MEDIA I INDUSTRY SURVEY

Highlights Deck

NOVEMBER 2025

Media i

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INTRODUCTION

The following presentation reports on Media i's latest instalment of its Industry Mood & Sentiment Survey. With over 4,500 respondents, the Media i Survey remains without doubt the largest and most significant industry sentiment survey for the media industry.

The surveys are aimed at helping to positively address the widening gap between media agencies and media owners. This is achieved through collating attitudes and opinions on issues that are affecting the industry and tracking over time the sentiments and performance of agencies, media channels and media owner sales representation.

As such, this survey is split into two tranches, one aimed at media sales professional's, the other at media agency practitioners. This report outlines the outcomes of each tranche.

Through this process Media i hopes to create more meaningful discussions with its clients, agency partners and industry observers

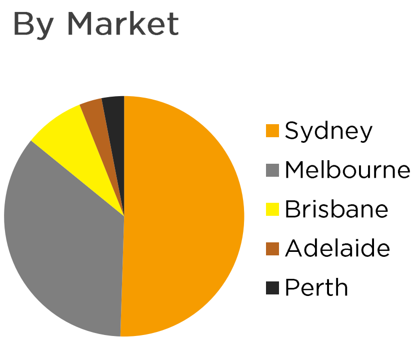
SURVEY COMPOSITION

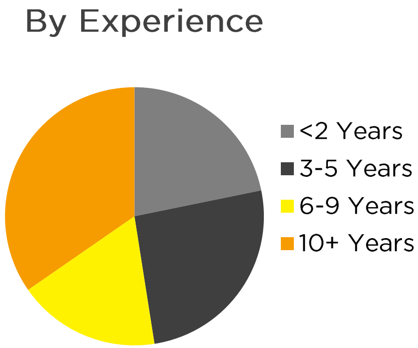
MEDIA AGENCY SURVEY COMPOSITION

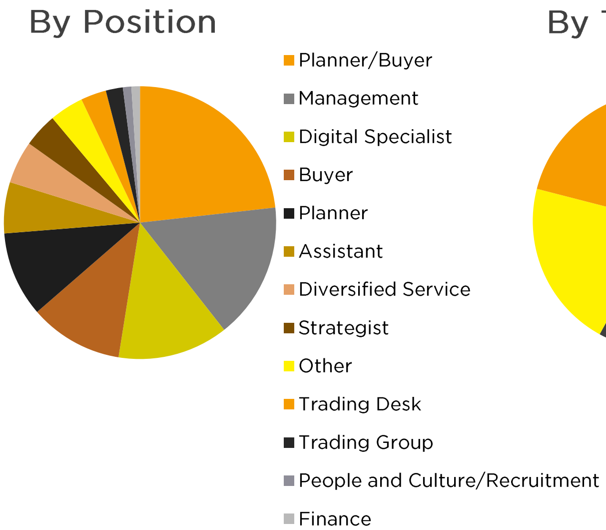
Source: Media i Industry Survey: 2nd October 2025 - 17th October 2025

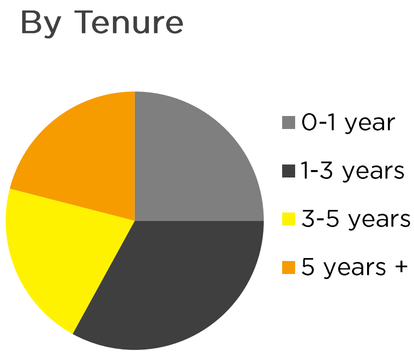
MEDIA AGENCY COMPOSITION

2,671 media agency professionals participated in the Media i October-25 survey. Being ***75-80% of the media owner facing agency market*** the survey composition is representative of the industry across all filters.









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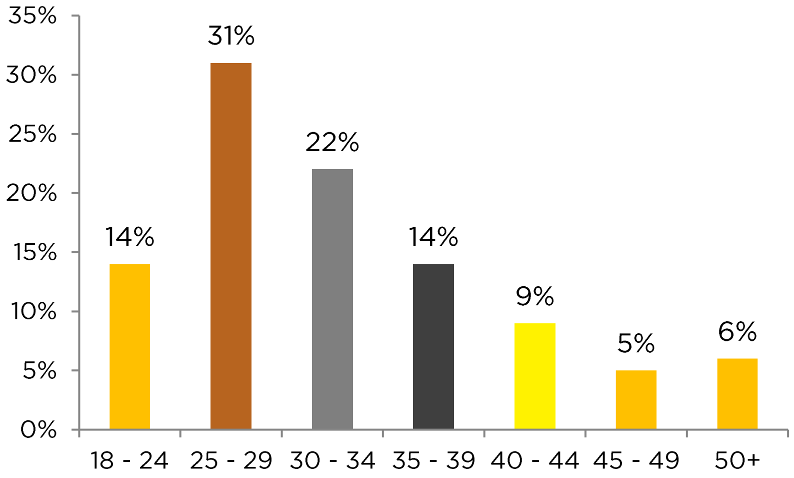
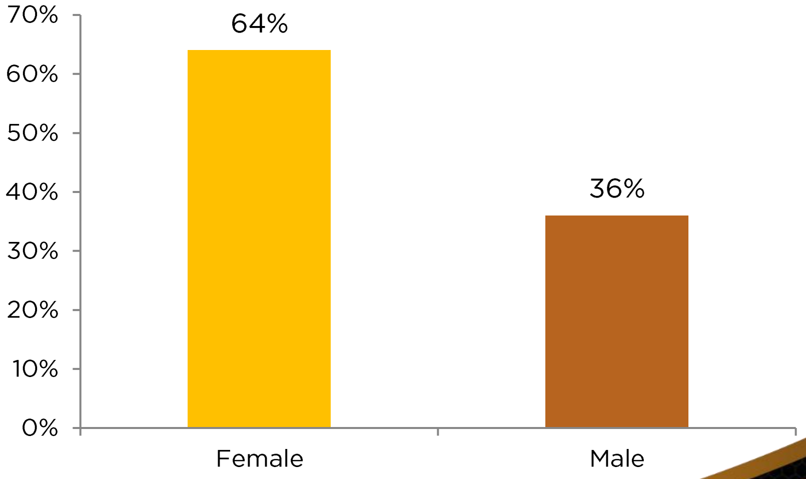
MEDIA AGENCY COMPOSITION

67% of respondents were aged under 34 years with a strong female skew [64%].

By Age



By Gender



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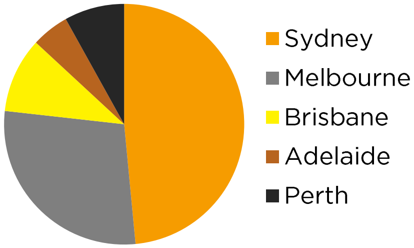
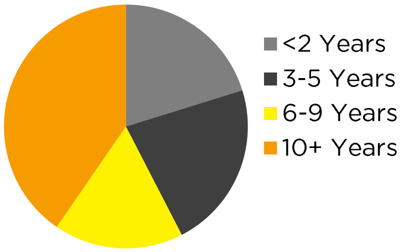
MEDIA OWNER COMPOSITION

2,003 media owner sales professionals participated in the Media i Oct-25. Being ***75-80% of the media agency facing sales roles***, the survey composition is representative of the industry across all filters.

