

VOZ TOTAL TV VIEWING REPORT

H1 2025 – Key Insights for Broadcast TV and BVOD



INTRODUCTION

VOZ Total TV Viewing Report: H1 2025 – Key Insights for Broadcast TV and BVOD

This is the first edition of OzTAM's bi-annual **VOZ Total TV Viewing Report**, highlighting Australian free-to-air (FTA) viewing trends drawn from the VOZ Total TV currency database.

The **VOZ Total TV Viewing Report** provides insights into Australian FTA broadcast TV and BVOD consumption, analysing the billions of minutes of content viewed. It presents key trends to support the industry, while also demonstrating the depth of data available within the VOZ database.

VOZ is Australia's 'Total TV' measurement standard, unifying broadcast TV and BVOD viewing into a single, de-duplicated, cross-platform currency database. It combines ratings from 20,000+ viewers in 8,300 OzTAM and Regional TAM panel homes (including coverage of the Rest of Australia market), with data from 16+ million connected devices streaming BVOD each month. The result is a comprehensive view across ABC, Seven, Nine, 10 and SBS, their regional affiliates and their BVOD services nationally. VOZ does not include viewing to SVOD and AVOD platforms.

The report will be published twice a year with the H1 edition covering the first half of the year and a follow-up edition providing combined results for the second half (H2) and the full year. Additional quarterly snapshots are available via the Insights section of the [VOZ website](#).

This H1 2025 edition is based on data from 29 December 2024 - 28 June 2025.

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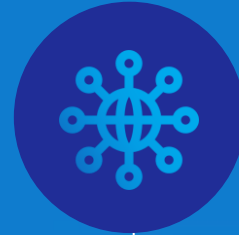
VOZ Total Television Landscape



How We Watch



Who is Watching & How Much



Broadcast TV and BVOD Reach



What We're Watching

KEY TAKE OUTS

Broadcast TV and BVOD viewing is rising in 2025, reaching nearly 9 in 10 Australians each month. Live streaming lifted BVOD viewing 41% year-on-year, helping push weekly BVOD minutes viewed to 2.2 billion.

16 billion minutes of broadcast TV or BVOD is consumed on average each week. Broadcast TV is mainly viewed live, with portable devices primarily used for on demand.

Australians watch over 41 hours of broadcast TV or BVOD each month, with the majority via the TV set. Under 55s and women view more on smartphones than other demographics.

Sunday is the highest reaching day across broadcast TV and BVOD. BVOD adds as much as 19% incremental monthly reach to broadcast TV for 16-39s.

Viewers continue to turn to broadcast TV for major news events like ex-Tropical Cyclone Alfred and the federal election. Drama has the highest proportion of BVOD viewing while sport accounts for 9-10% of both broadcast TV and BVOD consumption.



VOZ TOTAL TELEVISION LANDSCAPE



SUMMARY

This section explores the size and growth of Australia's TV viewing markets, the household viewing environment (including TV ownership and Internet Capable TV adoption), and the volume of content consumed across broadcast TV and BVOD.

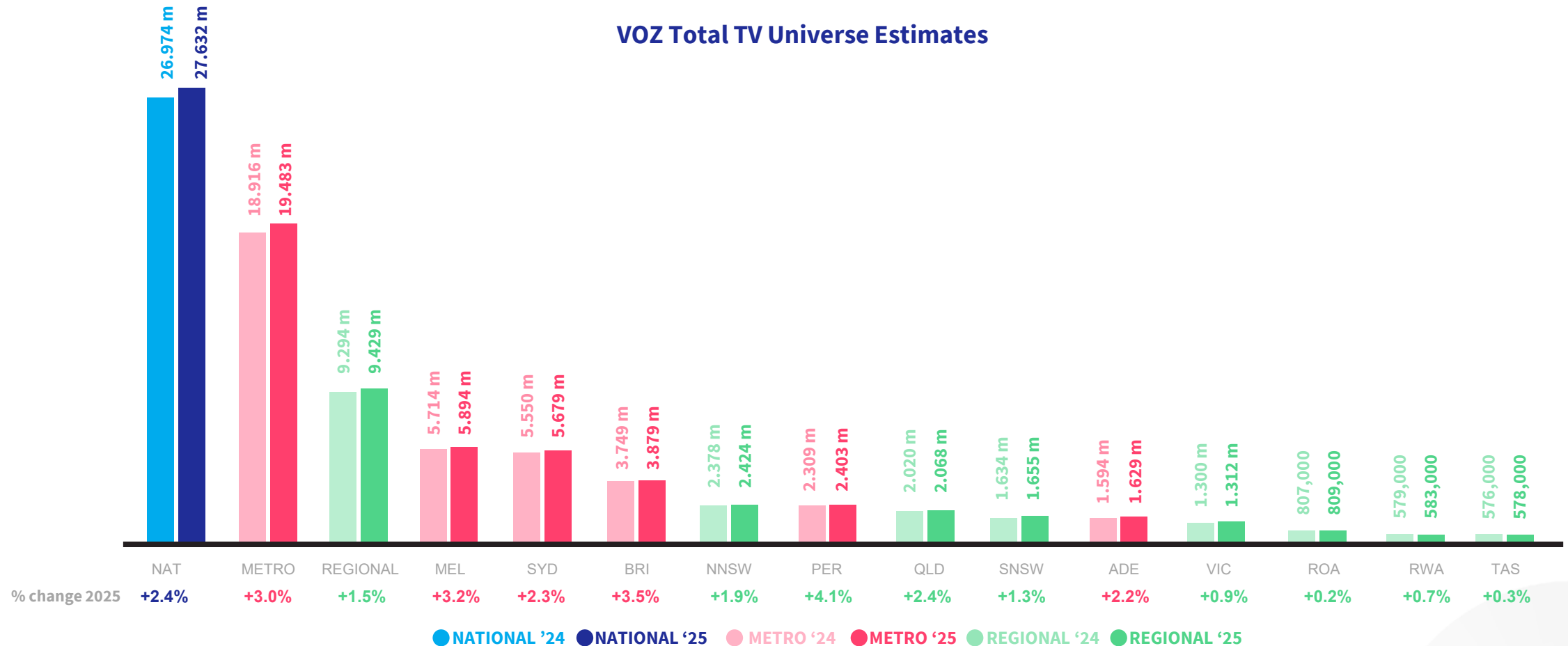


HIGHLIGHTS

- Aligned with Australia's population growth, the VOZ Total TV universe grew 2.4% from 2024-2025, led by Perth (+4.1%) and Brisbane (+3.5%).
- The average number of screens per home has plateaued at 6.9, with the number of households owning a TV set stable at 97%.
- 79% of homes now have an Internet Capable TV, up from 59% in 2020.
- Broadcast TV or BVOD reaches nearly nine in ten Australians each month (87.5%).
- Almost 75% of Australians engage with broadcast TV monthly, and more than 57% with BVOD.
- Weekly minutes viewed across broadcast TV and BVOD rose 2.5% year-on-year, lifting to 2.2 billion minutes and driven by BVOD growth.
- Live streaming continues to accelerate BVOD growth, up 41% year-on-year.

VOZ TOTAL TV UNIVERSE GROWTH

Led by Perth and Brisbane; NNSW remains fourth largest market



Source: OzTAM VOZ Total TV All People Universe Estimates including people in zero TV homes.



For more
information

[VOZ Universe Estimates](#)
[VOZ Coverage Map](#)

SCREENS IN AUSTRALIAN HOMES

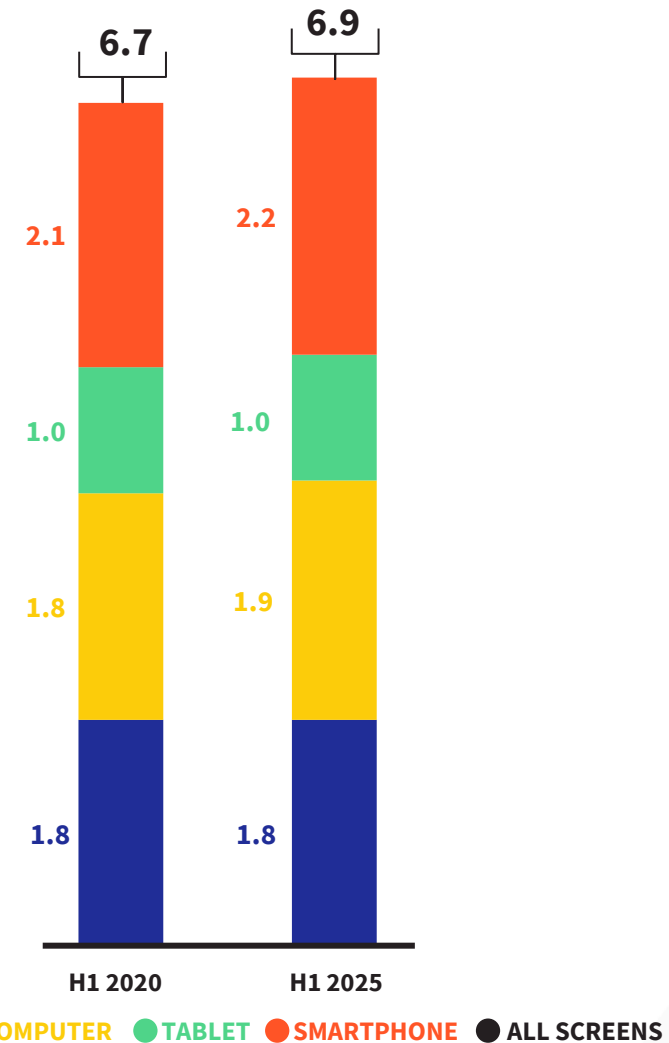
Average screens per home has plateaued as Internet Capable TVs grow rapidly



97%
of homes have
at least 1 TV set
(98% in 2020)






79%
of homes have an
Internet Capable TV
(59% in 2020)



