

Australia Streaming Market Outlook Report - Market Size, Share Analysis and Forecast (2025-2034)

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Report description:

Australia Streaming Market Trends The growth of the Australia streaming market is driven by its numerous advantages, such as access to global content, convenience, and cost-effectiveness. Users can enjoy a broad range of international and local content on-demand at flexible subscription rates, without the limitations of traditional cable TV. The wide variety of genres and multi-device accessibility boosts customer satisfaction. In January 2025, EssenceMediacom was appointed by Warner Bros. Discovery (WBD) to oversee the launch of the Max streaming service in Australia. The agency managed the strategy, planning, execution, and performance optimisation. Max, aiming to rival Netflix and Stan, featured a rich content library, including HBO, Harry Potter, and the DC Universe. The potential opportunities in the Australia streaming market are strengthened as streaming platforms provide customised subscription plans that suit individual preferences. They produce exclusive original content and provide an ad-free experience, increasing user satisfaction. Global partnerships bring international content, while investments in local production support the Australian entertainment industry. These offerings make streaming services more attractive to Australian consumers.

Australia Streaming Market Growth The demand for the Australia streaming market is driven by the availability of cutting-edge technology, such as 4K and HDR, providing a premium viewing experience. Interactive features, like language tracks and subtitles, offer flexibility, while personalised recommendations enhance content discovery. Flexible subscriptions, including multi-user plans and easy cancellations, also add to the appeal. In October 2024, Crunchyroll, Sony's anime streaming service, was launched in Australia as an add-on to Prime Video, offering two membership tiers: Fan-level (AUD 10.99) and Mega Fan (AUD 13.99). Mega Fan subscribers can enjoy offline viewing of Crunchyroll's extensive 24,000-hour content library.

The Australia streaming market revenue is impacted by enhanced customer experiences, offering user-friendly interfaces, 24/7 availability, and global accessibility. Australians can access their preferred content while traveling abroad, benefiting from a broad range of genres. Affordable, legal access to content helps reduce piracy, fostering a legitimate entertainment ecosystem.

Australia Streaming Market Insights Australia's gaming industry, generating USD 226.5 million in 2021 as per the Australian Government, significantly benefits the streaming market. The expanding gaming sector drives demand for streaming platforms offering eSports, game streaming, and on-demand videos, increasing engagement, and promoting growth within the overall market. According to ACMA, Australia's internet penetration reached 94.9% in December 2022, which supports the growth

of streaming services. With most Australians having access to high-speed internet, streaming platforms can connect with a broader audience, providing easy access to video, music, and gaming content across devices, boosting market demand. Industry reports show digital activity rose 8.6% (USD 10.9 billion) from 2012-2022, contributing to the increased use of streaming services. As digital consumption expands, Australians increasingly turn to streaming for entertainment, driving the uptake of on-demand video services, increasing subscriptions, and intensifying competition among providers. Industry News September 2024 Warner Bros Discovery confirmed that Max, previously HBO Max, would launch in Australia in the first half of 2025. At the APOS conference in Bali, the APAC president announced the direct service, signalling a shift in their long-standing partnership with Foxtel, aiming for long-term collaboration in the Australian market. August 2024 Creative Content Australia (CCA) launched an anti-piracy campaign, supported by Australia's media industry, to raise awareness about the risks of illegal streaming. The campaign highlighted the link between piracy and cybercrime, revealing that users of illegal sites were more likely to experience identity theft and fraud.

Australia Streaming Market Drivers

Growth of Local Content Production

The Australia streaming market development has been enhanced by a significant increase in local content production. Platforms such as Netflix, Stan, and Amazon Prime are dedicating more resources to Australian-made films and TV shows. This trend supports local talent, aligns with regional cultural values, and appeals to Australian audiences. The Australian government is also providing backing for the entertainment sector, stimulating further investment. In October 2022, Dean Devlin's Electric Entertainment launched its AVOD channel, ElectricNow, in Australia, offering 450 hours of content, including original productions like "The Outpost" and "The Librarians," as well as films like "Say My Name" and "The Dig." The platform also featured Electric's podcast network, Electric Surge.