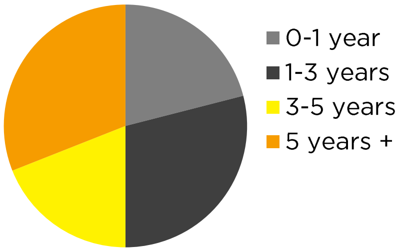
By Market



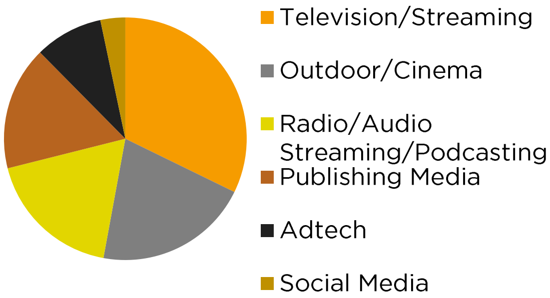
By Experience



By Tenure



By Position



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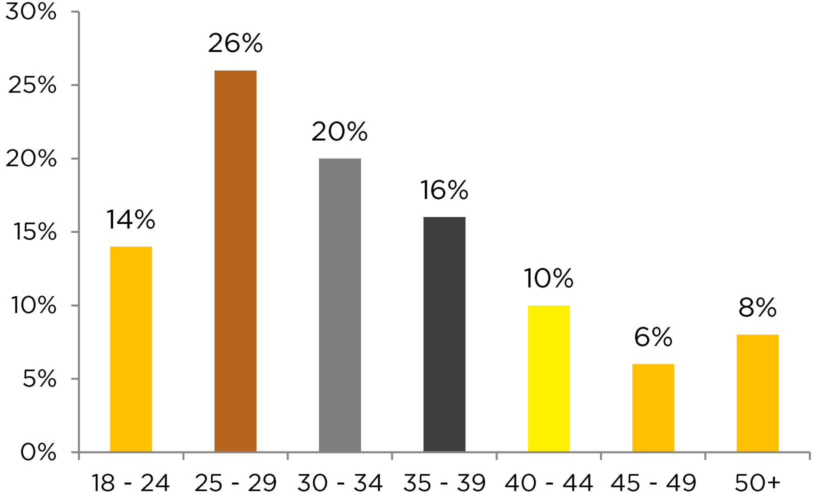
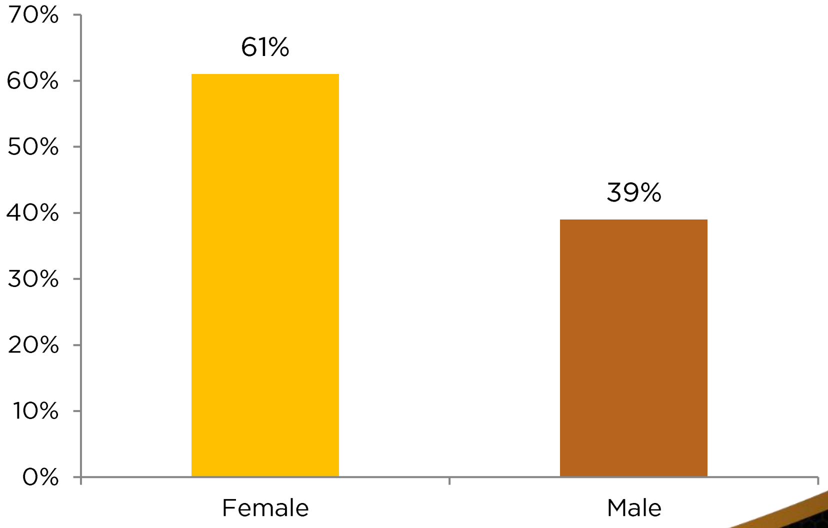
MEDIA OWNER COMPOSITION

60% of respondents were aged under 34 years with a strong female skew [61%].

