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.

SECTION 1

THE PULSE OF ENTERTAINMENT

ENTERTAINMENT PLAYS A HIGHLY MEANINGFUL ROLE IN THE EVERYDAY LIFE OF AUSTRALIANS.

ALMOST **3 IN 4**

PEOPLE SAY THAT ENTERTAINMENT IS EITHER CENTRAL TO THEIR LIFE, OR AN IMPORTANT PART OF IT.

SO WHY IS THIS IMPORTANT ?

PEOPLE ARE MORE STRESSED AND OVERWHELMED NOWADAYS...

AND THEY ENGAGE WITH ENTERTAINMENT TO SHIFT THEIR EMOTIONAL STATE.

AS A RESULT, AUSSIES ARE FULLY IMMERSED ACROSS THE ENTERTAINMENT CATEGORIES, SPENDING SIGNIFICANT TIME AND MONEY.

STREAMING	AUDIO	GAMING	CINEMA	LIVE EVENTS	CULTURAL EVENTS
Average weekly hours consumed	Average monthly hours consumed	Average monthly hours consumed	Average visits over the last 12 months	Average event attendance in the last 12 months	Average event attendance in the last 12 months
16.3	***15.4***	***31.6***	***4.5***	***4.6***	***3.6***
Average number of paid subscriptions	Average number of platforms	Average number of platforms	Types of cinema on average	Type of events on average	Types of events on average
4.5	***2.6***	***2***	***1.4***	***2.3***	***2.7***

HOWEVER, THERE ARE FURTHER OPPORTUNITIES TO UNLOCK GROWTH, BUT IT REQUIRES SOLVING TWO DISTINCT CHALLENGES FOR DIGITAL AND PHYSICAL SPACES.

1

DIGITAL

Content volume has a habit of overwhelming audiences, whilst also leaving them feeling unfulfilled.

2

PHYSICAL

All audiences are feeling underserved by choice, and compromised by cost.

SECTION 2

DIGITAL SPACES

BEFORE WE DIVE INTO DIGITAL SPACES, IT IS IMPORTANT TO NOTE THAT...

DIFFERENT LEVELS OF *FREQUENCY* TRANSLATE INTO DIFFERENT TYPES OF *MOTIVATION*.

THERE ARE THREE KEY FREQUENCY GROUPS, EACH WITH DISTINCT MOTIVATIONS.

THE DEVOTED 38% 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.

Share of audience by category

57% Streaming	32% Gaming
42% Audio	30% Cultural Events
33% Live Events	29% Cinema

THE CASUALS 32% 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.

Share of audience by category

38% Cinema	33% Gaming
37% Live Events	30% Streaming
36% Cultural Events	24% Audio

THE SEEKERS 30% MARKET PROPORTION

The Seekers are the functional and friction-prone users. They have a very **transactional relationship** with entertainment, but over-index in **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.

