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Journal of Media & Cultural Studies

ISSN: 1030-4312 (Print) 1469-3666 (Online) Journal homepage: www.tandfonline.com/journals/ccon20

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To cite this article: Ashleigh Dharmawardhana, Ramon Lobato & Alexa Scarlata (2025) A streaming generation? Interrogating assumptions about young-adult audiences, content discovery, and engagement with broadcast television, Continuum, 39:6, 898-910, DOI: 10.1080/10304312.2025.2551258

To link to this article: https://doi.org/10.1080/10304312.2025.2551258

Published online: 28 Aug 2025.

CONTINUUM: JOURNAL OF MEDIA & CULTURAL STUDIES
2025, VOL. 39, NO. 6, 898–910
https://doi.org/10.1080/10304312.2025.2551258

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A streaming generation? Interrogating assumptions about young-adult audiences, content discovery, and engagement with broadcast television

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ABSTRACT

With the rise of subscription video-on-demand (SVOD), Australian broadcasters have struggled to attract younger audiences. Younger adult viewers, aged 20 to 30, are often assumed to have abandoned free-to-air television entirely. This article adds a much-needed qualitative layer to current research about young-adult viewing practices. We present findings from a video interview study that explored the habits, routines, and discovery practices of a sample of twenty-something Australians. Two questions are foregrounded in our analysis: how, and to what extent, participants combine broadcast and streaming television in their everyday viewing; and how they discover content on SVODs and broadcast video-on-demand (BVOD) platforms. While confirming the general pattern of disengagement from broadcast television, our findings challenge the assumption that young adults are exclusively a 'streaming generation', as many participants consume broadcast television through co-viewing and enforced viewing. However, we also find that participants' discovery practices are strongly oriented towards SVODs, which exacerbates the generational drift away from broadcast television.

ARTICLE HISTORY
Received 27 March 2025
Accepted 11 August 2025

KEYWORDS
Television audiences; broadcast television; content discovery; BVOD (broadcaster video-on-demand); SVOD (subscription video-on-demand); Netflix; interface

The last two decades have been a time of great uncertainty for Australian television, with the free-to-air TV networks increasingly challenged by SVOD (subscription video-on-demand) services including Netflix, Disney+, and Prime Video. Free-to-air networks have experienced a substantial decline in their viewer base along with decreasing revenues for the commercial operators, Seven, Nine, and Ten: their share of total Australian advertising spend halved between 2006 and 2022, falling from 43% to 17%, as advertisers moved their spending online (Lotz et al. 2024, 23). While all the networks have invested heavily in their broadcast video-on-demand (BVOD) platforms – iView (ABC), SBS OnDemand, 7Plus, 9Now, and 10Play – BVOD viewing, while growing, is far outstripped by SVOD viewing. According to the Australian Communications and Media Authority (ACMA 2024a), the

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average Australian adult spends 6.1 hours a week watching SVODs, compared to 2.2 hours for BVODs.

An important demographic here is the young-adult audience, aged between 20 and 30. This cohort falls within the generation broadly defined as Generation Z – viewers born between 1995 and 2010 (Oztam 2012) – although we prefer the term 'young-adult' to that imprecise and contested label.[1] The young-adult cohort is unique because it is the first generation to have grown up with digital television, DVDs, Foxtel, mobile video, advertising video-on-demand (AVOD) platforms, and –since the mid-2010s – SVODs. Accessing content on-demand is both a norm and an expectation for these viewers. It is therefore unsurprising that young-adult audiences are known to watch significantly less broadcast television than other age groups: 52% of Australians aged 18–24 and 58% of those aged 25–34 watched broadcast TV in the last 7 days, as compared to more than 80% of those over 55 (Social Research Centre 2024, 71). Yet the fact that young-adult viewers still watch *some* broadcast television challenges the assumption that this cohort has abandoned free-to-air TV entirely. The reality is more complex, suggesting a hybrid viewing norm that integrates SVOD, AVOD and broadcast content in different amounts and for different purposes.