By Age

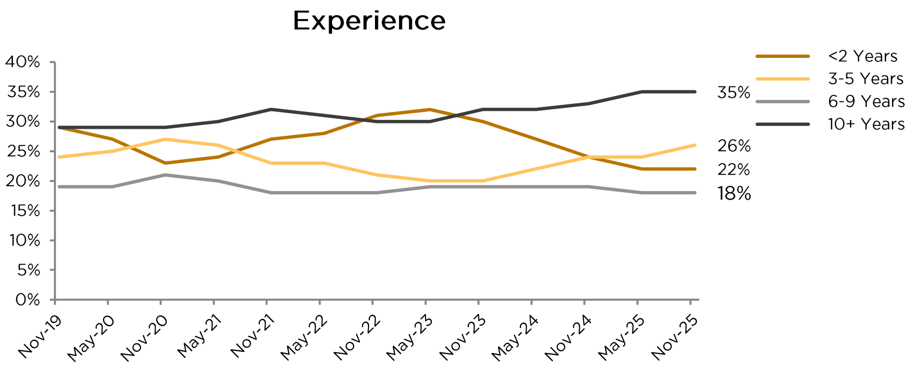


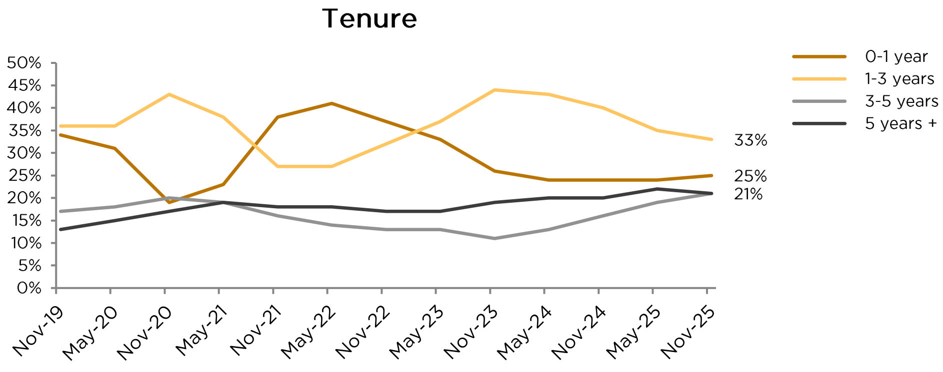
By Gender

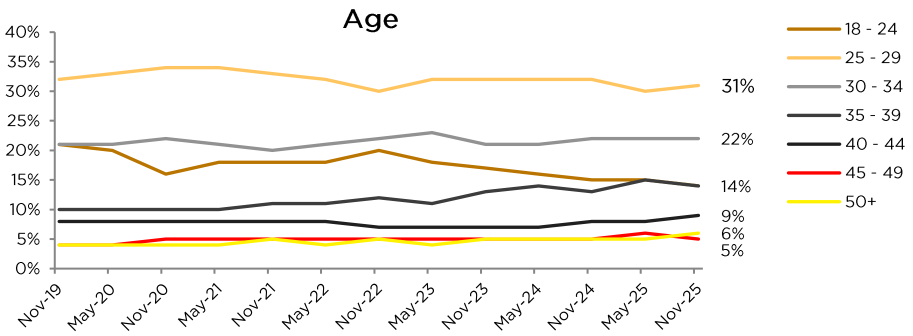


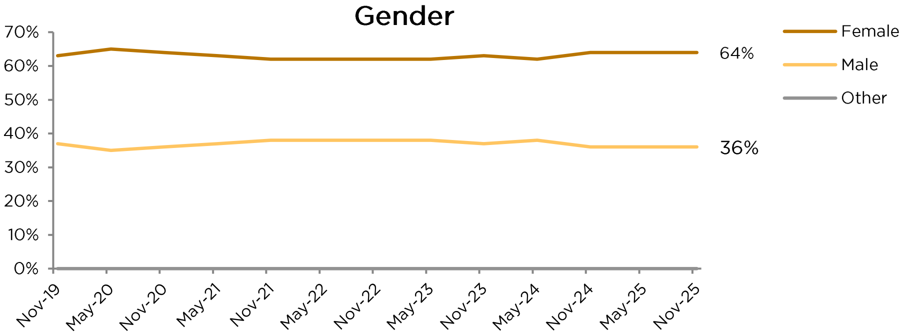
COMPOSITION TRENDS

MEDIA AGENCY COMPOSITION - TIME SERIES









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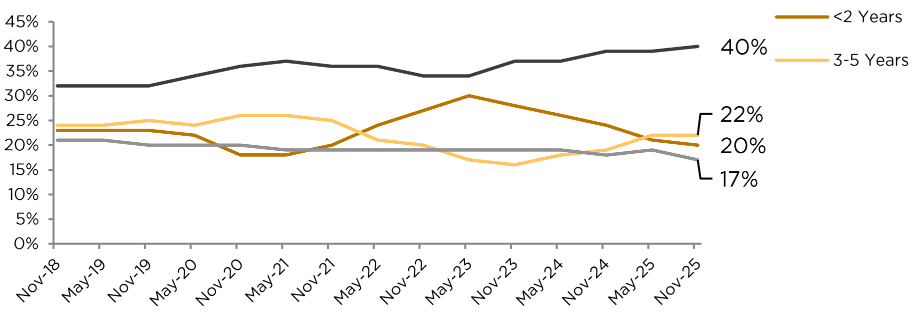
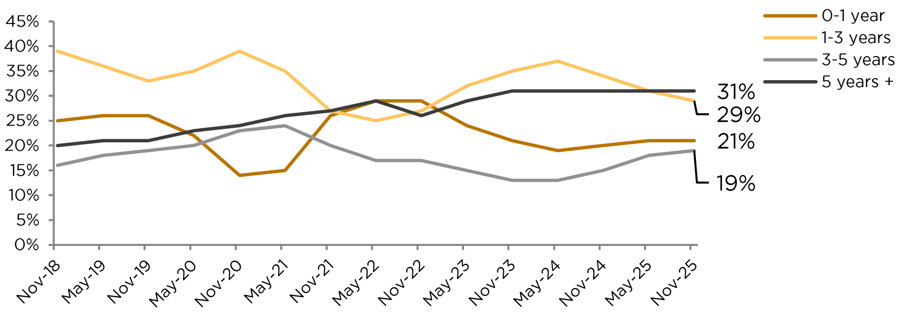
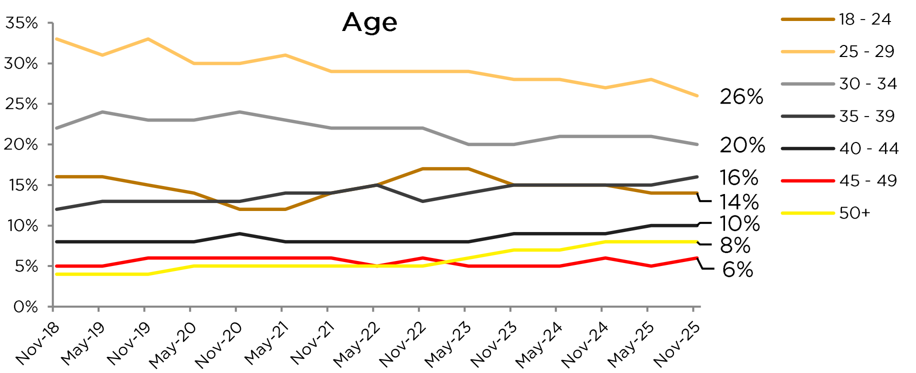
MEDIA OWNER COMPOSITION - TIME SERIES

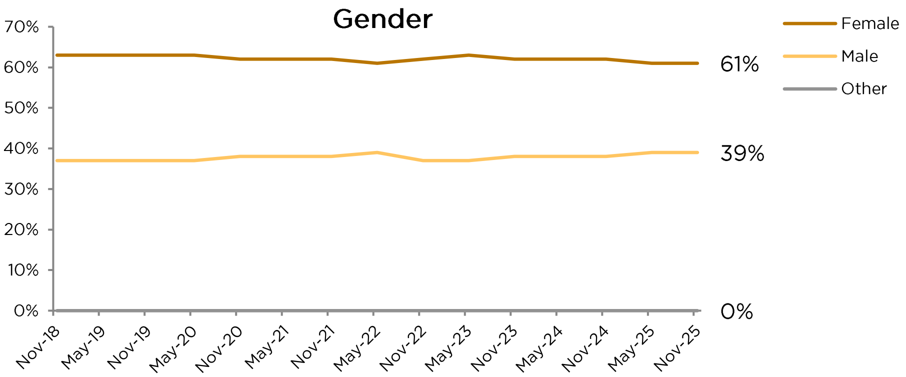
Experience



Tenure







OCTOBER 2025 SURVEY
HIGHLIGHTS

Market sentiment continues to show resilience in the face of sluggish macro-economics, geopolitical uncertainty and broad industry transformation efforts.

INDUSTRY STATEMENTS

MEDIA AGENCY STATEMENTS

Work Aspects Summary: Agree	Nov-25
Total	2,671
I Am Adequately Resourced To Perform My Job	68%
I Will Be Actively Looking For A Job In The Next 6 Months	33%
My Agency Recognises & Rewards My Efforts	73%
This Year Has Been Tougher Than Last Year	69%
Media Spend Will Increase Next Year	58%
I Am Proud Of The Work My Agency Produces	92%
I Feel I Am Adequately Remunerated For My Role	48%
My Agency Is Getting The Most Out Of My Skill Set	68%
I Enjoy My Agency's Culture	87%
My Manager Inspires, Motivates & Supports Me	84%
I receive enough training to learn, grow, and prepare for the next opportunity	74%
I spend more time solving problems/generating ideas/developing solutions than 12 months ago	79%
I feel empowered to make small or big changes, which make a difference	84%
I believe what I do is important to driving business & economic growth	87%

Media agency sentiment shows resilience against the backdrop of sluggish media market, geopolitical uncertainty and broad industry transformation efforts aimed at adapting to new technological developments.

Notable is significant drop in resourcing, presenting as the lowest since the depths of COVID.

Expectations of spend growth in CY26 improve slightly against CY25.

MEDIA AGENCY STATEMENTS - YOY

Work Aspects Summary: Agree	Nov-22	May-23	Nov-23	May-24	Nov-24	May-25	Oct-25
Total	2,623	2,850	2,640	2,652	2,641	2,524	2,671
I Am Adequately Resourced to Perform My Job	72%	77%	73%	75%	73%	74%	68%
I Will Be Actively Looking For A Job In The Next 6 Months	20%	22%	25%	27%	32%	35%	33%
My Agency Recognises & Rewards My Efforts	82%	79%	75%	77%	75%	76%	73%
This Year Has Been Tougher Than Last Year	52%	-	67%	-	69%	-	69%
Media Spend Will Increase Next Year	73%	-	57%	-	56%	-	58%
I Am Proud Of The Work My Agency Produces	94%	-	93%	-	93%	-	92%
I Feel I Am Adequately Remunerated For My Role	58%	-	52%	-	49%	-	48%
My Agency Is Getting The Most Out Of My Skill Set	71%	-	70%	-	68%	-	68%
I Enjoy My Organisation's Culture	93%	-	89%	-	89%	-	87%
My Manager Inspires, Motivates & Supports Me	88%	-	86%	-	85%	-	84%
I receive enough training to learn, grow, and prepare for the next opportunity	80%	-	76%	-	75%	-	74%
I spend more time solving problems/generating ideas/developing solutions than 12 months ago	82%	-	81%	-	81%	-	79%
I feel empowered to make small or big changes, which make a difference	88%	-	84%	-	83%	-	84%
I believe what I do is important to driving business & economic growth	91%	-	89%	-	88%	-	87%

MEDIA OWNER STATEMENTS

AUSTRALIAN MEDIA INDUSTRY STATEMENTS	Agree
Total	2,003
This Year Has Been Tougher Than Last Year	69%
Media Spend Will Increase Next Year	50%
I Am Adequately Resourced to Perform My Job	74%
I Will Be Actively Looking For A Job In The Next 6 Months	29%
My Organisation Recognises & Rewards My Efforts	73%
Media Agencies Budgets Match Their Expectations	30%
The Organisation I Work For Is Getting The Most Out Of My Skill Set	68%
I Enjoy My Organisation's Culture	83%
Media Agencies Are Increasingly Appreciative Of Our Efforts	58%
I Feel I Am Adequately Remunerated For My Role	56%
My Manager Inspires, Motivates And Supports Me	87%
I receive enough training to learn, grow, and prepare for the next opportunity	76%

Media owner sentiment shows similar resilience against the same backdrop.

