

# VOZ TOTAL TV VIEWING REPORT

H2 2025 – Key insights for broadcast TV and BVOD

**VOZ**  
BY OZTAM

# INTRODUCTION

## VOZ Total TV Viewing Report: H2 2025 – Key insights for broadcast TV and BVOD

Welcome to the second edition of OzTAM's bi-annual **VOZ Total TV Viewing Report**, providing a comprehensive view of Australian free-to-air (FTA) viewing trends drawn from the VOZ Total TV currency database.

This report is published twice a year. This H2 2025 edition covers 29 June 2025 to 27 December 2025 (Weeks 27-52) and includes combined results for both the second half and the full year (Weeks 1-52). The previous H1 2025 edition covered 29 December 2024 to 28 June 2025.

Additional quarterly snapshots are available via the Insights section of the [VOZ website](#).

The **VOZ Total TV Viewing Report** provides insights across Australian FTA broadcast TV and BVOD consumption, analysing the billions of minutes of content viewed and highlighting 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.

# CONTENTS



## VOZ Total Television landscape

### KEY TAKE OUTS

TV remains a near-universal and highly engaged medium, with strong device penetration underpinning stable Total TV viewing and continued growth in BVOD, driven by live streaming.



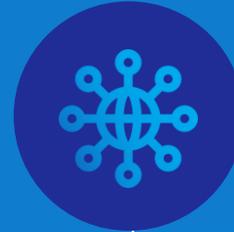
## How we watch

As BVOD's share of Total TV grows, viewing remains anchored to the TV set, with younger audiences and smaller screens extending audiences beyond prime time.



## Who is watching & how much

Australians are spending over 41 hours per month with Total TV, with women driving a larger share of viewing overall, BVOD attracting younger audiences, and device choice differing across demographics.



## Broadcast TV and BVOD reach

Broadcast TV and BVOD together deliver strong weekly reach and near-universal monthly reach, with BVOD playing a key incremental role across demographics and over time.



## What we're watching

Genre continues to shape viewing behaviour, with strong live viewing for News and Current Affairs on broadcast TV, while BVOD on demand extends reach for Drama and Children's content.



# VOZ TOTAL TELEVISION LANDSCAPE



# SUMMARY

This section explores the size and growth of Australia's Total 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

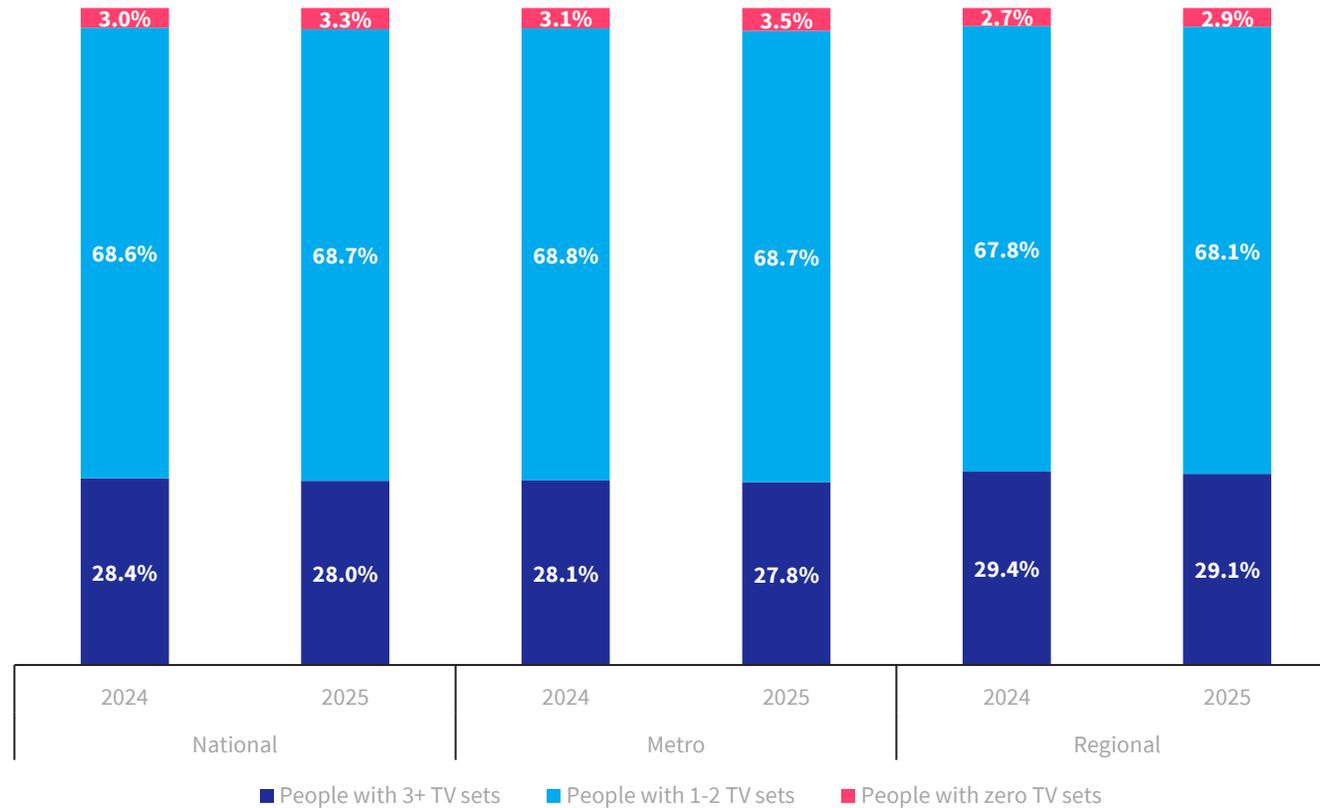
- TV ownership remains high, with 97% of homes having at least one TV set and 28.0% of Australians having access to three or more. Four in five homes now have an Internet Capable TV (80%), up from 62% in 2020.
- Beyond TV sets alone, the average number of screens per home has stabilised at just under seven, reflecting maturity in device penetration.
- Broadcast TV and BVOD together reached 87.2% of Australians on average each month in H2 2025. Among Grocery Shoppers 18+, this increases to 92.6%.
- Total weekly minutes consumed across broadcast TV and BVOD combined were broadly stable compared with H2 2024 with BVOD minutes increasing by 27.0%, driven by strong growth in live streaming.



# VOZ TV SET UNIVERSE

28.0% of Australians still have 3 or more TVs; 3.3% of people have zero TV sets

VOZ Total TV People Universe Estimates by # TV Sets



# SCREENS IN AUSTRALIAN HOMES

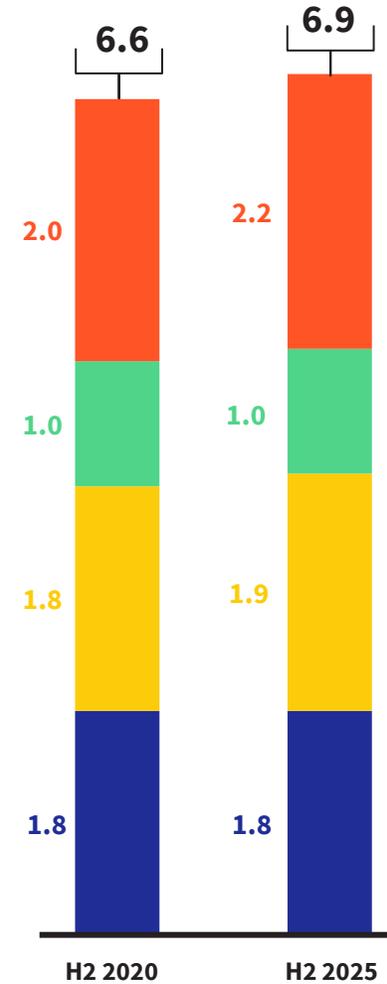
Average screens per home has plateaued as Internet Capable TVs grow rapidly



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



**80%**  
of homes have an  
Internet Capable TV  
(62% in 2020)



● TV SET ● COMPUTER ● TABLET ● SMARTPHONE ● ALL SCREENS

# H2 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*	<b>Total People</b>	1,551,000	5.6	68.5b	87.2	41:17	27,632,000
	<b>Men</b>	708,000	5.2	31.2b	85.6	37:58	13,716,000
	<b>Women</b>	843,000	6.1	37.2b	88.7	44:33	13,916,000
	<b>P 16-39</b>	193,000	2.1	8.5b	80.8	15:35	9,099,000
	<b>P 25-54</b>	466,000	4.1	20.6b	90.0	30:16	11,317,000
	<b>P 55+</b>	957,000	12.1	42.2b	95.1	89:19	7,882,000
	<b>Grocery Shopper 18+</b>	1,242,000	7.4	54.8b	92.6	54:08	16,874,000
 BROADCAST TV	<b>Total People</b>	1,300,000	4.7	57.4b	74.6	34:36	27,632,000
	<b>Men</b>	607,000	4.4	26.8b	74.2	32:35	13,716,000
	<b>Women</b>	692,000	5.0	30.5b	75.1	36:35	13,916,000
	<b>P 16-39</b>	123,000	1.4	5.4b	61.6	9:58	9,099,000
	<b>P 25-54</b>	338,000	3.0	14.9b	72.0	21:58	11,317,000
	<b>P 55+</b>	856,000	10.9	37.8b	88.4	79:57	7,882,000
	<b>Grocery Shopper 18+</b>	1,037,000	6.1	45.8b	78.7	45:15	16,874,000
 BVOD	<b>Total People</b>	252,000	0.9	11.1b	55.5	6:41	27,632,000
	<b>Men</b>	101,000	0.7	4.4b	50.4	5:23	13,716,000
	<b>Women</b>	151,000	1.1	6.7b	60.5	7:58	13,916,000
	<b>P 16-39</b>	70,000	0.8	3.1b	51.9	5:37	9,099,000
	<b>P 25-54</b>	128,000	1.1	5.6b	68.3	8:18	11,317,000
	<b>P 55+</b>	101,000	1.3	4.4b	63.3	9:22	7,882,000
	<b>Grocery Shopper 18+</b>	204,000	1.2	9.0b	68.0	8:53	16,874,000

