

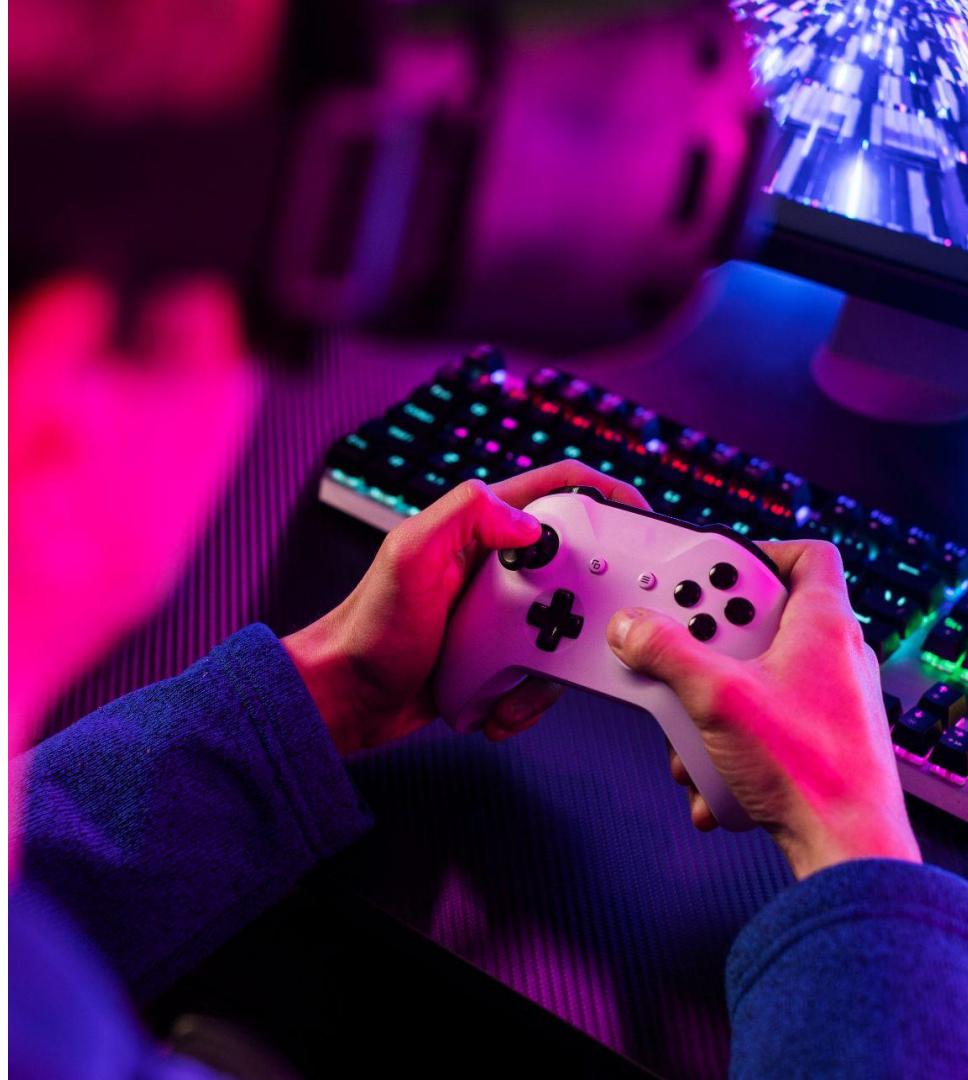
THE
growth
DISTILLERY



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.

Unless otherwise specified, all data are sourced from The Growth Distillery research and the methodology outlined above.



To understand what's really driving gaming 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.

GAMING OVERVIEW IN NUMBERS

GAMING IS ONE OF THE BIGGEST ENTERTAINMENT BEHAVIOURS IN AUSTRALIA

Australians now spend more on games than on streaming and music combined

Australians spent **AU\$4.2 billion** on video games and hardware in 2025, up 12% year-on-year

IGEA's latest official release (June 2026, covering the 2025 calendar year)

Video streaming subscriptions

~\$2.2–3 billion/year

(GlobalData, Australia, 2023–2028)

Recorded / digital music

\$727 million/year

(ARIA, Australia, 2025)

DIFFERENT FREQUENCIES IMPLY DIFFERENT MOTIVATIONS

THE DEVOTED

32% 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

33% 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

35% 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.