Notable again is the drop in resourcing, presenting as the lowest since the depths of COVID.

Gains can be seen in perceptions around remuneration as well as inspiration, motivation and support.

MEDIA OWNER STATEMENTS YEAR ON YEAR

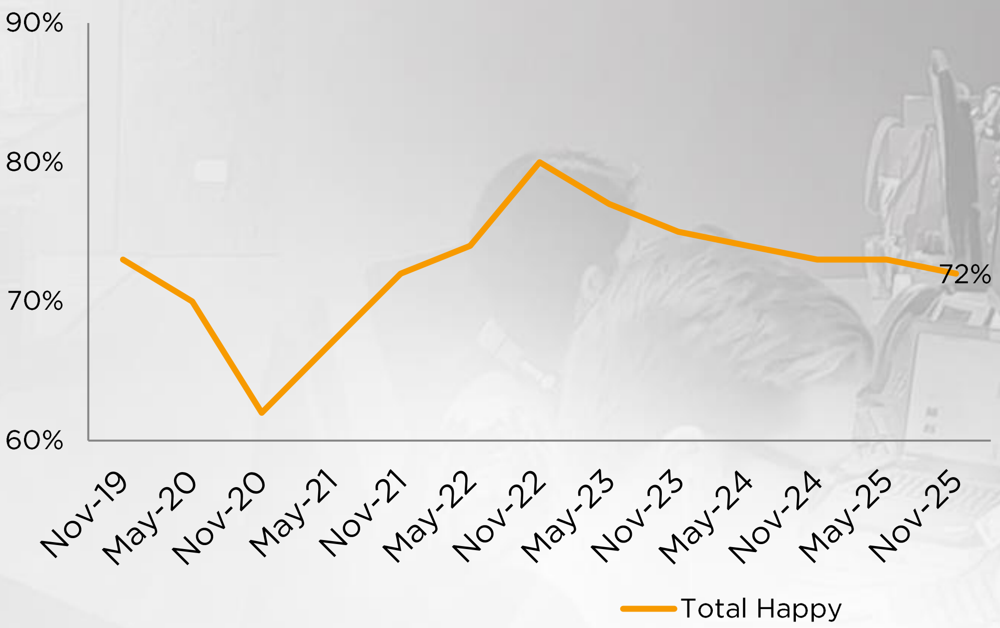
AUSTRALIAN MEDIA INDUSTRY STATEMENTS	Nov-21	May-22	Nov-22	May-23	Nov-23	May-24	Nov-24	May-25	Nov-25
Total	2,054	2,077	2,143	2,224	2,223	2,088	2,155	2,154	2,003
This Year Has Been Tougher Than Last Year	66%	-	46%	-	67%	-	71%	-	69%
Media Spend Will Increase Next Year	86%	-	59%	-	56%	-	55%	-	50%
I Am Adequately Resourced to Perform My Job	75%	80%	78%	80%	78%	77%	76%	77%	74%
I Will Be Actively Looking For A Job In The Next 6 Months	20%	23%	22%	26%	25%	31%	27%	30%	29%
My Organisation Recognises & Rewards My Efforts	82%	83%	82%	77%	74%	74%	74%	75%	73%
Media Agencies Budgets Match Their Expectations	37%	-	38%	-	33%	-	31%	-	30%
The Organisation I Work For Is Getting The Most Out Of My Skill Set	72%	-	74%	-	72%	-	69%	-	68%
I Enjoy My Organisation's Culture	87%	-	90%	-	85%	-	84%	-	83%
Media Agencies Are Increasingly Appreciative Of Our Efforts	63%	-	61%	-	60%	-	59%	-	58%
I Feel I Am Adequately Remunerated For My Role	63%	-	61%	-	54%	-	55%	-	56%
My Manager Inspires, Motivates And Supports Me	88%	-	88%	-	87%	-	86%	-	87%
I receive enough training to learn, grow, and prepare for the next opportunity	-	-	81%	-	77%	-	77%	-	76%

INDUSTRY HAPPINESS

AGENCY HAPPINESS - NATIONAL

Media agency happiness levels have declined slightly on May-25 consistent with sentiment.

Level Of Happiness At Work	Total
Total	2,671
NETT: Very Happy (9/10)	24%
NETT: Happy (7/8)	48%
NETT: Unhappy (1/6)	28%
NETT: Total Happy (7/10)	72%



MEDIA OWNER HAPPINESS - NATIONAL

Media owner happiness levels have decreased slightly on May-25 in line with sentiment.

Level Of Happiness At Work	Total
Total	2,003
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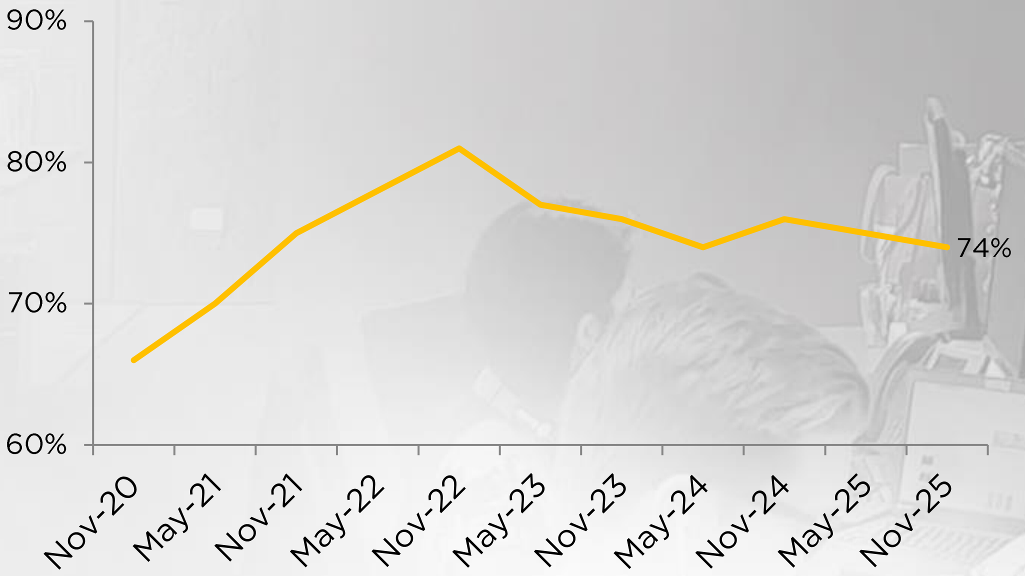
NETT: Happy (7/8)	46%
NETT: Unhappy (1/6)	26%
NETT: Total Happy (7/10)	74%



Industry spend growth expectations from media agencies for CY26 are more positive than the expectations held at the same time for CY25.

