores and asking for LG products featured on MasterChef.

Note: The information represented in these case studies was provided by the relevant networks and has not been independently verified by Deloitte

04

Social cohesion benefits

78%

of Australians say commercial TV creates shared experiences

69%

of Australians agree commercial TV brings people from different backgrounds together

Social cohesion – Key findings

As media consumption becomes increasingly fragmented, commercial television continues to support connection, trust and shared understanding

Social cohesion is a cornerstone of a stable, inclusive and resilient society. While Australia remains relatively cohesive by international standards, evidence suggests social cohesion has come under pressure in recent years. Economic uncertainty, housing affordability challenges, media fragmentation and increasing political polarisation are among the main contributors to a more complex social environment. Within this context, access to trusted information, shared experience and common points of reference become increasingly important to maintaining social connection and community resilience.

Media plays a significant role in shaping social cohesion because it influences how individuals understand public issues and engage with civic life and one another. Broad-reach media can support trust, belonging and shared understanding by exposing audiences to common stories, events and perspectives, while more fragmented media environments may reduce exposure to shared experiences and encourage audiences to consume information within narrower communities.

This chapter presents a framework for social cohesion, explores current trends in social cohesion in Australia and examines the contribution of commercial TV to social cohesion as a key media platform.

Commercial TV contributes to social cohesion through its combination of free and accessible services, trusted news, Australian content, local storytelling and major live events. As one of the few remaining mass-reach media platforms, it provides opportunities for Australians from different backgrounds, regions and generations to engage with common cultural moments and shared national conversations. This role is particularly important in a media environment increasingly characterised by audience fragmentation across digital and on-demand platforms.

Australians recognise this contribution. Deloitte Access Economics' 2026 consumer survey found that 78 per cent of Australians agree commercial TV helps create shared experiences, 69 per cent agree it brings people from different backgrounds together, and 70 per cent agree it contributes positively to family and community connection.

This chapter examines the role of social cohesion in Australia and the contribution of commercial TV to fostering social cohesion. The discussion is informed by a literature review of key sources, including The Scanlon Foundation Research Institute, OECD, World Bank, Bertelsmann Stiftung and ACMA, as well as consultations with leading experts, including social cohesion researcher Dr Rebecca Huntley and Anthea Hancocks from The Scanlon Institute. The remainder of this Chapter is structured as follows:

- Social cohesion and its components
- Where Australia stands today and emerging challenges
- The connection between media and social cohesion
- Commercial TV's contribution to social cohesion.

The Block
Image Source: Nine Entertainment.

Social cohesion and its components

Understanding the key pillars of social cohesion

Social cohesion is a critical component of a stable and inclusive society, yet it faces a range of challenges in contemporary Australia. While shaped by a number of economic, social and political factors, media also plays a significant role in influencing social cohesion, and this chapter explores the contribution of commercial TV within this broader context. Specifically, the relationship between commercial TV and social cohesion is examined later in the chapter through five key lenses: free and universal access, shared national moments, local stories and trusted news, Australian content and representation, and exposure to broad and diverse audiences.

Figure 4.1: Social cohesion framework

Social cohesion

Social cohesion refers to how well a society functions as a whole – whether people feel they belong, whether they trust each other and the institutions around them, and whether there is broad access to opportunity[1]

Inclusion and equitable access
Ensures people across different backgrounds and circumstances can access information, shared experiences and participation in public life.[2]

Shared identity and common understanding
Creates shared reference points, cultural moments and narratives that strengthen belonging and a common understanding of Australian society.[3]

Belonging
Creates a sense of connection and acceptance, helping individuals feel valued as part of a broader community and strengthening the trust, shared identity and social bonds that hold society together.[4]

Trust
Supports trust in news, institutions and other people by providing reliable information and a credible shared source of public communication.[5]

Recognition
Reflects and validates the diversity of Australian communities so people feel seen, respected and included in the national story.[6]

Cross-group connection
Brings together audiences across regions, generations and backgrounds through shared content that helps bridge social divides.[7]

Source: Deloitte Access Economics, *based on Scanlon Institute, OECD, ACMA and World Bank (2026)*

Social cohesion: where Australia stands today and emerging challenges

Social cohesion is a foundation of economic resilience and long-term prosperity

Where Australia stands today

The Scanlon Social Cohesion Index measures Australians' sense of belonging, trust, social inclusion and participation, providing an overall indicator of national social cohesion. Australia remains relatively cohesive by international standards, and the Scanlon index has been broadly stable. However, social cohesion has been under pressure in recent years and is weaker than pre-COVID figures, remaining at 78 (out of a maximum possible score of 100) from 2023 to 2025.[1,2]

The national and local pictures differ. National belonging and confidence can feel strained when cost of living, housing pressure, global instability and political distrust dominate public debate; however, local communities remain the strongest anchor of cohesion, through neighbourhood trust, local sport, emergency responses and a sense of voice and agency.

Multiculturalism remains a core strength. High openness to migrants and a flexible, evolving national identity support cohesion because different communities can see themselves within a common civic story.[3]

While Chart 4.1 demonstrates that social cohesion in Australia has declined in recent years, it remains relatively stable compared with many comparable OECD countries.[4] Supported by its institutions, Australia continues to be a highly trusting and cohesive society, with interpersonal trust levels above the international average and no clear evidence of a long-term erosion in social trust.[5] Current trends in social cohesion should be interpreted within the broader context of recent societal disruptions associated with inflation, housing affordability, political polarisation and global uncertainty.

Recent factors influencing social cohesion

Crises can strengthen cohesion by creating the opportunity for Australians to come together, as seen during COVID-19 and after events such as the 2025 Bondi Beach shooting. While they can also expose and deepen existing divisions, solidarity depends on whether institutions respond fairly and competently.[6] A crisis can expose social division, but it can also generate solidarity when people are asked to act around a common purpose and can see that institutions are responding with fairness and competence. The relevant question is therefore not whether cohesion automatically declines after shocks, but whether the institutional response converts short-term solidarity into longer-term trust.

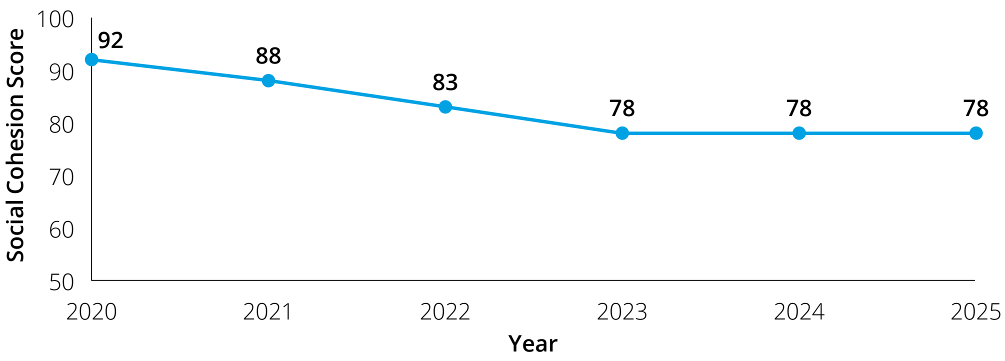
Cost-of-living and housing stress are central cohesion risks because they affect whether people believe the economy and institutions are working fairly. The pressure is uneven: younger Australians tend to report lower belonging and optimism, while also showing higher openness and acceptance; older cohorts generally report stronger belonging but lower openness to change.[7]

The post-COVID period shows that Australia's social cohesion is resilient but under pressure from inflation, disasters, geopolitical uncertainty and digital distrust. Policy should strengthen trust in institutions through fairness, responsiveness and transparency, while addressing inequalities and supporting a credible information environment.[8]

Why social cohesion matters

Social cohesion matters because it builds trust, belonging and connection, helping communities to function effectively, participate in civic life and respond to shocks.[9] Additionally, strong levels of social cohesion support democratic resilience, social stability and economic prosperity by enabling people, businesses and governments to work together and navigate periods of disruption.[10] In Australia, maintaining social cohesion is essential for fostering an inclusive society, supporting community resilience and sustaining the social and economic foundations that underpin long-term prosperity.

Chart 4.1: Australia's Scanlon Index Social Cohesion Score (2020–2025)



Source: The Scanlon Foundation Research Institute

The connection between media and social cohesion

Broad-reach and trusted media support shared understanding, informed participation and social connection

Mass media is one of the primary ways people form a shared understanding of the world around them. By providing universally accessible information and shared points of reference, it can help people understand and engage with common issues to foster a more connected and informed society. However, poor media practices can weaken cohesion when reporting erodes trust or amplifies fear and division without adequate context.

"As audiences become more segmented, there's a real risk that people lose those shared points of reference — and with that, some of the informal glue that holds communities together."