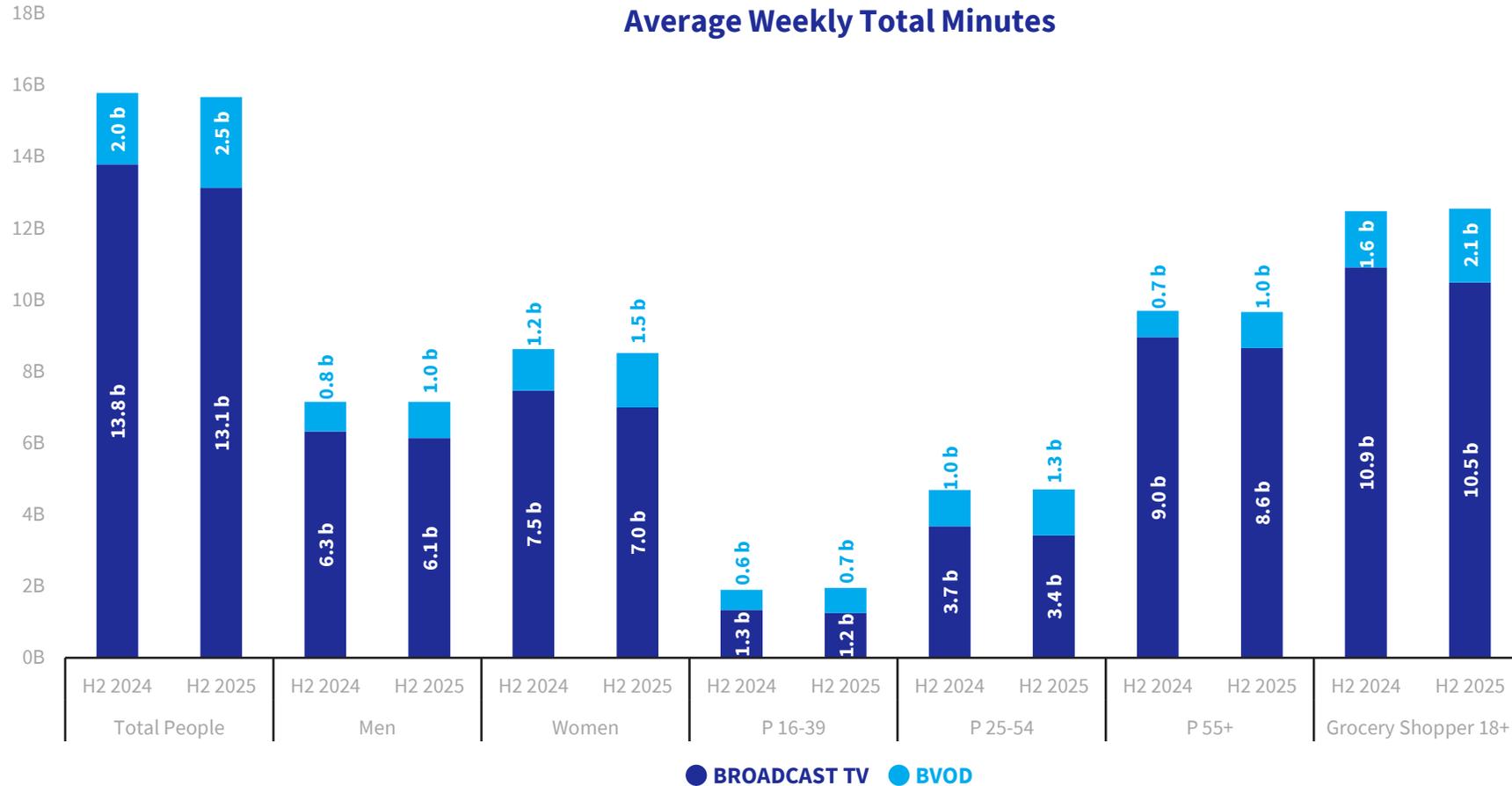


Source: OzTAM \*VOZ Total TV National FTA, When Watched, Reach Viewing Threshold >60 seconds for broadcast TV and > 15 seconds for BVOD, Monthly Minutes and Reach % are based on the arithmetical average of July to December 2025. The Universe Estimate for Grocery Shopper 18+ is the floating UE for H2 2025.

VOZ Total TV is the currency for Broadcast TV and BVOD. It does not include viewing to SVOD and AVOD. 8

# STRENGTH OF BROADCAST TV AND BVOD (TOTAL TV)

Total weekly minutes stable over H2 2024, driven by BVOD growth up 27.0%



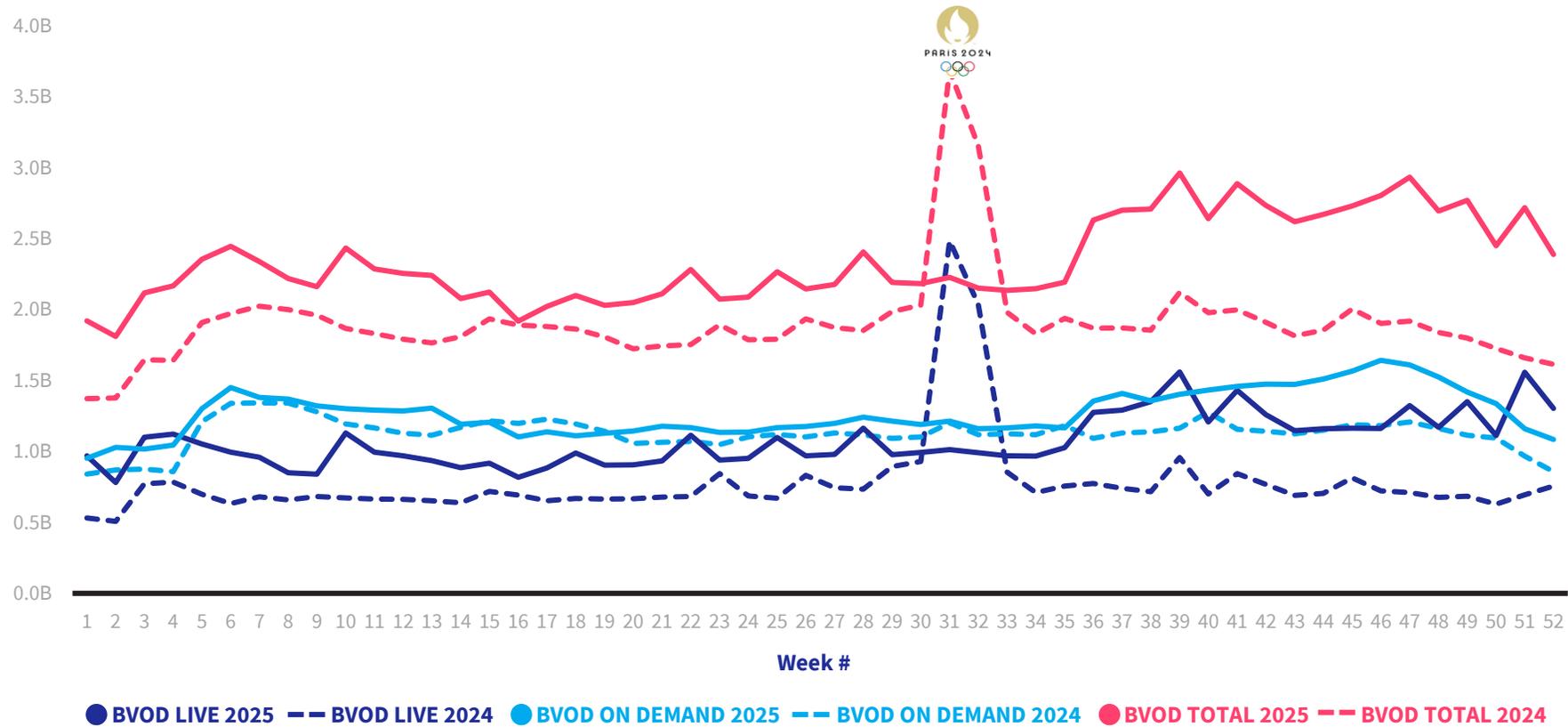
Source: OzTAM VOZ National FTA, When Watched, Average of Weeks 27-52 2025 and 2024, Broadcast TV and BVOD Total Minutes, 2am to 2am.

VOZ Total TV is the currency for Broadcast TV and BVOD. It does not include viewing to SVOD and AVOD. 9

# LIVE STREAMING CONTINUES TO DRIVE BVOD GROWTH

Live streaming has increased across the full year by 38.5%

### BVOD: Weekly Minutes Viewed



Source: OzTAM VOZ National FTA BVOD, When Watched, Total People, Total Minutes viewed by week, live, on demand (VOD) and total BVOD, Weeks 1-52 2025, 2am to 2am.

VOZ Total TV is the currency for Broadcast TV and BVOD. 10  
It does not include viewing to SVOD and AVOD.



# 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.

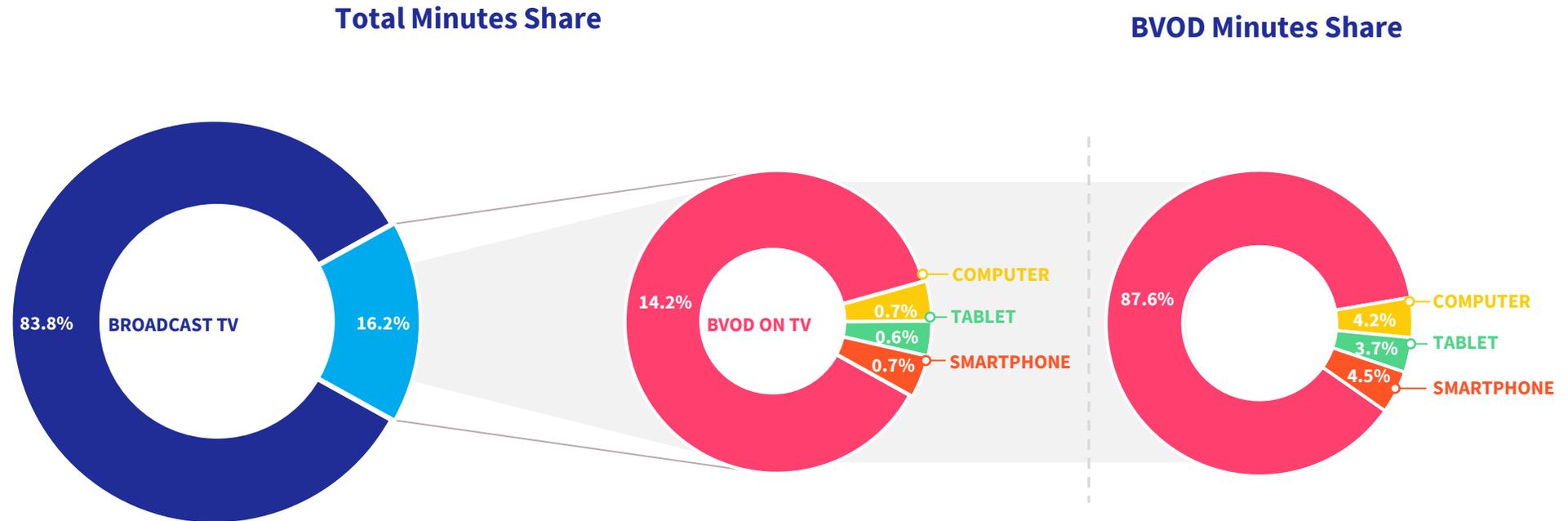


## HIGHLIGHTS

- BVOD now accounts for 16.2% of Total TV viewing with the majority occurring on TV sets (87.6%).
- Demographic analysis reveals that 31.1% of BVOD viewing for 16-39s is via TV sets but only 14.5% for Grocery Shoppers 18+ who watch significantly more broadcast TV. 16-39s also have the highest share of viewing on other devices, most notably smartphones (2.2% vs 0.8% for Total People)
- Broadcast TV viewing remains predominantly live (89.6%). On TV sets, BVOD viewing is more evenly split between live (49.0%) and on demand (51.0%) while smaller screens skew more heavily towards on demand viewing.
- Device usage varies across the day. Smaller screens account for a greater share of BVOD viewing in the early morning and late evening, while TV sets account for a higher share in late afternoon and prime time.
- Prime time remains the highest viewing period across all devices.