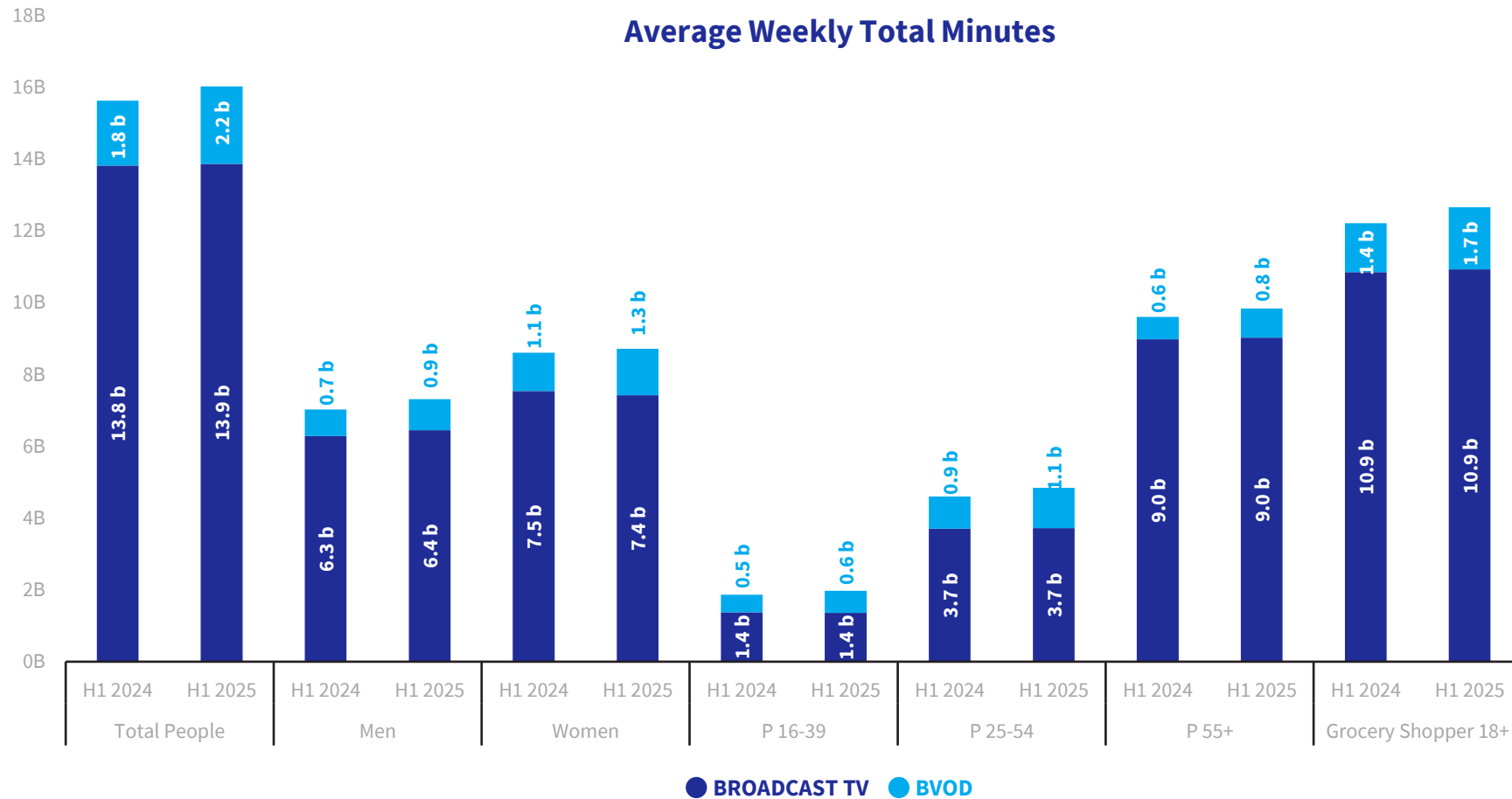
H1 2025 VIEWING SNAPSHOT

Broadcast TV or BVOD content reaches nearly 9 in 10 Australians each month

| | | Audience | TARP | Monthly Minutes | Monthly Reach % | Monthly hh:mm | Universe |
|---|---------------------|-----------|------|-----------------|-----------------|---------------|------------|
|  TOTAL TV* | Total People | 1,590,000 | 5.8 | 69.1b | 87.4 | 41:38 | 27,632,000 |
| | Men | 725,000 | 5.3 | 31.5b | 87.3 | 38:14 | 13,716,000 |
| | Women | 864,000 | 6.2 | 37.6b | 86.9 | 45:00 | 13,916,000 |
| | P 16-39 | 196,000 | 2.2 | 8.5b | 86.6 | 15:36 | 9,099,000 |
| | P 25-54 | 480,000 | 4.2 | 20.8b | 86.3 | 30:42 | 11,317,000 |
| | P 55+ | 976,000 | 12.4 | 42.4b | 86.1 | 89:41 | 7,882,000 |
| | Grocery Shopper 18+ | 1,256,000 | 7.5 | 54.6b | 85.9 | 54:37 | 16,646,000 |
|  BROADCAST TV | Total People | 1,376,000 | 5.0 | 59.7b | 74.7 | 36:01 | 27,632,000 |
| | Men | 640,000 | 4.7 | 27.8b | 74.6 | 33:43 | 13,716,000 |
| | Women | 736,000 | 5.3 | 32.0b | 74.5 | 38:18 | 13,916,000 |
| | P 16-39 | 135,000 | 1.5 | 5.8b | 74.4 | 10:41 | 9,099,000 |
| | P 25-54 | 369,000 | 3.3 | 16.0b | 74.3 | 23:34 | 11,317,000 |
| | P 55+ | 895,000 | 11.4 | 38.9b | 74.2 | 82:14 | 7,882,000 |
| | Grocery Shopper 18+ | 1,084,000 | 6.5 | 47.1b | 74.2 | 47:06 | 16,646,000 |
|  BVOD | Total People | 214,000 | 0.8 | 9.3b | 57.6 | 5:36 | 27,632,000 |
| | Men | 86,000 | 0.6 | 3.7b | 56.9 | 4:31 | 13,716,000 |
| | Women | 128,000 | 0.9 | 5.6b | 56.0 | 6:41 | 13,916,000 |
| | P 16-39 | 62,000 | 0.7 | 2.7b | 55.0 | 4:54 | 9,099,000 |
| | P 25-54 | 111,000 | 1.0 | 4.8b | 54.0 | 7:07 | 11,317,000 |
| | P 55+ | 81,000 | 1.0 | 3.5b | 53.2 | 7:25 | 7,882,000 |
| | Grocery Shopper 18+ | 172,000 | 1.0 | 7.5b | 52.3 | 7:30 | 16,646,000 |

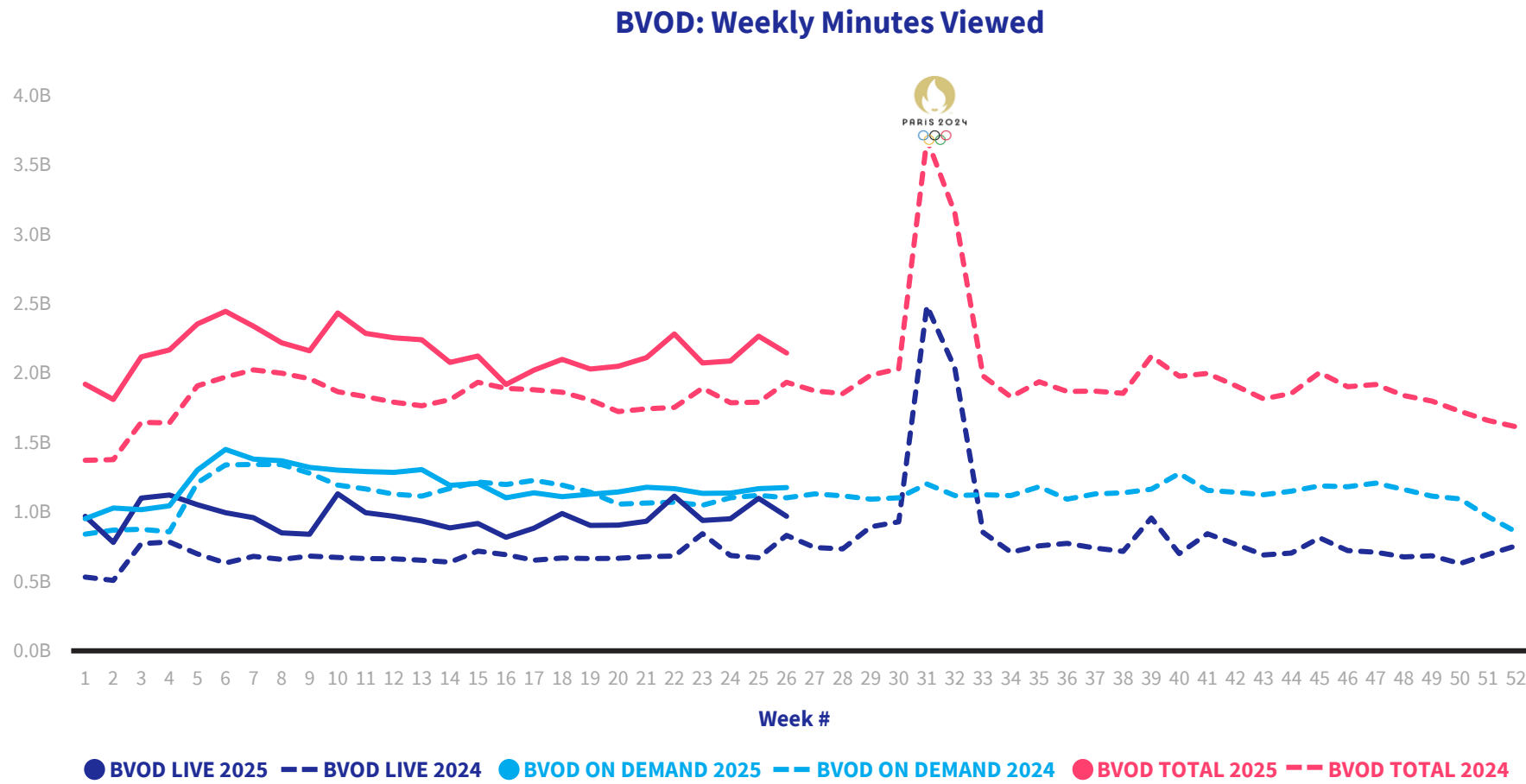
STRENGTH OF BROADCAST TV AND BVOD (TOTAL TV)

Total weekly minutes increased by 2.5% over H1 2024, driven by BVOD growth



LIVE STREAMING CONTINUES TO DRIVE BVOD GROWTH

Live streaming up 41% year on year with total BVOD viewing increasing by 19.3%





HOW WE WATCH



SUMMARY

The following analysis looks at how Australians consume television, comparing broadcast TV and BVOD viewing across devices, age groups, and time of day. It shows how consumption is split between live and on demand viewing and how screen choice shapes behaviour across the VOZ Total TV landscape.