– Dr Rebecca Huntley

Media fragmentation changes how cohesion is experienced

Social cohesion is shaped by the media environments through which people encounter public issues, other communities and national events. Older cohorts are more likely to have grown up with scheduled news and mass-audience programs (creating common reference points), which can help counter media fragmentation and support a stronger sense of belonging.[1] By contrast, younger audiences are more accustomed to personalised feeds and niche communities; this can increase openness and representation yet can also contribute to media fragmentation by reducing exposure to a shared national information base.[2]

Media practices can build or weaken trust

Sensationalist coverage can damage cohesion when it repeatedly emphasises fear, conflict or social threat without adequate context. People form impressions of community safety, institutional competence and social norms from what they see most often. Professional journalism produced to ethical standards is therefore important: it still reports difficult issues but adds proportionality and examples of how communities and institutions are responding.[3]

Local presence connects the national and local picture

Local news matters because social cohesion is often strongest at the community level. By covering local issues and diverse communities, news can strengthen civic participation and inclusion in public life.[4] How news is covered also matters. Reporting that provides context, reflects different perspectives, and follows strong editorial standards can support informed public debate and social cohesion, while overly simplistic or adversarial framing can reinforce political and social polarisation.[5]

Commercial TV's regulatory framework underpins its trusted, universal reach

Commercial TV operates under regulatory obligations – including Australian content requirements, local news provisions and broadcasting standards – that support broad public reach and editorial accountability. Its mass-audience model can create shared experiences through national news, live sport, major events and locally relevant stories.

Commercial TV can function as a low-barrier shared civic space. Its public value is strongest when it provides trusted news, visible local presence, sport and Australian content that generate common reference points, pride and conversation for people of different ages and backgrounds. This includes Indigenous broadcaster Imparja Television, which helps amplify First Nations voices and perspectives.

Commercial TV's enabling characteristics for social cohesion

- **Brand incentives:** Broadcasters protect trusted, broadly appealing content that maintains audience confidence.
- **Commercial incentives:** Large audiences encourage widely accessible news, sport and entertainment that are favoured by audiences and create shared experiences.
- **Occupational standards:** Professional journalism operates within established industry standards that underpin accountability and informed public discourse.[6]
- **Government regulation:** The Broadcasting Services Act 1992 underpins commercial TV access and public interest obligations.
- **Co-regulation and industry of practice:** Commercial TV operates under a co-regulatory framework overseen by ACMA, helping ensure trusted and accountable broadcasting that strengthens fairness, trust and a shared understanding.
- **Emergency and crisis broadcasting role:** Commercial TV delivers trusted news and emergency updates during crises, a function increasingly recognised internationally as core to media's role as civic infrastructure.[7]

Commercial TV's contribution to social cohesion

Commercial TV impacts social cohesion through access to information, stories and events, alongside its role within the broader Australian media ecosystem

Social cohesion is shaped by a range of factors – including media – with commercial TV contributing through a number of mechanisms. Although commercial TV is one of many factors that can influence social cohesion, it remains one of the few channels that can carry news, live sport and Australian programming to large audiences without requiring a paid subscription – which is material in a market where audiences are increasingly split across services.

Free and universal access:

In 2025, commercial TV reached an average of 21.6 million Australians each month, with 78.4 per cent of Australians engaging with it monthly.[1] This suggests television remains a common connector across Australian households, bringing together audiences with differing ages, incomes, locations and patterns of digital use. The access benefit is most relevant where affordability, broadband quality or platform preferences vary.

Commercial TV supports equitable access to information, while the quality, accuracy and relevance of the programming still determine how useful that access is for audiences.

However, while commercial TV services are available across Australia, including through satellite delivery, a small number of very remote communities face infrastructure-related barriers that can limit access. Addressing these challenges remains an important component of broader efforts to support digital inclusion and connectivity across Australia.

Shared national moments:

Nearly nine in ten Australians (89 per cent) watched a major sporting event on commercial TV in 2025[2], illustrating that commercial TV aggregates audiences around programming that cuts through everyday media fragmentation and is often followed live rather than watched later in isolation.

78 per cent agree that major events on commercial TV create shared experiences across Australia, whilst 69 per cent agree that commercial TV brings people from different backgrounds together.[3] Additionally, another notable finding adds a household and community lens, with 70 per cent saying commercial TV contributes positively to family and community connection.[4] Together, these results point to observable behaviours: watching, discussing and sharing commercial TV moments, helping create common points of reference that can reduce the risk of social polarisation.

78% of Australians say commercial TV helps create moments of shared experience across Australia

69% of Australians agree that commercial TV brings people from different backgrounds together

66% of Australians say they feel more connected to other Australians by watching events on commercial TV

70% of Australians agree that commercial TV contributes positively to family and community connection in Australia

Source: Deloitte Access Economics, *Consumer Survey (2026)*

Commercial TV also impacts social cohesion through local stories, Australian content and broad audience reach

Local stories and trusted news

Commercial TV's evidence of impact is strongest when local events are made visible beyond the immediate community. Local bulletins, on-the-ground reporting and network news packages can give suburban or regional stories a larger audience, particularly where the story has public relevance or a clear community response. However, while events of significant public interest warrant reporting, coverage of divisive or adverse events can generate both positive and negative community responses, which may moderate the broader benefits associated with increased visibility.

Several examples demonstrate these responses:

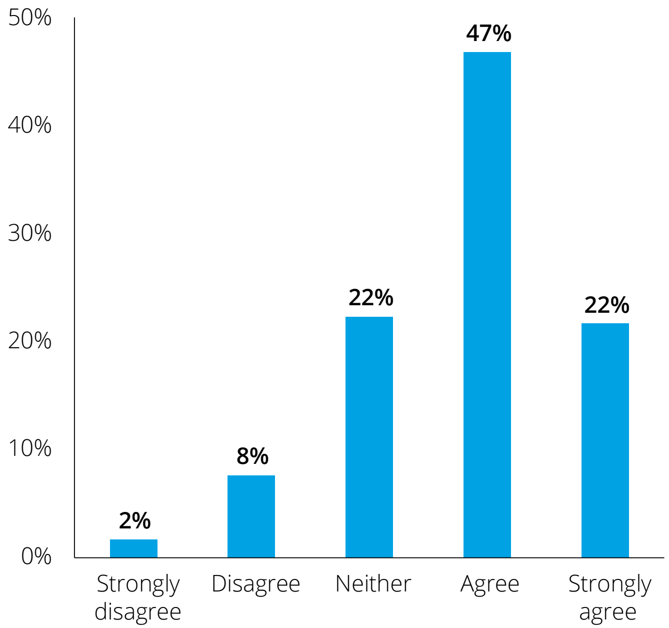
- The Bondi memorial paddle-out provides a recent and useful example. Following the 2025 Bondi shooting crisis, with some broadcasters providing ad-free coverage, all major commercial TV networks broadcast the paddle-out, where more than 2,000 people gathered. As a broadcast community response, the event gave audiences a shared image of solidarity, not just crisis. The impact came not only from reporting the incident, but also from showing the public response that followed.
- Similarly, coverage of the 2019 and 2025 Townsville floods brought national attention to the experiences of affected communities, highlighting stories of resilience, recovery and community support. By making local disasters visible to a broader audience, commercial TV can help bring Australians together to support the challenges and responses across different parts of the country.

In crises such as these, media coverage can have a varying impact on social cohesion. For example, repeated imagery of perpetrators could weaken social cohesion by contributing to heightened fear and reduced trust within society. While this risk cannot be eliminated entirely, editorial decisions about what is shown, repeated and amplified can influence the extent to which media coverage supports or undermines social cohesion.

Broad audience exposure

Commercial TV's mass-audience model means viewers can encounter stories, people and places they did not actively search for. In a market shaped by paid streaming, social feeds and recommendation algorithms, Chart 4.2 shows that 69 per cent agree commercial TV brings Australians from different backgrounds together.[5]

Chart 4.2: Perceptions of commercial TV and inclusivity



Source: Deloitte Access Economics, *Consumer Survey (2026)*

Australian content and representation:

Australian news, sport, drama, reality and entertainment provide everyday examples of local places and community issues on screen. This is most valuable when representation is specific and contemporary: viewers can recognise familiar experiences, while also seeing other parts of Australia outside their own networks.

What this means for cohesion

The evidence presented in this chapter points to exposure and visibility rather than a guaranteed outcome. Commercial TV can place the same story, event or Australian program in front of people who otherwise consume different media. That creates opportunities for recognition and conversation, but its value depends on editorial choices, tone and relevance.

For commercial TV, this means its most credible contribution is in using broad reach to make Australian stories, local responses and shared events visible in ways audiences can recognise and discuss. Overall, the evidence suggests commercial TV's greatest contribution to social cohesion is its ability to make Australian stories, events and experiences visible at scale – providing common points of reference that help connect Australians across communities, generations and backgrounds.

> *"Periods of crisis can strengthen cohesion, but it depends heavily on how institutions and leaders respond."*
>
> *– Anthea Hancocks*

05

Australia’s democracy

7.6 million

Australians reached by election coverage

80%

of Australians agree commercial TV helps ensure shared and reliable information

Australia's democracy and the role of trusted information

Australia's democracy is strong by international standards, but its resilience rests on trusted institutions and journalism at a moment when news consumption is fragmenting

By international standards, Australia's democracy is strong. The Economist Intelligence Unit's 2025 Democracy Index ranks Australia 11th out of 167 countries and classifies it as a "full democracy", ahead of similar countries like the United Kingdom and Canada.[1] This comes at a time when democracy is backsliding worldwide, with roughly three-quarters of the world's population now living under some form of autocracy.[2] The Parliamentary Education Office identifies the pillars underpinning this strength as active and engaged citizens, an inclusive and equitable society, free and fair elections, and the rule of law applying equally to citizens and government alike.[3]

Against this backdrop, Australia comes from a position of strength, reflecting a long history of democratic innovation and consistent evidence that Australians value democracy. However, satisfaction with how the system works is fragile and depends on effective and trusted institutions. Without these, it becomes harder for Australians to make informed decisions and for policymakers to address the most significant challenges facing the nation.