# HOW WE WATCH TOTAL TV

BVOD viewing accounts for 16.2% of Total TV viewing in H2 2025



Average Weekly All Device Minutes Viewed: 15.7 billion

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

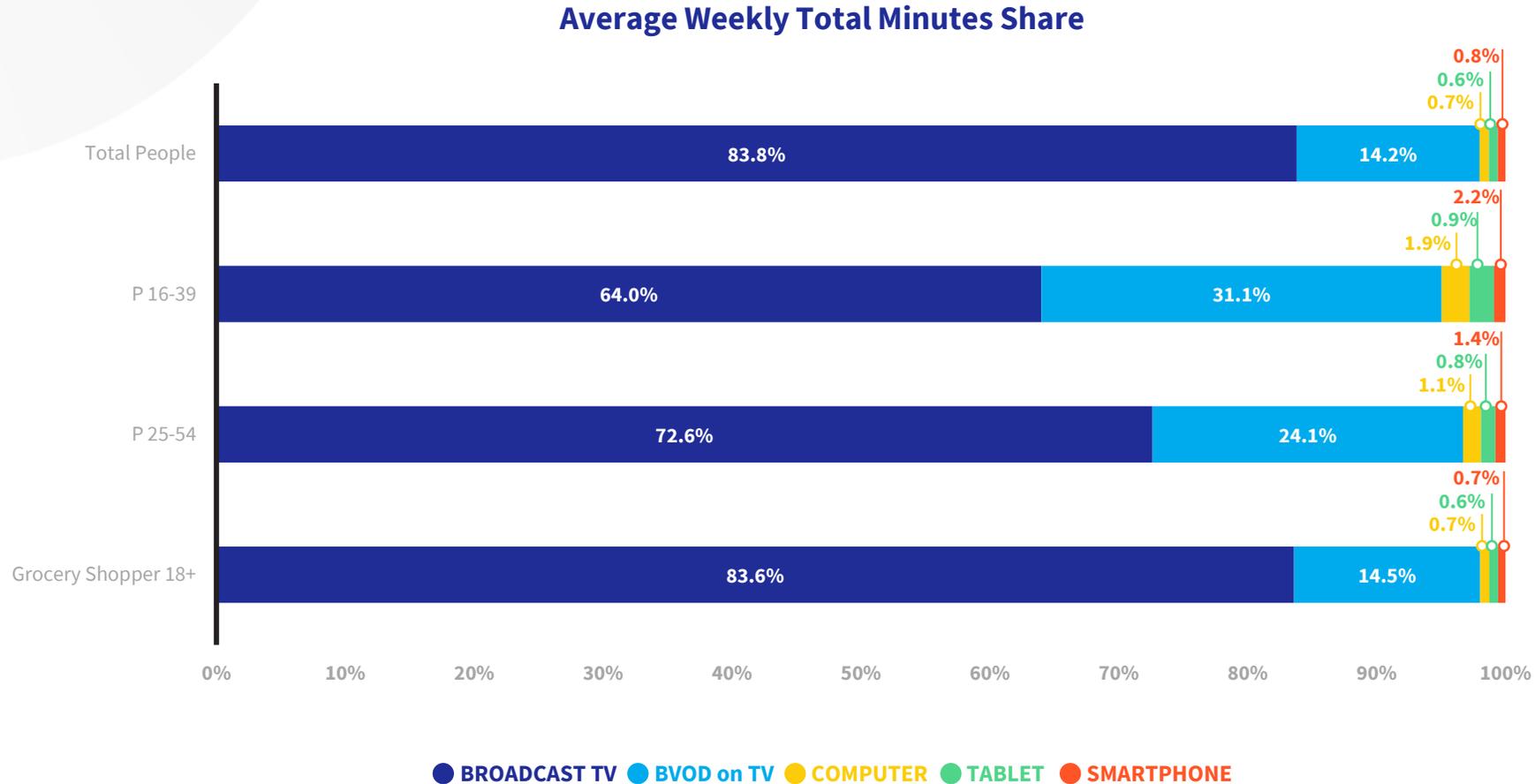


Source: OzTAM VOZ National FTA Total TV, When Watched, Total People Weeks 27-52 2025, Average Weekly Share of Total Minutes viewed across all platforms including Broadcast TV, 2am to 2am.

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

# VIEWING ACROSS SCREENS VARIES BY DEMOGRAPHIC

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

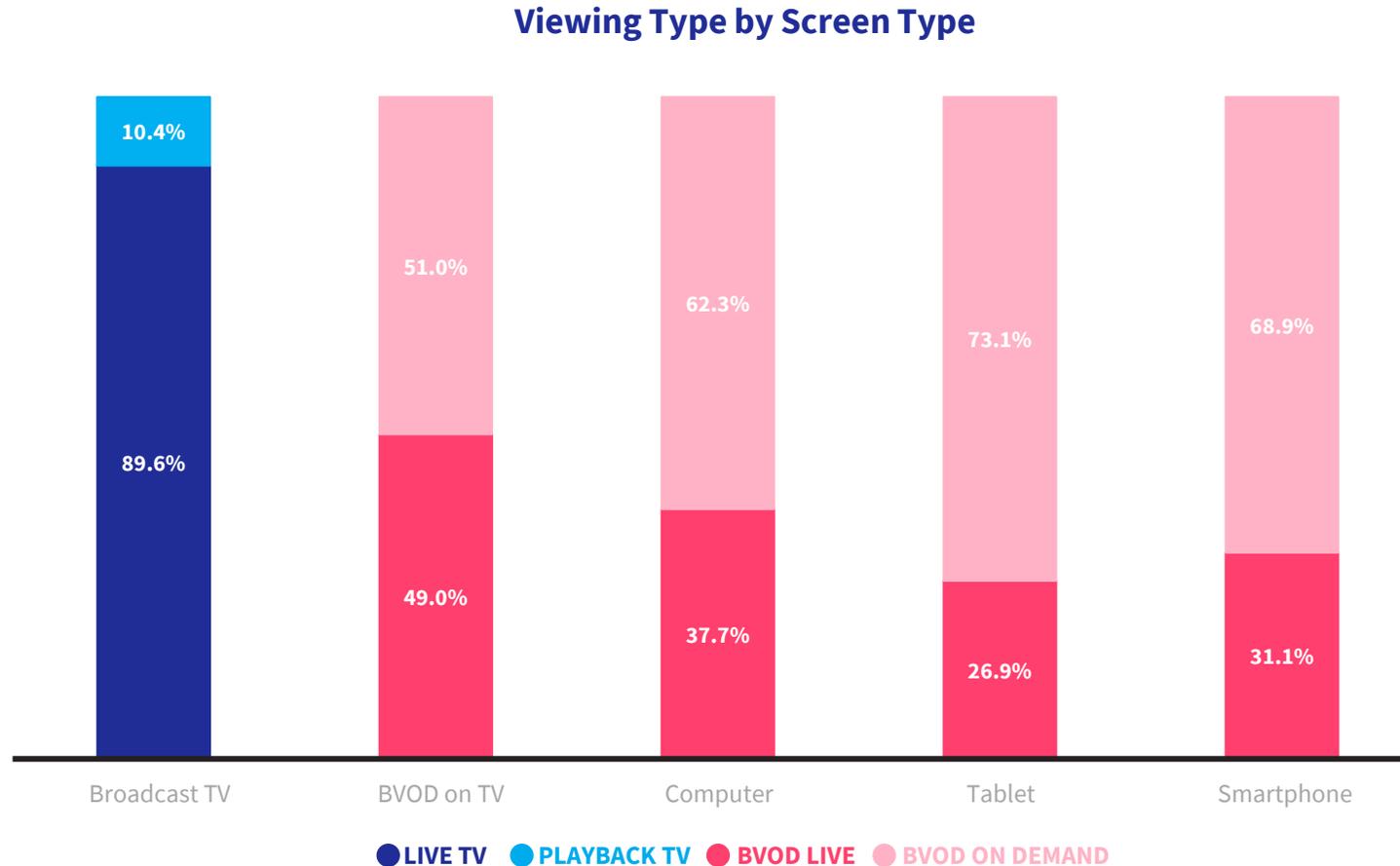


Source: OzTAM VOZ National FTA Total TV, When Watched, Weeks 27-52 2025, Average Weekly Share of Total Minutes viewed across all platforms including broadcast TV by demographic, 2am to 2am.

VOZ Total TV is the currency for Broadcast TV and BVOD. 14  
It does not include viewing to SVOD and AVOD.

# LIVE VIEWING DOMINATES BROADCAST TV

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



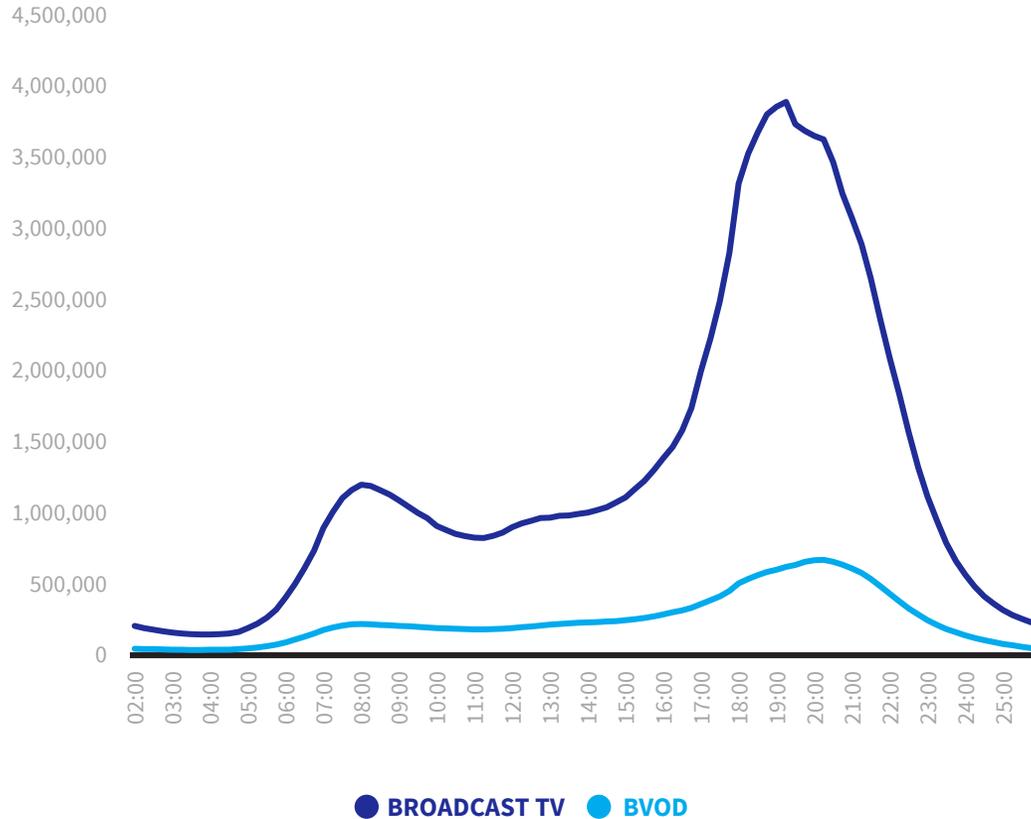
Source: OzTAM VOZ National FTA, When Watched, Total People Weeks 27-52 2025, Share of Total Minutes viewed by Screen Type (device) by Viewing Type, 2am to 2am.