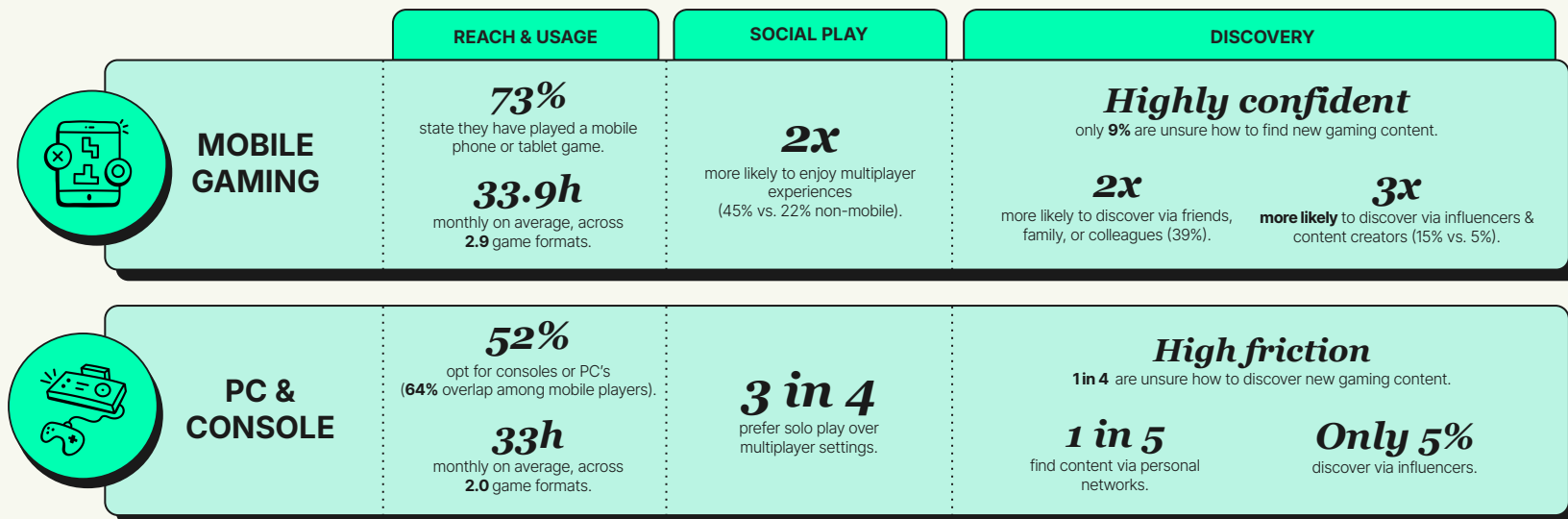
Their discovery behaviour is heavily **passive and reliant on advertising and mainstream visibility** across digital and real life touch points. When faced with an abundance of choice, they are easily overwhelmed and often experience choice paralysis.

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

DEVICE CHOICE MATTERS AND DICTATES HOW PLAYERS ACT BEYOND THE SCREEN



DIGITAL CHALLENGE

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



GAMING CHALLENGE

In gaming, the challenge is less about overload and more about knowing what to commit to, while its value extends beyond play into the role it plays in people's lives

THE MARKET IS FLOODED WITH NEW GAMES

And every release still competes with an established back catalogue of older titles.

~20.000

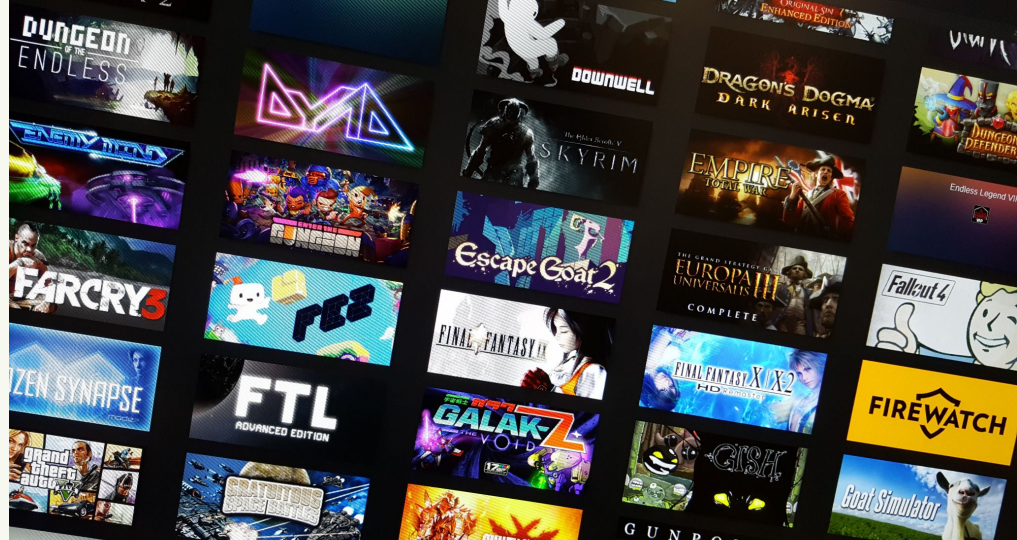
Games released on Steam in 2025.
(Steam Official Release Tracker)