Central to a well-functioning democracy is access to trusted information, and journalism is widely recognised as a public good that provides it.[4] A free, pluralistic and independent press is a necessary condition of an open society, giving citizens the verified, public-interest information they need to participate fully in civic life. Journalism also acts as an independent watchdog and agenda-setter, forming an essential part of the checks and balances that hold governments to account and guard against corruption and political malpractice.[5] The benefits extend to communities too: news consumers tend to be more politically engaged, better connected and more knowledgeable about electoral issues, and when communities lose their local news sources, civic engagement suffers.[6]

At the same time, the way Australians access this information is changing. 60 per cent of Australians aged 18 to 34 accessed news through social media and communication websites in 2024.[7] However, free TV remains resilient as the most popular news source for Australians, with 50 per cent of adults accessing free TV for news.[8]

Figure 5.1: Four key ideas of Australian Democracy

Active and engaged citizens
Citizens have a voice and can make changes in society

An inclusive and equitable society
We work towards a society where everyone is respected and free

Free and fair elections
We get to stand for election and choose who makes decisions on our behalf

The rule of law for both citizens and the government
Everyone is equal before the law and must follow the law

Source: Parliamentary Education Office

Commercial TV as a trusted source of news

Media fragmentation is creating new challenges for trust, misinformation and democratic debate

The growth of online information is not a problem in and of itself. However, a more fragmented media environment can create risks, as the quality and reliability of content varies widely across platforms. As audiences consume news and information from an increasingly diverse range of sources, misinformation can spread more easily, potentially eroding the shared factual foundation on which democratic debate depends. These risks are widely felt: three-quarters of Australians say they are worried about misinformation, and three in five reported encountering political misinformation in the two weeks before the 2025 federal election.[1]

Generative AI intensifies the challenge, sharply increasing both the volume of false content and the ease with which it can appear credible, which is an increasing concern given around 10 per cent of global news consumers already use AI chatbots to get their news.[2] A high volume of misinformation can confuse the public's understanding of the democratic system and make it harder for citizens to hold governments to account.[3] This risk is widely recognised, with 71 per cent of Australians reporting concern about the rise of AI-generated misinformation.[4] A related risk is polarisation. While Australia is not currently considered highly polarised — as measured by an index aggregating expert ratings — polarisation has been rising in comparable countries such as the United Kingdom and New Zealand, driven in part by a fragmenting news media.[5]

Chris Reason, 7NEWS
Image Source: Southern Cross Media Group.

Commercial television remains among Australia's most trusted sources of information, with 80 per cent of Australians agreeing it helps ensure access to shared and reliable information

Against this backdrop, commercial TV can play a stabilising role. News on commercial TV is subject to an industry Code of Practice, enforced by the regulator, ACMA, which regulates the accuracy, fairness and impartiality of reporting. Because it offers a shared source of information that is not curated for the individual viewer, it also helps guard against polarisation. Australians continue to rely on commercial TV, with four in five (80 per cent) agreeing it helps ensure access to shared and reliable information and 20 per cent ranking news as the top reason to watch commercial TV.[6]

As geopolitical tensions rise and severe climate events become more frequent, free TV plays an increasingly key role in providing Australians with readily accessible information about emergencies. Australians recognise the value of this role, with 60 per cent viewing commercial TV as a reliable or very reliable source of information during emergencies.[7] More broadly, as Chart 5.1 shows, free TV news remains one of the first sources Australians turn to during times of crisis, with significant increases in viewership around significant events.

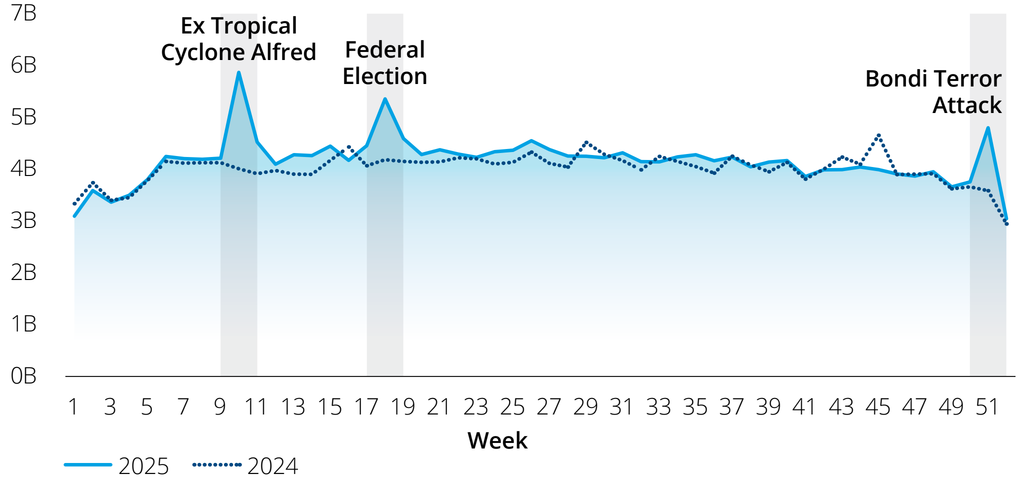
Critiques of commercial news media argue that its structural and financial incentives mean that a relatively narrow range of perspectives is presented to audiences.[8] And, as with any type of news, errors can sometimes occur, as evidenced by reporting on breaches of the Code of Practice.[9] However, the identification of these breaches underscores the value of the Code, which establishes clear rules and holds commercial broadcasters to account — a safeguard largely absent from many alternative news sources. This is reflected in the fact that commercial TV remains highly trusted among Australians, with 87 per cent rating it as very or moderately trustworthy, well ahead of social media (44 per cent) and generative AI news content (52 per cent).[10]

7.6 million individuals were reached by commercial TV coverage of the 2025 federal election[11]

11.4 million Australians watch local news on free TV each week[12]

390 local news bulletins are aired every week on commercial TV

Chart 5.1: National Broadcast TV Weekly Total Minutes News/Current Affairs Genre



Source: OzTAM VOZ National FTA Broadcast TV, When Watched, Total People Weeks 1-52 2025 and 2024, Weekly Total Minutes, News/Current Affairs Genre, 2am to 2am

06

Australian content and sport

25,300+ hours

of Australian content aired by metropolitan broadcasters in 2024

$15.6 billion

invested in Australian content over ten years

The importance of Australian screen content

Australian content contributes to a shared national identity, reflects shared experiences and is highly valued by audiences

Australian content is valued for its reflection of Australian experiences, values and identity. Research consistently shows strong public support for Australian content, with one survey finding that 85 per cent of Australians agreed that Australian film and TV stories are important for contributing to our sense of Australian identity.[1]

This support is also evident in audience viewing behaviour. In 2025, all ten of the most-watched free TV broadcast programs in Australia were Australian programs.[2] The popularity of these programs demonstrates the enduring appeal of local content, particularly genres such as news, sport and entertainment that provide shared cultural reference points and bring Australians together around common experiences and nationally significant moments.

Australian screen content also creates value beyond domestic audiences. Successful Australian programs act as cultural exports, showcasing Australian stories, perspectives and talent to international audiences while strengthening Australia's global profile. Australian screen content on commercial TV is immensely popular worldwide, with MasterChef Australia ranked as the world's most popular reality series in 2020.[3]

Spotlight on Australian shows

Below are three examples of programs aired on commercial TV that cover a variety of genres, showcasing commercial TV's investment in local production and Australian content.

Channel 7:

Farmer Wants A Wife showcases a side of Australia rarely represented in global television, highlighting the people, industries and communities that underpin regional and rural Australia. By following the lives of farmers across the country, the program provides audiences with insight into regional lifestyles while highlighting the importance of Australia's agricultural communities.

Channel 9:

The Block taps into Australia's love of DIY and passion for real estate. As Australia's longest-running reality program, its 22 seasons have taken viewers onto construction sites across inner cities, the suburbs and regional communities, as contestants compete to renovate homes and sell them at auction. Channel 9 reflects that their hard work has revitalised neglected buildings, boosted small-town tourism, and driven consumer trends.

Channel 10:

Have You Been Paying Attention? is a distinctly Australian entertainment program that combines comedy with a uniquely local take on current events, popular culture and public life. Featuring Australian comedians and personalities, the show reflects the national conversation each week and showcases a wide array of Australian-produced entertainment.