VOZ Total TV is the currency for Broadcast TV and BVOD. 15  
It does not include viewing to SVOD and AVOD.

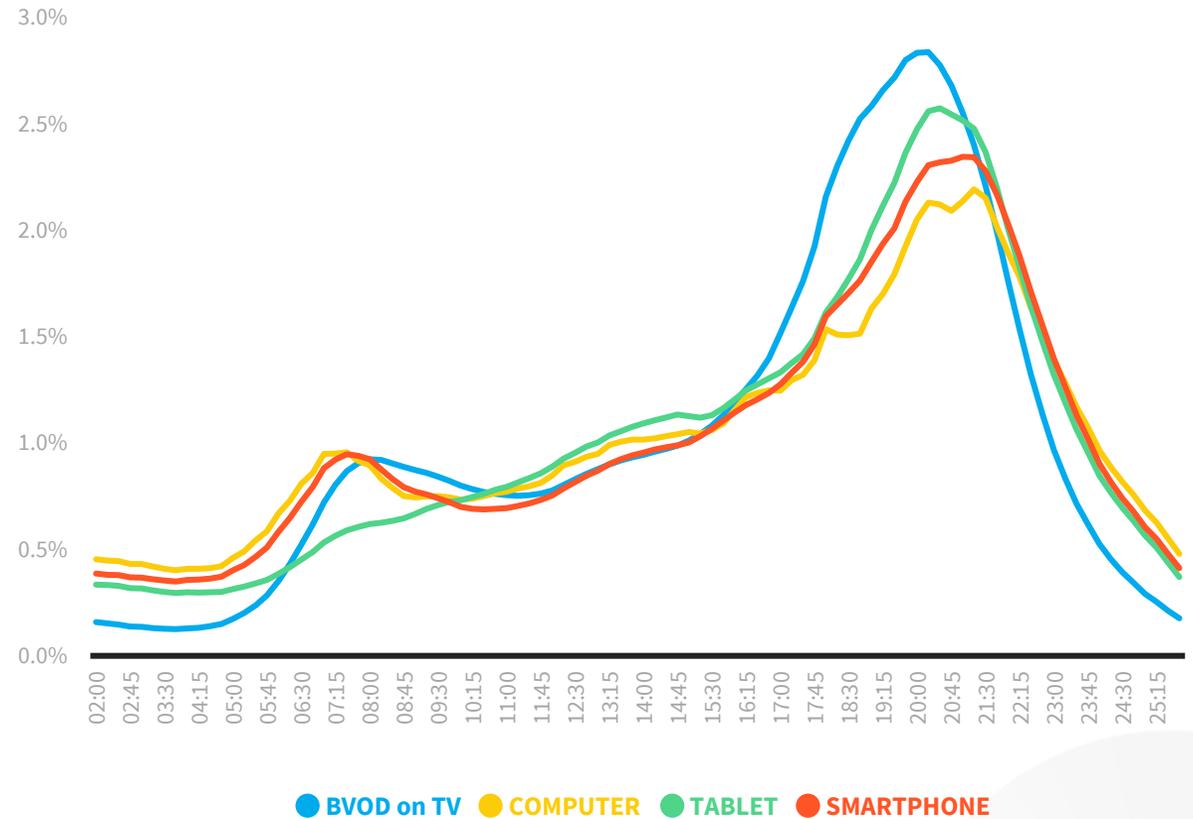
# WHEN WE WATCH

## BVOD viewing shifts by screen type across the day

National Audience Shape of the Day



BVOD: Percentage of Device Minutes Across the Day



Source: OzTAM VOZ National FTA, When Watched, Total People Average of Weeks 27-52 2025 , Broadcast TV and BVOD Audience across the day, BVOD percentage across the day of Total Minutes by device.

VOZ Total TV is the currency for Broadcast TV and BVOD. 16 It does not include viewing to SVOD and AVOD.



# 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.

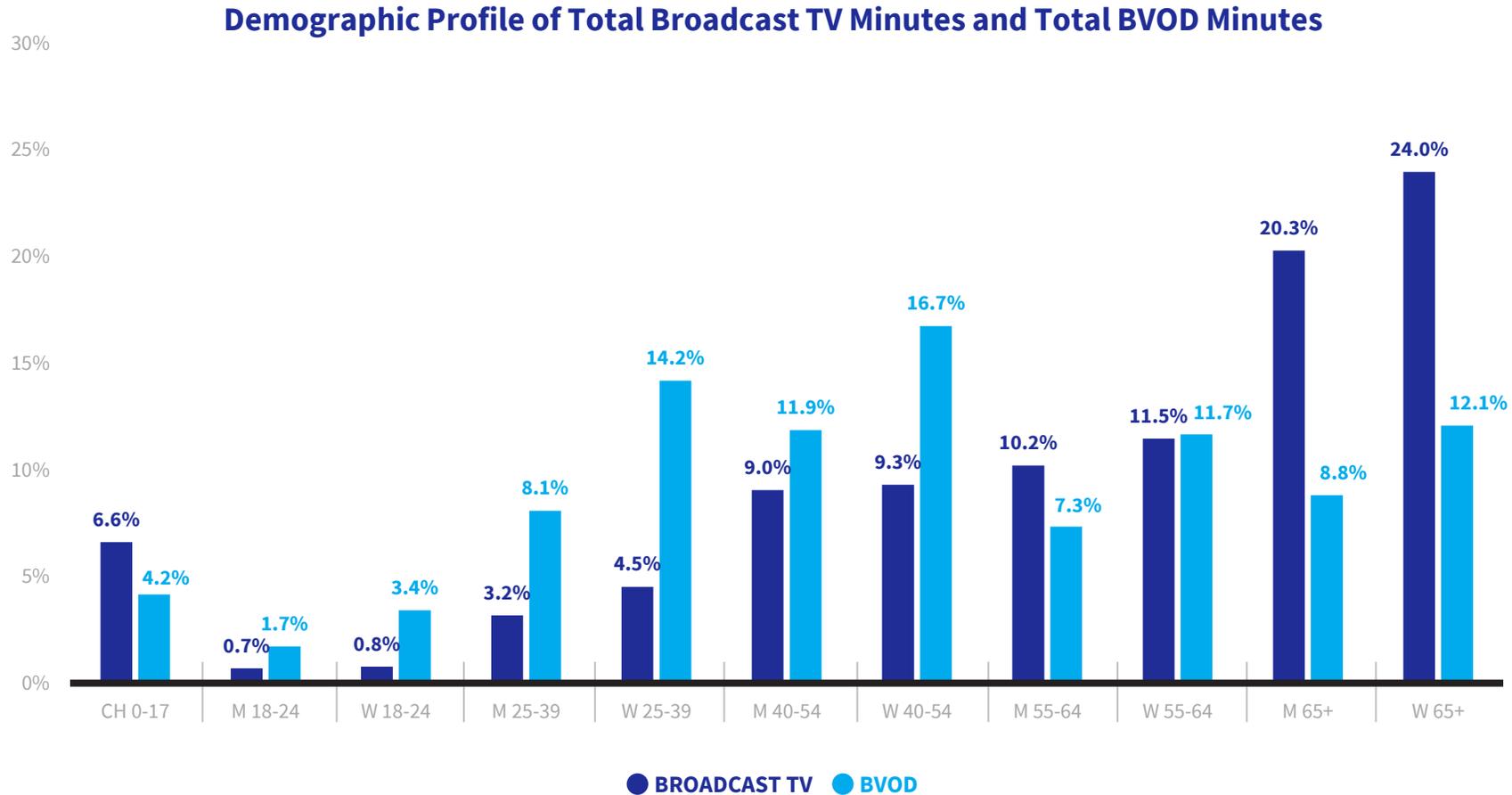
## HIGHLIGHTS

- Viewing to either broadcast TV or BVOD skews more to Women 18+ (broadcast TV 53.1% and BVOD 58.1%) than Men 18+ (46.4% and 39.4% respectively).
- BVOD viewing skews younger, with 25-54s accounting for approximately half of all BVOD minutes.
- Australians spent over 41 hours per month on average viewing broadcast TV or BVOD in H2 2025. The majority of time spent viewing occurs on TV sets.
- In other screen usage, computer is the next preferred device for Total Men but has the highest usage amongst People 55+ and Grocery Shoppers 18+. Tablet viewing accounted for the smallest share of time across most demographics (55+ had the highest minutes for tablet viewing), while smartphone viewing was higher with Total Women and People 25-54.