Rise of Subscription Video on Demand (SVOD)

Subscription Video on Demand (SVOD) services are significantly influencing the Australian streaming market dynamics and trends, with platforms like Netflix, Stan, Disney+, and Amazon Prime dominating the sector. SVOD's popularity is driven by its convenience, extensive content libraries, and on-demand viewing flexibility. Consumers are increasingly moving away from traditional TV subscriptions in favour of more affordable and accessible streaming options, which offer both international and local content, appealing to a wide range of audiences. The rise of ad-free, on-demand entertainment caters to the growing demand for personalised viewing experiences. According to ACMA, five SVOD providers—Amazon Prime Video, Disney+, Netflix, Paramount+, and Stan—spent USD 341.5 million on 1,527 Australian programs in the 2023-24 financial year.

Opportunities in the Australia Streaming Market

Sports streaming has become a significant trend in the Australia streaming market, with more consumers opting for digital platforms to watch live events. Services like Kayo Sports, Foxtel, and 7plus are capitalising on this shift, offering live sports coverage. The convenience of watching on smartphones, tablets, and smart TVs appeals to younger, tech-savvy audiences who prefer streaming over traditional TV subscriptions. The growth of sports streaming is driven by the demand for real-time content and interactive features. In October 2023, Cricket Australia launched a free 24/7 streaming channel, Cricket Gold, showcasing classic moments from Australian cricket history. The service, available on Samsung TV Plus, leverages over 12,000 hours of archival footage, digitised and preserved over the past 40 years, offering fans a unique viewing experience.

Market Restraints

The Australia streaming market faces several key challenges. High subscription costs across multiple platforms create a financial burden, particularly for households with multiple subscriptions. Additionally, inconsistent internet speeds, especially in rural areas, hinder the quality of streaming. Content licensing restrictions limit access to desired shows, frustrating consumers. Piracy remains a significant issue, undermining revenue and growth for legitimate services.

Market saturation intensifies competition, making it difficult for new players to establish a presence. Regulatory complexities and taxation concerns also add to operational challenges. Fragmented content libraries lead to subscription fatigue, while privacy and data protection concerns may erode consumer trust, affecting market expansion.

"Australia Streaming Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

- Market Breakup by Type- Live Video Streaming- Non-Linear Video Streaming (Video on Demand)
- Market Breakup by Solution- Internet Protocol TV- Over-the-Top (OTT)- Pay-TV
- Market Breakup by Platform- Gaming Consoles- Laptops & Desktops- Smartphones & Tablets- Smart TV
- Market Breakup by Service- Consulting- Managed Services- Training & Support
- Market Breakup by Revenue Model- Advertising- Rental- Subscription
- Market Breakup by Deployment - On-Premises- Cloud
- Market Breakup by End User - Enterprise- Consumer (Personal)
- Market Breakup by Region - New South Wales- Victoria- Queensland- Australian Capital Territory- Western Australia- Others

Australia Streaming Market Share

Market Analysis by Type

According to the Australia streaming market analysis, live video streaming is a key driver, offering viewers access to real-time content. This enhances engagement, particularly for live sports, news, and entertainment, while meeting the growing demand for immediate access. The

