THE growth DISTILLERY

ENTERTAINMENT NATION 2026

WHAT WE DID

A large scale quantitative survey was conducted in April 2026 with a nationally representative sample of 3,647 Australian respondents aged 18 and older. The survey captured varying levels of audience engagement across six categories: Streaming, Audio, Cinema, Gaming, Live Events, and Cultural Events.

To understand what's really driving streaming behaviour, we looked at the numbers behind it, motivations, engagement levels and audience profiles, and how well streaming actually delivers on what these audiences are seeking.

STREAMING OVERVIEW IN NUMBERS

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DIFFERENT FREQUENCIES IMPLY DIFFERENT MOTIVATIONS

THE DEVOTED

57% MARKET PROPORTION

The Devoted are the intentional ecosystem explorers. For them, their motivators surround **emotional fulfilment, identity and community**.

Not only do they know what they want, but they engage far beyond the activity itself. They **dive into the broader ecosystem by actively exploring reviews, fan communities, content creators, and merchandising.**

Because they see the emotional and social return from entertainment spaces, they perceive it to be of high value in their spending, and they are **the group most likely to further increase their engagement** in the next 12 months.

THE CASUALS

30% MARKET PROPORTION

The Casuals are the flexible escapists. They turn to entertainment to help **decompress and escape everyday pressures**.

They are less sure about what they want, meaning **discovery comes from both their own decision making and external recommendations**. However, they still tend to gravitate towards comforting, nostalgic, or feel good entertainment types.

Their engagement in the wider ecosystem remains relatively light touch, which makes them **more value conscious**. They often need incentives or reassurance before committing time and money.

THE SEEKERS

13% MARKET PROPORTION

The Seekers are the functional and friction prone users. They have a very transactional relationship with entertainment, but over index in motivators related to self exploration and validation.

Their discovery behaviour is heavily **passive and reliant on advertising and mainstream visibility** across digital and real life touch points. When faced with an abundance of choice, they are easily overwhelmed and often experience choice paralysis.

Due to **low ecosystem** engagement and **high price sensitivity**, this audience requires targeted encouragement to clearly see the value in entertainment.

MOST FREQUENT ← → LEAST FREQUENT

THE CATEGORIES OF MOTIVATORS WHICH REPRESENT THE OVERALL NEEDS OF AUDIENCES WITHIN STREAMING

	ESCAPISM AND UNWINDING	NOSTALGIA AND COMFORT	SELF EXPLORATION AND VALIDATION	SOCIAL CONNECTION AND SHARED ENERGY	THRILL AND CATHARSIS
STREAMING	87%	41%	9%	17%	25%
AUDIO	71%	34%	25%	31%	26%
GAMING	80%	33%	18%	21%	39%

NICHE PLAYERS PUNCH ABOVE HOUSEHOLD NAMES IN TERMS OF ENGAGEMENT

STREAMING

Average weekly hours consumed
16.3

Average number of paid subscriptions
4.5

Netflix	7plus	9 now	Youtube	Amazon Prime Video	10 play	ABC / iView	Disney+	SBS on demand
16.3	18.2	18.2	17.5	19.1	19.4	19.5	19.8	19.5

Stan	Paramount+	Foxtel	HBO Max	Youtube Premium	Binge	Apple TV	Tubi	Hayu
20.1	21.0	15.8	19.7	23.5	22.1	15.4	**25.9**	**26.9**

Unsure
5.5

ENTERTAINMENT NATION 2026

While our census covered the wider landscape, this deep dive zooms into streaming and unpacks choice paralysis, the category's deeper meaning and behaviour, its unique challenges, and the opportunities within.

STREAMING DEEP DIVE

DIGITAL CHALLENGE

Specific audiences within digital spaces struggle with content overload, whilst also lacking motivational fulfilment.

STREAMING CHALLENGE

Content overload **comes with specific nuances** that **keep** audiences from achieving motivational fulfilment.

SECTION 01

UNDERSTANDING THE CONTEXT

CURRENTLY, STREAMING'S BIGGEST CONVERSATION IS ABOUT CONSUMER OVERWHELM AND CHOICE PARALYSIS

News Center >

Nielsen

New Gracenote Report Highlights Impact of Ineffective Content Discovery on Consumer Happiness with Streaming

NBC NEWS

Streaming services are causing a 'mass of customer confusion' and decision paralysis

Some viewers spend as much as nine minutes just trying to decide what to watch.