# BVOD ATTRACTS UNDER 55s BACK TO FTA TV

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



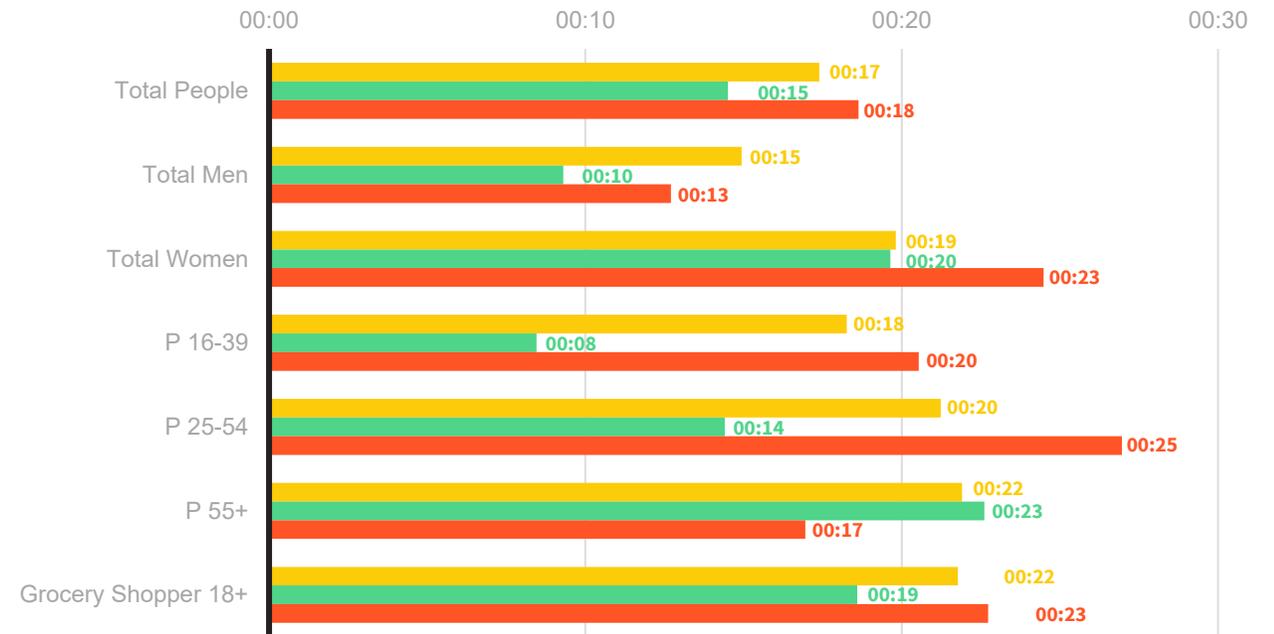
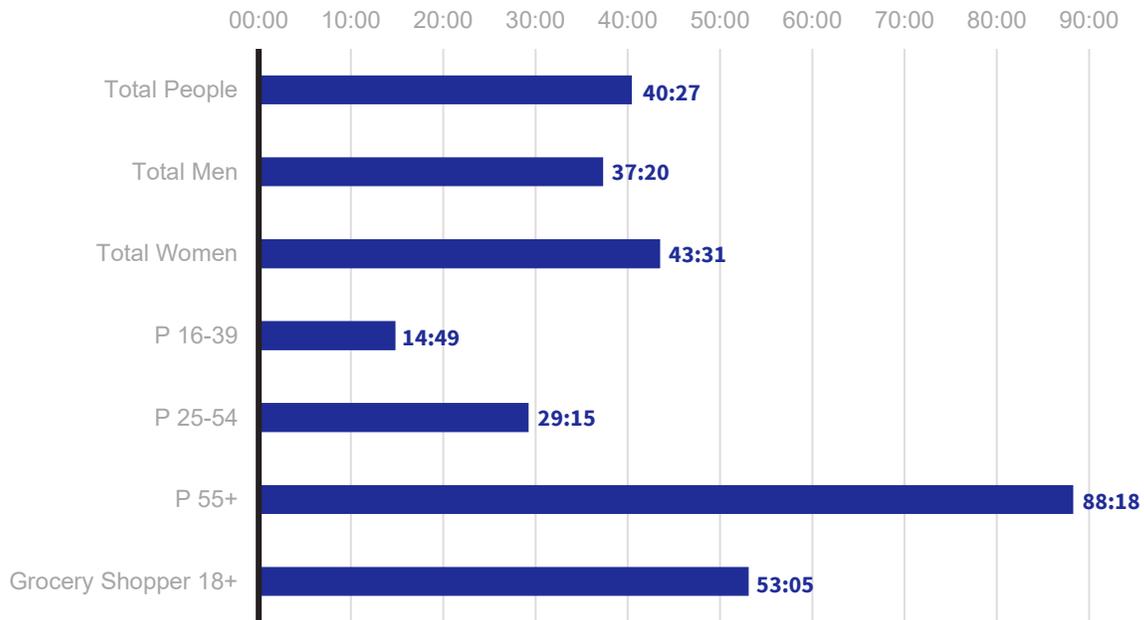
Source: OzTAM VOZ National FTA Total TV, When Watched, Weeks 27-52 2025, Total Minutes by Demo as a percentage of viewing for the platform, 2am to 2am.

VOZ Total TV is the currency for Broadcast TV and BVOD. 19  
It does not include viewing to SVOD and AVOD.

# 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

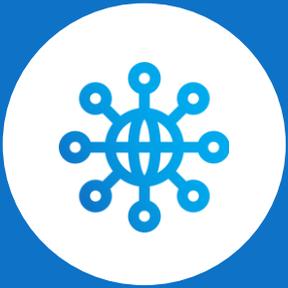


● TV SET ● COMPUTER ● TABLET ● SMARTPHONE



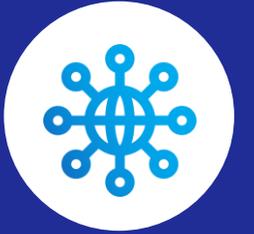
Source: OzTAM VOZ National FTA, When Watched, Average Monthly Time Spent Viewing (Universe) to Screen Type HH:MM, July-December 2025, 2am to 2am.

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)**

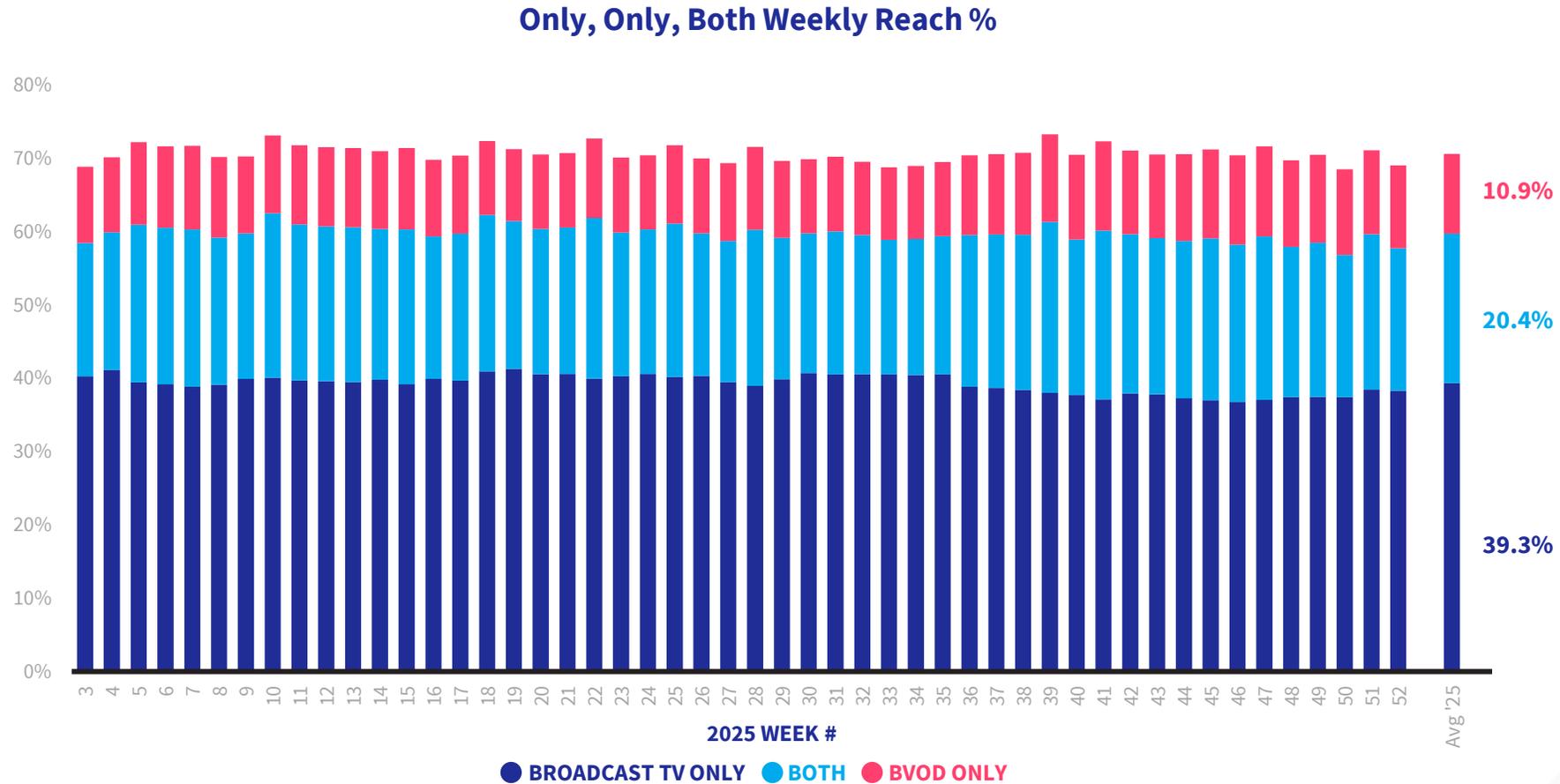
Only, Only, Both reach is analysed by time periods, demographics and how people move between these categories as reach accumulates over a 28-day period.

## HIGHLIGHTS

- Broadcast TV and BVOD together reached on average 19.4 million or 70.4% of Australians weekly which builds to 24.1 million or 87.2% monthly in H2. This is even higher for Grocery Shoppers 18+ with an average weekly reach of 78.1% building to 92.6% across a month.
- Sunday recorded the highest combined daily reach (45.1%). Tuesdays recorded the highest BVOD Only reach (7.7%).
- Weekly vs monthly reach analysis highlights the transition of viewing from broadcast TV Only to Both (broadcast TV and BVOD) over time. People 55+ have the highest reach to Both (56.6%) across an average month while 16-39s build the highest BVOD Only reach across a week (16.3%) and across a month (19.2%) on average.
- Analysis of how Only, Only, Both reach builds by demographic across 28 days can give insight into campaign planning. Observations from our latest analysis shows:
  - Women 18+ build reach more quickly than Men 18+ and gain more incremental reach (BVOD Only) across the 28-day period (15.1% vs 12.4%).
  - Grocery Shoppers 18+ follow a very similar pattern to Women 18+ with a slightly lower 28-day incremental BVOD Only reach of 13.6% reflecting the mix of men and women in this demographic.