popularity of live streaming also fosters social interaction, enabling audiences to connect with hosts and other viewers during broadcasts, increasing overall participation. The Australia streaming market has also benefitted from the rise of non-linear video streaming, or Video on Demand (VOD). VOD platforms like Netflix and Stan provide Australians with the flexibility to watch content at their convenience. These platforms offer a diverse selection of films, series, and documentaries, ensuring an enriching viewing experience through tailored recommendations that cater to various tastes. Market Analysis by Deployment According to the Australia streaming market report, on-premises streaming solutions offer enhanced control over content delivery and security. They enable businesses to manage infrastructure, ensuring minimal latency and high-quality video. This model suits organisations focused on data privacy, customisation, and compliance with local regulations. In September 2024, Confluent launched an OEM program targeting MSPs, CSPs, and ISVs, allowing them to embed and redistribute its real-time data streaming platform. Built on Apache Kafka and Apache Flink, the platform enables businesses to quickly bring real-time products to market and monetise streaming with minimal risk. The demand for the Australia streaming market is driven by cloud-based streaming services, which provide scalable and cost-efficient solutions, allowing users to access content from any location. These services reduce infrastructure costs, provide seamless global content delivery, automatic updates, and greater reliability. The cloud model supports the increasing demand for high-quality video streaming and enhances audience reach across devices. In December 2024, ABC Commercial partnered with Amagi to launch a suite of Free Ad-supported Streaming TV (FAST) channels. This initiative demonstrates ABC's commitment to adapting to the evolving media landscape, with plans to expand into Europe, Asia, and other English-speaking regions. Market Analysis by End User In the Australia streaming market, opportunities are increasing as enterprise solutions provide businesses with scalable, secure platforms for high-quality content delivery. They enable efficient internal or external distribution, enhance collaboration, and support real-time data streaming, promoting business growth. In September 2024, Paramount Australia revealed its Paramount Connect launch for January 2025, a new advertising technology uniting BVOD, Paramount+, and 60+ FAST channels, with Phase 2 incorporating linear TV by 2025. The growth of the Australia streaming market is driven by consumer streaming services that offer flexibility and convenience, allowing users to access a wide range of on-demand content, such as movies, series, and live events. Personalised recommendations improve user experience, and subscription models provide affordable entertainment, catering to various viewing preferences across multiple devices. Netflix is the most popular service in Australia, followed by Amazon Prime Video and Disney+. Among local platforms, Stan (owned by Nine Entertainment) leads, with Foxtel Now also being a prominent choice. Australia Streaming Market Regional Insights New South Wales Streaming Market Overview New South Wales benefits from a strong, competitive streaming market, supported by high internet connectivity and a tech-savvy population. According to the Australian Bureau of Statistics, by 2022, 90% of households in New South Wales had internet access, with urban areas exhibiting higher connectivity rates than rural regions. Consumers have access to a wide variety of global and local content, with diverse platforms meeting the demand for flexible, on-demand viewing across multiple devices. Queensland Streaming Market Trends Queensland benefits from an increasing trend towards personalised streaming services, with growing consumer preference for on-demand content. The rise of mobile and smart TV usage allows for flexible viewing experiences. This dynamic market supports diverse content, providing entertainment that caters to varied regional interests and consumer needs. Qplus.tv is the OTT streaming platform of Queensland Rugby League, serving as the primary platform for broadcasting and livestreaming QRL content. Western Australia Streaming Market Dynamics Western Australia benefits from the region's increasing adoption of digital streaming platforms. With high internet penetration and a growing demand for varied content, consumers can enjoy flexible access to movies, TV shows, and live events. This trend enhances the entertainment landscape, meeting diverse audience preferences across devices. According to the Government of Western Australia, the state ranks fourth in digital inclusion among Australian states and territories. The state government is working to improve digital participation through initiatives focused on connectivity, affordability, and skills development. Competitive Landscape The Australia streaming market key players specialise in providing networking hardware, software, and telecommunications solutions that enhance connectivity, security, and collaboration for businesses, governments, and service providers. Their product offerings include routers, switches, cybersecurity solutions, collaboration tools, and cloud computing technologies, which support both small and large enterprises. These companies focus on digital transformation, assisting organisations in adopting cloud services, network automation, and Internet-of-Things (IoT) technologies. Key Industry Players Akamai Technologies: Founded in 1998, Akamai Technologies is a leading global provider of content delivery network (CDN) services, cloud security, and cloud computing solutions. Headquartered in Cambridge, Massachusetts, the company focuses

on helping businesses improve the performance, security, and scalability of their online services. Amazon Web Services, Inc.: Amazon Web Services (AWS), established in 2006, is a subsidiary of Amazon that offers on-demand cloud computing services to individuals, companies, and governments. Headquartered in Seattle, Washington, AWS provides a broad set of infrastructure services such as computing power, storage, and networking, revolutionising the cloud computing industry. Apple Inc.: Apple Inc. was founded in 1976 and is headquartered in Cupertino, California. Renowned for its innovation, the company designs and manufactures consumer electronics, software, and online services. Apple is best known for its flagship products such as the iPhone, iPad, and Mac computers, alongside services like iCloud and Apple Music. Cisco Systems, Inc.: Founded in 1984 and headquartered in San Jose, California, Cisco Systems is a global leader in networking technology. The company provides a wide range of hardware, software, and telecommunications equipment that powers the internet and enables businesses to improve connectivity, security, and collaboration. Other key players in the Australia Streaming market report are Kaltura, Inc., Netflix, Inc, IBM Corporation, Wowza Media Systems, LLC, and Hulu, LLC among others. Recent Development April 2024 Australia's first entertainment search and guide software, Searchr.TV launched. The app aggregates content from five free-to-air and ten paid streaming providers, including movies, TV shows, sports, and news. It also integrates breaking news from 16 global publishers and is available on various devices, including TVs. January 2024 Sky News Australia launched a subscription streaming service for USD 5 per month, offering access to four news channels: Sky News, Sky News Extra, Sky News Weather, and FOX SPORTS News. The service feature's top opinion shows, live news, sports, weather updates, and expert insights, alongside a new daily newsletter.

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