A great deal has been written recently about young audiences and their viewing habits (ACMA 2024a; Balanzategui, Baker, and Clift 2024; Lotz and McCutcheon 2023a, 2023b; Social Research Centre 2024). Many of the most well-known contributions are survey-based studies or market research that explore what people watch[2] But surveys, while providing a useful picture of demographic differences, cannot fully explain the underlying drivers of viewing choices. A qualitative approach, in contrast, lets viewers explain their viewing practices in their own words. This approach has been used powerfully in classical television audience ethnographies (Lull 2014; Morley 1986) as well as in recent work on streaming television (Balanzategui, Baker, and Clift 2024; Johnson, Dempsey, and Hills 2020; Potter et al. 2024), which explores how different forms of television are combined in everyday viewing. Scholars in the UK (Johnson, Dempsey, and Hills 2020), Europe (Esser and Steemers 2024), Greece (Podara et al. 2021) and Scandinavia (Jensen and Mitric 2023; Jensen, Redvall, and Christensen 2023) have also used audience research methods to study youth and young-adult engagement with broadcasting television, finding a similar generational drift away from broadcast television, but also moving beyond a simple narrative of broadcaster decline, crisis or substitution.

Building on these debates, our study adds a much-needed qualitative layer to the current conversation about young-adult television audiences in Australia. We present findings from a video interview study that explored viewing habits, routines, and discovery practices (i.e. how viewers find content to watch). Two questions are foregrounded in our analysis: how, and to what extent, young-adult viewers *combine* broadcast and streaming television in their everyday viewing; and how they *discover* content on BVODs and SVODs. While confirming the general pattern of disengagement from broadcast television, our findings challenge the common assumption that young adults are a 'streaming generation' who have entirely abandoned linear broadcast television. We find instead that young-adult viewers are still watching a substantial amount of broadcast television through enforced viewing, family television rituals, and via YouTube; by implication, broadcast television may play a larger role in young-adult media worlds than is commonly assumed. However, we also find that participants' content discovery practices

are strongly oriented towards SVODs, which exacerbates the already formidable challenges faced by broadcasters in retaining young-adult audiences. Together, these findings speak to the complexity of viewing practices in a multiplatform television ecology, which are inadequately captured by generational caricatures, and reflect the need within audience research for 'a far greater empirical sense of audiences' situated discovery practices' (Johnson, Hills, and Dempsey 2023, 3).

Television audience research in the platform age

Why does young-adult viewing matter for television audience research? The importance of this topic extends beyond questions of industry strategy and advertising revenue. Indeed, everyday choices about what to watch are part of a set of larger critical concerns which include – but are not limited to – the interaction between national and global television systems (Chalaby 2023; Lobato 2019); the impact of digital video platforms on legacy providers (Evens and Donders 2018); the social stratification of television culture in the streaming age (Straubhaar et al. 2021); and the future of public-service broadcasting (Freedman and Goblot 2018). More broadly, research on this topic can also clarify what Turner (2019, 229) describes as 'the expanding range of ways in which [television's relation to the everyday] is now articulated and shaped'. In the following review, we note some key contributions to these debates that provide context for the current article.

The present crisis of broadcasting has long been anticipated in television research. Almost thirty years ago, the great communication scholar Elihu Katz declared that broadcast television 'has all but ceased to function as a shared public space' due to the rise of multichannel programming (Katz 1996, 22). Katz's point, developed in other studies of television transitions (Steemers 1997), was that content fragmentation and new television technologies had terminally undermined the authority of national broadcasters. This discussion led in time to new conceptualizations of television as a hybrid (Ellis 2000), post-broadcast (Turner and Tay 2009) ecology. In response, television audience scholarship became increasingly concerned with how the various parts of this television ecology interact, and how audiences distribute their time and attention across its different parts (Johnson, Dempsey, and Hills 2020; Schrøder 2019; Wood 2007).

A recurring theme throughout this literature is how television viewing practices change with age and lifestage. In the UK, Ellis (2020, 396) reflected on Ofcom audience research showing a 'serious generational divide' between younger users who like streaming and older viewers who prefer broadcast television. Yet Ellis rejected a simplistic interpretation of this data, arguing that broadcasting remains resilient due to factors such as '[domestic] routines, the desire for consolatory entertainment and the need for connection' (2020, 393). Also in the UK, Johnson, Hills, and Dempsey (2023, 1626) used qualitative in-home research with participants across the age spectrum to study interrelations between broadcast and streaming television discovery, focusing on 'the technological, industrial, cultural and social processes that shape people's routes to content in a platform-dominated media landscape'. Their research, which examined everyday micro-practices such as TV browsing and searching, revealed both a gender and age structure that helps to explain how viewers engage with streaming television.