# IN 2025, BROADCAST TV AND BVOD REACHES 70.6% OF AUSTRALIANS EACH WEEK

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



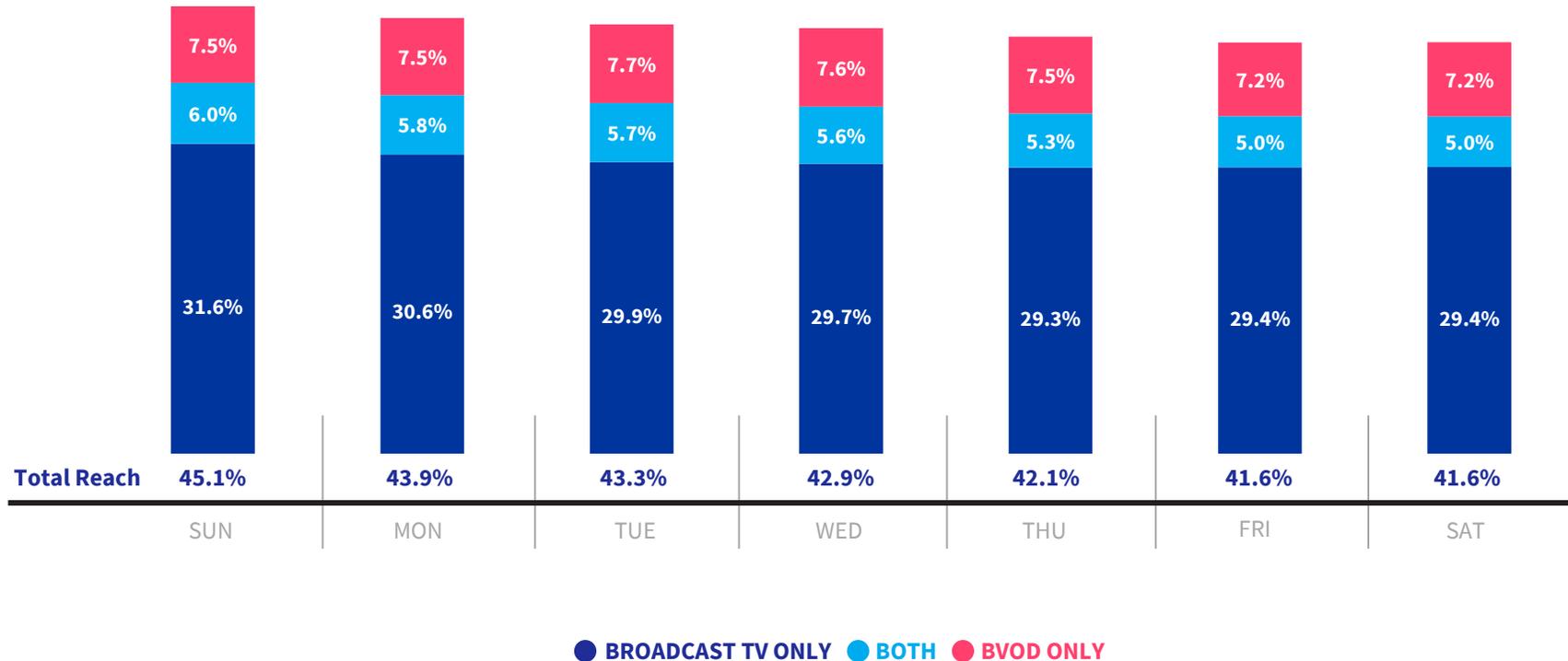
Source: OzTAM VOZ National FTA, When Watched, Total People Only, Only, Both Reach, Weeks 1-52 2025  
Viewing Threshold >60 seconds Broadcast TV and >15 seconds BVOD, 2am to 2am

VOZ Total TV is the currency for Broadcast TV and BVOD. 23  
It does not include viewing to SVOD and AVOD.

# BROADCAST TV AND BVOD REACH ACROSS THE WEEK

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

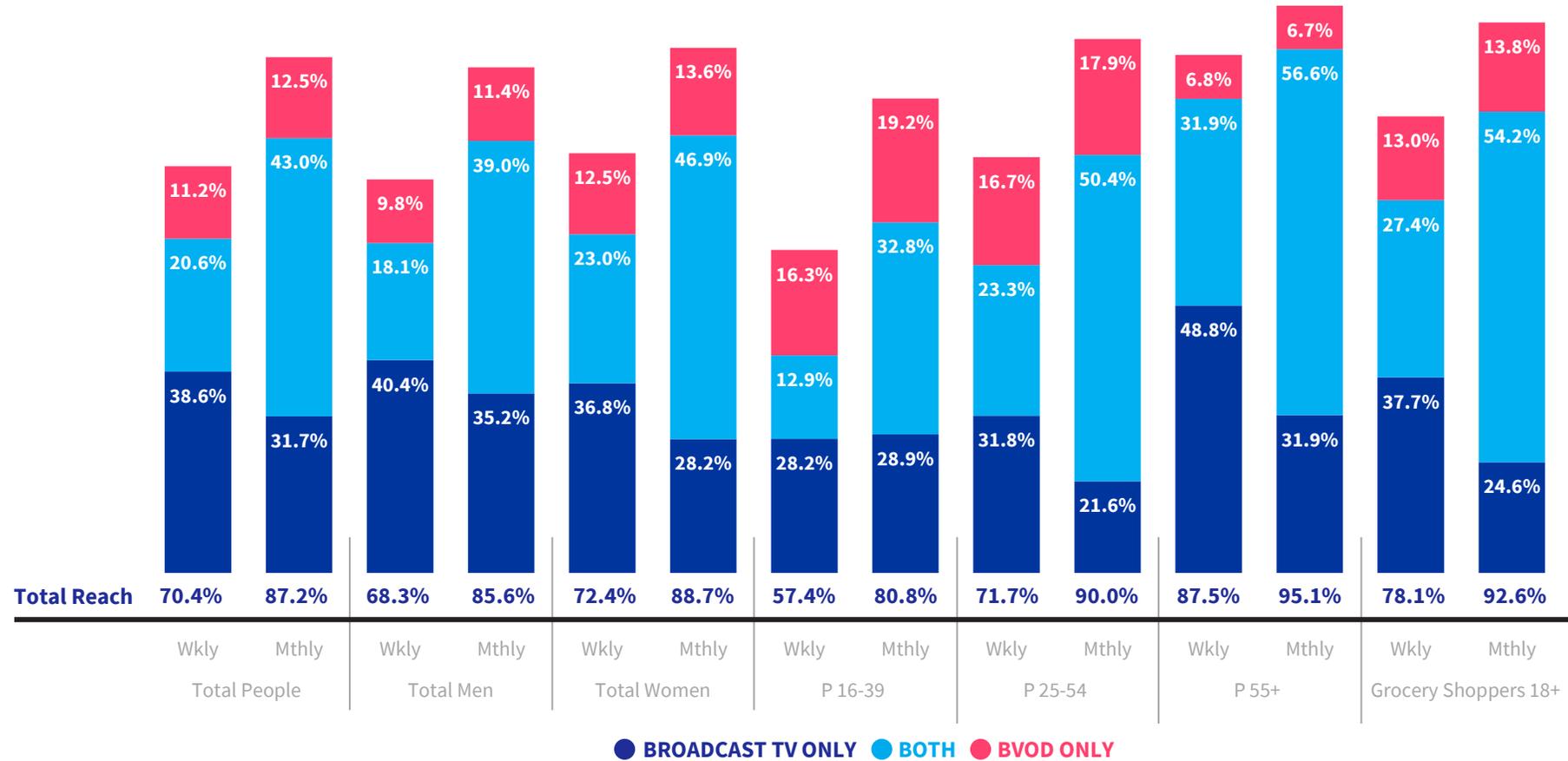
Average Daily Only, Only, Both Reach % by Day of Week



# BVOD ONLY REACH BUILDS ACROSS A MONTH IN H2 2025

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

Average Weekly vs Monthly Only, Only, Both Reach %



Source: OzTAM VOZ National FTA, When Watched, Only, Only, Both Reach, Average of weeks and calendar months across wks 27-52 2025, Viewing Threshold >60 seconds Broadcast TV and >15 seconds BVOD, 2am to 2am.

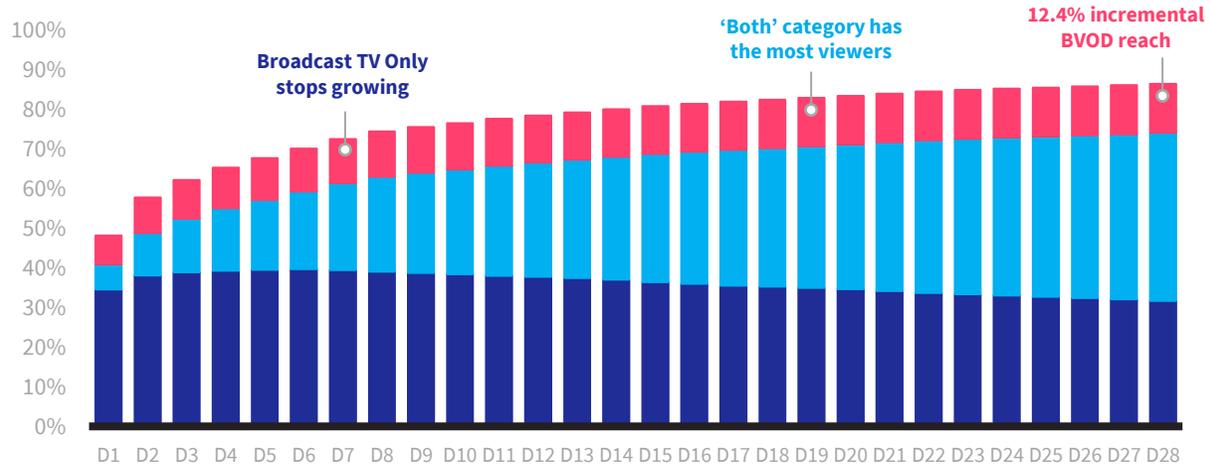
VOZ Total TV is the currency for Broadcast TV and BVOD. 25  
It does not include viewing to SVOD and AVOD.

# HOW TOTAL TV REACH BUILDS ACROSS 28 DAYS

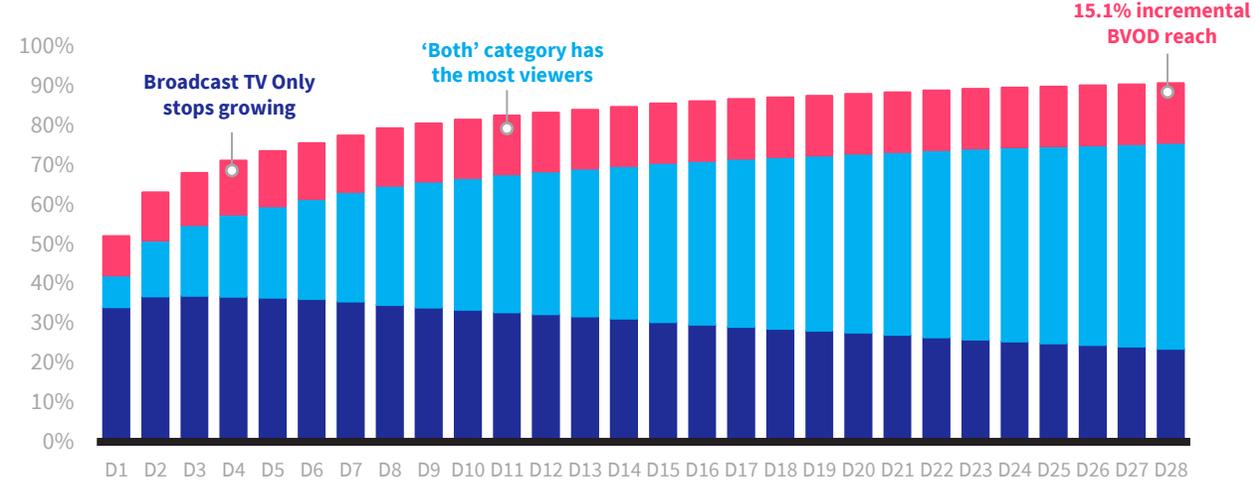
Men 18+ remain with broadcast TV for longer while Women 18+ build the most incremental BVOD reach.