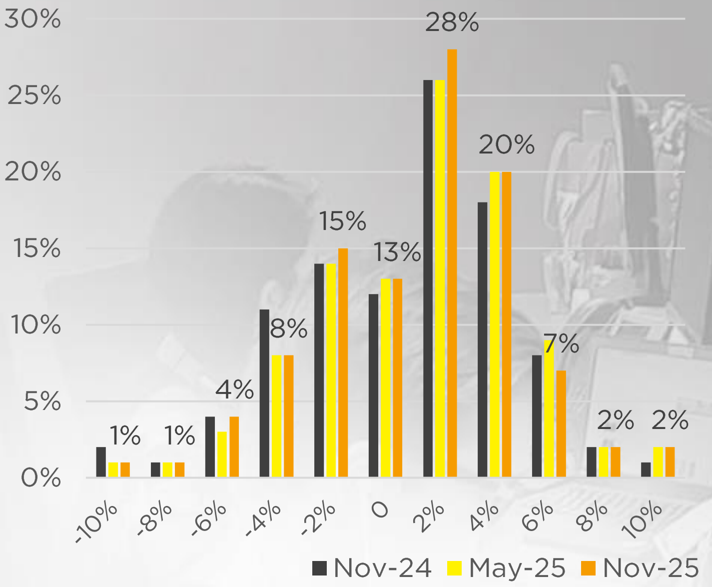
MEDIA INDUSTRY GROWTH

NATIONAL

MEDIA INDUSTRY GROWTH – AGENCY

59% of agency respondents believe the total media market [excluding search] will grow in 2026 - up from 55% heading into CY25.

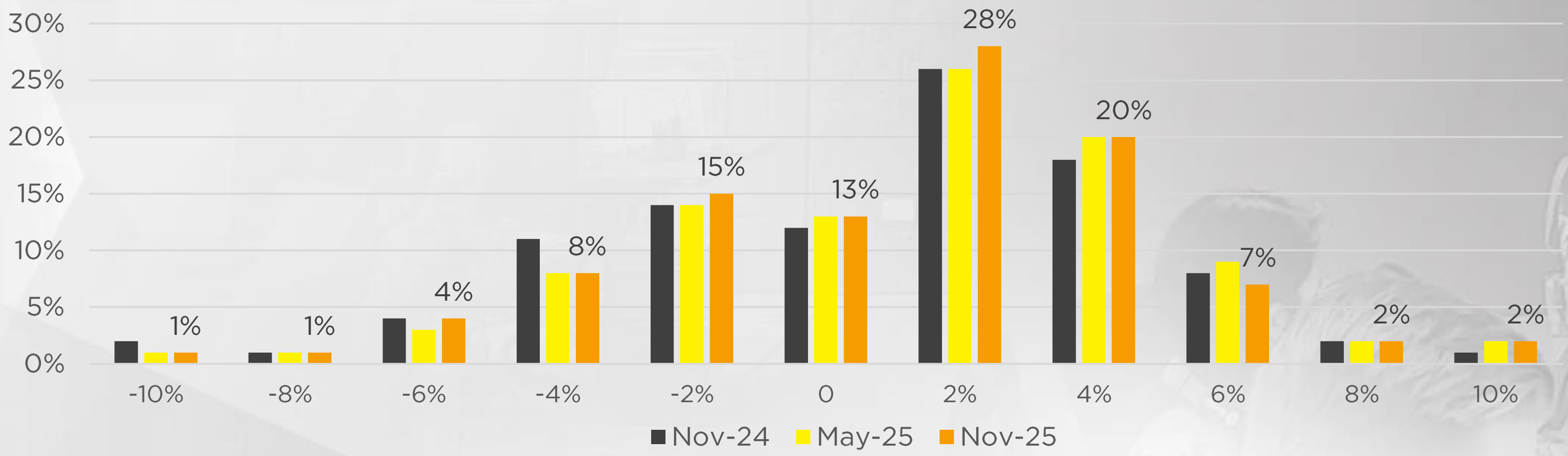
Work Aspects Summary: Agree	Nov-25
Total	2,671
-10%	1%
-8%	1%
-6%	4%
-4%	8%
-2%	15%
0	13%
2%	28%
4%	20%
6%	7%
8%	2%
10%	2%



Q: Please indicate the extent to which the total media market advertising spend [excluding search] will grow or contract in 2026

MEDIA INDUSTRY GROWTH - AGENCY

This results in agencies' CY26 total market [excluding search] growth expectations sitting at 1.05%, up from 0.85% at the same time last year.

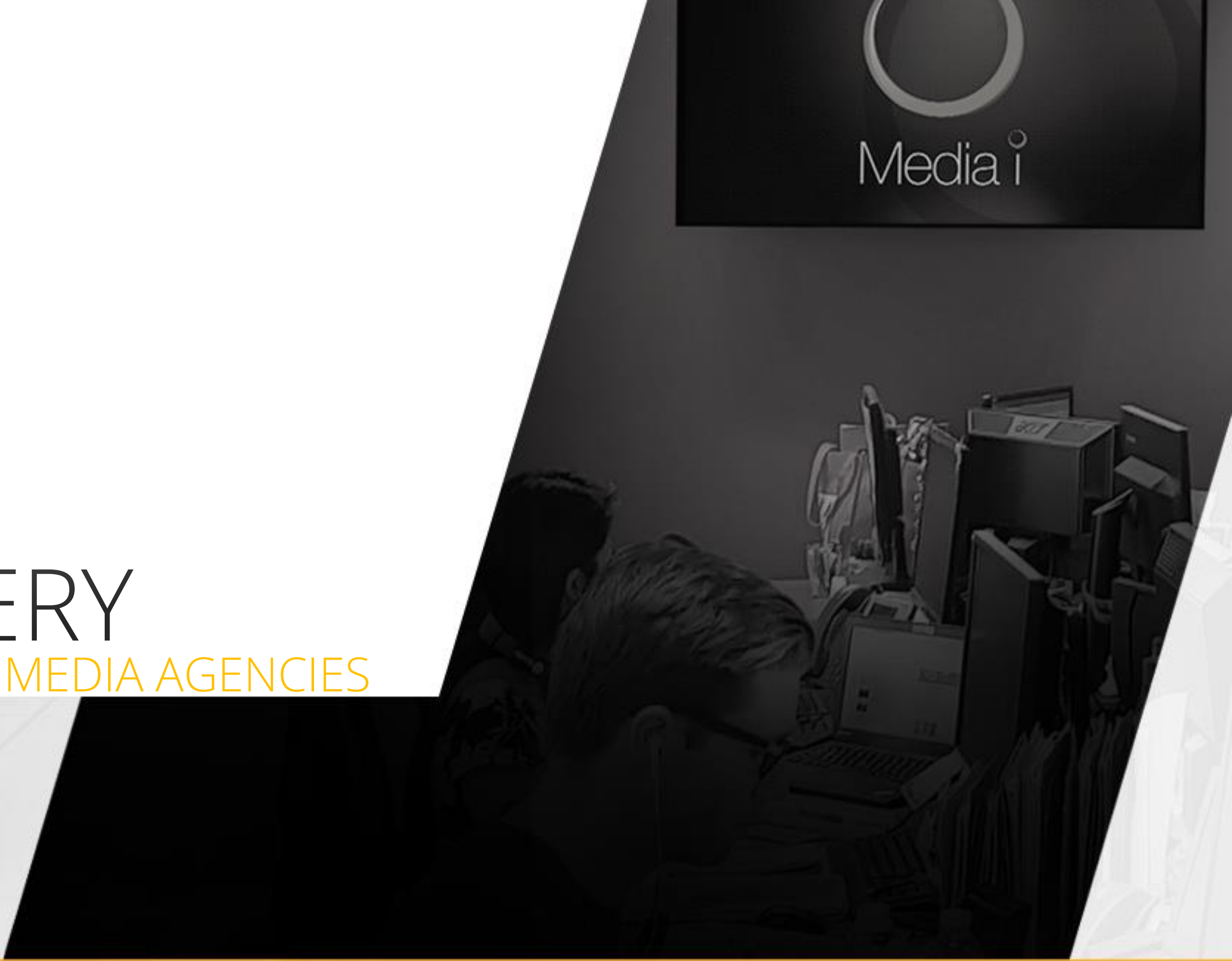


Weighted Ave Growth Est.
Nov-25, CY26 +1.05%
May-25, CY25 +1.18%
Nov-24, CY25 +0.85%