Australian screen content policy context

The value of Australian screen content is recognised by the Australian government, resulting in an increased policy focus to ensure audiences keep seeing Australian culture on screen regardless of the platform

Due to the benefits of Australian content that go beyond its commercial value, the promotion and production of Australian content has been an important focus of government policy. The National Cultural Policy, Revive, released in 2023, established 'Australian stories are seen and heard, regardless of platform' as a key policy principle.[1] With the Government now developing a new National Cultural Policy that builds on Revive, the visibility of Australian content across both broadcast and online platforms remains relevant.[2]

Previous research has quantified the value of Australian screen content to the public. It estimated that, across the Australian population, the value people place on simply having Australian screen content available as a viewing option amounts to approximately $511 million per year.[3] Additionally, Australians value Australian stories being made and available, even if they don't watch them themselves. This "existence value" (or "altruism value") was estimated to be approximately $415 million a year.[4]

There are long-standing policies promoting Australian content including quotas on commercial broadcasters to ensure the continued production of Australian content. These include annual quotas of 55 per cent local content aired on primary channels between 6 am and midnight and 1,460 hours of Australian content aired between 6 am and midnight on non-primary channels per broadcaster.[5]

In line with commitments in Revive, the Government introduced local content requirements on subscription streaming services in 2025, also in acknowledgement of the fact that commercial broadcasters have historically carried a larger share of Australian content obligations than most digital streaming services. Under the new laws, streaming services with more than one million Australian subscribers will need to invest 10 per cent of their total Australian program expenditure or 7.5 per cent of their Australian revenue on new Australian content.[6]

"The ready availability of mass content produced in other countries, particularly the United States, risks drowning out the voices of Australian storytellers."

- National Cultural Policy, 'Revive'

Andy Allen, Poh Ling Yeow, Sofia Levin and Jean-Christophe Novelli, MasterChef Australia
Image Source: Network 10.

Australian content on commercial TV

88 per cent of commercial TV program expenditure goes toward Australian content, with 77 per cent of Australians recognising commercial TV as a key source of local content

Commercial TV plays a significant role in creating and commissioning Australian content at scale. Commercial broadcasters invested $15.6 billion in Australian content over a 10-year period from 2014-15 to 2023-24.[1,2,3] In 2023-24, investment in Australian content made up 88 per cent of all program expenditure for commercial broadcasters (see Chart 6.1).[4] Australian sport and light entertainment are the largest content genres by revenue, together accounting for 70 per cent of free TV broadcasting revenue in 2025.[5]

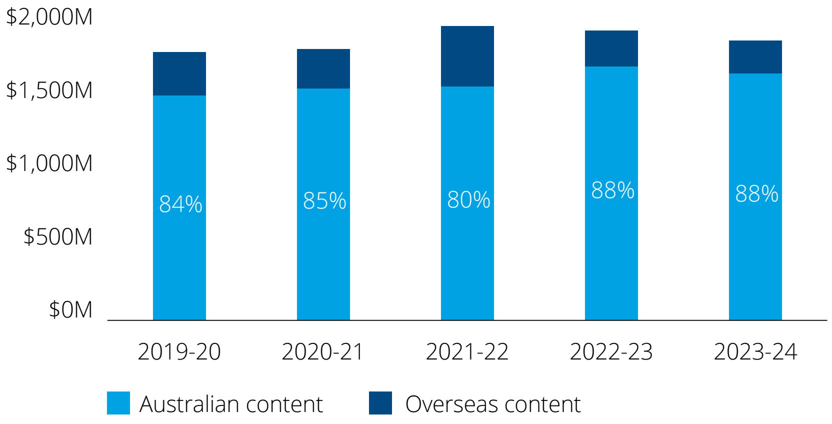
Metropolitan broadcasters delivered more than 14,600 hours of Australian content on primary channels in 2024, representing 74 per cent Australian content and significantly exceeding the 55 per cent quota (see Chart 6.2).[6] Regional broadcasters also exceeded the quota, with Australian content comprising between 64 per cent and 82 per cent of programming. Metropolitan broadcasters also exceeded non-primary channel requirements, collectively delivering more than 10,700 hours of Australian content in 2024, while regional broadcasters delivered between 1,851 and 5,340 hours per broadcaster. These results demonstrate both broadcasters' commitment to Australian content as well as strong audience demand.

Since January 2021, commercial broadcasters must meet a first-release Australian programs quota that requires them to broadcast 250 points of commissioned dramas, documentaries and children's programs as well as acquired films. Broadcasters have exceeded these requirements, broadcasting 329 points on average in 2024.[7]

By consistently investing in and broadcasting Australian content and first-release programs at levels above regulatory requirements, commercial broadcasters help ensure Australian stories, voices and shared experiences remain visible on screen. Commercial TV is also a major source of local news, producing 46 bulletins across capital cities and regional centres each weeknight. Australian audiences recognise commercial TV's role in producing local content, with 77 per cent agreeing that commercial TV is a key source of Australian content.[8]

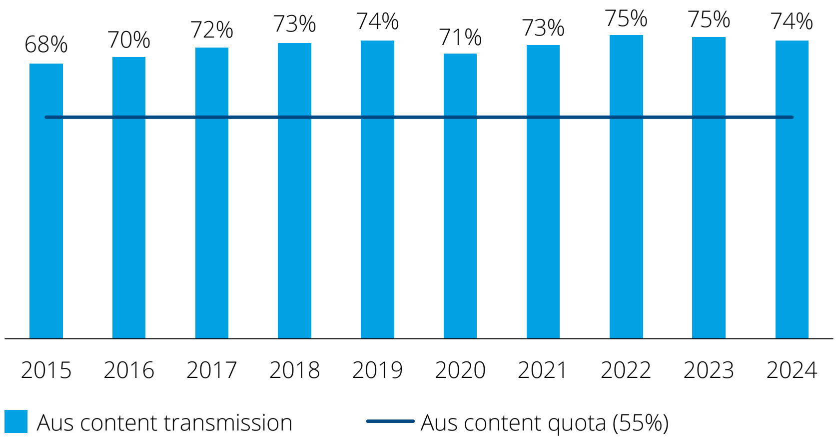
investment in Australian content from 2014-15 to 2023-24

Chart 6.1: Commercial broadcasters' program expenditure



Source: ACMA

Chart 6.2: Australian content on metropolitan primary channels



Source: ACMA

Australian sport

Commercial TV is the primary platform through which Australians access free sport

Sport holds a defining place in Australian culture and national identity. From local grounds to the world stage, it creates shared moments that bring the country together and shape how Australians connect with one another. The strength of this connection is reflected in how Australians follow sport. Nearly two out of three Australians (65 per cent) regularly watch sport, and nearly nine in ten (89 per cent) watched at least one major sporting event in 2025.[1,2]

Commercial TV plays a central role as a provider of free sport. It is the main source of sports content for Australians (see Chart 6.3), and the popularity of this content is reflected in the five most-watched free TV broadcast programs in 2025 all being sports broadcasts (see Table 6.1).[3,4] This pattern is even more pronounced in regional Australia, where nine of the ten most-watched free TV broadcast programs were sport.[5]

Australians place great value on free access to sport, as shown by findings from the 2026 consumer survey. More than four in five Australians (83 per cent) believe iconic sporting events such as The Ashes and the Australian Open should remain freely available, while nearly seven in ten (69 per cent) regard commercial TV's provision of free sport as very or extremely important to society.[6]

The Matildas
Image Source: Network 10.

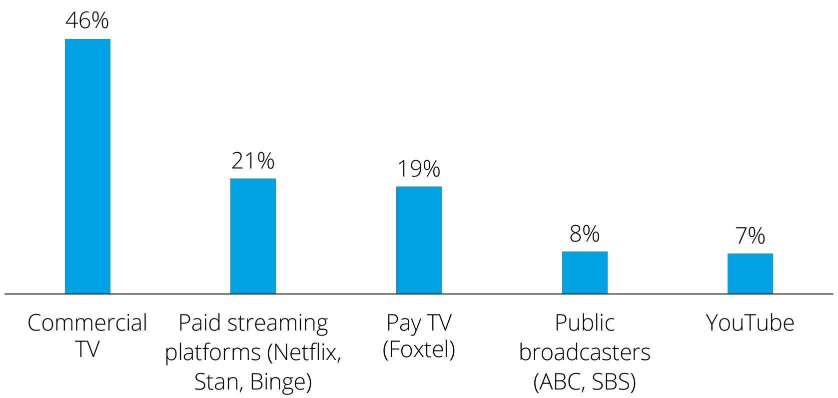
83% of Australians believe iconic sporting events should remain free

Table 6.1: Top 5 most watched television broadcast programs in Australia, 2025

Program	Audience
AFL: Grand Final – Geelong vs Brisbane	3,202,000
NRL Grand Final Day – Match	3,180,000
State of Origin Rugby League NSW vs QLD – 3rd Match	2,958,000
State of Origin Rugby League NSW vs QLD – 1st Match	2,813,000
State of Origin Rugby League NSW vs QLD – 2nd Match	2,805,000

Source: OzTAM VOZ, Top Programs, Broadcast, Weeks 1-52 2025, National, Audience, Consolidated 7, Total People, All FTA channels, Minimum program duration 10 minutes

Chart 6.3: Australians' main source for sport content on screen, 2026



Source: Deloitte Access Economics, *Consumer Survey (2026)*

Anti-siphoning rules support commercial TV's ability to deliver free sport

The ability of commercial TV to deliver this coverage is underpinned by anti-siphoning laws. Under these laws, free TV broadcasters are given the right of first opportunity to acquire broadcast rights to events of national significance. The anti-siphoning list includes major cricket, football, and tennis matches, as well as the Olympics, ensuring that these events remain accessible to all Australians regardless of their ability to pay for subscription services.[7] By preserving free access to iconic sporting events, the framework supports social cohesion and participation in nationally significant cultural experiences. Commercial broadcasters, in turn, benefit from the advertising revenue that can be earned through the allocation of these sporting rights.