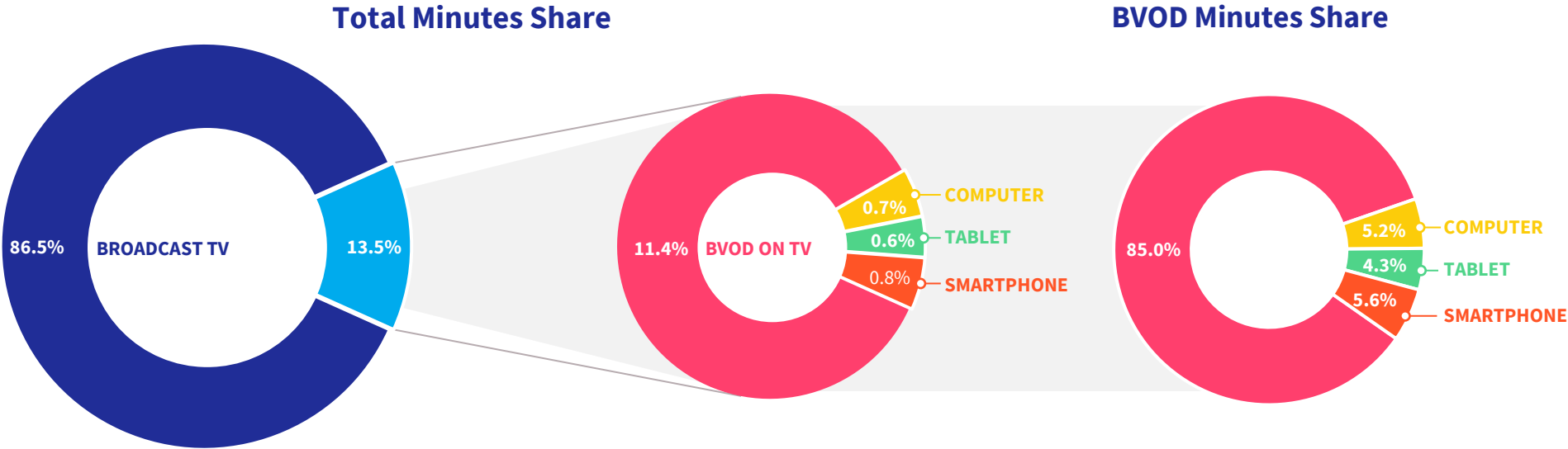


HIGHLIGHTS

- 85% of BVOD viewing occurs on the big screen.
- Viewing patterns differ by age. Australians aged 25-54 allocate almost one-fifth of their combined broadcast TV and BVOD viewing time to BVOD. This rises to more than one-quarter for 16-39s.
- Live viewing dominates broadcast TV (89.7%). On TV sets, BVOD is more evenly split between live (46.9%) and on demand (53.1%). Smaller screens skew more heavily to on demand.
- BVOD viewing shifts by device across the day. Smartphones and tablets lead early morning and late night. Computers lead during work hours. Viewing transitions to the TV screen late afternoon and evening.
- Prime time remains the key viewing period across all devices.

HOW WE WATCH

BVOD represents 13.5% of VOZ Total TV viewing, with the majority on the TV screen



Average Weekly All Device Minutes Viewed: 16 billion

● BROADCAST TV ● TOTAL BVOD ● COMPUTER ● TABLET ● SMARTPHONE

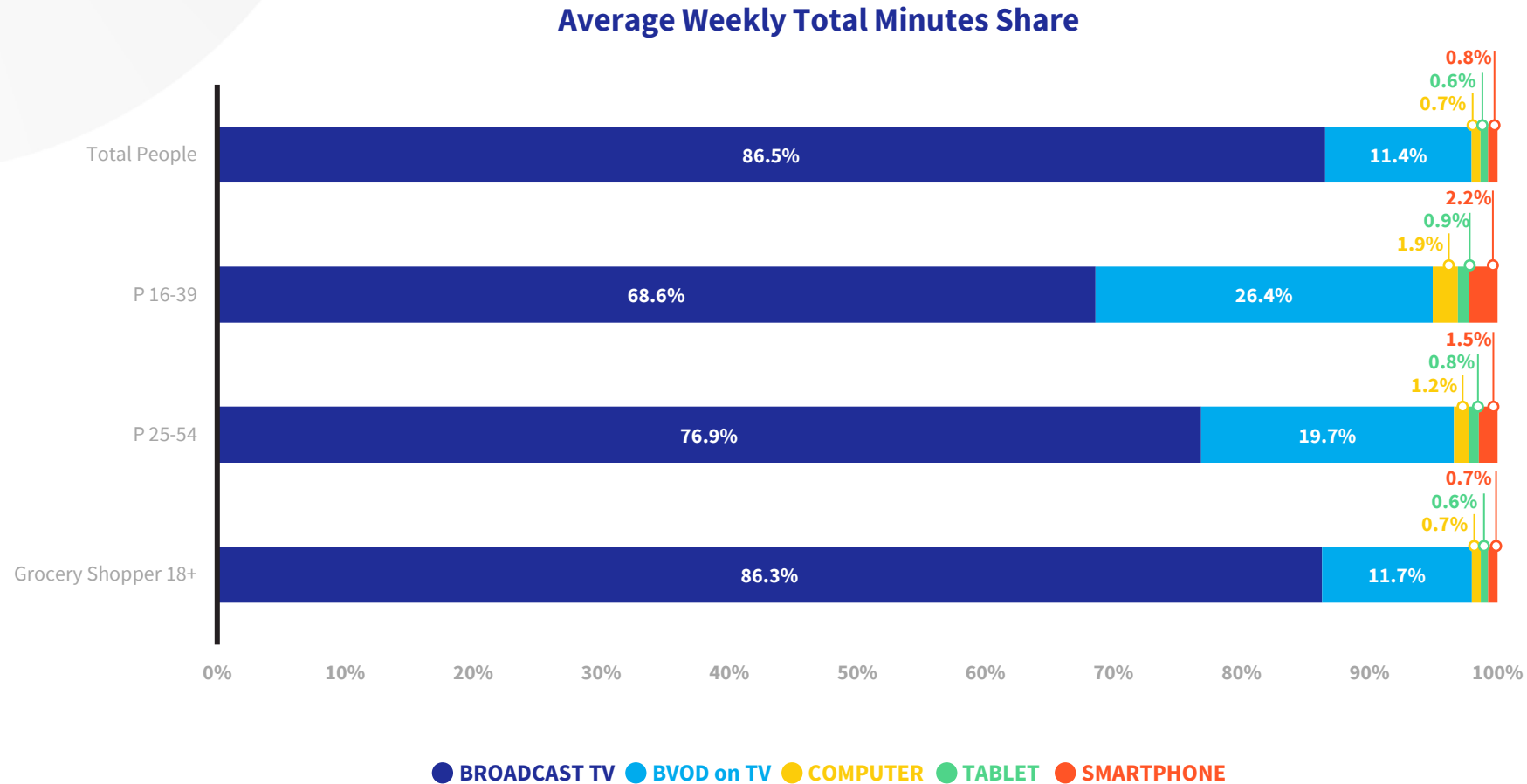


Source: OzTAM VOZ National FTA Total TV, When Watched, Total People Weeks 1-26 2025, Average Weekly Share of Total Minutes viewed across all platforms including broadcast TV, 2am to 2am.

VOZ Total TV is the currency for broadcast TV and BVOD. It does not include viewing to SVOD and AVOD. 13

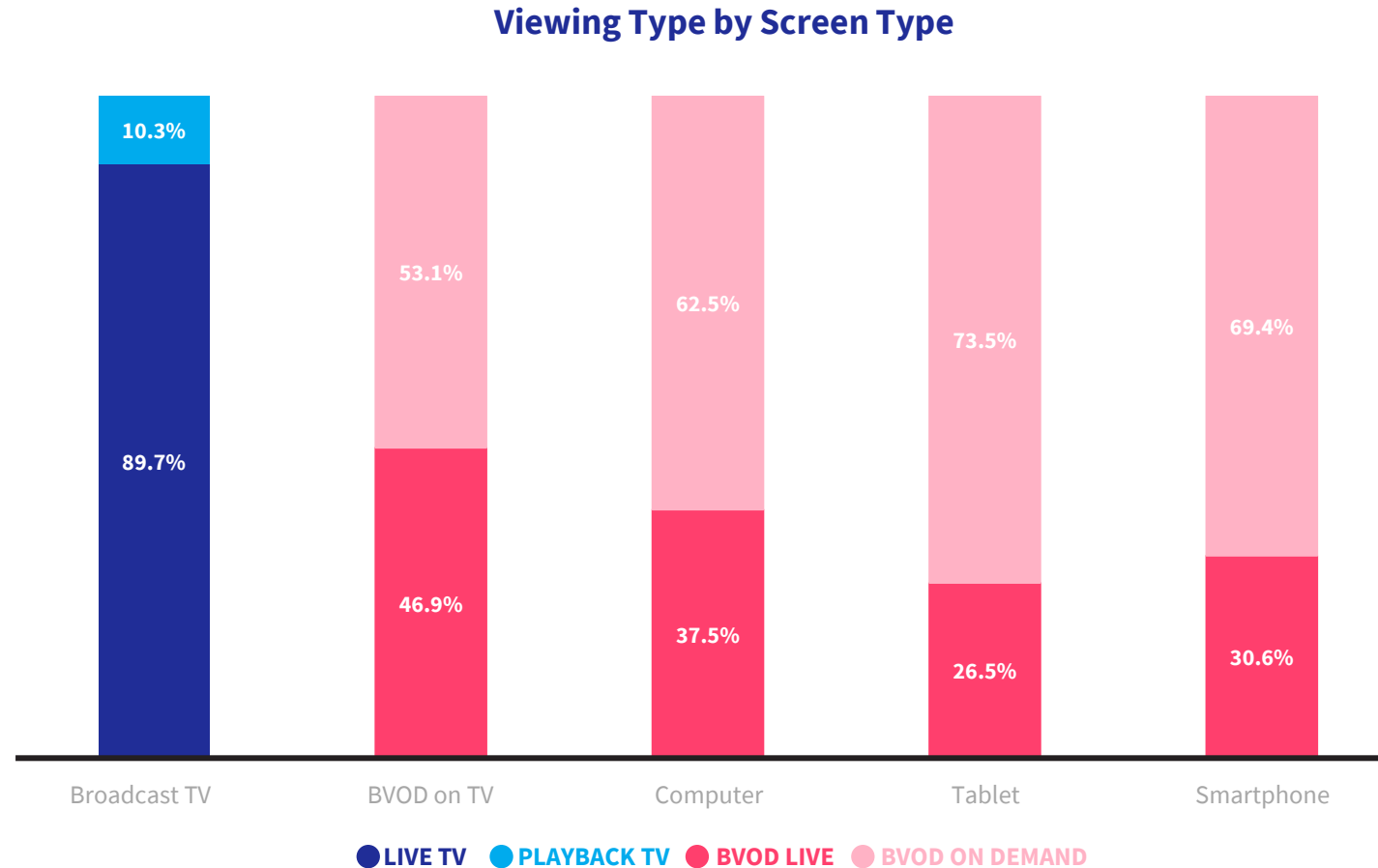
VIEWING ACROSS SCREENS VARIES BY DEMOGRAPHIC