Only, Only, Both Reach % Build Across Days

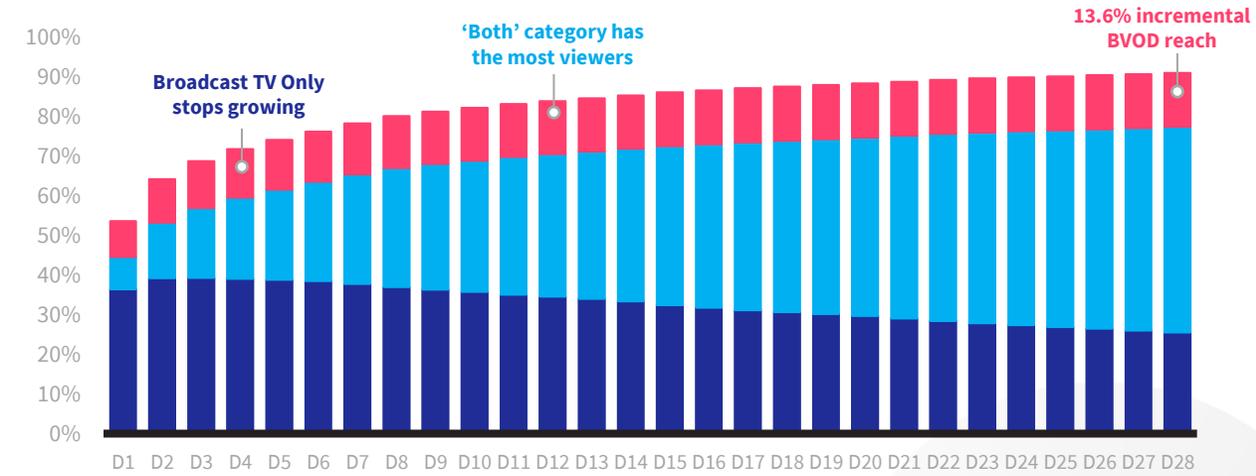
## Men 18+



## Women 18+



## Grocery Shoppers 18+



● BROADCAST TV ONLY ● BOTH ● BVOD ONLY



Source: OzTAM VOZ National FTA, When Watched, Only, Only, Both Reach, Average of Wks 27-30, 31-34 & 35-38 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.

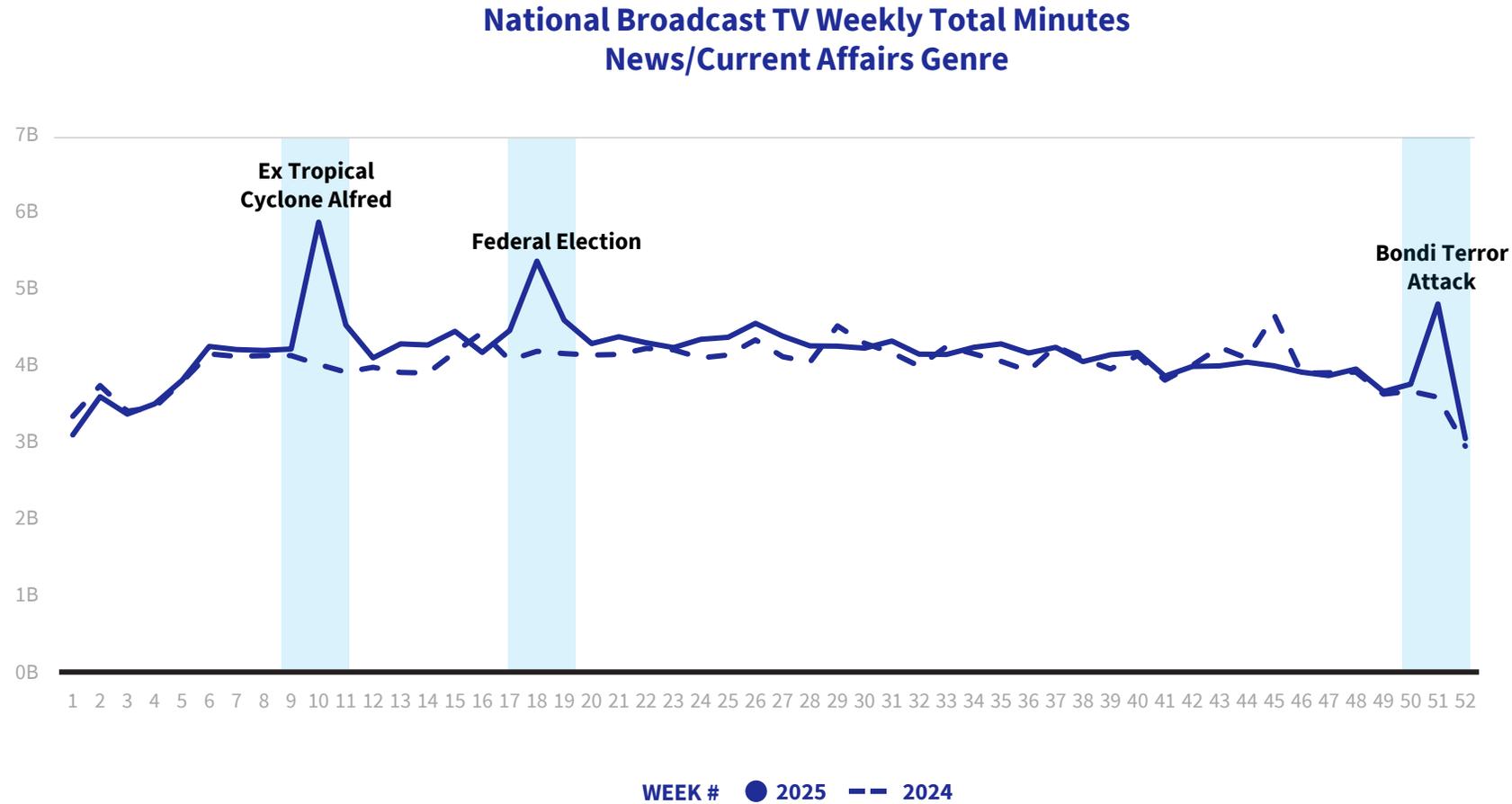


## HIGHLIGHTS

- Increased News and Current Affairs viewing during major events continued to draw large audiences to broadcast TV across 2025.
- Content preferences differ between broadcast TV and BVOD:
  - News and Current Affairs accounts for the largest share of broadcast TV minutes (31.3%), while Drama accounts for the largest share of BVOD minutes (25.7%). Sport accounts for similar shares of viewing across broadcast TV (9.6%) and BVOD (9.1%).
- Whether programming is viewed live or on demand also varies by genre. News and Current Affairs are predominantly viewed live (94.5%), while almost half of Children's content (47.0%) is viewed on demand.
- Broadcast TV drives reach across all genres, with BVOD extending reach particularly for Drama and Children's programming.

# BROADCAST TV REMAINS THE TRUSTED SOURCE FOR MAJOR NEWS EVENTS

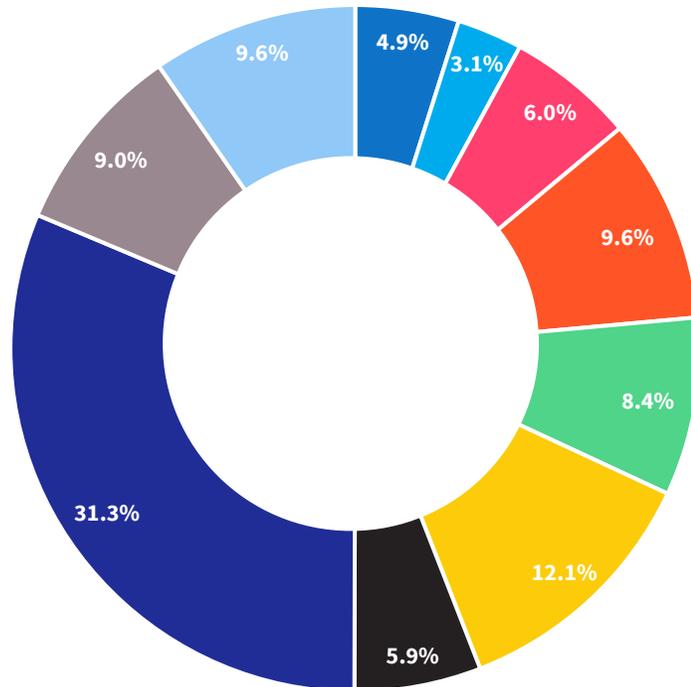
## Evidenced by the consumption to News/Current Affairs in key news weeks



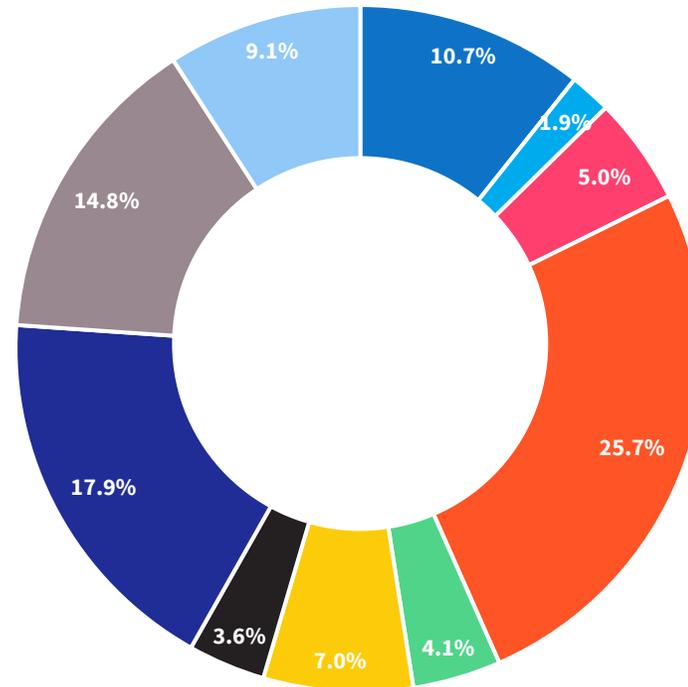
# CONTENT IS VIEWED DIFFERENTLY BY PLATFORM