Q: Please indicate the extent to which the total media market advertising spend [excluding search] will grow or contract in 2026

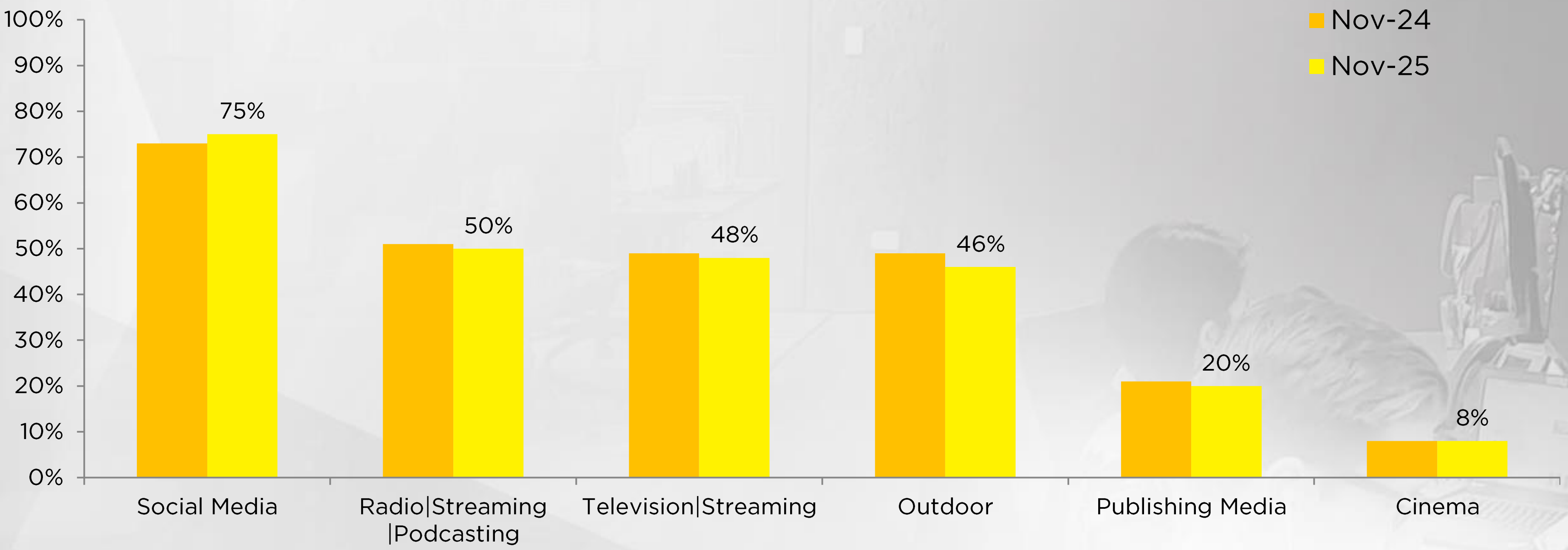
MEDIA IMAGERY

CHANNEL PERCEPTIONS OF MEDIA AGENCIES



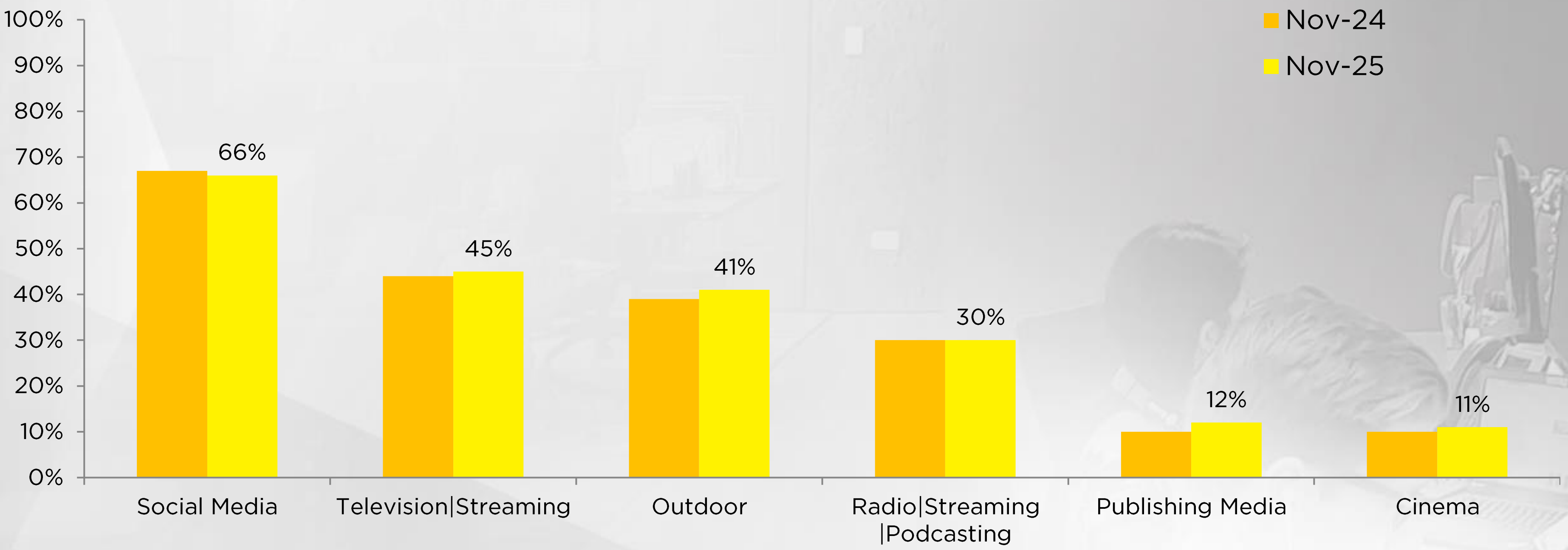
Media agency perceptions of channels continue to evolve along with digital capabilities.

CHANGING WITH THE TIMES



Q: Please tick the media(s) you think is most appropriate for each statement. Scale: Select as many as you wish