In the United States, where anti-siphoning legislation is no longer in effect, viewers pay substantial subscription fees across platforms to watch major sporting competitions like the NFL.[8] A US senator noted that many games once free or easy to find are increasingly scattered across several apps and exclusive deals.[9] While Australia has a well-developed anti-siphoning framework, the current rules only apply to linear television, meaning that digital streaming rights can still be placed behind paywalls.[10]

69% of Australians regard commercial TV's provision of free sport as very important to society

NRL Beanie for Brain Cancer Round
Image Source: Nine Entertainment.

Women's sport

Growing audiences for women's sport are driving greater participation, visibility and commercial investment

The popularity of women's sport has increased significantly in recent years. One of the biggest sporting moments of recent years was the Matildas' run at the 2023 FIFA Women's World Cup, which was broadcast live and free by Seven. The semi-final against England reached 11.15 million Australians, making it the highest-rated program in the nation's history.[1] Following the tournament, 69 per cent of Australians who watched a match said they were more likely to follow other women's sporting events in future, while soccer player registrations in NSW rose 34 per cent after the tournament, led by women and girls.[2,3]

Growing audience interest in women's sport is translating to stronger commercial outcomes. Sponsorship of women's sport is growing 50 per cent faster than men's major leagues, and every $1 a corporate sponsor invests in the visibility of women's elite sport leads to more than $7 in customer value for the organisation.[4]

Commercial TV has been a key contributor to the growth of women's soccer and women's sport more broadly. It aired 15 key 2023 FIFA Women's World Cup matches, alongside each Matildas match.[5] This coverage came before the tournament was placed on the anti-siphoning list, demonstrating an independent commitment to women's sport. Additionally, all Matildas matches at the AFC Women's Asian Cup 2026 were aired by Network 10.[6]

69% of Australians who watched a Matildas match said they were more likely to follow women's sport

34% increase in soccer player registrations in NSW, led by women and girls

The Matildas, 2023 FIFA Women's World Cup
Image Source: Southern Cross Media Group.

Commercial TV is expanding the reach and visibility of women's sport through free-to-air coverage

In addition to soccer, other major women's sporting events that have aired or are set to air on commercial TV include:

- All matches of the 2025 NRL Women's Premiership[7]
- At least 30 AFLW home-and-away games, plus the finals and Grand Final (per season) from 2025 to 2031[8]
- Major netball events from 2027 to 2031 (see spotlight).

Stacey West (Former Netball Australia CEO), Amanda Laing, (Managing Director, 9Network, 9Now and Stan), Liz Ellis (Chair of Netball Australia)
Image source: Nine Entertainment.

Spotlight: Nine and Netball Australia partnership

In April 2026, Nine Entertainment secured a five-year broadcast agreement with Netball Australia. The deal covers every Suncorp Super Netball match, all Australian Diamonds matches and all 64 matches of the Netball World Cup Sydney 2027. Running from 2027 to 2031 across the 9Network, 9Now and Stan Sport, it represents the largest free TV footprint in the sport's history. Previously held by Pay TV broadcaster Foxtel, the transition of these rights to Nine marks a significant expansion in the volume of netball content freely accessible to Australian audiences.

Netball is Australia's leading team sport for women and girls, with more than 700,000 registered participants and over one million active players nationally. This participation base gives netball a strong appeal to advertisers seeking access to households, families, and women who drive spending decisions every day. The agreement reflects accelerating broadcaster investment in women's sport driven by strong audience demand, increased attendance and expanding advertiser interest.

Netball Australia's interim CEO, Mark Falvo, said:

"Netball Australia's new five-year broadcast agreement with Nine will give netball its largest-ever free-to-air footprint, creating more opportunities for fans across the country to watch their heroes and celebrate the moments that make our sport special."

"Nine saw the power in women's sport and chose to invest in us to bring more incredible netball to families in every state and territory in Australia."

07

Distinctive role in the market

Free access

to news, sport, Australian content and entertainment

78%

of Australians see value in Australia having an Australian-owned and regulated broadcast sector

Comparison with other platforms

Commercial TV plays a distinctive role in Australia's media environment, combining broad reach with free access to important content

Australia has a complex and evolving media environment, with audiences accessing information and entertainment across a wide range of platforms. This fragmentation has largely been driven by the growth of streaming services and social media, with the latter becoming an increasingly important source of news for many Australians. This is being further exacerbated by the increasing volume of AI-generated content.

Within this fragmented media environment, commercial TV continues to have an important and enduring role. As Figure 7.1 on the following page shows, different media platforms have areas they excel in. However, commercial TV is distinctive in providing free access to Australian programs, live sport and trusted local news while being available through both broadcast and the internet. Some key features include the following:

- **Access to reliable information.** Commercial TV is an important source of reliable, independent journalism and local news content, supporting the public's access to the information needed to participate in democratic life.
- **Broad media access.** Alongside public broadcasting, commercial TV is distinctive in being available both via broadcast and over the internet, free of charge. This provides pathways to quality content for audiences who face barriers such as subscription costs or limited internet access.
- **Access to sport.** Commercial TV provides free coverage of significant Australian sporting events, keeping this content accessible rather than behind subscription paywalls.
- **Access to Australian content.** Commercial TV is a major supporter of Australian content, helping to keep Australian stories on screen.

Georgie Parker and Nicholas Cartwright, Home and Away.
Image Source: Southern Cross Media Group.

Fishing Australia
Image Source: WIN Network.

Figure 7.1: Comparison of different media platforms

	Cost and access	Australian content	Live sport	Local news
Commercial television	• Free • Universal service, accessed via TV or the internet • Ad-supported.	• Australian content quotas apply • Australian content exceeds quotas.	• Anti-siphoning laws ensure many major sporting events are available • Only applies to linear TV; streaming can remain behind paywalls	• Strong focus on local news • Comply with Industry Code of Practice.
Public broadcasting	• Free • Universal service, accessed via TV or the internet • Mix of ad-free (ABC) and limited advertising services (SBS).	• Operate under charters that prioritise Australian content.	• Anti-siphoning laws ensure many major sporting events are available.	• Strong focus on local and international news • Editorial standards embedded in legislative charters and codes of practice.
Subscription streaming services	• Accessed via the internet • Paid subscription required • Some ad-supported tiers.	• Australian content requirements in effect from 2026 • Requirements below free commercial TV broadcasters.	• Many streaming platforms offer live sport • Access is paywalled and varies by provider.	• Some local news coverage • Primary focus on entertainment content. • International platforms do not broadcast local Australian news
Online video sharing platforms	• Free and accessed via the internet • Ad-supported • Some optional paid tiers.	• No content requirements • Australian content is available alongside global content.	• Live sport availability is limited and is at the discretion of rights-holders.	• Local news is available but varies significantly in quality and is generally not subject to enforceable editorial standards.
Pay TV	• Subscription required • Accessed through TV or internet-enabled device.	• Australian content requirements apply to drama services, depending on the provider.	• Extensive live sport coverage • Based on exclusive subscription-based rights.	• Limited local news coverage is available on some services • Subject to industry codes where applicable.
Newspapers (online and print)	• Distributed physically and online • Mix of paid and free models.	• No content requirements, • Coverage typically focused on Australian issues and audiences.	• Coverage provided through reporting and commentary.	• Extensive local and international news coverage. • Subject to standards of practice.
Radio	• Free • Available through terrestrial broadcasting and online streaming • Mix of ad-free and ad-supported services.	• Australian music quotas apply to commercial radio.	• Coverage provided through live commentary and reporting.	• Strong focus on local and international news • Editorial standards embedded in legislative charters and codes of practice.
Free Ad-supported TV Channels (FAST channels)	• Free • Available through the internet • Ad-supported.	• No content requirements • Some Australian content may be available on some channels.	• Live sport availability varies by provider.	• Some local and international news coverage available depending on the provider.

Source: Deloitte Access Economics

The public interest role of commercial TV

Policy settings recognise commercial TV's public interest role

Free commercial TV occupies a distinctive position as Australian, independent media broadcasting that delivers sports, news and Australian content to viewers, while utilising spectrum — a scarce public resource.

Australian commercial broadcasters deliver public benefits in a role that goes beyond a purely commercial media business. They produce Australian content, provide coverage of significant sporting events and deliver local news. The government imposes regulatory obligations such as local content quotas and restrictions on advertising content. At the same time, the government has also introduced policies aimed at supporting industry sustainability such as prominence and discoverability requirements for commercial TV applications on smart televisions. Figure 7.2 illustrates some key policies and obligations impacting commercial TV. This public interest role is widely recognised by Australians, with 77 per cent agreeing that commercial TV is valuable and 78 per cent agreeing there is value in maintaining an Australian-owned and regulated broadcast sector (see Figure 7.3).[9]

Australian broadcasters operate in a highly regulated environment while the broader media market has been heavily disrupted. The growth of streaming services and digital platforms has intensified competition for both audiences and advertising revenue, fundamentally reshaping the commercial media landscape. Many of the obligations placed on commercial broadcasters do not apply to other platforms that increasingly compete for the same audiences. There is growing acknowledgment that regulatory requirements are not evenly distributed across the broader media ecosystem, but settings remain in flux.[10] Australia has begun updating regulatory settings for other media platforms, including extending local content requirements to streaming services and becoming the first country in the world to introduce minimum age obligations for certain social media platforms. However, policy settings are expected to continue evolving alongside new media developments.