Share of audience by category

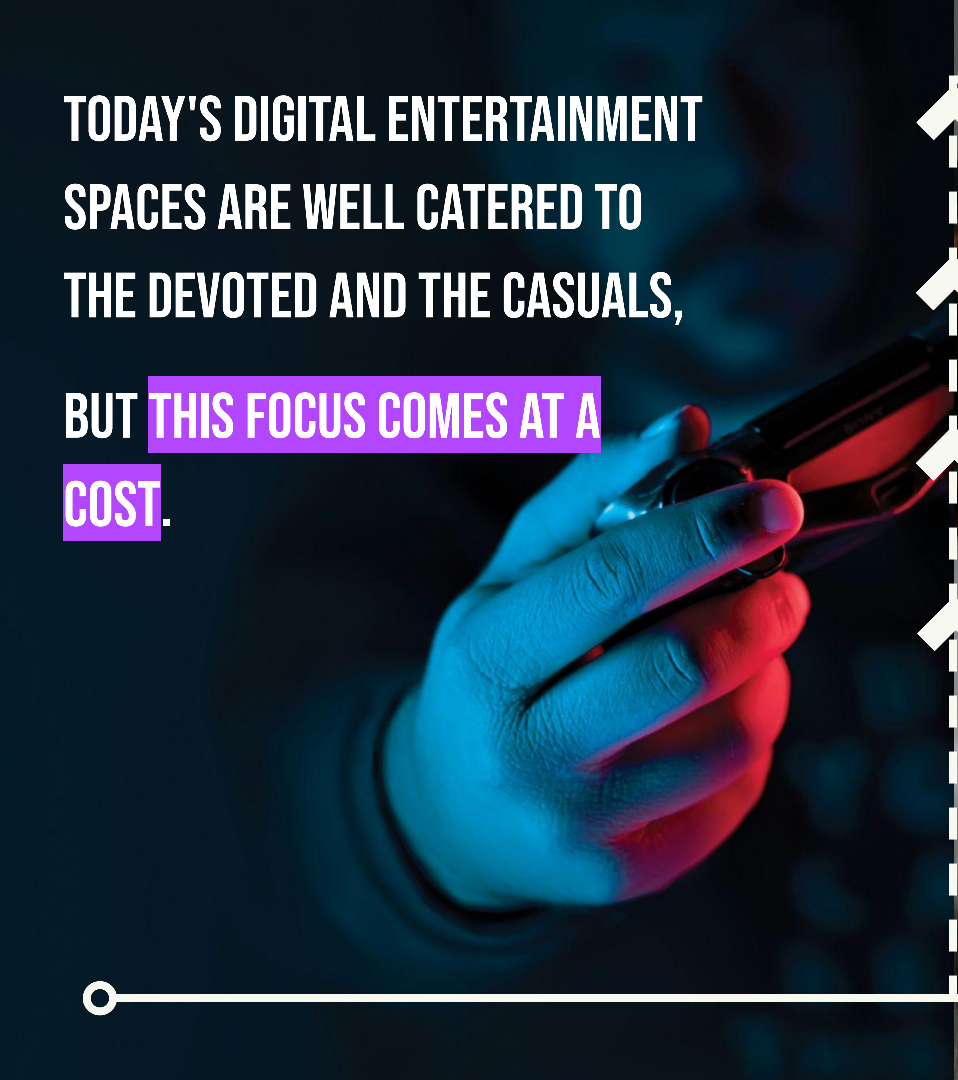
35% Gaming	33% Cinema
34% Cultural Events	33% Live Events
34% Audio	13% Streaming

MOST FREQUENT ⟷ LEAST FREQUENT

FOR ALL OF THESE AUDIENCES, THESE MOTIVATIONS OR NEEDS, SHOW UP IN DIFFERENT WAYS ACROSS THE ENTERTAINMENT CATEGORIES...

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

...PROVIDING IMMEDIATE OPPORTUNITY TO TAILOR EXPERIENCE TO NEED.



TODAY'S DIGITAL ENTERTAINMENT SPACES ARE WELL CATERED TO THE DEVOTED AND THE CASUALS,

BUT THIS FOCUS COMES AT A COST.

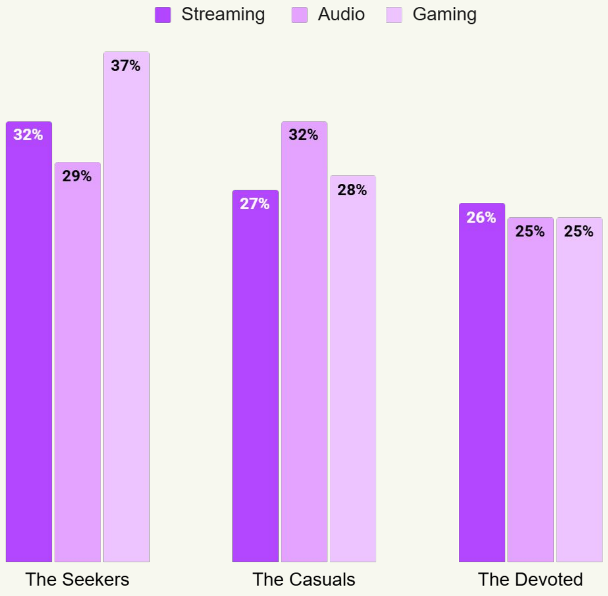
IT OVERLOOKS THE SEEKERS, AN AUDIENCE THAT REPRESENT A SIGNIFICANT OPPORTUNITY.