Medium

Why I Can't Choose What to Watch Anymore | The UX Trap of Choice Paralysis in Modern Entertainment

Mokithrahul Follow 5 min read · Jun 29, 2025

Tech

VICE

Rokus Are Getting a New Feature to Help With Choice Paralysis

I often joke that more than anything on TV, I've stared at the home screen most. Well, it used to be a joke.

By Matt Jancer April 25, 2025, 7:04pm

BUT THE OFTEN-CITED CHOICE-PARALYSIS STUDY DIDN'T EVER SUCCESSFULLY REPLICATE.

A LATER, MORE RIGOROUS ONE FOUND THE NUANCES IT MISSED, AND A 2025 STUDY PINPOINTED THE BIGGEST DRIVER OF CHOICE DEFERRAL FOR STREAMING.

STUDY 1

CHOICE DEFERRAL TRIGGERS

Choice set complexity
Are the options easy to compare?

Decision task difficulty
Time pressure, co-decisions, layout

Decision goal
Browse mode amplifies overload, intent mode protects against it

Preference uncertainty
Do you have an articulated "ideal point" going in?

STUDY 2

MAIN CHOICE DEFERRAL TRIGGER IN STREAMING

Affective ambivalence
The inability to identify which conflicting feeling you're actually trying to resolve

Sources: Iyengar & Lepper (2000), Journal of Personality and Social Psychology; Scheibehenne et al. (2010), Journal of Consumer Research; Chernev, Böckenholt & Goodman (2015), Journal of Consumer Psychology; Kim, Choi & Bao (2025), AJPOR.

TOO MUCH CHOICE MATTERS, BUT SPECIFICALLY FOR STREAMING, THE DEEPER PROBLEM IS **NOT HAVING THE WORDS FOR THE EMOTIONAL PAYOFF YOU WANT** .

Almost

2 IN 5

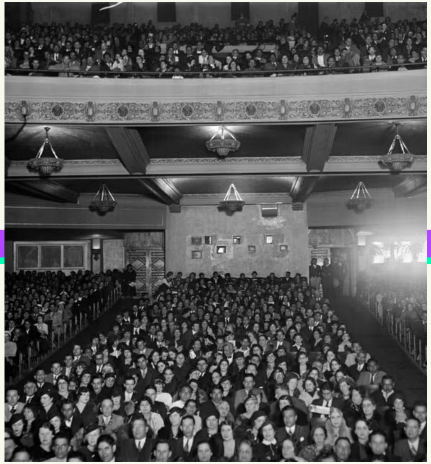
Australians agree they "**often struggle to find and decide** what to engage with, even when I know I want to watch or do something"

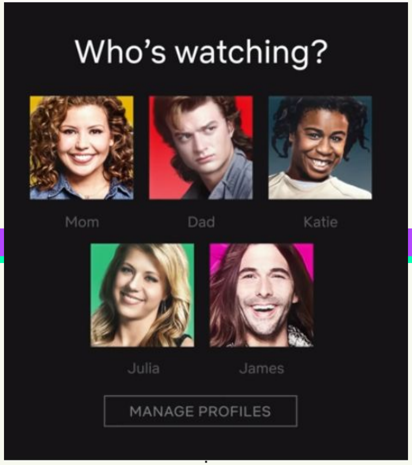
SO WHAT'S KEEPING AUSTRALIANS FROM ARTICULATING WHAT THEY WANT OUT OF STREAMING AND MAKING DISCOVERY SO HARD TO NAVIGATE?

1

DIGITAL ENTERTAINMENT IS BEING ASKED TO DO AN OLD JOB IN A NEW INFRASTRUCTURE

ENTERTAINMENT IS SHIFTING FROM SOMETHING WE EXPERIENCE TOGETHER TO SOMETHING INCREASINGLY SHAPED AROUND THE INDIVIDUAL.





64% of Australian households split into separate streaming profiles; only 29% share one.

AS WE GOT LONELIER, MORE OVERWHELMED AND MORE STRESSED...