TV set remains dominant with 16-39s highest users of other devices



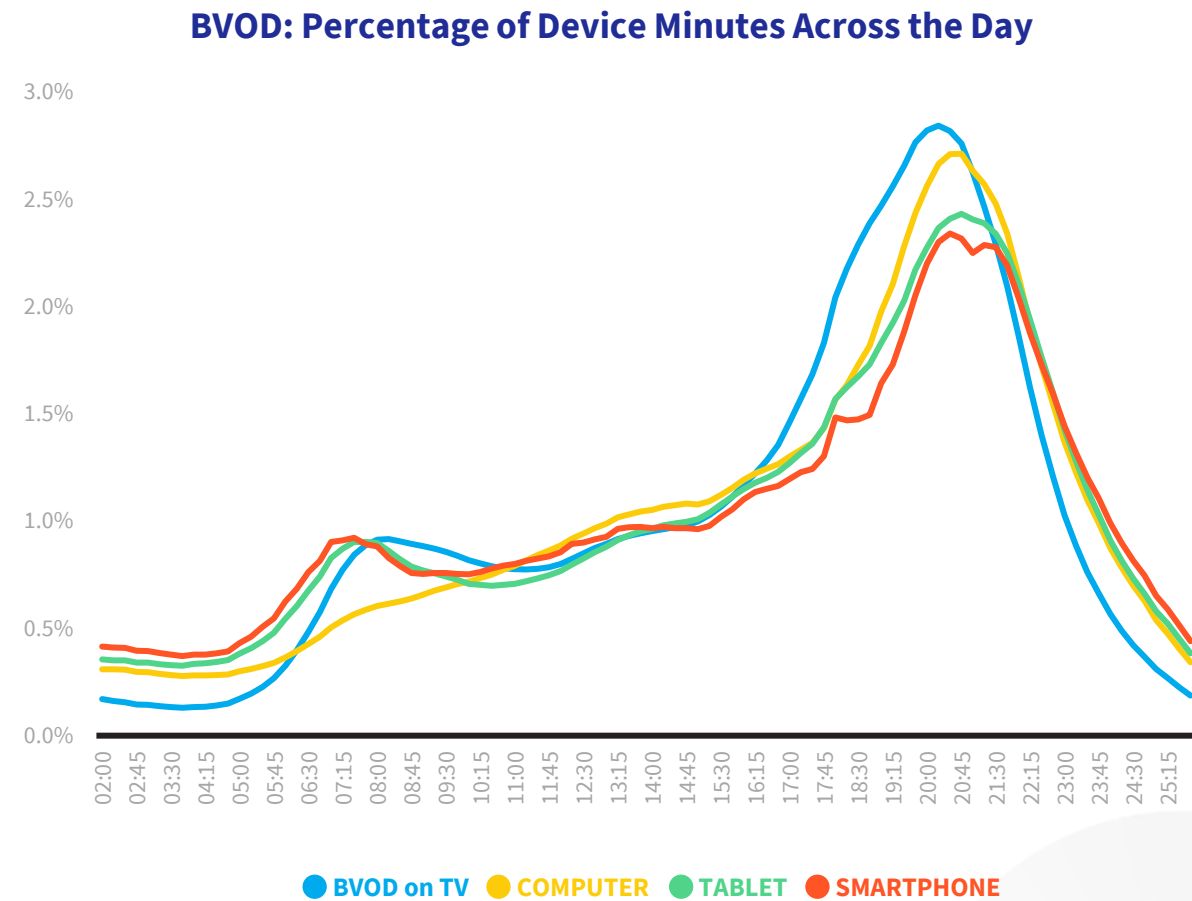
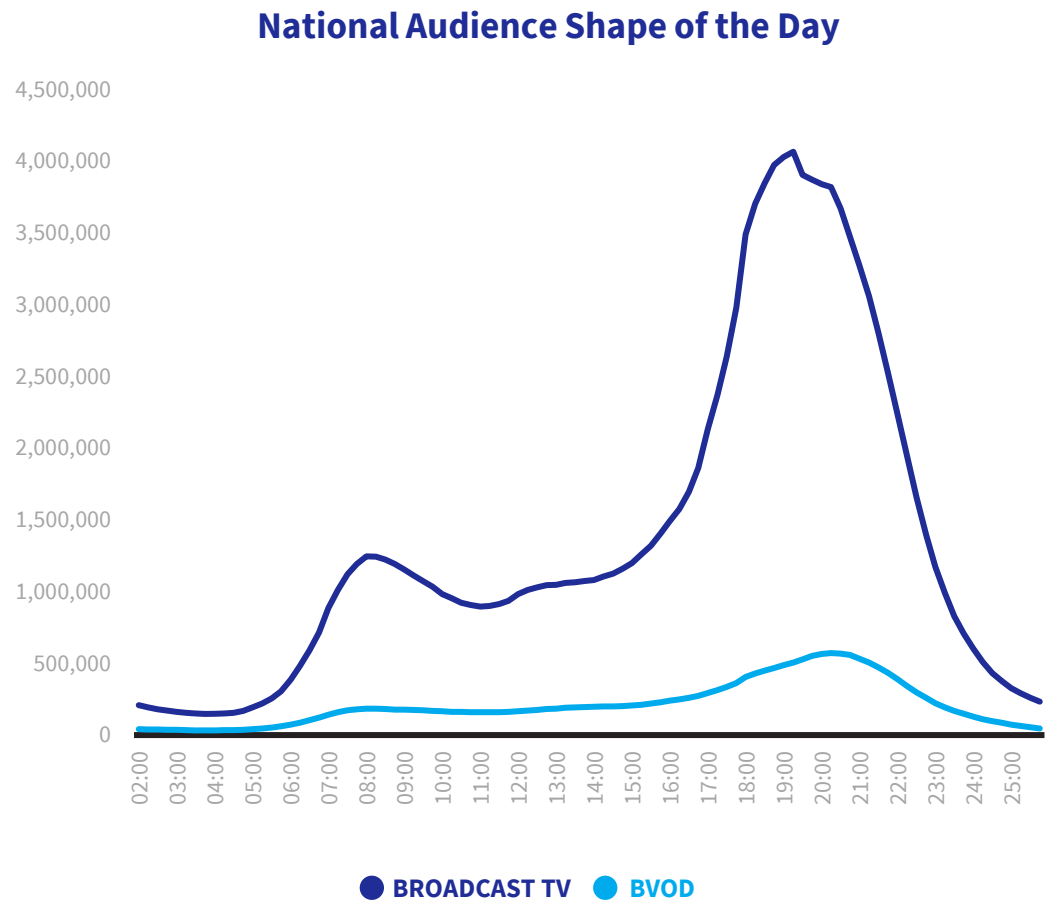
LIVE VIEWING DOMINATES BROADCAST TV

BVOD viewing to TV sets is more evenly split between live and on demand



WHEN WE WATCH

BVOD viewing shifts by screen type across the day



Source: OzTAM VOZ National FTA, When Watched, Total People Average of Weeks 1-26 2025 | Broadcast TV and BVOD Audience across the day | BVOD percentage across the day of Total Minutes by device.



WHO IS WATCHING AND HOW MUCH



SUMMARY

This section looks at the demographic profile of broadcast TV and BVOD audiences, along with the volume of viewing across devices and demographics.

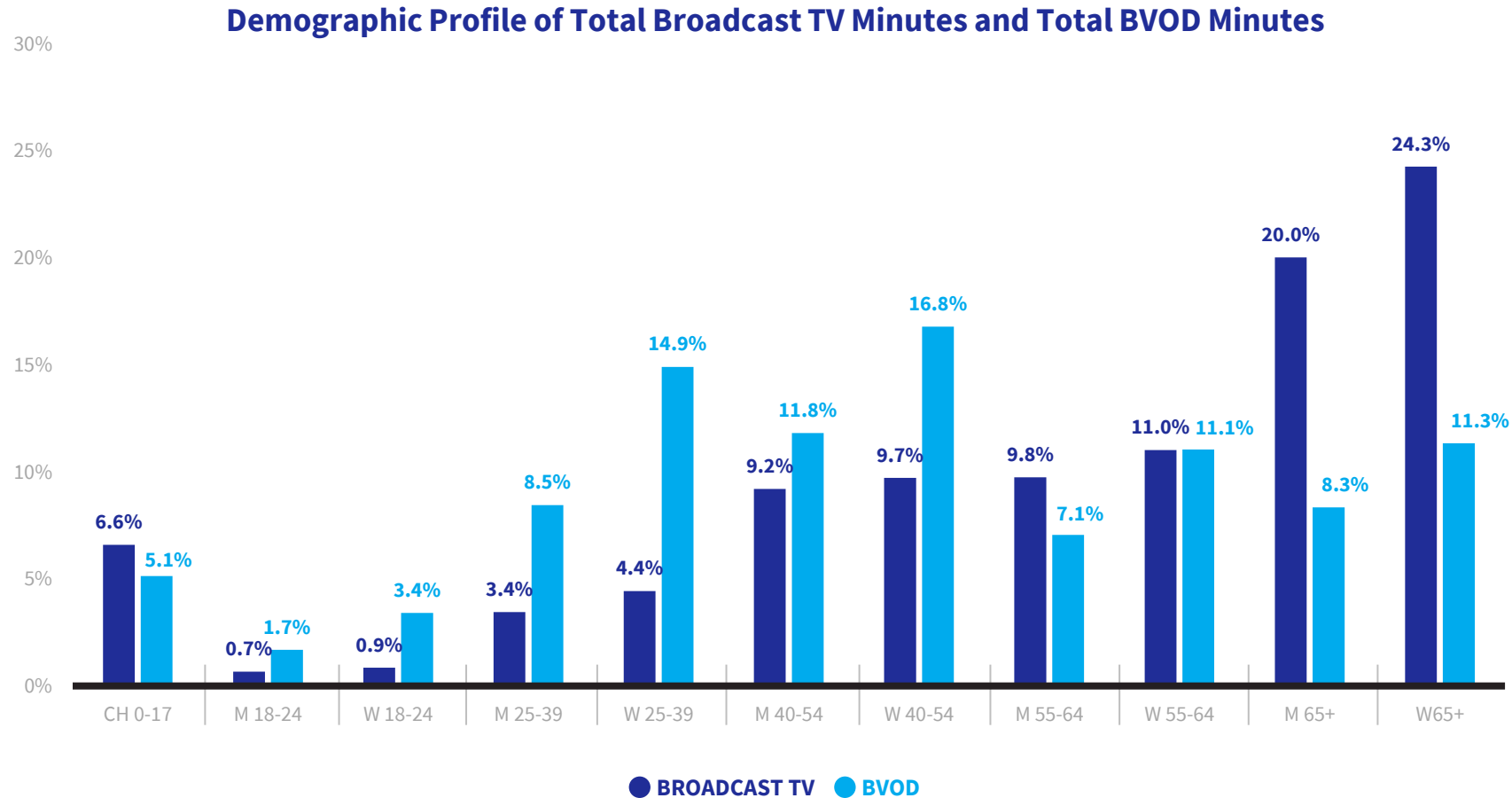
HIGHLIGHTS

- BVOD draws under 55 audiences back to FTA TV.
- Viewers aged 25-54 account for over half of BVOD minutes viewed, led by female audiences.
- Australians watch over 41 hours of broadcast TV or BVOD on average each month, with the majority via the TV set:
 - TV set - 40 hours and 48 minutes
 - Smartphone - 18 minutes
 - Computer - 17 minutes
 - Tablet - 14 minutes
- Smartphone viewing is higher among Total Women (24 minutes) and 25-54s (27 minutes).