DELIVERS STRONG ROI



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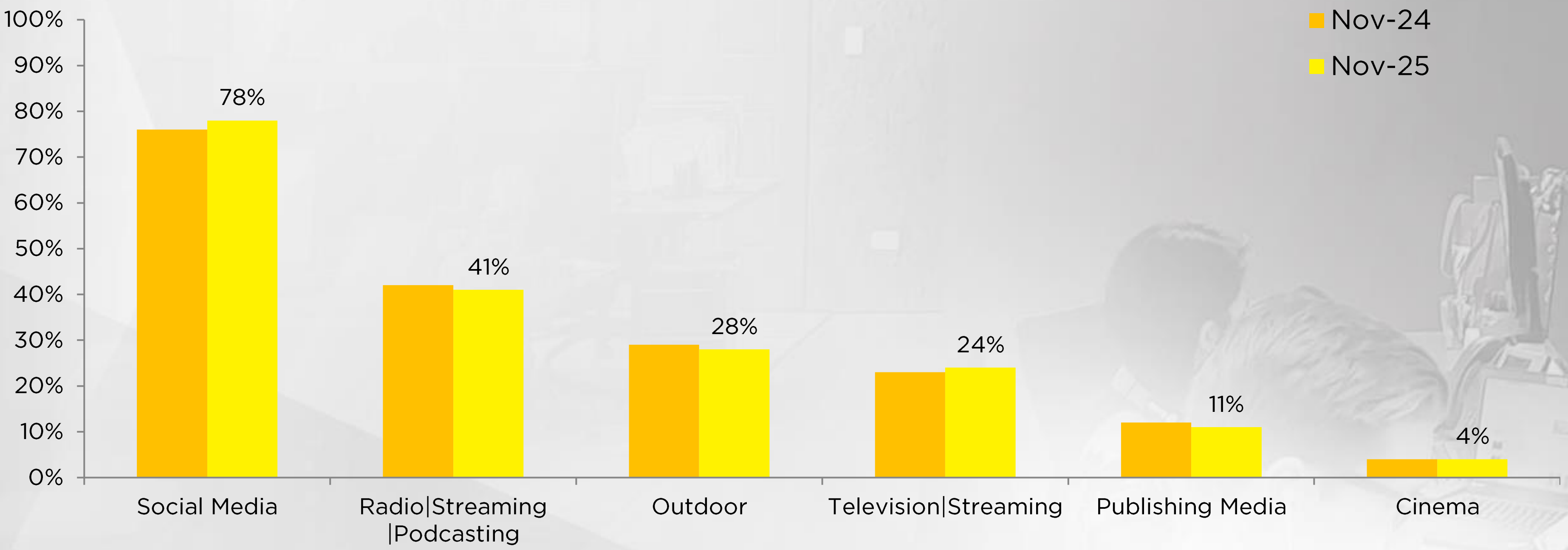
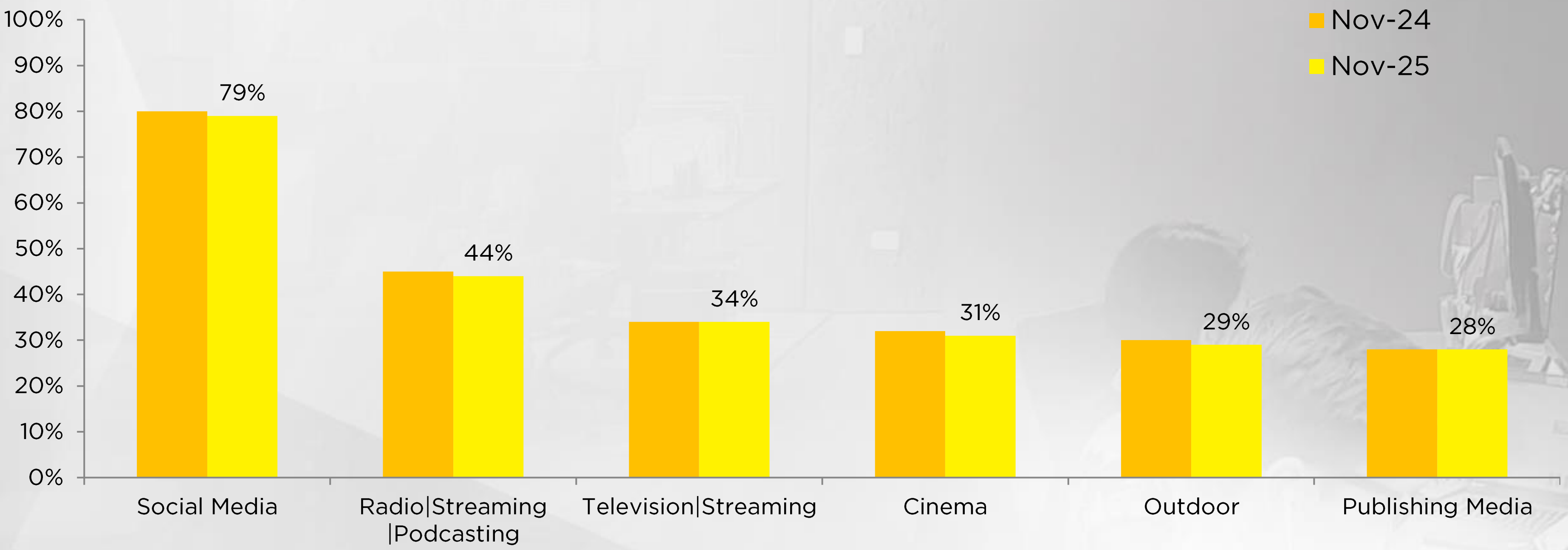
COST EFFECTIVE



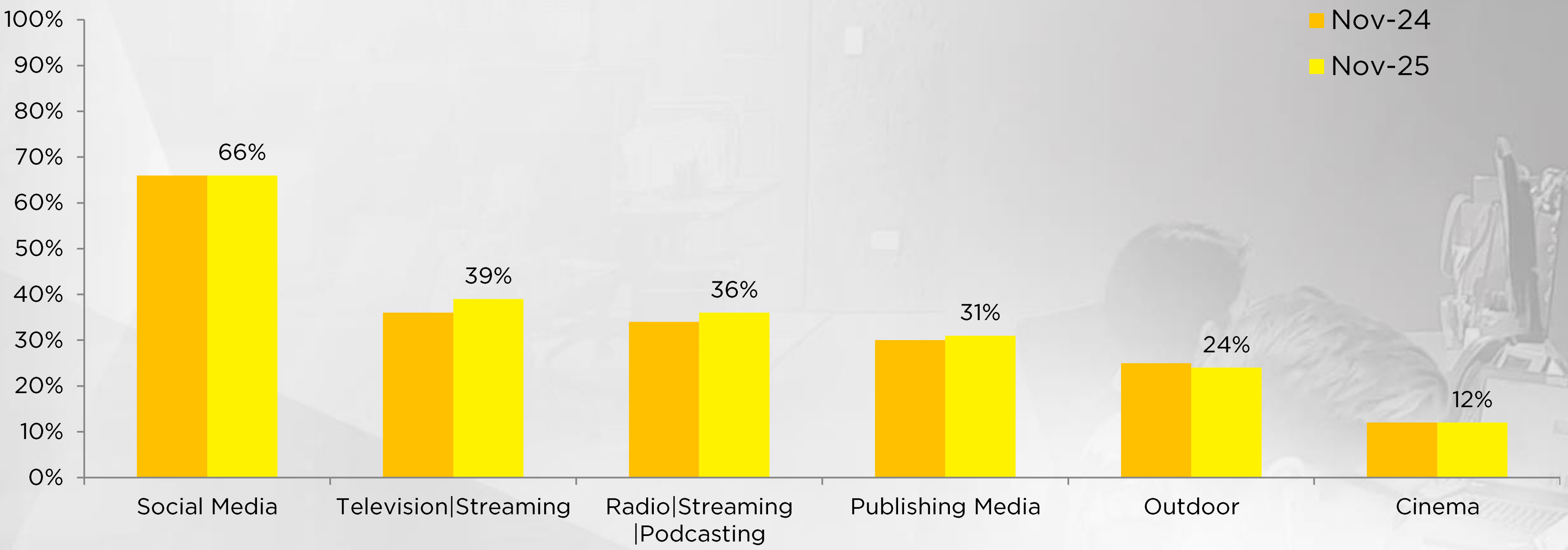
Q: Please tick the media(s) you think is most appropriate for each statement. Scale: Select as many as you wish

CONSUMERS ENGAGE WITH



Q: Please tick the media(s) you think is most appropriate for each statement. Scale: Select as many as you wish