50% of Australians say they feel more stressed and overwhelmed these days compared to a few years ago

WE TURNED DIGITAL ENTERTAINMENT INTO ONE OF THE MOST CONSISTENT EMOTIONAL SUPPORT PRESENCES IN OUR LIVES.

71% of Australians say gaming, streaming or audio it is either central to their life or an important part of it

WE MIGHT HAVE INDIVIDUALIZED ENTERTAINMENT, BUT WE STILL EXPECT IT TO DELIVER THE **BELONGING AND RITUAL** IT ONCE GAVE US COLLECTIVELY.

BUT THE TRUTH IS

OF THE ALL THE ENTERTAINMENT FORMATS, STREAMING IS THE MOST HOLLOWED OUT OF **BUILT-IN CONNECTION AND MEANING.**

"Entertainment helps me connect with other people and feel part of something"

STREAMING	56%
AUDIO	70%
GAMING	66%
LIVE EVENTS	70%
CINEMA	68%
CULTURAL EXPERIENCES	72%

2

STREAMING'S GROWING DEMAND FOR EMOTIONALLY COMPLEX STORIES IS MAKING ITS EMOTIONAL VOCABULARY MORE COMPLEX TOO.

“DIFFICULT EMOTION IS BECOMING A CATEGORY”

“What is emerging now is a smaller but structurally significant counter-movement, in which grief, loss, and emotional complexity are treated as the product rather than the problem.”

Streaming saturation has produced audience fatigue with **emotionally identical content.**

Post-pandemic, a broadly documented rise in collective grief created a population that had **processed difficulty in public and found it connective** rather than isolating.

Simultaneously, platforms like Tik Tok demonstrated that **raw emotional content, personal testimony, public mourning, dramatised pain, outperforms polished positivity** in both reach and engagement duration.

AMERICAN CINEMATHEQUE “BLEAK FESTIVAL”

Bleak Festival is built **entirely around the 'cinema of hopelessness,'** programming narrative films that explore difficult and desolate human experience. **The festival has now gone global** - the 2026 edition ran across **100 theatres in 73 cities and eight countries** with more than 300 films.

SINGAPORE PINK DOT ANNUAL LGBTQ+ GATHERING

The event is restructuring its 2026 edition around personal testimony rather than performance **replacing the single-stage concert format with facilitated conversations, gallery walks, and immersive installations.**

NETFLIX TV SERIES “ADOLESCENCE”

The emotionally complex four-parter ranked #1 in 80 countries and Netflix's most-watched series of the first half of 2025. The first streaming show ever to top the UK's overall weekly TV ratings – 6.45 million viewers for episode one – and **its four episodes outperformed all nine of Stranger Things 4** to rank second on Netflix's all-time English-language chart.

Sources: TrendWatching (2026), BBC News (2025), The Guardian (2025), Netflix (2025), Associated Press (2026)

PARTICULARLY FOR AUSTRALIANS, THE INTEREST IN COMPLEXITY IS DRIVING THEIR STREAMING PREFERENCES

42%

of all digital original demand in Australia is for **complex scripted drama.**

TOP 10

most in-demand sub-genres in Australia include **Mystery Drama**, making it one of the **only global markets** where the genre ranks this highly.

ONE OF THE HIGHEST DEMAND SHARES FOR CRIME SHOWS GLOBALLY

belongs to Australia: 21.5% of all show demand went to a crime series, above the 19.1% global share.

COMPLEX PROCEDURAL CONTENT DEMAND OUTSTRIPS SUPPLY 4.5X

Intense medical drama and criminal investigations captures 3.6% of total market demand in Australia while making up just 0.8% of available digital titles.

BUT THE TRUTH IS

THE VOCABULARY STREAMING USES TO DESCRIBE CONTENT HASN'T CAUGHT UP WITH THE EMOTIONAL DEPTH AUSTRALIANS CRAVE

2 IN 5

Australians can't put their specific streaming mood into words - whether they can't name the feeling, or can't find a way to search for it

3 AUSTRALIANS ARE USING NEW PLATFORMS WITH OLD EXPECTATIONS

AUSTRALIANS DEFAULT TO THE PLATFORM ITSELF WHEN THEY'RE STUCK

#1

of streaming-uncertain Australians **turn to the platform first when stuck** – highest platform-default rate of any pillar.