WHILE ALL AUDIENCES IN-PLATFORM BROWSE TO DISCOVER CONTENT, SEEKERS ARE THE LEAST SUCCESSFUL AT IT, AND ARE OFTEN LEFT OVERWHELMED AND THINKING THERE IS TOO MUCH TO CHOOSE FROM.

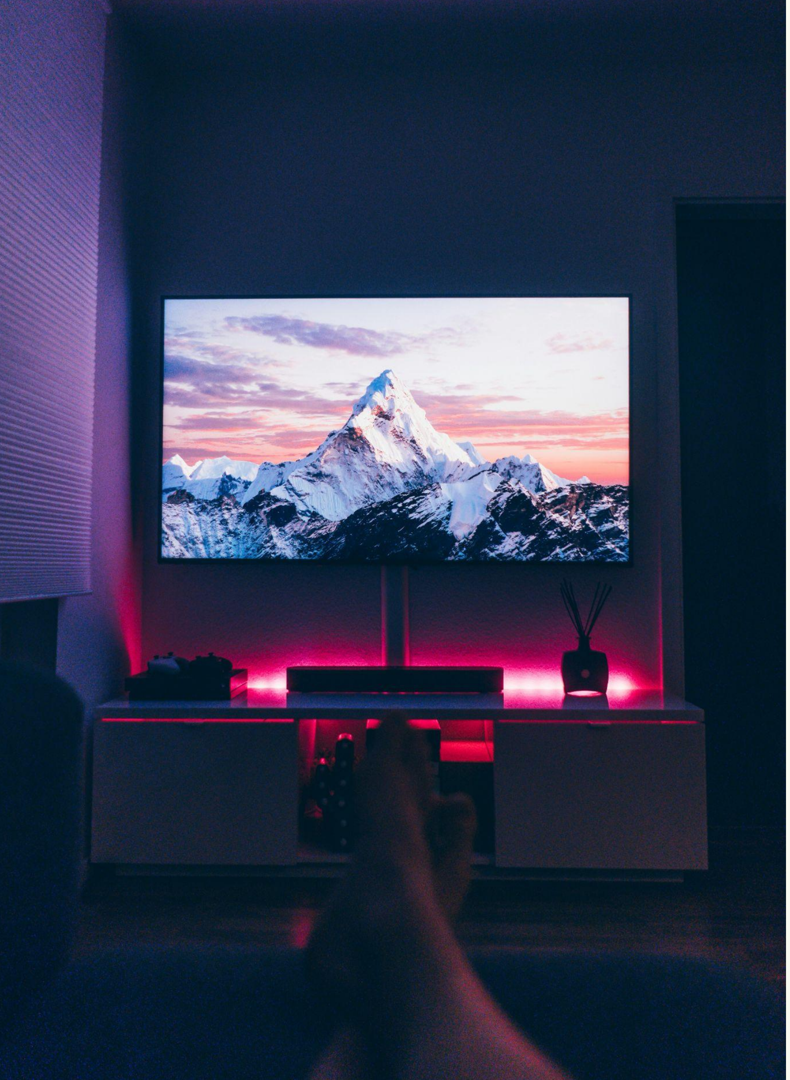
The Devoted and The Casuals are the heaviest users of in-platform browsing, but arrive having an idea of what content they want to engage with, making the discovery process less consuming.