BVOD ATTRACTS UNDER 55 AGE GROUPS BACK TO FTA TV

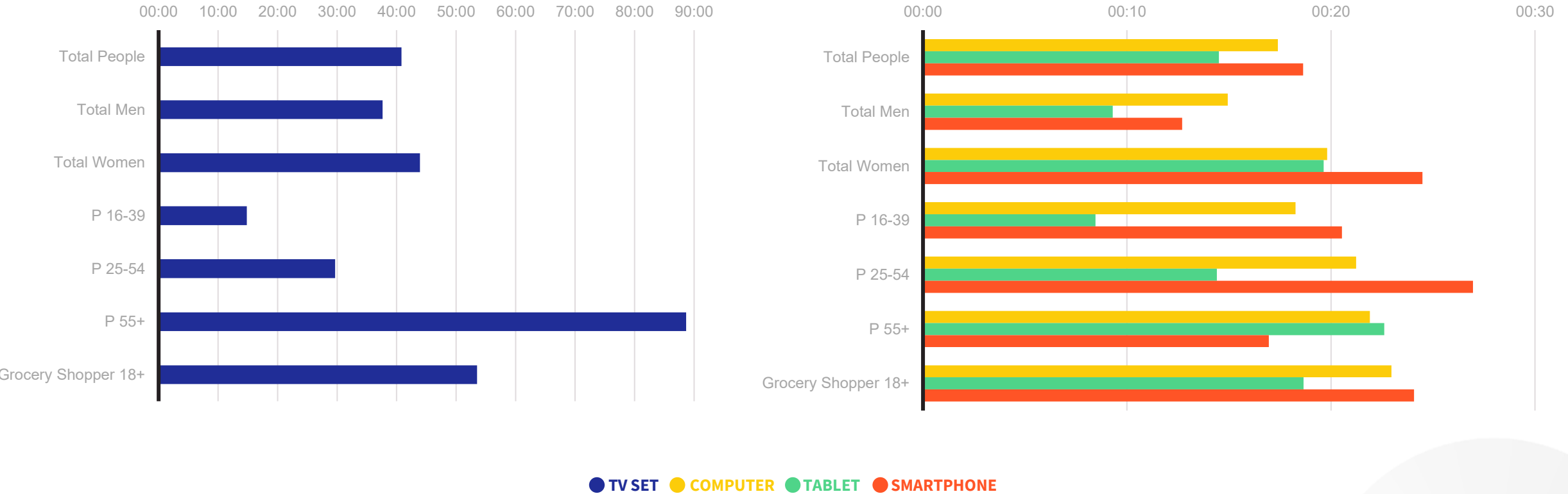
25-54s account for over half of BVOD viewing minutes



OVER 41 HOURS OF BROADCAST TV OR BVOD VIEWED A MONTH

The majority is viewed on a TV set

VOZ Total TV Average Monthly Time Spent Viewing [HH:MM] by Screen Type



Source: OzTAM VOZ National FTA, When Watched, Average Monthly Time Spent Viewing (Universe) to Screen Type HH:MM, Jan-June 2025, 2am to 2am.

VOZ Total TV is the currency for broadcast TV and BVOD. 20
It does not include viewing to SVOD and AVOD.



BROADCAST TV & BVOD REACH



SUMMARY

This section focuses on reach – the number of unique individuals reached through broadcast TV or BVOD. These individuals can be grouped into three mutually exclusive categories, viewing content via:

- **Broadcast TV Only (no BVOD viewing)**
- **BVOD Only (no broadcast TV viewing)**
- **Both (viewing broadcast TV and BVOD)**

Only, Only, Both reach is analysed by time periods, demographics and how people move between these categories as reach accumulates over a 28-day period.

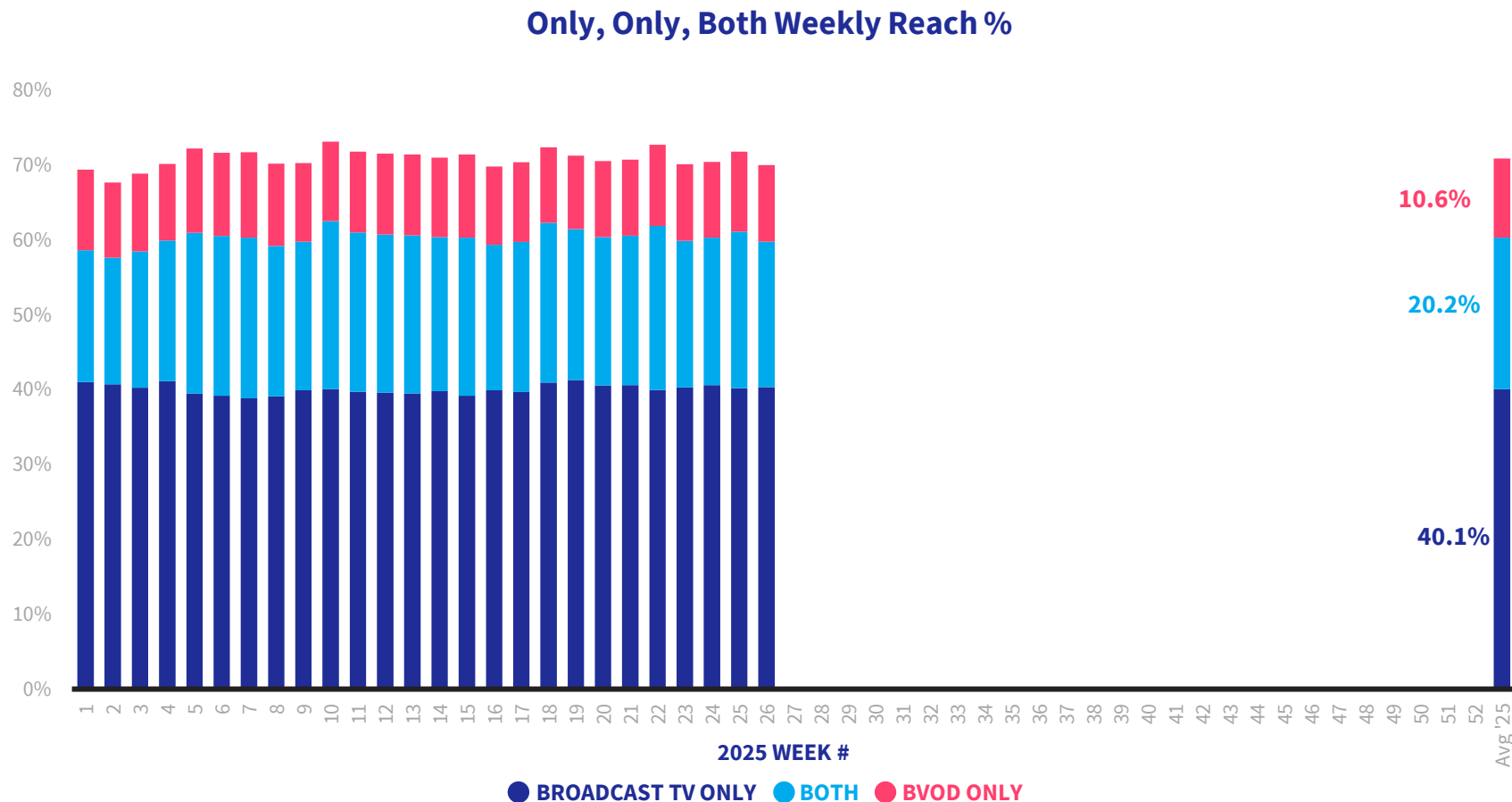


HIGHLIGHTS

- Together, broadcast TV or BVOD reaches 71% of Australians each week and 87.4% across a month.
- BVOD Only viewing adds almost 11% incremental reach to broadcast TV in a week and close to 13% across a month, increasing to 19.4% for 16-39s and 18.3% for 25-54s.
- Sunday is the highest reaching day across broadcast TV and BVOD combined (44.8%). Wednesdays deliver the highest BVOD Only reach (6.9%).
- Grocery Shoppers 18+ and People 55+ have the highest weekly and monthly cross-platform reach (Both).
- Analysis of how reach builds across 28 days for both broadcast TV and BVOD can give insight into campaign planning. The observations for our analysis shows:
 - 16-39s build reach slower, are more likely to exclusively watch BVOD (incremental reach) and have the smallest proportion of viewers who fall into the Both category.
 - 25-54 Broadcast TV Only viewers move into the Both category much sooner than 16-39s or Total People.

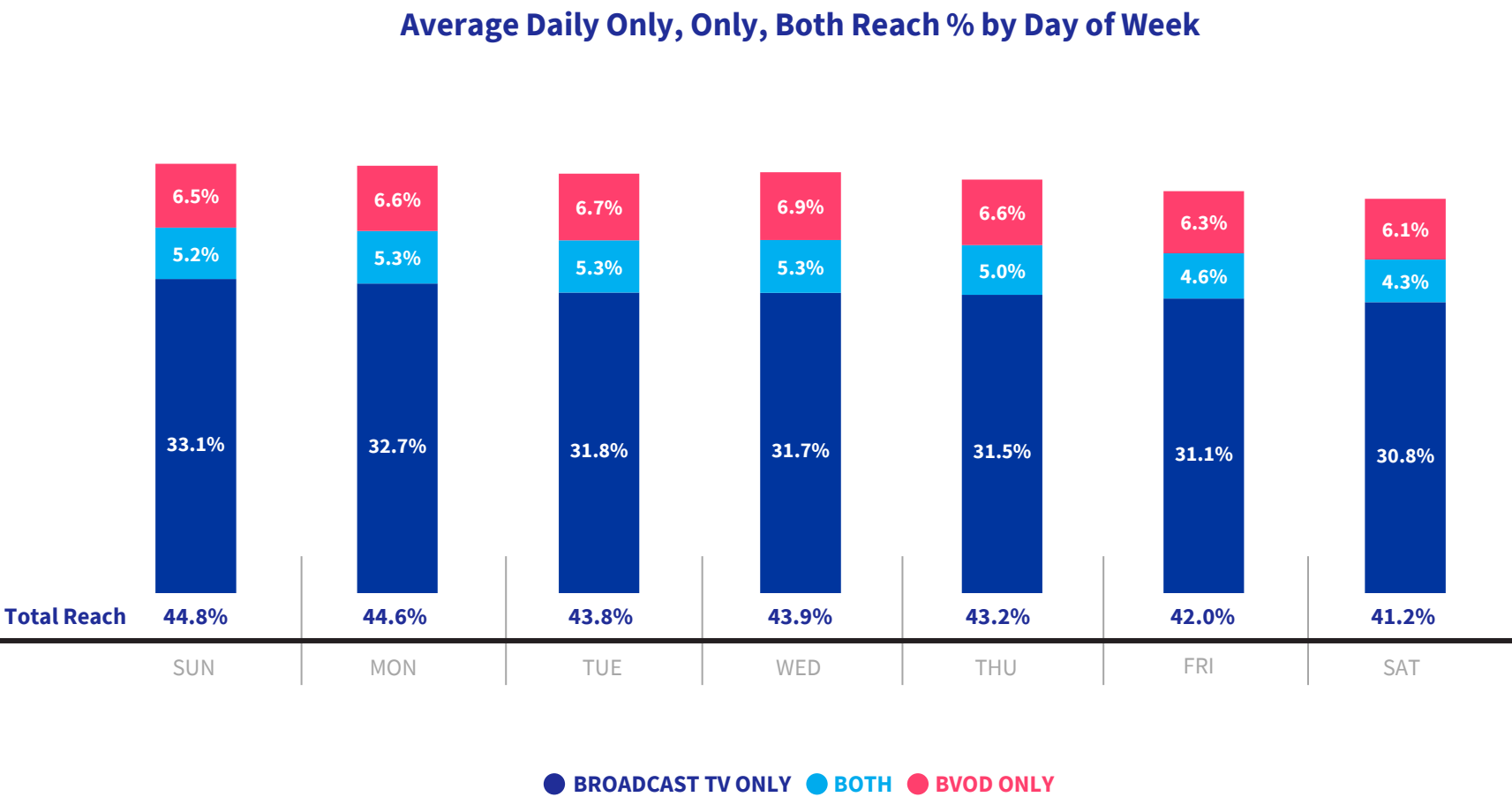
TOGETHER, BROADCAST TV AND BVOD REACHES 71% OF AUSTRALIANS EACH WEEK

Exclusive BVOD viewing (BVOD Only) adds nearly 11% more viewers to weekly reach on average