79%

of Steam's 2026 half-year revenue came from games released before 2026. New games compete with the back catalogue, not just this year's slate.
(Alinea Analytics)

MEANWHILE, THE STOREFRONT IS DESIGNED TO SELL WHAT ALREADY SELLS

They excel at converting existing interest into sales but fall short in introducing new games to uninitiated players.



"Storefronts are built to be bottom of funnel: 'You're interested in this game? Let's get you to the buy button.' They're pretty bad at introducing the uninitiated consumer to new games."

[Ichiro Lambe](#)

30-year gaming industry veteran, helped launch Steam Labs at Valve;
CEO of Totally Human Media, publisher of We Love Every Game.

A man and a woman are sitting on a couch, playing video games. The man, on the left, has a beard and long hair, and is wearing a white t-shirt. He is holding a black and white game controller and has his head tilted back with his mouth open in a shout or yell. The woman, on the right, has short pink hair and is also wearing a white t-shirt. She is holding a black game controller and has a content, slightly pouting expression on her face. They are both looking towards the camera. The background is a plain, light-colored wall. There are some pillows on the couch, including a pink one on the right.

TO BREAK INTO GAMING'S CROWDED MARKET, START BY CHALLENGING THESE THREE MISCONCEPTIONS

AND LEVERAGING THE OPPORTUNITIES
CREATED WHEN **WE RETHINK THEM.**

While our census covered the wider landscape, this deep dive zooms into gaming – the role it plays for Australians, how it became everyday behaviour, and why choosing what to play is still the hard part.

GAMING DEEP DIVE

1

RETHINKING WHAT MAKES GAMING SOCIAL

CO-PLAY MAY BE THE HOOK, BUT IN GAMING,
CONVERSATION IS THE REAL ENGINE THAT
DRIVES SOCIAL VALUE (AND DISCOVERY.)

IT'S EASY TO ASSUME
PLAYING WITH OTHERS
IS ONE OF THE BIGGEST
AUDIENCE MOTIVATORS.

2 IN 5

of Australians say they play multiplayer games

66%

of Australians say gaming helps them "connect
with other people and feel part of something"*

BUT SOCIAL CONNECTION
IS ONE OF THE LAST
REASONS GAMERS SAY
THEY PLAY.

ONLY

12%

of Australians cite **"Sharing a moment with others"** as a reason to play

AND ANOTHER

12%

of Australians say **"feeling connected to a community that shares my passion"** is a motivator

THE REALITY IS, PLAYING TOGETHER IN ITSELF DOESN'T
CARRY AS MUCH SOCIAL WEIGHT AS TALKING ABOUT IT DOES.

7:42:18  PixelRogue: that was crazy! 🤪
7:42:21  LunarTide: insane play 🔥
7:42:24  ByteSprint: no way!!
7:42:27  MapleFox: that timing tho 🐱
7:42:30  Kestrel: 
7:42:37  SolarMoss: that was clean 🌱
7:42:41  RoguePanda: love this game 💜
7:42:45  Zenith: still going?!
7:42:48  FrostByte: epic 🤪
7:42:52  Cloder: legend 🔥

AND THAT'S BECAUSE THE SOCIAL PAYOFF DOESN'T HAPPEN IN PLAY.

According to research, talking about the game is more valuable than playing it.



BEHAVIOR FREQUENCY

People talk about games over 3.5x more than they actually play them together.



SELF & GROUP PERCEPTION

Playtime doesn't make you a gamer as much as talking does. Conversation drives gamer identity far more than play frequency, both for self-image and social perception.