In comparison, The Seekers are least likely to know what they want beforehand, and when dropped into heavy content libraries, are often left feeling overwhelmed.

The Seekers within **Gaming** are more likely to experience choice paralysis, which is more than **3x** the amount for The Seekers within Audio and **1.5x** the amount in Streaming.



% of those who believe there is too much content to choose from



SEEKERS ARE MORE TRANSACTIONAL AND MORE LIKELY TO BE DRIVEN BY A SINGLE MOTIVATOR, THIS GIVES THEM A NARROWER VIEW OF WHAT ENTERTAINMENT CAN DELIVER...

STREAMING

The Seekers are ***3x more likely*** to have only one motivator for engaging with content, compared to The Devoted.

AUDIO

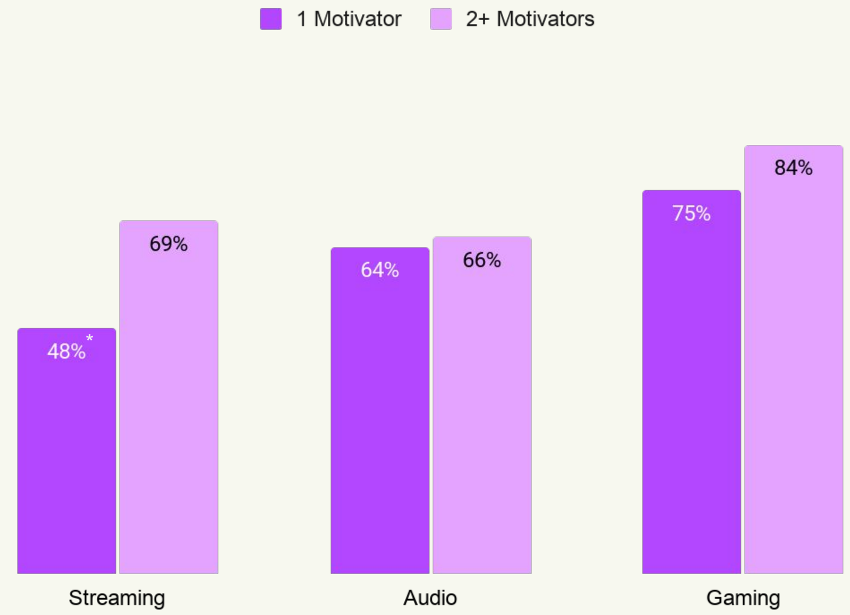
The Seekers are ***2x more likely*** to have only one motivator for engaging with content, compared to The Devoted.

GAMING

The Seekers are almost ***4x more likely*** to have only one motivator for engaging with content, compared to The Devoted.

ENTERTAINMENT NATION 2026

BUT AUDIENCES WITH MORE MOTIVATORS TO SATISFY, PERCEIVE GREATER VALUE IN THEIR CATEGORY AND IMPROVED WILLINGNESS TO PAY.



% of The Seekers who believe the category is value for money, split by the number of motivators for engaging with each category

BY EXPANDING THE SEEKER'S VIEW OF WHAT ENTERTAINMENT CAN DELIVER, WE INCREASE ITS PERCEIVED VALUE AND CAN DRIVE WILLINGNESS TO PAY.

*Low sample size, results are indicative

HOW DO WE BOOST FULFILLMENT AND VALUE FOR OPPORTUNITY AUDIENCES?

CATER TO MOTIVATIONS AND NEEDS

2 IN 3

Australians say they use entertainment as a way to **reset or recharge** emotionally.

1 IN 3

Australians say they still **struggle to find and decide** what to engage with, even when they know they want to watch or play something.

Let entertainment be their emotional shift.

Content recommendations and organisation needs to be more intentional. Leading with audience motivators and needs will help align content with how people want to feel. This ensures they get the emotional return they now seek.