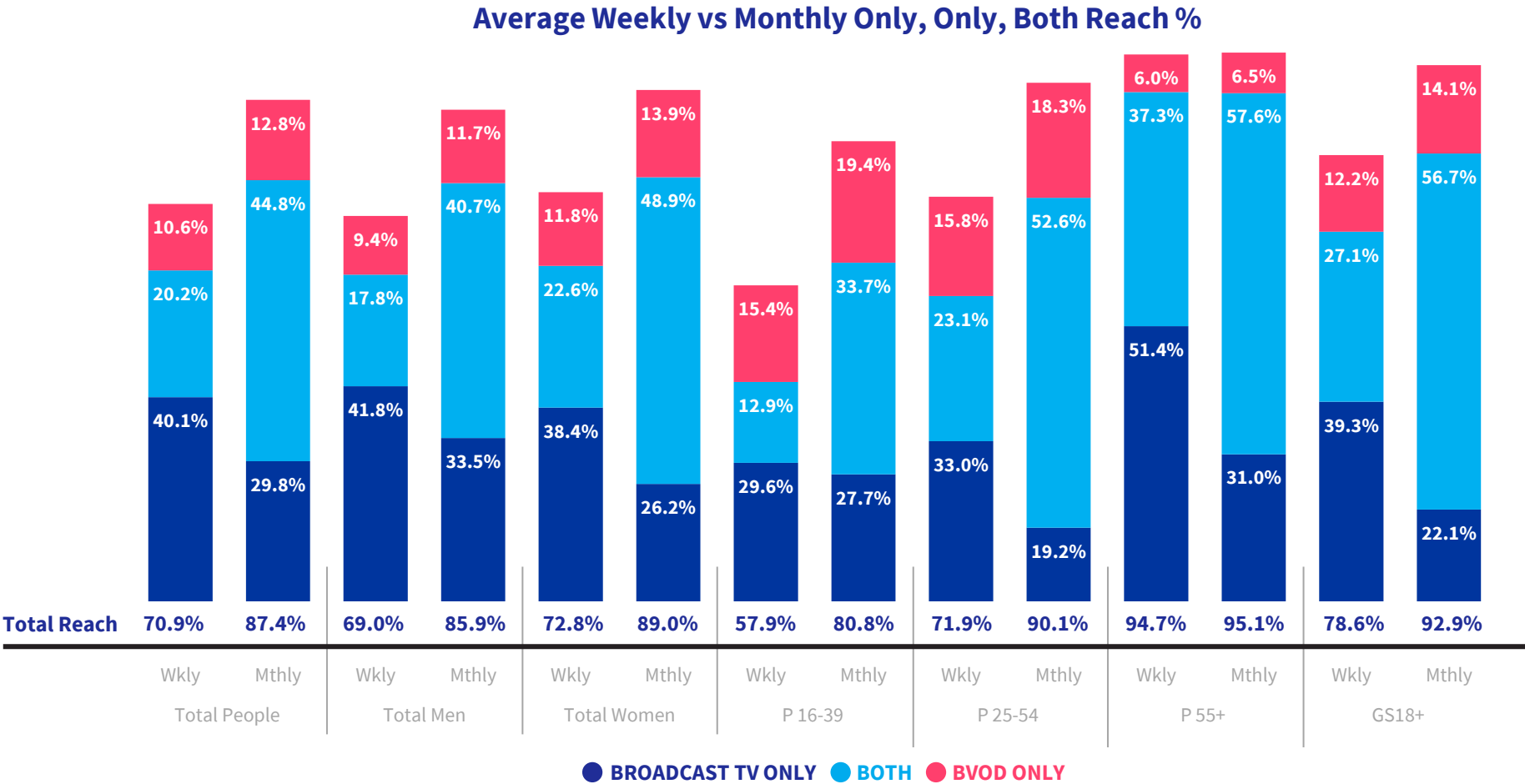
BROADCAST TV AND BVOD REACH ACROSS THE WEEK

Sunday is the highest reaching day, with BVOD Only reach the highest on Wednesdays



BVOD ONLY REACH BUILDS ACROSS A MONTH

Exclusive broadcast TV viewing declines as viewers move into the Both category



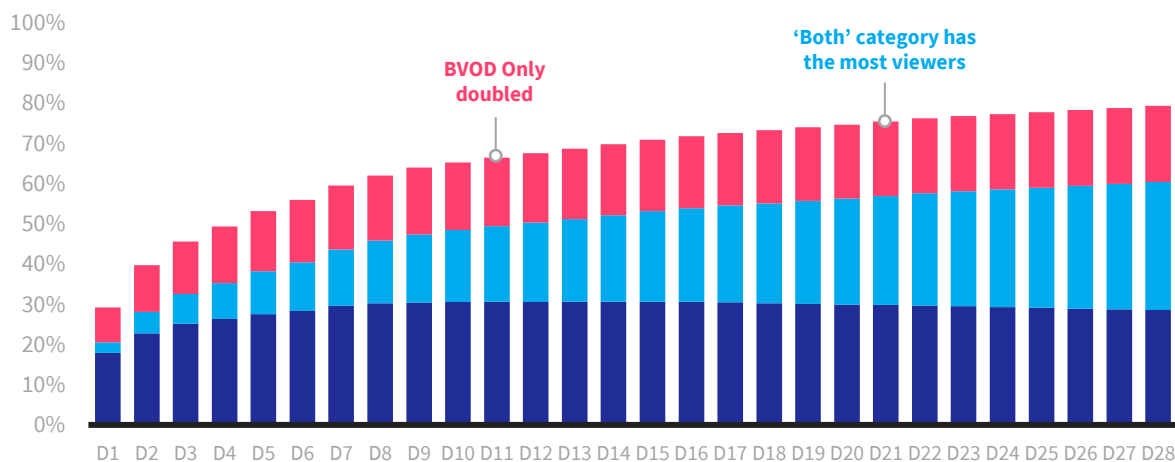
Source: OzTAM VOZ National FTA, When Watched, Only, Only, Both Reach, Average of Weeks 1-26 2025, Viewing Threshold >60 seconds Broadcast TV and >15 seconds BVOD, 2am to 2am.

HOW TOTAL TV REACH BUILDS ACROSS 28 DAYS

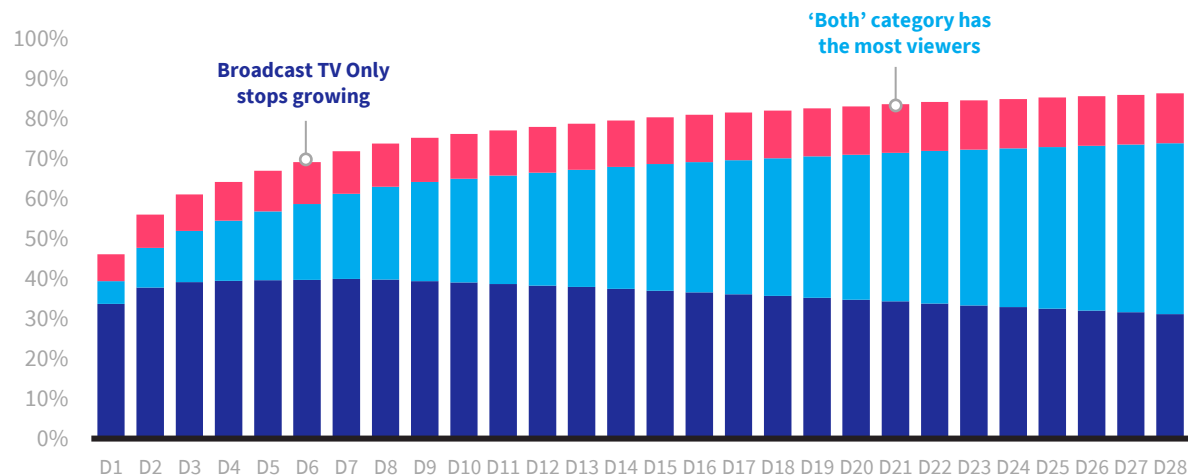
People 16-39 build incremental BVOD reach quickly while People 25-54 achieve the highest proportion of reach to Both by day 11.

Only, Only, Both Reach % Build Across Days

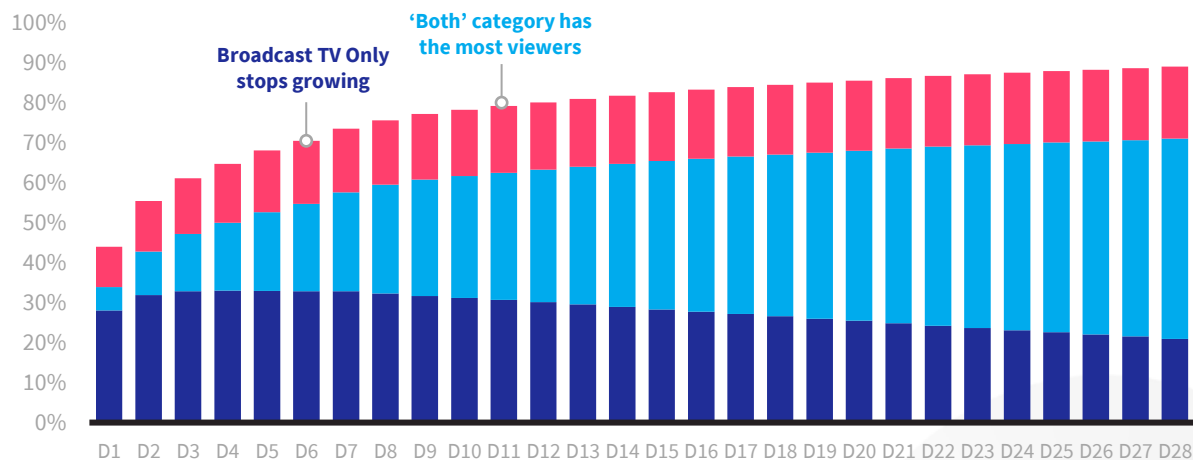
People 16-39



Total People



People 25-54



● BROADCAST TV ONLY ● BOTH ● BVOD ONLY



Source: OzTAM VOZ National FTA, When Watched, Only, Only, Both Reach, Average of Wks 6-9, 11-14 & 18-21 2025
Viewing Threshold >60 seconds Broadcast TV and >15 seconds BVOD, 2am to 2am.