Figure 7.2: Key policies relating to commercial TV

Anti-siphoning legislation

Free TV broadcasters are given the right of first opportunity to acquire broadcast rights to events of national significance.[1]

Content obligations

Commercial broadcasters are subject to a number of content obligations including Australian content quotas, first-release Australian program quotas, mandatory closed captioning and program classification requirements.[2,3]

Prominence and discoverability

Internet-connected televisions sold in Australia must have free TV broadcasters' apps installed and prominently displayed on the home screen.[4]

Spectrum and broadcast licences

Commercial TV broadcasters must hold a broadcasting licence to access scarce spectrum via a transmitter licence, with a government regulator administering the allocation and renewal of these licences.[5]

Advertising rules and restrictions

Regulations on commercial TV include restrictions on alcohol and gambling ads, advertising restrictions during children's programming, and blackout periods for elections and referendums.[6,7,8]

Source: ACMA and the Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts

Commercial broadcasting serves a public interest role, with Australia's regulatory framework reflecting the importance of protecting local voices

Regulation reflects the importance of maintaining Australian voices in a relatively small media market. Given the large-scale production of media content from other countries, policy intervention is particularly important to ensure local stories, perspectives and voices are not crowded out by larger international players. This is reflected in Australia's local content quotas for commercial TV, as well as tax incentives such as the Producer Offset, which support the production of Australian content.

Regulatory settings reflect the public benefits of commercial broadcasting. The combined effect of these settings is to treat commercial broadcasters as regulated Australian media entities with a public interest role beyond their commercial activities.

This role is similarly recognised in other comparable jurisdictions. Canada places a similar emphasis on local content requirements, while the United Kingdom maintains a comparable anti-siphoning regime. By contrast, New Zealand adopts a relatively light-touch approach: commercial broadcasters do not face local content requirements, and while the Government has recently signalled its intention to introduce prominence requirements, no prominence regime is currently in place and broadcasters do not benefit from anti-siphoning protections.[11] While jurisdictions tailor their media policies to their own contexts, Australia's settings reflect a relatively strong emphasis on the public interest role of commercial broadcasters.

Figure 7.3: Australian views on commercial TV as a valuable service

Source: Deloitte Access Economics, *Consumer Survey (2026)*

Australian Survivor
Image source: Network 10.

08

Television in the regions

65%

of regional Australians agree commercial TV spotlights regional communities

15%

of direct FTE roles in commercial TV live and work in the regions

Regional Australia and the importance of connection

Commercial broadcast television plays a key role in keeping the regions of Australia connected

Commercial broadcasting remains a critical and reliable source of news and entertainment for regional Australia

Regional Australians rely more heavily on commercial TV, accessed via both terrestrial broadcasting and BVOD platforms, because it remains one of the most accessible and reliable sources of news and information. As of November 2025, approximately seven million Australians, around 27 per cent of the population, live outside major metropolitan areas.[1]

Compared to metropolitan communities, regional Australians often have access to fewer media services and face greater barriers to digital connectivity. The Australian Digital Inclusion Index found that while most regional Australians report internet services that work "most" of the time, 15.9 per cent experience connectivity issues or network interruptions "often" or "always", and internet costs can be up to 30.5 per cent higher than in metropolitan areas.[2] Consequently, regional Australians are more reliant on traditional broadcast services for access to news, sport and other television media.[3]

58 per cent of Australians who live and work in regional areas consume commercial TV regularly and, on average, view for longer than those who live in metropolitan areas.

In contrast to the challenges associated with internet access, terrestrial commercial broadcasting remains widely available and easy to access. Ninety-four per cent of Australians report that commercial broadcasting is easy to find and use.[4] In 2025, free TV (inclusive of both commercial and public broadcasters) reached more than 70 per cent of regional Australians,[5] with 91 per cent of viewers accessing services through terrestrial transmission via a television aerial.[6] These findings highlight the continued importance of broadcast infrastructure in ensuring regional Australians can access reliable news, information and entertainment regardless of digital connectivity constraints.

Local broadcasting strengthens community connection, representation and resilience

Regional broadcasters deliver significant local value that extends beyond entertainment. Regional Australians access commercial broadcasting through both terrestrial and BVOD streams. Certain commercial broadcasters operating in regional licence areas are subject to local content requirements, which require them to broadcast material of "local significance", including community announcements, local news and programming relevant to regional audiences.[7] While these obligations are required under regulation, they also represent a key strength of regional broadcasting by ensuring communities receive information that reflects local interests, experiences and priorities.

Regional television networks play a valuable role in representing communities that may otherwise receive limited media coverage. Regional licensees produce dedicated local news bulletins covering regional issues, community events, local sport and stories that may not otherwise be covered.[8, 9] This local content focus helps regional Australians remain informed about matters directly affecting their communities while strengthening local identity and social connection.

Local broadcasting also provides an essential public service during emergencies. During bushfires, floods and other natural disasters, regional television broadcasters disseminate timely information that helps communities stay informed and respond to rapidly changing conditions. By combining local news, emergency communications and community-focused content, regional broadcasters contribute to the resilience, representation and cohesion of regional Australia.

ACMA's 2023-24 Commercial TV program expenditure report found that commercial broadcasters spent $35.3 million on Australian content in the regions, of which $35.2 million was spent on news and current affairs.

Case Study: Townsville spotlight

A local voice for North Queensland: regional television provides a trusted platform for local stories, businesses and community organisations. Across North Queensland, Seven Queensland and WIN Television maintain a local presence through their newsrooms and community engagement activities. Together, broadcasters help ensure local communities see their experiences, achievements and challenges reflected on screen, strengthening regional identity and community connection. Regional newsrooms cover stories that may receive limited attention from metropolitan media, including:

- Defence activities and military exercises, reflecting Townsville's status as Australia's largest garrison city,
- Mining and resources industries that underpin the regional economy,
- The Great Barrier Reef and environmental issues,
- James Cook University research, education and student achievements,
- Local sporting, cultural and community achievements,
- Community milestones, anniversaries and volunteer contributions.

Beyond news coverage, regional television also supports local events, charities and community initiatives. For example, WIN Television has helped promote community initiatives such as Dinner on the Runway in Mackay, while Seven Queensland regularly highlights local achievements, organisations and events that matter to communities across North Queensland.

"Local commercial TV news provides an important source of information about issues affecting the region and helps ensure residents remain informed about developments occurring throughout North Queensland."

- Townsville Mayor Nick Dametto

Hayden Menso, WIN News
Image source: WIN Network.

Furthermore, regional television supports local employment, economic activity and community resilience across North Queensland. In Townsville, Seven Queensland employs four full-time reporters and three full-time camera operators/editors, while WIN's local journalist and camera operator are supported by a broader Queensland editorial and production team. Together, these roles support local jobs and the delivery of dedicated news coverage for North Queensland communities.

For example, Seven Queensland's Townsville newsroom employs reporters, producers and camera operators dedicated to delivering local news tailored to North Queensland audiences. This local presence allows broadcasters to cover issues that matter to regional communities and maintain strong connections with local audiences.

Beyond news coverage, regional television supports regional economic development by providing businesses and organisations with access to highly engaged local audiences. Through community stories and local coverage, broadcasters help showcase regional strengths, raise awareness of local initiatives and encourage participation in community activities. This is exemplified through WIN Television supporting community initiatives as described on page 42, helping connect businesses, charities and residents in support of shared community goals.

Coverage of key industries including defence, mining, health, education, tourism and the Great Barrier Reef also helps showcase the economic strengths of North Queensland. By highlighting regional businesses, major employers and investment opportunities, local television contributes to the visibility and profile of the region.

Regional television also plays a critical role during emergencies. During events such as cyclones and flooding, broadcasters provide weather updates, expert advice, evacuation information, transport disruption alerts and links to official emergency channels. Coverage of events such as the 2025 Ingham floods demonstrates the important role broadcasters play in supporting community preparedness, safety and recovery, while helping government agencies communicate with large audiences across North Queensland's geographically dispersed communities.

"Given the size of North Queensland and the dispersed nature of many communities, regional television provides an important communication platform during emergencies."

- Townsville Mayor Nick Dametto

Image source: Southern Cross Media Group

Challenges to commercial broadcasting in the regions

Despite its importance, the sustainability of regional broadcasting is under increasing pressure

Despite its ongoing importance, regional commercial broadcasting is facing increasing challenges. The emergence of streaming services, changing audience behaviours and sustained declines in advertising revenue have placed significant pressure on traditional broadcasters. Between 2006 and 2022, commercial broadcasters' share of Australian advertising revenue declined by approximately 26 per cent,[1] reducing the financial capacity of broadcasters to maintain services, content production and workforce levels. Further, streaming services can have varying levels of accessibility in regional Australia, as they rely on a stable internet connection, which as established earlier can be a hurdle to regional Australians. This leaves some regional Australians further disadvantaged with regard to access to media.