In these debates, 'age' often serves as an umbrella category for other factors including life-stage, living arrangements, and access to technology. Research on generational

differences in television viewing made the point that older audiences tend to have more free time and thus are more likely to spend it watching broadcast television (Comstock and Paik 1991; Robinson, Skill, and Turner 2004). In contrast, young-adult audiences – those in the pre-family stage of life, with less time and more disposable income – have traditionally spent less time watching broadcast television. Other studies identified health and income variables as relevant factors, as well as age (Mares and Woodard 2006). These studies point to the need to disentangle various factors that sit behind age – a task well suited to qualitative audience research that attends to the social context of viewers and their viewing.

A further area of research relevant to our study is the literature on public-service broadcasting (PSB) in the platform age (Donders 2021; Martin and Johnson 2024; Michalis 2022). In Australia – as in the UK – television is a mixed public/private system in which a small number of public-service broadcasters are funded and regulated to provide essential public goods, including high-quality journalism, a range of viewpoints, and national and minority-language content. Many national PSBs are linked to the wider broadcast system through shared infrastructure and spectrum, so understanding audience engagement with broadcasting television generally is crucial to understanding the future of PSBs. Research by PSB scholars has established that public-service broadcasters around the world are struggling to compete for audience share with streaming services, especially Netflix and YouTube (D'Arma, Barclay, and Horowitz 2024; Donders 2019), and that changing audience viewing habits are a key factor. For most PSBs, the 'new media generation' (Sundet and Lüders 2023) are perceived as core to the future legitimacy and survival of PSBs (Lowe and Maijanen 2019; Vanhaeght and Donders 2016). Hence, research into young-adult engagement with broadcast television is essential if we wish to clarify impacts and implications for PSBs and for the vital public goods and cultural resources they make available to audiences.

Our study contributes to these interconnected debates about television ecologies, generations, and PSBs by offering a case study of young-adult engagement with broadcast television in Australia. We use qualitative audience research to explore how a sample of viewers are – or are not – engaging with broadcasters in a context of widespread streaming. In this way, we contribute to an evolving conversation about how young adults are integrating public broadcast and streaming television in their daily lives, and what this means for the future of the broadcast system.

Method

The research described in this article emerges from an Australian Research Council project (FT190100144) and a related research collaboration with the Australian public-service broadcaster SBS (the Special Broadcasting Service). The purpose of these projects was to explore how Australian audiences are adapting to new domestic television technologies and to assess the implications for Australian broadcasters. In late 2022, we conducted an online survey into smart TV use (Lobato et al. 2023, 2024), in which we asked a nationally representative sample of 1069 Australian adults detailed questions about the television devices, channels, and services they use, and how they use them. Survey findings confirmed the generational drift away from broadcast television noted in the research cited above. However, we also found that the vast majority of young Australians still watch

some form of broadcast television, either via live broadcast channels (17% rarely, 28% sometimes, 24% often, 18% very often) or one or more BVODs (81% at least 'rarely') – thus challenging assumptions that young adults had completely abandoned broadcast culture.

Intrigued by these findings that suggest a hybrid rather than streaming-only norm, we decided to conduct further qualitative research to explore generational differences in how Australians watch television. We recruited 20 survey respondents — 10 older participants (aged 50–68) and 10 young-adult participants (age 22–29) – for hour-long compensated semi-structured Zoom interviews, conducted between February and November 2024 (Table 1). The older cohort research was completed in partnership with SBS, who funded that element of the project. Participants were selected on the basis of geographic, income and gender diversity within each subgroup. Our sample included white-collar professionals and public servants, stay-at-home mothers, students, manual trade workers, and low-wage service workers, living across five states in rural, regional and metropolitan areas. This article focuses specifically on the young-adult cohort, although our interpretation of that data is informed by the differences we observed in comparison to the older cohort.

Adapting the semi-structured interview technique of Johnson, Dempsey, and Hills (2020), we used the first half-hour of the Zoom interview to discuss our participants' viewing preferences and rituals, while the second half-hour was a 'show and tell' session in which we observed the participants use their TV, navigate through their preferred apps, and browse and select content. In this way, we built up a detailed picture of the participants' television viewing across broadcast, pay-TV and VOD services, encompassing not only *what* they watch but also *when, how, why* and *with whom* they watch. All up, these interviews generated more than 20 hours of video recordings and more than 200,000 words of interview transcripts which we coded thematically. From these

Table 1. Interview participants.