WHAT DOES THIS LOOK LIKE?

DO MORE

- ➔ Categorisation of content by motivational themes.
- ➔ Content recommendations for different physical settings.
- ➔ The tone of genre to be more descriptive of feelings and needs.

DO LESS

- ➔ Broad content recommendations by genre.
- ➔ Shortened carousel recommendations.
- ➔ Generic ‘everyone is watching this’ lists.

LEAN INTO SELF EXPLORATION AND VALIDATION

Focus on what motivates them most.

While The Seekers do engage to escape, they value self exploration and validation far more than other users. Reassurance and identity drives their digital search. Aligning content with these core needs boosts perceived value and long term engagement.

WHAT DOES THIS LOOK LIKE?

DO MORE

- ➔ Frame content around identity and personal growth.
- ➔ Build affinity through shared experiences.
- ➔ Create reflective experiences for personal and group settings.

DO LESS

- ➔ Generic calls to action for content engagement and discovery.
- ➔ Unrelatable personalities to speak to self exploration and identity.

1 IN 5

Seekers specifically turn to digital entertainment spaces for **self exploration and validation**.

8 IN 10

Australians say that the **emotional experience** entertainment will give them, is an important factor when deciding what to consume or attend.


SECTION 3
PHYSICAL SPACES

THE CHALLENGE SHIFTS FOR PHYSICAL SPACES...

AUDIENCES FEEL UNDERSERVED WITH CONTENT, AND PRICED OUT.

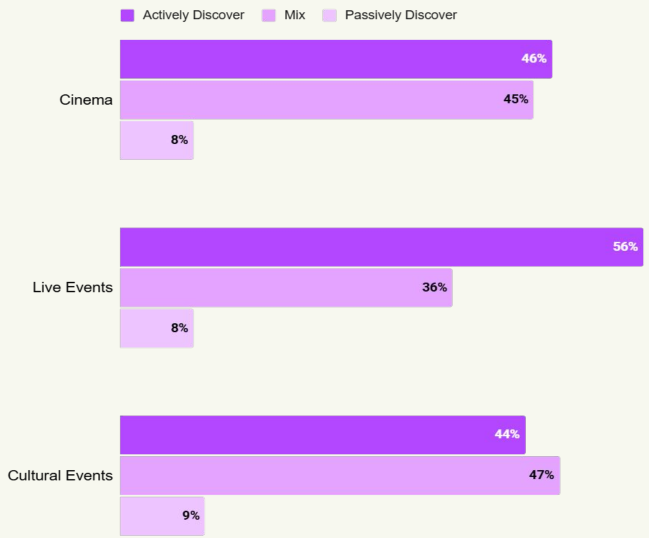
WHILST A PROPORTION OF AUDIENCES BELIEVE CONTENT QUANTITY IS JUST RIGHT, THERE IS AN OPPORTUNITY TO FURTHER BOOST THOSE WHO WANT MORE.

CONTENT QUANTITY How do audiences feel about the options available to them?

CATEGORY	NOT ENOUGH	JUST RIGHT	TOO MUCH
Cinema	24%	69%	8%
Live Events	20%	70%	10%
Cultural Events	16%	79%	5%
Streaming	12%	61%	27%
Audio	5%	66%	28%
Gaming	7%	63%	30%