These pressures are reflected in broader trends across the Australian media landscape. Between 2019 and 2024, Australia saw widespread closures and service reductions across news outlets, including newspapers, radio, television and digital news services, with 61 per cent occurring in regional areas.[2]

Recent service withdrawals further highlight the vulnerability of regional broadcasting. In 2024, residents in Mildura and surrounding areas lost access to their commercial broadcast service following the surrender of the Mildura Digital Television (MDT) licence to ACMA.[3,4] While alternative viewing options remain available, the closure illustrates the challenges regional broadcasters face in maintaining services in some markets amid ongoing commercial pressures. The case highlights the importance of ensuring regional communities can continue to access commercial TV services as audience behaviours evolve and industry economics become increasingly challenging.[5] In some remote areas, these challenges are compounded by the cost of maintaining ageing transmission and retransmission infrastructure across vast geographic areas, placing additional pressure on the long-term sustainability of broadcasting services.

The implications extend beyond media access. Regional broadcasters contribute to local economies through advertising and employment opportunities, enabling local businesses to reach customers and supporting economic activity across regional communities. In 2025, commercial broadcasters employed 751 full-time equivalent staff who lived and worked in regional Australia.[6] As commercial pressures continue to grow, maintaining the viability of regional broadcasting remains important not only for media diversity and community access to information, but also for regional employment, economic activity and local representation.

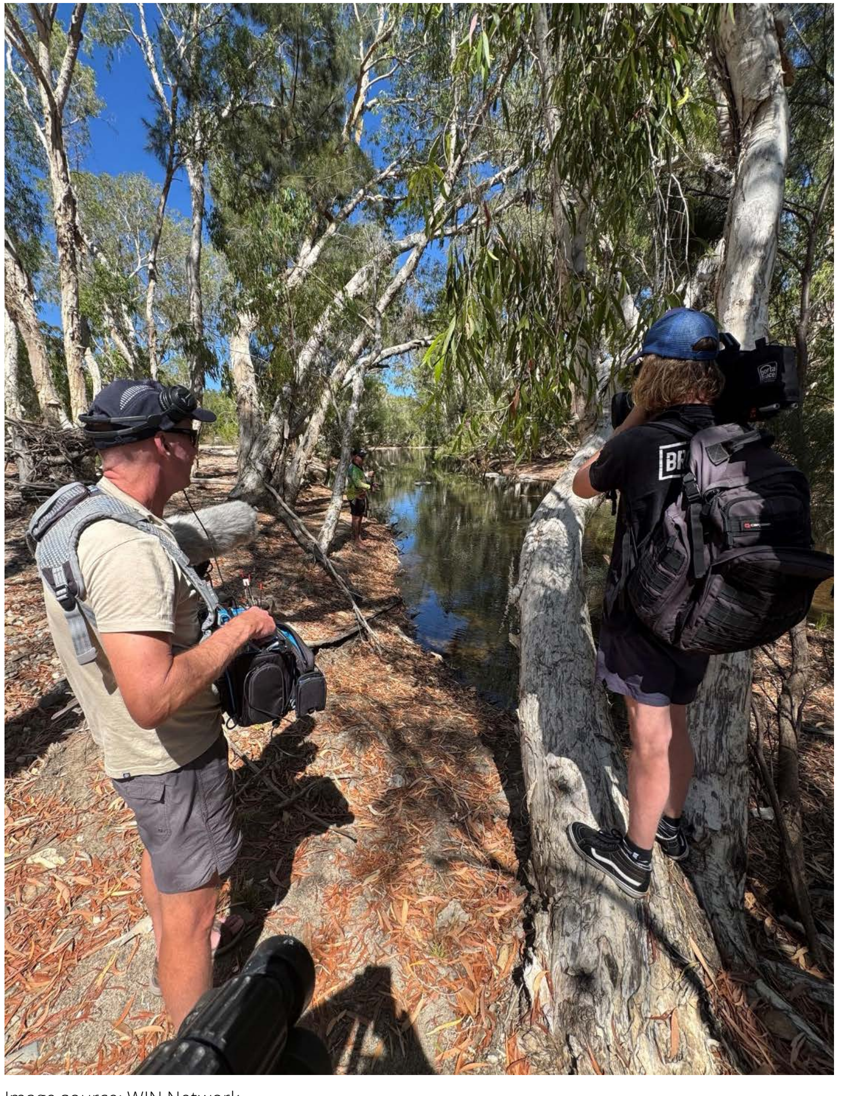


Image source: WIN Network

Case Study: Imparja connecting remote Australia

Remote TV keeps communities connected

Imparja Television is Australia's only Indigenous-owned and operated commercial TV broadcaster, providing its services across some of the country's most remote regions. Imparja's licence area covers remote parts of the Northern Territory, Queensland, New South Wales and South Australia, including communities too small or dispersed for standard terrestrial transmission. For many remote and First Nations communities, it provides a free, shared connection to news, sport, entertainment and local information.

"Every Australian is entitled to free television regardless of where they live."

- Amy Graham, CEO, Imparja

Connecting remote and First Nations communities: Imparja reaches almost 200 remote Indigenous communities, where satellite services are often essential for news, weather, emergency information and entertainment. The broadcaster also serves around 75,000 homes across remote Australia, helping maintain access to information where alternative communications infrastructure is limited or unreliable.[1] This supports emergency information access and helps households stay connected when radio, mobile data or internet access is costly or intermittent. Some communities face limited television, internet and mobile coverage due to infrastructure constraints, reducing access to news and information services that many metropolitan Australians take for granted.

Advertising, employment and training benefits: Imparja provides a trusted pathway for organisations seeking to reach local audiences, reporting a significant uplift in advertising from Indigenous organisations over the past 6–12 months. This helps enable culturally relevant campaigns to reach their intended audiences. Additionally, Imparja has historically been a significant employer of First Nations people and is seeking to strengthen First Nations employment and training pathways through its strategic plan, supporting skills development and long-term career opportunities for Indigenous Australians.

Sport and entertainment also matter: Shared access to sport and cultural events contributes to the wellbeing and social connectedness of Indigenous communities. AFL in particular provides opportunities for families and communities to come together and strengthen relationships. In communities such as Atitjere in the Northern Territory, the restoration of commercial TV access enabled families to watch programs together again, strengthening connection and belonging. Anecdotal evidence suggests community members reported spending more time together and feeling less disconnected from other communities across Australia. Imparja's services provide opportunities for remote communities to connect, strengthen community ties and build community spirit.

Future opportunities and challenges: Looking ahead, Imparja sees an opportunity to further support First Nations communities by expanding Indigenous storytelling and content. This aligns with the Closing the Gap objective of ensuring Aboriginal and Torres Strait Islander cultures and languages are strong and flourishing (Outcome 16), recognising the importance of Indigenous-led media and accessible platforms for maintaining cultural knowledge, language and community connection.[2]

Maintaining broadcasting services across some of Australia's most remote regions remains challenging. Imparja manages ageing retransmission infrastructure while ensuring communities retain access to news, weather information, emergency communications and entertainment. These challenges highlight the importance of long-term planning and investment to support equitable access to broadcasting services.

Image Source: Imparja Television.

09

The future of commercial TV

The future of commercial TV

In an era where trust is becoming increasingly valuable, commercial TV will remain an important economic contributor and a source of shared and reliable information

In a changing media landscape, commercial TV will continue to play a central role. As this transition continues, trust and policy settings will be critical in supporting the industry's ongoing role and sustainability. The following takeaways highlight some of the opportunities and challenges that lie ahead for commercial TV.

Online consumption is becoming increasingly important

Audience behaviour continues to shift towards online and on-demand viewing, with online viewing increasing from 12 per cent to 15 per cent of total free TV viewing between 2024 and 2025. This shift is particularly pronounced among younger audiences, with online viewing accounting for 34 per cent of free TV viewing among 18 to 39 year olds in 2025, up from 29 per cent in 2024.[1] Additionally, while long-term viewership among 18 to 24 year olds has been declining, total free TV viewing for this group increased 7 per cent from 2024 to 2025.[2]

Australians increasingly expect content to be available across a range of devices and viewing formats, and commercial TV is already adapting through online viewing models. As a result, the way audiences engage with commercial TV content will continue to evolve — driven by the shift online and audience demand for more tailored viewing experiences.

Commercial TV will remain a key economic contributor

The rapid growth of competing digital platforms and increasing audience fragmentation have intensified pressure on the commercial TV business model. By 2029, linear commercial TV advertising revenue is forecast to decline by 14 per cent annually, while online and on-demand streaming revenue grows by 11 per cent annually.[3] Traditional TV's share of advertising revenue is forecast to fall from 13 per cent in 2023 to 7 per cent by 2028.[4]

Despite market disruptions, particularly for linear TV, commercial TV remains a major economic driver and continues to support Australian jobs. In 2024-25, the industry supported $2.4 billion in economic activity and more than 15,600 full-time equivalent jobs, with approximately 58 per cent of this contribution generated through supply chain activity.