Name	Age	Occupation	Location
Young-adult viewers			
Nick	24	Disability support worker/cleaner	Regional QLD
Tara	22	Nuclear medicine technologist	Metro VIC
Cooper	25	Mechanic/honours student (geo-mapping bushfires)	Rural NSW
Nathan	26	Software engineer	Metro VIC
Amelia	28	Stay at home mother	Metro NSW
Liana	26	Sustainability analyst	Metro SA
Lora	27	Public servant	Metro ACT
Chloe	29	Stay at home mother/student (community services/legal studies)	Rural NSW
Hasan	26	IT graduate/MBA student	Metro VIC
Hamza	29	Business operational risk manager	Metro NSW
Older viewers			
Linda	67	Retired primary school teacher	Metro VIC
Merv	54	Disability support worker	Metro NSW
Sean	57	Relationship manager	Metro QLD
Maria	50	Barrister	Metro SA
Joe	61	Technology manager	Metro VIC
Penny	61	Homemaker	Metro NSW
Jennifer	61	High school maths/science teacher	Metro QLD
George	63	School crossing supervisor	Metro NSW
Tim	68	Pet care, retired audit officer	Metro WA
Sue	58	Passive investor	Metro NSW

interviews, we formulated hypotheses about generational change in television viewing practices. For example, we noticed that our older participants had discovery habits strongly rooted in a linear broadcast and pay-TV paradigm (e.g. checking the electronic programme guide or the TV schedule published in newspapers). Most were also closely connected to the rhythms of linear TV (the 8.30 pm movie slot on pay-TV provider Foxtel, the nightly news on free-to-air TV), even though they commonly used subscription streaming services as well. We decided to test whether these broadcast-era discovery behaviours were present, if at all, in the younger cohort of viewers; and if not, what forms of discovery might have replaced them.

There were limitations to our dual approach. The sample size was necessarily small, due to the resource-intensive nature of qualitative interviews. As such, we regard our interviews as exploratory and do not make any claims about statistical representativeness. Our initial selection of the 50+ interview group was limited by its initial scope (limited to smart TV owners aged 18+), and by the need for participants to be users of SBS On Demand, per our arrangement with SBS. Despite these limitations, the research produced many valuable findings that have shaped our understanding of television discovery, and which inform our analysis of the interviews offered below.

Uses of broadcast television: families, companionship and enforced viewing

As expected, our young-adult participants were largely uninterested in broadcast television content, and some expressed active distaste when asked about broadcasters. Hasan, a 26 year old MBA student, was neutral in that he has 'nothing against them, but nothing for them at the same time'. Nick, a 24 year old support worker, told us he would only browse a BVOD catalogue 'if, like, I exhausted every other option'. Others expressed more hostile views. Cooper, a 25 year old mechanic, described Channel 7's content as complete 'rubbish'. We saw an even more pointed attitude with Liana, a 26 year old sustainability analyst, who said 'I think I would have to put myself in a situation of desperation [to watch broadcaster content]'.

However, digging deeper into our participants' daily practices revealed a more complex engagement with broadcast television than these comments might suggest. As Ellis (2020, 296) notes in his discussion of generational shifts in British television viewing, the role of qualitative research is to explore more complex and textured patterns of engagement than viewing metrics alone suggest. Our conversations with participants revealed that around half of our sample still lived with their parents; and most of these told us they participated in what Morley (1988, 30) described as 'enforced' viewing—i.e. watching programmes that someone else in the family, usually a parent, has chosen. These programs were not deliberate choices from our participants, yet these family viewing sessions seemed to carry a sense of familiarity and pleasure. Hence, we can see here how life-stage factors (whether or not one has moved out of home or is still living with parents) can be decisive in shaping viewing practices.

Take the example of Hasan, who lives with his parents in a middle-class Melbourne suburb. Everyday before dinner, Hasan is 'passively paying attention' to the US police procedural *NCIS* (shown on Network 10 in Australia). Hasan even takes time away from his usual YouTube viewing to watch NCIS 'more intently' with his parents after dinner. This example suggests that, for those young adults still living with parents, broadcast

television is often an ambient background to family rituals. It also confirms the finding of Johnson, Lobato, and Scarlata (2025) that the 'default viewing' rituals of the household are often decisive even in a context of abundant on-demand options.