VOZ Total TV is the currency for Broadcast TV and BVOD. 26
It does not include viewing to SVOD and AVOD.



WHAT WE'RE WATCHING



SUMMARY

This section explores the types of content Australians watch, the platforms they use, and how viewing differs by genre.



HIGHLIGHTS

- Major news events continue to draw large audiences to the big screen. 9.5 million people watched the federal election coverage on election day, with 98% viewed on the TV screen.
- Increased News and Current Affairs viewing in Week 10 (w/c March 2), during ex-Tropical Cyclone Alfred, reinforces broadcast TV as the primary source of viewing for major news events.
- Content preferences differ by platform:
 - News and Current Affairs dominates broadcast TV (31%).
 - Drama leads BVOD (24.4%).
 - Sport is equally viewed on broadcast TV (10.2%) and BVOD (9.2%).
- Viewing habits vary by genre with 40% of drama viewed on demand, and 95.4% of sport watched live.
- Broadcast TV drives reach across genres while BVOD extends reach, especially for drama and children's programs.

BIG EVENT = BIG SCREEN

9.5 million
Australians tuned in to watch the
Federal Election coverage



**More than
1 in 3
of the population**



98%
Viewing to the
TV screen

8%

BVOD on TV

2%

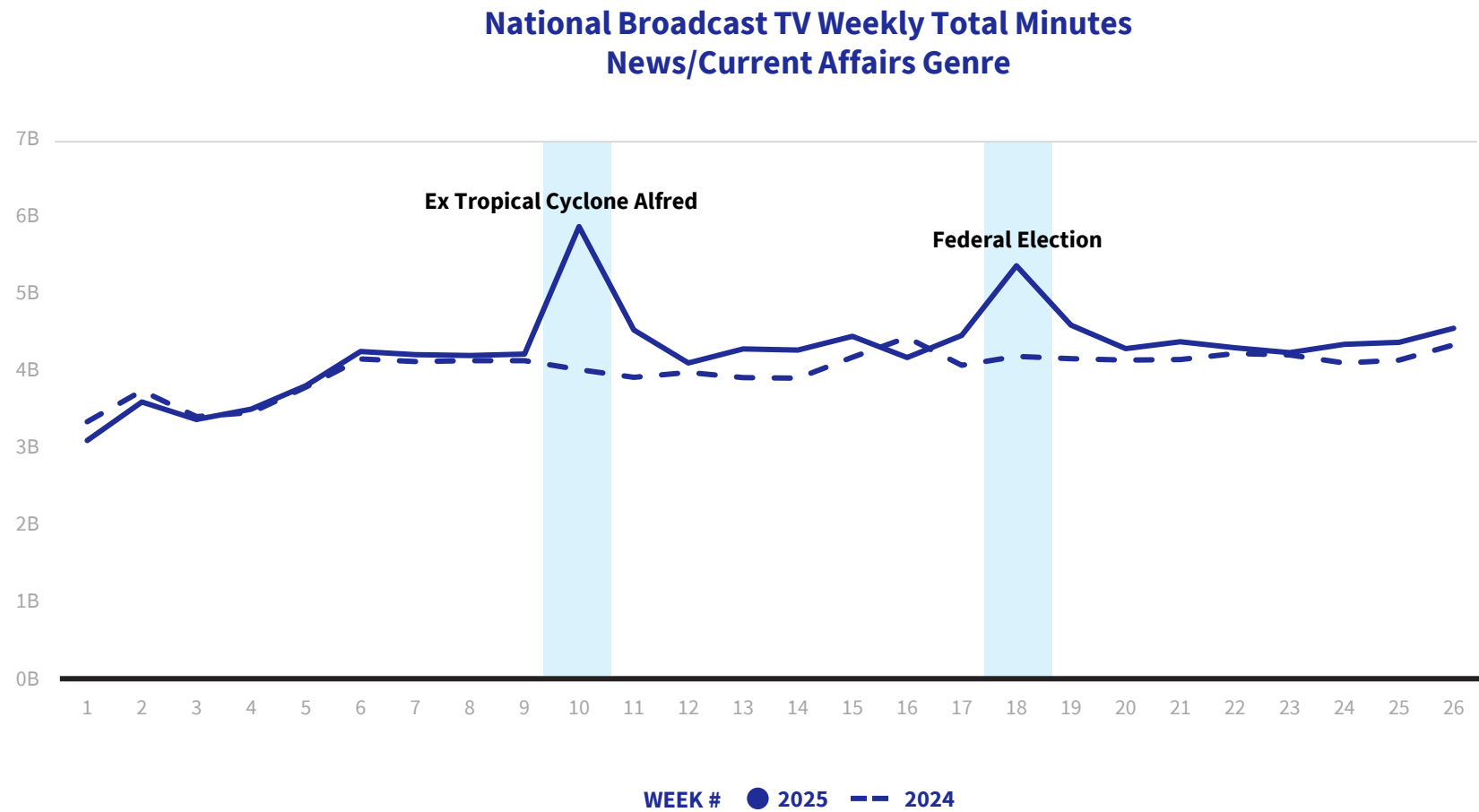
BVOD ON
COMPUTER/TABLET/
SMARTPHONE

90%

BROADCAST TV

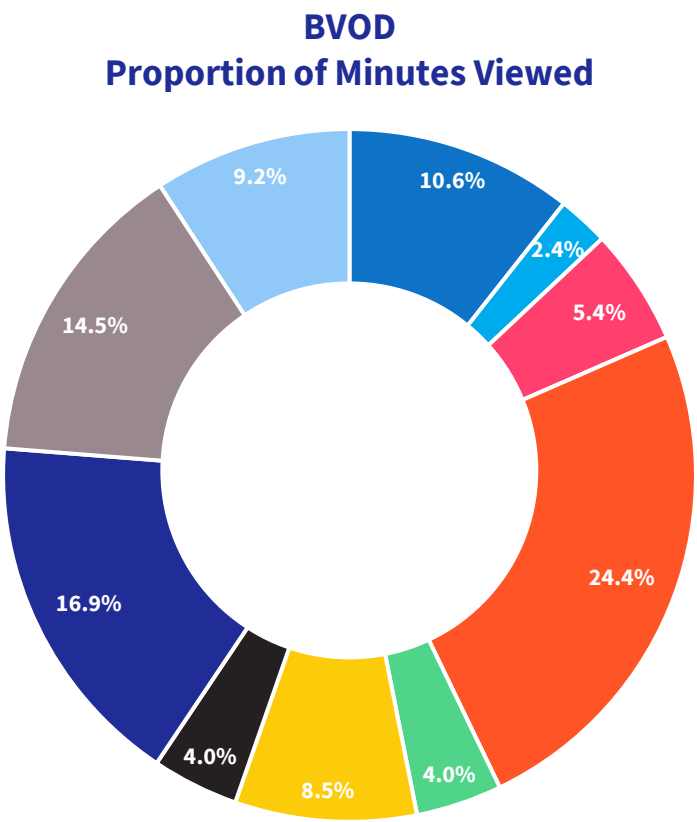
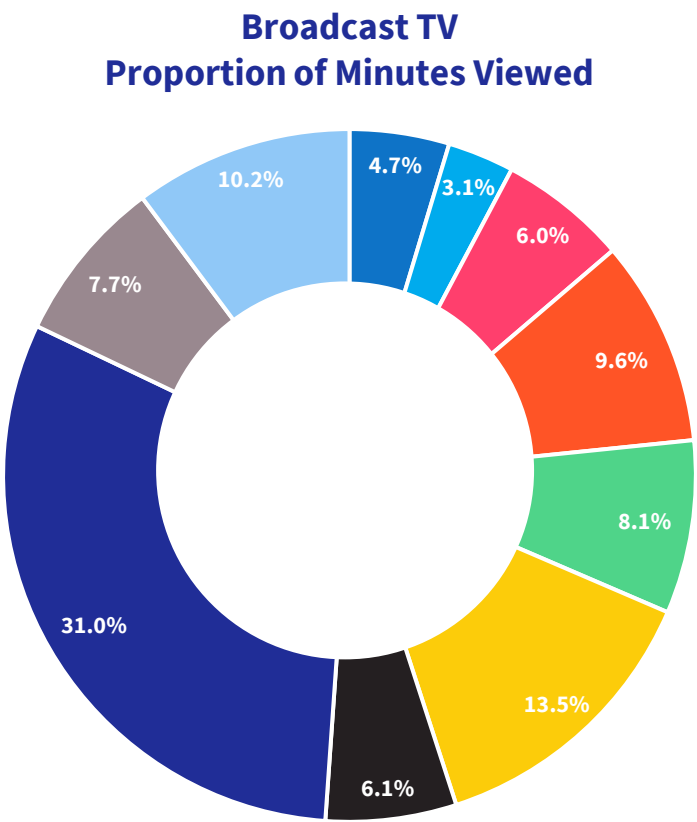
BROADCAST TV REMAINS THE TRUSTED SOURCE FOR MAJOR NEWS EVENTS