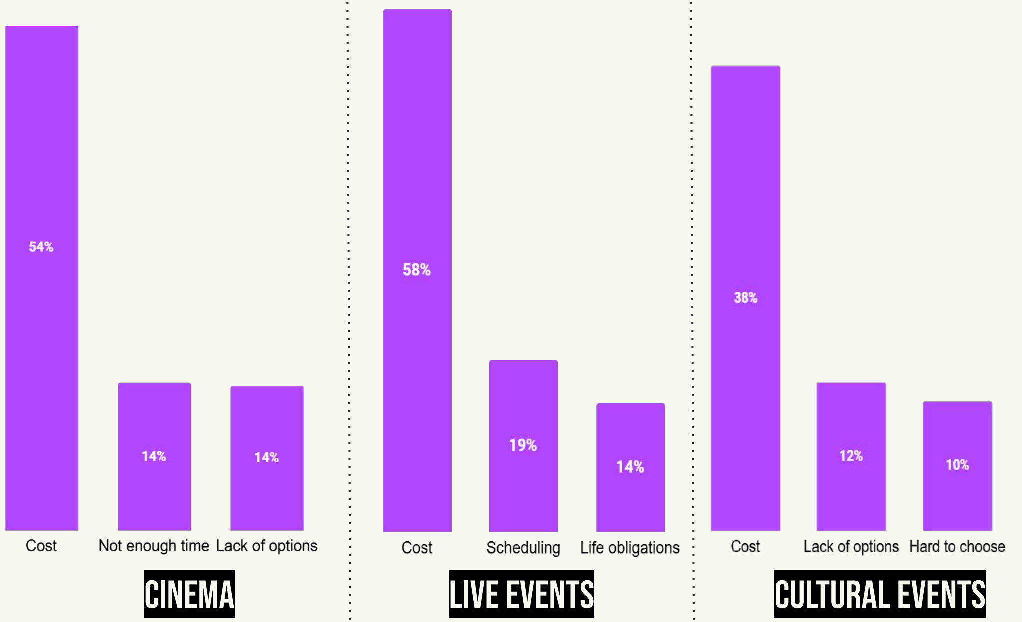
And exposure isn't the problem. These audiences aren't waiting to passively discover content, they actively hunt.

When it comes to finding events and things to watch, how do you discover options?



ALTHOUGH AUDIENCES ARE EAGER AND ACTIVELY SEARCH FOR MORE EXPERIENCES, COST REMAINS THE PRIMARY BARRIER, FURTHER IMPACTING PERCEIVED VALUE.

What holds you back most from engaging more often?



Only **1 IN 4**
Cinema goers (24%) state that the quality of content and quantity of options are excellent.

Only **2 IN 5**
Live event attendees (41%) state that the quality of content and quantity of options are excellent.

Only **2 IN 5**
Cultural event attendees (45%) state that quality of content and quantity of options are excellent.

SO HOW DO WE IMPROVE QUANTITY AND EASE THE COST BARRIER?

IMMERSE AUDIENCES INTO THE BROADER ECOSYSTEM

Whilst you can't create new events immediately, you can prolong the experience of the ones that already exist. There is a demand from audiences wanting additional content within the broader ecosystems that brands are not fully tapping into.

29%

of cinema goers want analysis, review and commentary content.

31%

of live event attendees want social and community engagement content.

37%

of cultural event attendees want production and talent access content.

What would you like to see more of in these physical spaces?

"I would like to see more clips of films released closer to the release date".
-Cinema, Millennials.

"When a concert is on, I would like to see more side attractions on".
-Live Events, Gen Z.

"Limited edition or value packages to explain historical and cultural context".
-Cultural Events, Gen Z.

WHAT DOES THIS LOOK LIKE?

DO MORE

→ Pre-event activations to start the moment earlier.
→ Post-event amplification to keep the moment going.
→ Precinct environments to allow for greater connection and socialisation with others.
→ Strategic partnerships with sponsors to increase values of on site activations and activities.

DO LESS

→ Generic communications to alert attendees of events, without providing them with actual utility.
→ Over-branding on-site activations that are just marketing.

MAKE COST JUSTIFIED FOR ATTENDEES

For audiences, the perceived value of the cost of a ticket is no longer defined by the activity itself. It is defined by the lifespan of the experience.

When brands provide paid audiences with extended access to adjacent content, it ultimately extends the lifespan of the purchase. This ensures audiences feel a much higher return on value for what they pay.

Implement value-packed experiences.