Similarly, Cooper – who claims to loathe broadcast TV shows – admits that he '[doesn't] mind' watching *The Chase* with his family. His willingness to watch content selected by others echoes findings by Lotz and McCutcheon (2023b) that many viewers are happy to cede control over programme selection when co-viewing. Lotz and McCutcheon found that only 14% of their respondents rank watching something they like as the top priority when watching with others. This again suggests that broadcast television, while not always the first choice of young-adult viewers, still serves the function of companionship identified by Lull (1980) in his influential typology of television's 'social uses'.

Other participants in our study recalled similar experiences of co-viewing broadcast television. Tara describes the shared viewing of broadcast shows in her household as following a regular dinnertime routine ('we sort of watch *MasterChef* and stuff like that, and reality TV sort of thing while we're eating, and then we'll maybe watch a movie'). Nick describes a dinnertime ritual of watching *Tipping Point* with his Dad before dinner, until 'Netflix gets put on at 7 o'clock . . . .'. For these participants, broadcast television largely retains its status as a household medium (Morley 1988, 27), with the TV acting as a 'behavioural regulator' that 'punctuates time and family activity' (Lull 1980, 202).

Some participants – including those living independently – even expressed affection for broadcast television shows, despite previously claiming not to engage with the broadcasters. Nick told us that he likes to 're-watch' shows like *Married at First Sight* on 9Now, though earlier denying that he watches local broadcasters at all ('not me, personally, no'). Even Lora, who strongly criticized the 'commercialised' Channel 7 for being full of talent that 'just doesn't seem genuine', uses 7Plus when she wants to watch a specific episode of a show that has piqued her interest. Our conversation revealed that Lora knows quite a bit about *Jeopardy* and *Married at First Sight* – especially noteworthy given that Lora lives alone and is not exposed to enforced viewing by her parents. Her knowledge of these shows – despite infrequent or non-existent viewing – highlights the enduring cultural imprint of certain broadcast programming. This may be through direct broadcast exposure, but could also be from social media, peer discussion, and other sources (Hamza told us he was 'peer pressured' by a friend into watching MasterChef despite 'not [being interested] in general'). This system of ambient exposure appears to enable broadcast flagship content to circulate culturally in ways that may be obscured by traditional viewership metrics.

Nightly news was a special case. While none of our participants regularly sit down to watch broadcast nightly news programmes, several told us that they watch clips through YouTube daily – typically before dinner. The participants seem to regard commercial television broadcasters as reliable news providers, despite not engaging in linear live-streams – this may help to qualify findings from existing research that shows social media as the main news source for many young Australians (ACMA 2024b). Hamza explained his approach as follows:

> [I watch the news] more through YouTube for sure . . . mostly [made by] Channel Seven and Nine . . . they've got little snippets of whatever news it is there for that particular day or that particular hour, and you can just watch little blocks of it rather than the whole thing.

As this comment suggests, Hamza prefers to consume news media in short and segmented clips. The same is true for Cooper and Chloe, although for Chloe the main motivation is to avoid the ads on broadcast television. Nathan, a YouTube Premium subscriber, is another ad-avoider. Nightly, he clicks on one of the short snippet videos from the Channel 7 or 9 YouTube channels and 'just let[s] it autoplay'. Here, these participants create an experience that emulates the continuity of traditional linear broadcasting, while circumventing the traditional linear flow of broadcast television. Given this cohort's formative years coincided with the post-broadcast era of television (Turner and Tay 2009), it is unsurprising that they prioritize on-demand access over scheduled viewing. Yet the habit of viewing nightly broadcast television news in fragments through an AVOD platform (YouTube) provides a distinctive example of how television's relation to the everyday is 'articulated and shaped' (Turner 2019, 220).