This can be seen in the consumption to News/Current Affairs in key news weeks



CONTENT IS VIEWED DIFFERENTLY BY PLATFORM

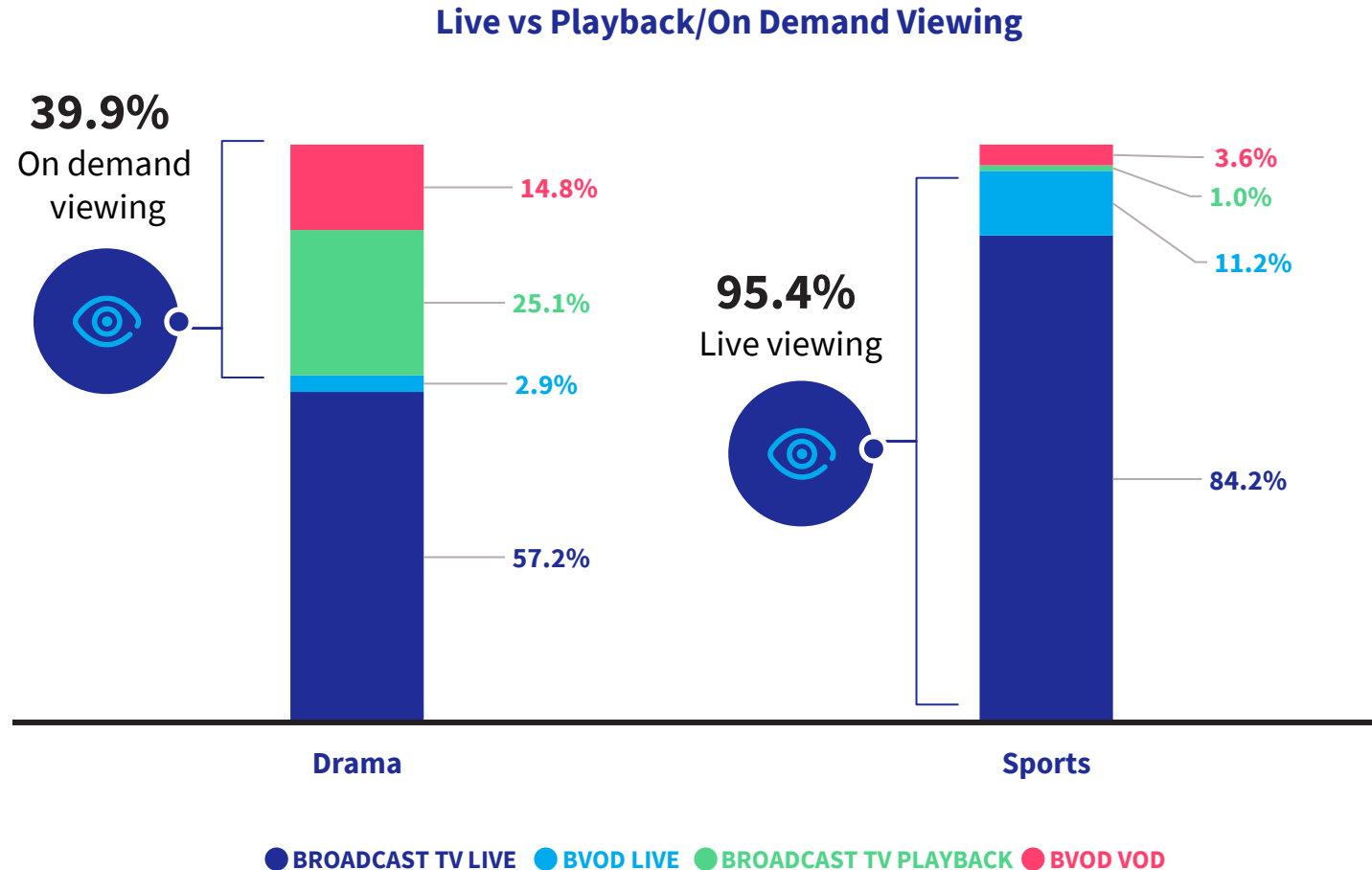
News/Current Affairs dominates broadcast TV; drama strongest for BVOD



- Children's Programs
- Comedy
- Documentary/Cultural
- Drama
- Infotainment / Lifestyle
- Light Entertainment
- Movies/Mini-series
- News/Current Affairs
- Reality Television
- Sport

LIVE OR LATER? VIEWING HABITS DIFFER BY GENRE

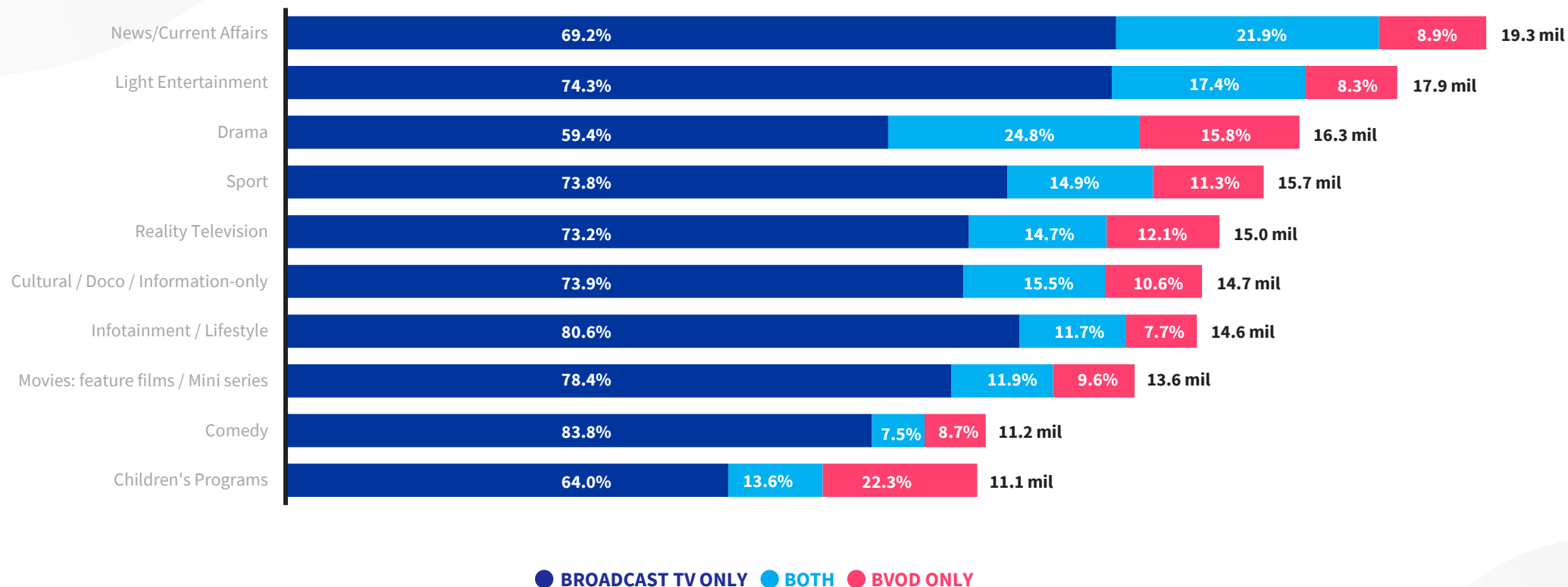
40% of viewing to drama content is on demand; 95% of sport viewing is live



ONLY, ONLY, BOTH REACH PROPORTIONS DIFFER BY GENRE

Broadcast TV drives reach across genres; BVOD extends reach, especially for drama and children's programs

Average Monthly Only, Only, Both Reach % by Genre



NOTES

The analysis in the report is sourced from OzTAM's VOZ Total TV currency database unless otherwise noted.

VOZ is Australia's 'Total TV' measurement standard, unifying broadcast TV and BVOD viewing into a single, de-duplicated, cross-platform currency database delivering a comprehensive view of TV performance across ABC, Seven, Nine, 10, SBS, their regional affiliates and their BVOD services. VOZ does not include viewing to SVOD and AVOD platforms.

Frequent terms used in the report:

- **VOZ TOTAL TV:** viewing of broadcaster* content across all screens – live or playback on TV sets, plus BVOD live-streamed or on demand on connected devices
- **WHEN WATCHED:** measurement and reporting of viewing to broadcaster content at the time it was viewed
- **AUDIENCE:** the average number of people viewing in any minute
- **TOTAL MINUTES:** the sum of minutes viewed by all individuals in the audience
- **TIME SPENT VIEWING (Universe):** the average number of minutes each person in the demographic viewed in the analysis period, including those who did not watch at all
- **ONLY, ONLY, BOTH REACH:** refer page 22 for definition

INTRODUCTION TO THE TOTAL VIDEO LANDSCAPE



Launched in August 2025, Streamscape is OzTAM's new quarterly report that, for the first time, delivers a unified, independent view of Total Video consumption in Australia.

Distinct from VOZ Total TV currency data, Streamscape provides a singular view of how Australians consume video (broadcast TV, BVOD and SVOD) across platforms and demographics, empowering agencies and marketers to plan with greater confidence, precision, and accountability.

Across H1 2025, Streamscape reveals that broadcast TV (free-to-air television) and BVOD still dominate the Total Video viewing landscape.

Broadcast TV accounts for the majority of viewing among Total People, with over 60% share of Total Video. BVOD services (ABC iview, 7plus, 9Now, 10 and SBS On Demand) represent over 8%, while Digital Video (which includes streaming services* such as Netflix, Disney+, Amazon Prime Video and YouTube etc) makes up the remaining ~30%.

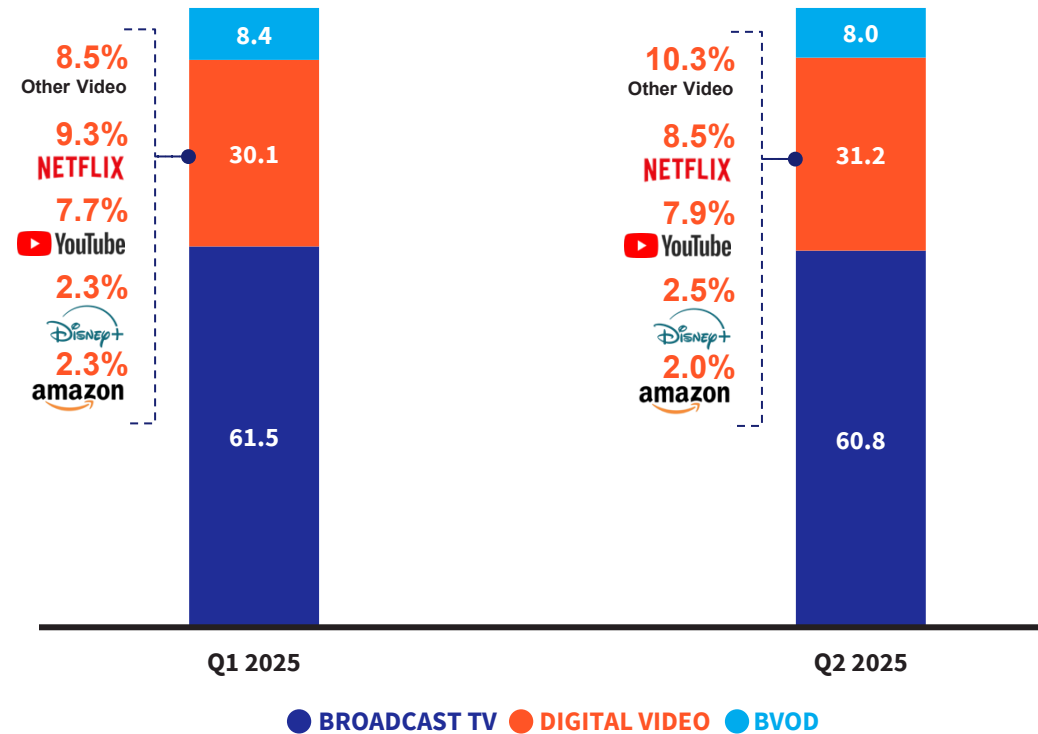
Available quarterly to paid subscribers, Streamscape provides a monthly snapshot of video viewing to TV sets, across key demographics. Reporting will continue to evolve, with future updates set to further expand demographic granularity and incorporate viewing on additional connected devices such as smartphones, tablets, and computers.

For more information on subscribing to the Streamscape report contact info@oztam.com.au

THE TOTAL VIDEO VIEWING LANDSCAPE

Broadcast TV and BVOD still dominate according to OzTAM's new Streamscope report

Total Video Share | Q1 vs Q2 2025



QUESTIONS ?



More information on the VOZ Total TV database is available at virtualoz.com.au/resources/

Or get in touch via info@oztam.com.au