BUT THE MENU IS NOT ENOUGH - THERE'S STILL A NEED TO BETTER NAVIGATE DISCOVERY.

Almost

1 IN 3

Australians say discovery itself (not knowing what's worth watching, not finding what matches their interests, or feeling overwhelmed by choice) is what's holding them back

THE TRUTH IS

THE AUSTRALIAN HABIT OF BEING GUIDED NEVER WENT AWAY (AND IT'S ACTUALLY GROWING)

2ND GLOBALLY

Australia ranks 2nd globally for algorithm distrust – 61% concerned about algorithmic discovery missing important information

(Digital News Report Australia)

GROWING DEMAND FOR TV GUIDES

TV Week magazine print readership actually GREW 4.3% in 2025

(Roy Morgan, August 2025)

SECTION 02

UNPACKING THE OPPORTUNITY

	EXPERIENCE	DISCOVERY	
INSIGHT	Streaming has been hollowed out of the rituals and connection that surrounded older formats	How streaming describes content hasn't caught up with the emotional depth australians crave	The australian habit of being guided never went away (and it's actually growing)
NEED	MEANING & CONNECTION	VOCABULARY	GUIDANCE
OPPORTUNITY	**Help restore the ritual** Recreate shared moments, occasions and experiences around streaming	**Translate feeling into recommendation.** Help people move from mood to choice	**Establish taste authority** Become the voice people trust before the choice even happens

RESTORE THE RITUAL

THE INSIGHT:

Entertainment used to be collective but it is increasingly becoming personalised and individualised.

STRATEGIC OPPORTUNITY:

Help return viewing into a shared moment or a meaningful and memorable experience

What it looks like in practice:

- ➔ **Creating or sponsoring water-cooler moments** – premiere nights, finale watch parties, post-episode conversations, turn solo viewing into shared activity (curated group watches, co-viewing prompts, "watching this too" signals)
- ➔ **Claiming a recurrent time slot:** Owning a standing appointment slot that exists independent of any single show (a branded Sunday night ritual, a Wednesday reality drop)
- ➔ **Create physical extensions**: Extending the ritual into physical space (pop-ups or real-world activations built around digital IP, turning a stream into something you can attend)

TRANSLATE FEELING INTO RECOMMENDATIO N

THE INSIGHT:

If people can't articulate what they want, whoever helps them name it wins their attention.

STRATEGIC OPPORTUNITY:

Go beyond conventions and own the emotional frame

What it looks like in practice:

➔ **Naming the feelings contextually:** Editorial voice that names emotional states ("the kind of Sunday afternoon that needs something you don't have to concentrate on" vs "our top rom-coms")

➔ **Repackaging content:** Content packaging that leads with the emotional payoff on the tile or thumbnail itself, ahead of the genre or the star name

➔ **Redesigning the discovery path:** Create discovery flows that ask "how do you want to feel" before "what do you like" (an emotion-first filter ahead of a genre-first one)

➔ **Surface the emotional journey:** Brand-authored content that enters the entertainment conversation through a more contextual point of view, describing the deeper feelings evoked along with the content's artistry (performances, script, production)

ESTABLISH TASTE AUTHORITY

THE INSIGHT:

Australians still expect someone to help narrow the field.

STRATEGIC OPPORTUNITY:

Become a trusted cultural filter and set the standard.

What it looks like in practice:

- ➔ **Build authority in-house:** Using editorial voice, talent or brand positioning to narrow the field before the platform does (a masthead "pick of the week" or a presenter's nightly recommendation that beats the algorithm to the punch)
- ➔ **Borrows authority that already exist:** Partnering with the editorial voices audiences already trust, instead of building that trust from zero (co-signing a list with critics, columnists or cultural commentators whose judgment is already taken as fact)
- ➔ **Become or create the unit of measurement:** Creating a proprietary rating or certification that becomes shorthand for quality (a "must-watch" seal or score that travels with a title everywhere it's discussed, independent of any single review)
- ➔ **Shape what's remembered over time:** Building a recurring canon-forming format that outlives any single title (an annual definitive list, an awards moment, a "best of the year/decade" franchise that sets the cultural record rather than reacting to it)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ENTERTAINMENT
NATION
2026
THAT’S A WRAP.