An outlier in our sample was Amelia, a 29 year old young mum from Western Sydney. Amelia is a prolific broadcast television user who has a genuine passion for free-to-air shows, stars, and brands. Living with her mother and infant son, Amelia comes from a low socio-economic background, and is very price-sensitive. The only service she subscribes to is Netflix, shared with her partner who lives elsewhere. Amelia describes free-to-air television – including both commercial and public-service channels – as 'a big part of [her] life'. Broadcast television is playing at all hours of the day in her household, almost without pause ('like another member of the family, in a weird way'). She knows the schedules of ABC, SBS, Seven, Nine, and Ten intimately, and enjoys both their flagship and non-flagship offerings. What's more, her household often watches multiple broadcast feeds at the same time; the lounge room TV plays a live broadcast channel, Amelia and her Mum's iPads are playing non-flagship content (most recently *Prisoner* and *Below Deck*) from the BVODs, and the TV in her son's bedroom plays children's content on ABC iView or 10Play. Amelia keenly advocated for BVODs as valuable entertainment providers:

> I don't think you realise till you're sitting there and going through [that you notice that] free TV is actually pretty good . . . *How to Lose a Guy in 10 Days* was a free movie on [Channel 10], but Netflix has it . . . I thought, am I getting ripped off with paying $6.99 . . . for Netflix in a month?

Amelia's story demonstrates the value of free content to certain low-income family households. While this example may bring to mind classist stereotypes of 'constant television households' (Butsch 2000, 262), we found Amelia to be a savvy and critical viewer of television. For example, she completely stopped watching Channel 7 due to its journalistic practices, as she thinks it has 'gone really downhill lately especially with a lot of the media coverage from what I've seen, like political wise . . . with the Bondi attack [when] they named the wrong person . . . . I don't really trust them'. She is also very proactive about protecting her data on the BVOD apps, having altered her settings to prevent data tracking.

In summary, these interviews present a mixed picture of young-adult engagement with Australian broadcast television. While most participants expressed negative views of broadcasters and BVODs, many were surprisingly engaged with certain broadcast programmes, often watching those programmes as part of nightly family rituals. As Ellis (2020) observed, broadcast television is often present in the quotidian routines of our

participants, but in a different fashion from older audiences. Rather, young-adult engagement with broadcast television is a result of social processes, including co-viewing and enforced viewing. These indirect modes of engagement suggest broadcast television retains a diminished but real cultural salience through dispersed, adapted, and hybridized encounters peppered into participants' daily rituals.

BVODs, SVODs, and content discovery

So far in this article, we have foregrounded domestic engagements between young-adult audiences and broadcast television often involving communal or enforced viewing. What's missing from this picture is *discovery*, or how viewers find new content to watch. Here, we found the viewing practices of our participants more uniformly favoured SVODs over BVODs.

With the exception of Amelia, none of our participants seemed to use BVODs or broadcast schedules to find new things to watch (discovery); instead, they used BVODs simply to access shows already known to them (retrieval). This aligns with research by Lotz and McCutcheon (2023a), whose national online survey found that only 5% of 18–24 year olds and 7% of 25–34 year olds turn to BVODs to discover new things to watch. In effect, this means young Australians are likely exposed to an ever-narrowing subset of broadcast programming.

The cultural power of Netflix's user interface here was plain to see. Netflix was the most-used service for 8 out of 10 young-adult respondents, with the others citing Disney+ and YouTube. Nathan told us Netflix was his most used and valued service 'hands down', as it's 'so ahead of the game'. Hamza describes Netflix as 'very easy to navigate through different kinds of content'. Hasan describes the Netflix user experience as 'smoother, with the [autoplay] previews', noting this was a 'huge aspect' in why he names Netflix as his number one streaming service. For Liana, the Netflix user interface allows her to 'not put in that much effort' to find something to watch, because just 'a few seconds' are needed to immerse herself into the content offerings.

The seamless user experience of Netflix also serves as a benchmark against which our participants measure the value of other services. Liana told us she thinks of Disney+ and Prime Video as 'catalogues' rather than as places of discovery, whereas she values Netflix's engaging user experience. This underscores the distinction between discovery services and retrieval services we referred to earlier. Similarly, Tara told us she likes Foxtel's aggregator Hubbl because 'it feels a bit more like Netflix', reflecting Netflix's position as a benchmark of success, while Nathan observed that his time spent on Prime led him to realize that he's 'taken [autoplay banners] for granted in Netflix', describing these as a 'really, really helpful [and] beneficial' tool for content discovery.