Introducing intentional, value-first bundles directly addresses cost sensitivity by stretching the event experience well beyond the main event itself. When ticket purchases include extended content, partner perks, or exclusive digital access, attendees receive a significantly greater return on their investment.

WHAT DOES THIS LOOK LIKE?

DO MORE

- ➔ VIP or tiered upgrades that cater to different groups needs.
- ➔ Incorporate more packages within ticket pricing (e.g. food, drink and transportation).

DO LESS

- ➔ Fragmented add-on selling (e.g. food, drink and transportation).
- ➔ Event promotion that isolates the main attraction.

APPENDIX

THE DEVOTED FREQUENCY PROFILE

TOP 3 BARRIERS

STREAMING
Nothing (35%), Cost (21%), Life obligations (11%)

AUDIO
Nothing (26%), Cost (21%), Life obligations (14%)

GAMING
Life obligations (26%), Cost (21%), Nothing (20%)

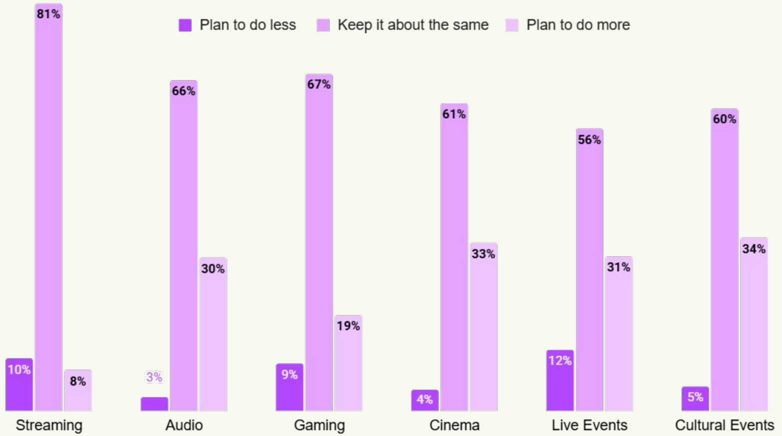
CINEMA
Cost (49%), Nothing (19%), Relevant content (16%)

LIVE EVENTS
Cost (49%), Nothing (19%), Relevant content (16%)

CULTURAL EVENTS
Cost (31%), Nothing (23%), Life obligations (16%).

Average hours or attendance for The Devoted frequency group per category

WEEKLY HOURS		MONTHLY HOURS	ANNUAL VISITS		
STREAMING	AUDIO	GAMING	CINEMA	LIVE EVENTS	CULTURAL EVENTS
21	24.9	57.7	7.7	8.8	5.7



Frequency intention over the next 12 months

Share of audience by category

57% Streaming
42% Audio
33% Live Events
32% Gaming
30% Cultural Events
29% Cinema

Net good value for money by category

89% Audio
89% Cultural Events
79% Streaming
73% Live Events
67% Cinema
63% Gaming

THE CASUALS FREQUENCY PROFILE

TOP 3 BARRIERS

STREAMING
Nothing (32%), Cost (26%), Life obligations (15%)

AUDIO
Nothing (24%), Life obligations (22%), Cost (19%)

GAMING
Life obligations (26%), Nothing (25%), Not enough time (21%)

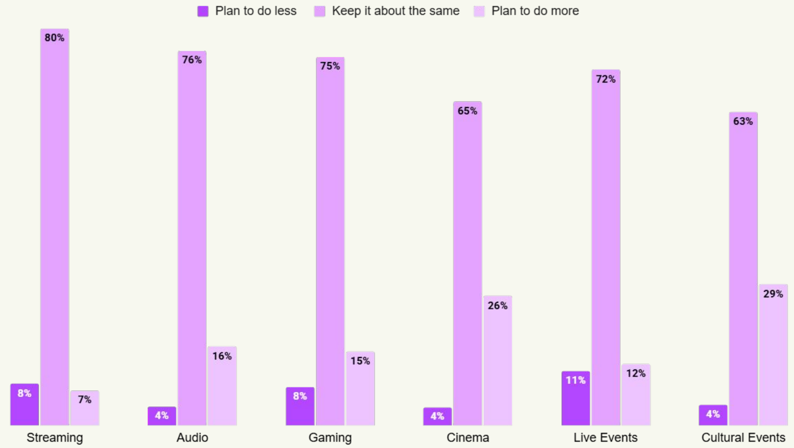
CINEMA
Cost (57%), Relevant content (18%), Not enough time (16%)