Commercial TV also remains a significant platform for advertising despite the growth of online advertising, with its own unique benefits such as trust and audience attention. This highlights the industry's role in supporting production, creative industries, technical services and other upstream sectors. With the right support in place, commercial TV is expected to remain resilient and continue to drive economic activity.

Policy interventions should be considered to sustain services that deliver broader benefits

As audiences, advertising expenditure and content consumption continue to fragment, governments will face ongoing questions about how policy settings should evolve across the media ecosystem, and there is value in ensuring these keep pace with how audiences actually access content today. Much of the existing regulatory framework reflects a media landscape where commercial TV played a more dominant role and has not yet fully accounted for the rise of online transmission. Anti-siphoning rules, for example, continue to apply to broadcast rights but not digital transmission rights.

More broadly, structural changes in the media market are placing pressure on services that generate public benefits but face increasingly challenging commercial conditions (e.g. regional television news). In the face of these challenges, policy interventions may be warranted to help sustain these beneficial services.

Sources of trusted and reliable information will be more important than ever

A growing number of Australians — 77 per cent in 2026 — are concerned about what is real or fake online, reflecting the rising use of social platforms and increasingly sophisticated AI-generated content.[5] As information sources become more fragmented, trust is likely to become increasingly valuable. Australians will continue to require accessible and reliable information. Local news content will also remain important, helping communities stay informed about local issues, participate in civic life and access timely information during emergencies and other periods of disruption. In this context, commercial TV's role as a shared and trusted source of information will become increasingly important to social cohesion and the healthy functioning of Australia's democracy.

10

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Key definitions

Keyword	Definition
Commercial TV (commercial TV)	Commercial TV delivers television programs owned by commercial, privately owned media networks available free to all viewers. This includes terrestrial TV, live linear TV, which airs content on a set schedule, and on-demand viewing through BVOD apps and other online platforms.
Public broadcaster	Public broadcasters deliver television programs primarily funded through tax revenue. In Australia these are the Australian Broadcasting Corporation (ABC) and the Special Broadcasting Service (SBS).
Free television (free TV)	Free TV refers to the programs delivered collectively by both commercial TV broadcasters and public broadcasters, which includes terrestrial and online BVOD services.
Reach	Total TV Reach is the distinct count of individuals who are reached via broadcast TV (at least 60 seconds) or BVOD (at least 15 seconds).
Audience	The audience to any program or time band represents the average number of people in a target demographic viewing at any given minute during that period.
ACMA	Australian Communications and Media Authority.
BVOD	Broadcaster Video on Demand.
OzTAM	OzTAM is Australia's official source of video audience measurement, providing trusted, transparent viewing data across free-to-air broadcast TV, BVOD (broadcaster video on demand) and other streaming. OzTAM is the central managing body for the delivery of 'VOZ', the accepted industry currency metric by which Australian television is traded and evaluated.
Regional TAM	Regional TAM is an Australian industry joint venture that measures broadcast TV viewing across the regional commercial television markets and is a key input into the VOZ Total TV service.
VOZ	OzTAM's Total TV measurement service that combines free-to-air broadcast TV viewing on TV sets and granular BVOD viewing on connected devices to provide a single national, de-duplicated, all-screen currency database.

Appendix A

Economic contribution methodology

This appendix sets out the methodology used to estimate the economic contribution of the commercial television industry in Australia in 2025. Economic contribution analysis measures the employment and value added associated with the economic activity of a particular industry in a historical reference year. In this report, the analysis considers the commercial TV activities of Free TV's members and is based on data relevant to the 2024-25 financial year.

Data inputs

This report is informed by industry data and data provided by each of Free TV's members. Free TV members Nine Entertainment, Network 10, Southern Cross Media Group, WIN and Imparja Television, all provided data to Deloitte Access Economics to inform the analysis.* The data provided included information on the financial performance of members, broadcasting, production and content.

All data collected from members relates only to television broadcasting, production and distribution businesses, and associated overheads from these activities. This includes broadcast video on demand, but excludes other activities members may undertake, such as radio, publishing or print media.

Input-output modelling

Economic contribution modelling was undertaken using an input-output framework. The report uses an economic contribution model to calculate the contribution of the industry through this framework. This framework captures both the direct economic activity of the commercial TV industry and the indirect activity supported through its supply chain. The report is focused on economic impacts and is not an analysis of policy costs and benefits such as broadcasting spectrum policies, the anti-siphoning list, or regulatory requirements.

Employment

Employment measures the number of jobs supported by Free TV in FTE terms and does not double count jobs across the economy. Employment is measured by the direct employment through jobs directly involved with screen productions, and the indirect employment it supports across upstream industries. Indirect employment is calculated using Deloitte's model based on the ABS IO tables, based on the ratio of FTE employment per output.

Value added

Value added measures the value of goods and services generated by the activity associated with commercial TV. Value added is calculated by summing the payments to labour, gross operating surplus (GOS), and production taxes less subsidies.

GOS represents the value of income generated by the entity's direct capital inputs, generally measured as the earnings before interest, tax, depreciation and amortisation (EBITDA). For the general government sector (which includes Free TV), GOS is equal to the consumption of fixed capital (taken to just be depreciation and amortisation).

Value added is the most appropriate measure of a firm's GDP at the national level, or gross state product (GSP) at the state level. The value added of each industry in the value chain can be added without the risk of double counting across industries caused by including the value added by other industries earlier in the production chain.

The economic activity accounting framework is presented in Figure A.1 on the following page, showing how total revenue can be disaggregated into component parts to measure the economic contribution of an entity or industry. The framework demonstrates the definition of value added being the difference between total revenue and intermediate inputs.

*Southern Cross Media Group was merged with Seven West Media in January 2026. However, Seven West Media was operating during the time period for this analysis and was therefore included within the analysis.

Value added (cont.)

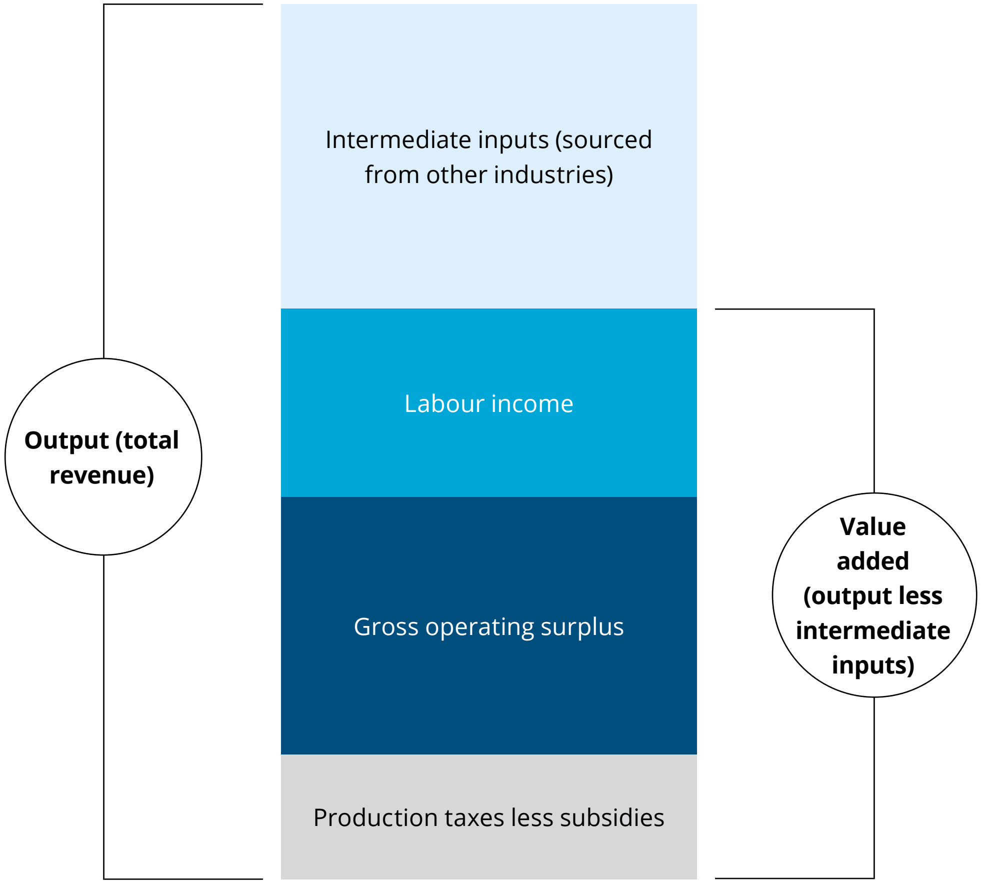
Direct and indirect value added was estimated.

The direct economic contribution is a representation of the flow from labour and capital involved in the economic activity itself. For example, the employment and wages of the cast and crew working directly on the productions. Here the GOS is a measure of returns to capital.

The indirect economic contribution is a measure of the demand for goods and services produced in other industries as a result of demand generated by economic activity associated with commercial TV activities. The profile of intermediate expenditure is converted into indirect value added by applying the industry relationship between value added and output from the ABS IO tables.

Deloitte Access Economics does not consider 'induced effects' or Type II multipliers in its IO analyses. These are effects generated throughout the broader economy due to employees spending their wages/salaries paid to them by their employer.

Figure A.1: Components of value added



Source: Deloitte Access Economics.

Appendix A

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