CREDIBLE AUDIENCE INSIGHTS & DATA



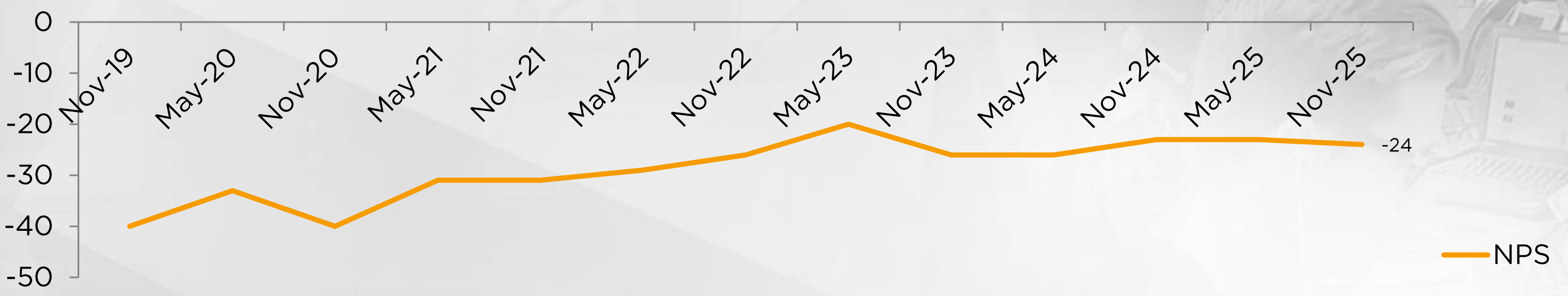
Q: Please tick the media(s) you think is most appropriate for each statement. Scale: Select as many as you wish

MEDIA AGENCY NPS

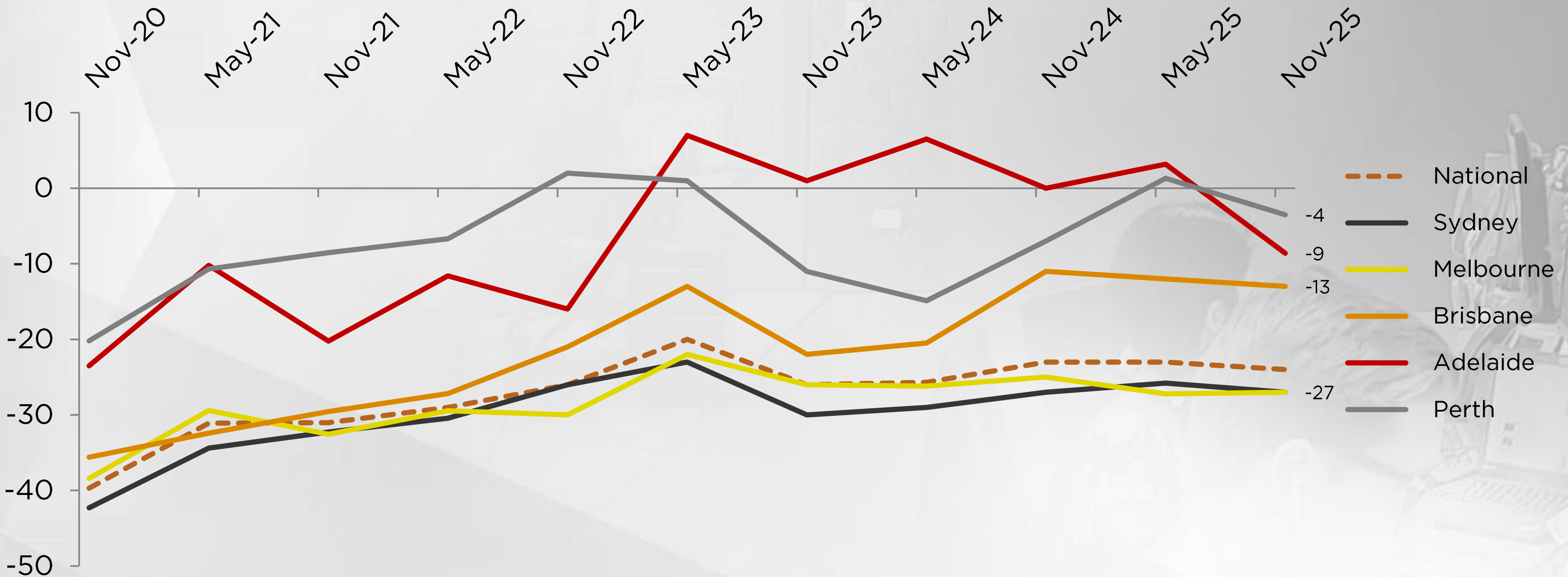
Media agency NPS decreased -1 on May-25 with all markets affected.

AGENCY NATIONAL NPS

NATIONAL NPS	Nov-20	May-21	Nov-21	May-22	Nov-22	May-23	Nov-23	May-24	Nov-24	May-25	Nov-25
PROMOTE	15%	17%	17%	19%	19%	22%	20%	19%	21%	20%	20%
PASSIVE	31%	35%	35%	33%	36%	36%	34%	36%	35%	37%	36%
DETRACT	54%	48%	48%	48%	45%	42%	46%	45%	44%	43%	44%
NPS	-40	-31	-31	-29	-26	-20	-26	-26	-23	-23	-24



TOTAL NPS TIME SERIES

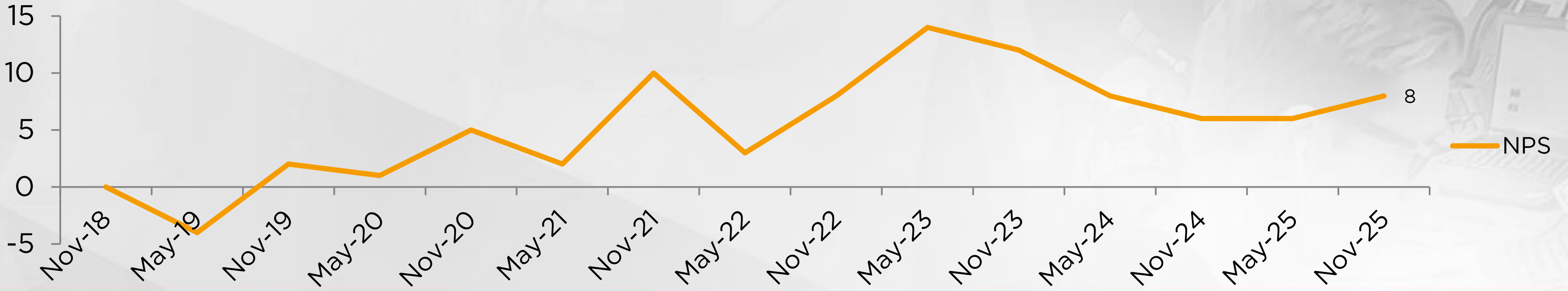


MEDIA OWNER NPS

Media owner NPS increased by +2 on May-25 with Television|Streaming, Adtech, Social and Outdoor|Cinema improving period on period.

MEDIA OWNER NATIONAL NPS

NPS	Nov-20	May-21	Nov-21	May-22	Nov-22	May-23	Nov-23	May-24	Nov-24	May-25	Nov-25
PROMOTE	31%	30%	34%	31%	33%	36%	36%	33%	33%	33%	33%
PASSIVE	43%	42%	42%	41%	41%	41%	40%	41%	40%	40%	41%
DETRACT	26%	28%	24%	28%	26%	22%	24%	25%	27%	27%	26%
NPS	5	2	10	3	8	14	12	8	6	6	8



MEDIA OWNER NATIONAL NPS – BY CHANNEL

NPS	Total	OOH	Radio/Streaming /Podcasting	TV/Streaming	Publishing Media	AdTech	Social Media
PROMOTE	33%	46%	40%	27%	25%	30%	26%
PASSIVE	41%	40%	42%	45%	41%	35%	36%
DETRACT	26%	14%	19%	27%	34%	36%	38%
NPS	-8	32	21	0	-8	-6	-13