In our interviews, we also explored whether participants use different discovery practices on different platforms (i.e. whether there are user behaviours unique to Netflix or other services). The majority of our interviews suggested that Netflix was in a class of its own when it comes to discovery behaviours. Nick, for example, described his fortnightly ritual of 'sit[ting] there for ages, flicking through [the Netflix catalogue] … for like half an hour'. He bookmarks titles as he scrolls to the bottom of the interface – something he does not do on other services. Tara likewise specified that 'it's definitely the home page of specifically, like Netflix [where] I'm finding [things] to watch'. Participants such as Liana,

Nick, and Tara seem to have made up their minds that Netflix is the only service worth exploring in this deep way – Liana realized that the reason she does not explore on her other services is because Netflix 'created a bias in my head where I don't even consider [other services] because I don't even view them as a streaming option'. Thus, the discovery-retrieval distinction seems to shape the amount of time and attention users devote to different VODs, with only the 'discovery' services getting significant time. This underscores the growing gulf in audience perceptions of usability and desirability between SVODs and BVODs, as noted in the PSB audience research literature (Ofcom 2020), reminding us of the increasingly uneven terrain upon which PSBs and other broadcasters must now compete with SVODs.

Conclusion

This article has sought to complicate common assumptions about diminishing engagement by young-adult audiences with broadcast television in Australia. While confirming the broad generational drift away from broadcast television and the widening of this trend in recent years, our study suggests that there is still a meaningful level of broadcast viewing among young-adult viewers, especially those who live with their parents. Although most of this viewing is enforced viewing, it nonetheless leads to familiarity with core broadcast programming such as reality TV, news, and gameshows. It is likely that some of these young-adult viewers will in turn pass on those rituals to their own future children, if broadcast television still exists then. This points to the enduring importance, long noted by television scholars, of seeing television as 'a social activity [. . .] conducted within the context of the family as a set of social relations' (Morley 1986, 7).

Yet, our study also found that most of our young-adult participants did not claim to value broadcast television in the same way as other internet-distributed services such as Netflix. This can be seen clearly in our findings regarding discovery practices: the observed behaviour of our participants, with only one exception, suggests they do not see BVODs as places to explore or discover new content. This disposition – the tendency to treat Netflix as a place to find things to watch, and BVODs as retrieval portals for content they already know about – represents a challenge for the long-term viability of broadcasters, including public-service broadcasters, because it constrains public awareness of their new content. Unless broadcasters can disrupt these now-established user practices it will be difficult to reverse the drift away from broadcast television.

There are also implications here for the practice of television audience research. The approach used in this article shows the enduring value of qualitative methods (semi-structured interviews and observation) for understanding the wider contexts of audience activity, beyond the 'what' and 'how much' aspects prioritized in quantitative market research. Our finding that many participants ambiently watched broadcast content through co-viewing and enforced viewing is an insight that would have been obscured via a structured survey focusing on self-reported individual choices. Similarly, our analysis of participants' micro-practices of content discovery would hardly have been amenable to standardized methods of quantitative audience research. The qualitative approach used here – which involved talking in an unhurried way with participants in their home environments (virtually) about their viewing practices – is a tried-and-tested method for investigating audience experience, and it remains highly useful today.

Notes

1. This classification of Generation Z is not empirically definitive or standardised across industries and literature. We have used Oztam's age range of 20-30 to assist in the classification of our participants (aged 22–29), who have grown up within a mixed media landscape of digital and linear television, and are now in comparable life stages characterised by early career and family development.
2. Government-commissioned research on television viewing in Australia has found a consistent pattern of disengagement with broadcast television in younger cohorts (ACMA 2024a; Social Research Centre 2024). A survey study by the Australian Media and Communications Authority (ACMA 2024a) identified Australians aged between 18–24 as the group least likely to engage with broadcast television. Other government-commissioned research suggests that Australians between 18–34 are using paid online subscription services to watch screen content at a significantly higher rate (78–80%) than those over 45 years old (65% or less) (Social Research Centre 2024, 24). Gen Z viewers also appear to use a greater range of online video services and to spend more money on VODs: the ACMA (2024a) study found 53% of Australians aged 18–34 use five or more VODs, compared to 37% for those over 55. Meanwhile, Deloitte (2023, 49) found that 16–24 year olds are spending nearly twice as much on digital entertainment subscriptions (an average of $88 per month) as those over 56 years of age.

Disclosure statement

No potential conflict of interest was reported by the author(s).

Funding

This work was supported by the Australian Research Council [FT190100144] and the Special Broadcasting Service (SBS). The authors report there are no competing interests to declare.

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