News/Current Affairs dominates broadcast TV; Drama remains strongest for BVOD

**Broadcast TV**  
Proportion of Minutes Viewed



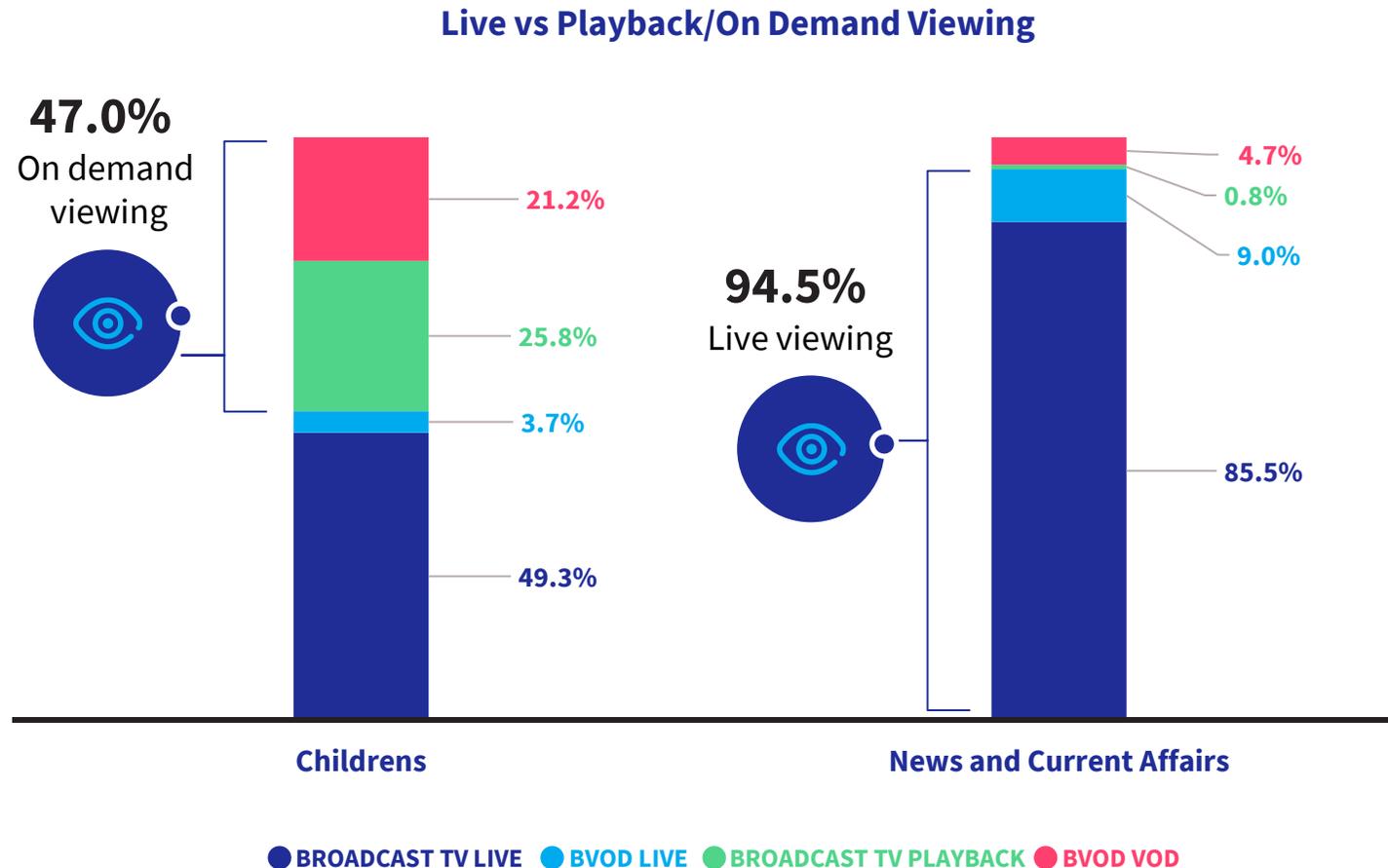
**BVOD**  
Proportion of Minutes Viewed



- 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

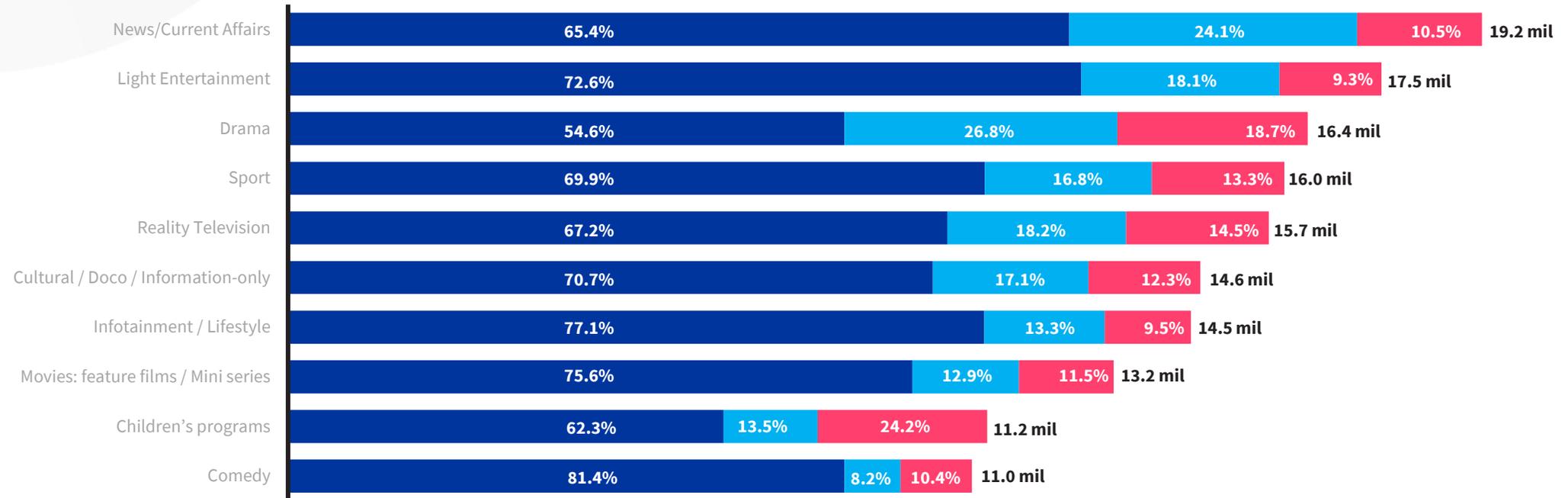
47.0% of viewing to Children's content is on demand; 94.5% of News viewing is live



# ONLY, ONLY, BOTH REACH PROPORTIONS DIFFER BY GENRE

Broadcast TV drives reach across genres; BVOD extends reach, particularly for Drama and Children's programs

Average Monthly Only, Only, Both Reach % by Genre



● BROADCAST TV ONLY ● BOTH ● BVOD ONLY

# NOTES

The analysis in this 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 June 2025, Streamscape is OzTAM's 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.**

The quarterly report now covers the full year 2025 with the latest Q4 release expanding to include viewing across in-home connected devices, including computers, tablets and smartphones alongside viewing to TV sets.

This latest report reveals that the majority of Total People in-home video viewing occurs on TV sets (85.3% of total minutes), with Total TV (broadcast TV and BVOD) accounting for 62.1% of all minutes viewed. Broadcast TV alone accounted for 52.3%, BVOD 9.8% and Digital Video 37.9%.

Available to paid subscribers, Streamscape provides a monthly snapshot by quarter of video viewing, across key demographics. The current delivery of a static report is expected to transition to a digital, interactive dashboard in early 2026, enabling deeper analysis, improved cross-referencing and more efficient extraction of data for industry planning and trading tools.

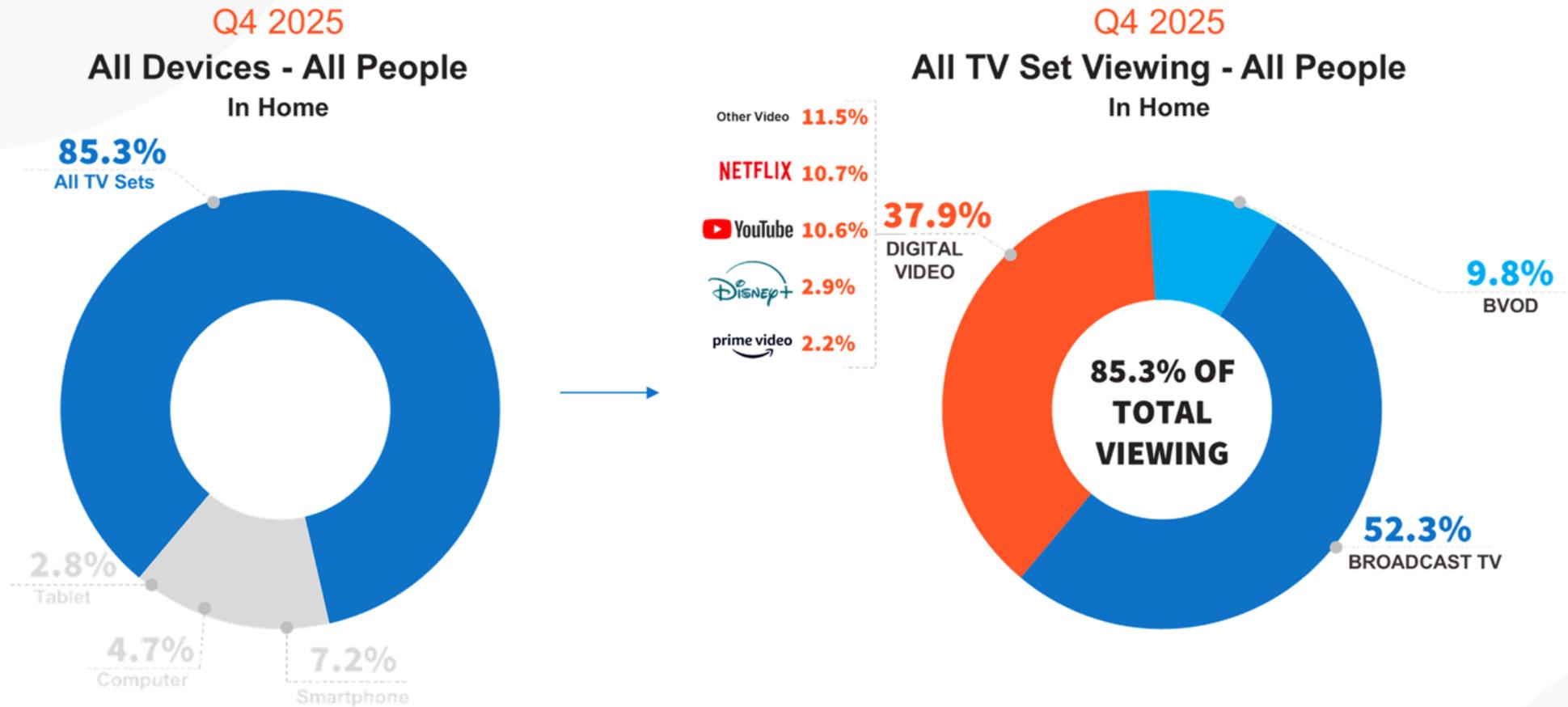
For more information on subscribing to the Streamscape report contact [info@oztam.com.au](mailto:info@oztam.com.au)



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# THE TOTAL VIDEO VIEWING LANDSCAPE

TV sets dominate video viewing, with Total TV accounting for 62.1% of all minutes viewed.



# QUESTIONS ?



More information on the VOZ Total TV database is available at [virtualoz.com.au/resources/](https://virtualoz.com.au/resources/)

Or get in touch via [info@oztam.com.au](mailto:info@oztam.com.au)