LIVE EVENTS
Cost (64%), Scheduling (16%), Life obligations (16%)

CULTURAL EVENTS
Cost (45%), Nothing (19%), Life obligations (19%).

Average hours or attendance for The Casual frequency group per category

WEEKLY HOURS		MONTHLY HOURS	ANNUAL VISITS		
STREAMING	AUDIO	GAMING	CINEMA	LIVE EVENTS	CULTURAL EVENTS
11.1	11.2	27	3.7	3.2	3



Frequency intention over the next 12 months

Share of audience by category

38% Cinema
37% Live Events
36% Cultural Events
33% Gaming
30% Streaming
24% Audio

Net good value for money by category

90% Cultural Events
77% Streaming
73% Audio
71% Live Events
67% Cinema
67% Gaming

THE SEEKERS FREQUENCY PROFILE

TOP 3 BARRIERS

STREAMING
Cost (29%), Nothing (22%), Not enough time (13%).

AUDIO
Nothing (23%), Life obligations (19%), Cost (17%)

GAMING
Nothing (33%), Life obligations (20%),, Not enough time (19%)

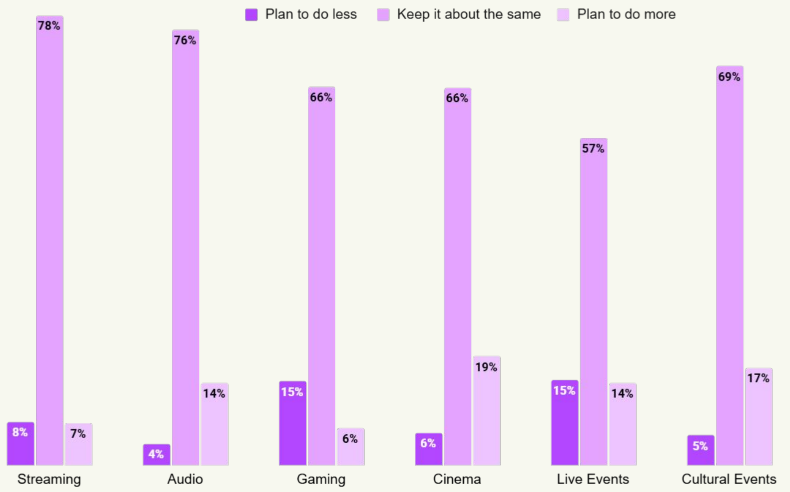
CINEMA
Cost (57%), Not enough time (13%), Lack of options (12%).

LIVE EVENTS
Cost (62%), Scheduling (20%), Life obligations (16%)

CULTURAL EVENTS
Cost (36%), Nothing (17%), Life obligations (13%).

Average hours or attendance for The Seekers frequency group per category

WEEKLY HOURS		MONTHLY HOURS	ANNUAL VISITS		
STREAMING	AUDIO	GAMING	CINEMA	LIVE EVENTS	CULTURAL EVENTS
7.5	7.2	11.7	2.6	2.5	2.2



Frequency intention over the next 12 months

Share of audience by category

35% Gaming
34% Cultural Events
34% Audio
33% Cinema
33% Live Events
13% Streaming

Net good value for money by category

79% Cultural Events
65% Live Events
64% Streaming
63% Cinema
60% Audio
46% Gaming