IDENTITY FORMATION

Gamer identity is shaped far more by talking about games with friends than by actually playing together.

BEYOND THAT, CONVERSATION IS THE MOST CONSISTENT DISCOVERY LAYER.

It creates value for players no matter how engaged they are.

DISCOVERY CHANNELS	THE DEVOTED	THE CASUALS	THE SEEKERS
Friends, family or colleagues	36%	35%	32%
Browsing within a gaming platform	8%	27%	28%
Recommendations on gaming system home page	5%	9%	19%
Reviews or ratings websites	2%	7%	17%
Online forums or communities	4%	10%	15%
Cannot name how they find out at all	23%	11%	3%
Discovery via an AI tool	2%	4%	5%

THE TRUTH IS

THE CONVERSATION AROUND
GAMING IS WHERE MEANINGFUL
SOCIAL VALUE IS CREATED, AND
WHERE BRANDS CAN EARN AN
IMPACTFUL ROLE TO PLAY.

47%

of adult players (average gamer age 35yo) report making long-term friends and joining community groups **strictly through game-related discussions.**

70%

of Australian players state that **gaming communities and conversation** directly support their social well-being.

2

RETHINKING THE FRICTION

CONSUMERS STRUGGLE TO JUDGE IF THE
COMMITMENT IS WORTH IT UNTIL THEY'VE
ALREADY PAID THE COST.

EVEN THOUGH CHOICE IS SATURATED, AUSTRALIANS ARE NOT LOST IN THE AISLES



Gaming audiences are mostly in intent mode.

61%

sit at the *"I have an idea what to play and go direct to it"* end of the scale, against 8% who open the platform first and decide from what's there.

47%

lean toward going **looking for specific franchises, genres or developers**, against 13% who mostly come across things through feeds and exposure.

PLAYER FRUSTRATION ISN'T ABOUT VOLUME OR QUALITY

Across both mobile and PC/console players:



63%

of Australians who play say the **amount of games available is just about right** (and only 7% say they want more)



93%

Say they the **quality** of options and content available on gaming platform is "Ok" or "Excellent"



ONLY 5%

say there aren't many **new or appealing options** right now.

THE DISAPPOINTMENT THAT
LANDS HARDER IN THIS
CATEGORY IS THAT YOU
DON'T JUST PICK WRONG,
YOU PAY TO PICK WRONG.

1 IN 5

Say the **cost of subscriptions** or content are a barrier that holds them back.

46%

of Australian players experienced **financial detriment from digital gaming** (overspending, feeling pressured into a purchase, buying something by accident. etc)*

30%

spent time or effort trying to navigate paid DLCs*

NAVIGATING CHOICE IS EVEN HARDER WHEN PICKING A GAME MEANS COMMITTING TO A MONETISATION RELATIONSHIP IN AN ENVIRONMENT OF LOW TRUST

83%

reported a perceived negative impact from encountering a **manipulative design pattern**.

54%

reported **feeling manipulated** when gaming.

95%

encountered at least **one dark pattern** in the past 12 months, and 58% encountered more than ten different types.

46%

of Australian players have **spent more than they intended** or made purchases they didn't mean to make.

Deceptive designs exploiting cognitive biases:

trick questions (confusing wording), disguised ads, confirmshaming (guilt-tripping exit prompts), false hierarchies (pricier options made to stand out).

Gambling-like reward mechanics:

loot boxes, battle passes, skin betting

Privacy harm:

Accidental or coerced account sign-ups, and sharing more personal information than intended.

Layered in-game currencies:

that mask or distort real-world monetary costs (microtransactions)

Manipulative practices targeted at children

WHEN IN DOUBT, THE STOREFRONT BECOMES THE DEFAULT GUIDE

Outside the store, the answer splits across many different signals (reviews, trends, influencers), none of them consistent enough alone. So players fall back on what's built into the platform itself.

Imagine a scenario where you're not sure what to play and are open to ideas - what would you do first to help you decide?

35%

just open the platform
and browse

10%

default to the platform's own
"recommended for you"

45%

end up letting the platform's own
systems make the call for them

15% ask friends or family

15% have no idea what to do

7% read reviews

8% social trending

5% influencers

3% search/AI

THE TRUTH IS

TOO MUCH CHOICE IS THE WRONG DIAGNOSIS.

Commitment (not just in terms of money, but also time and skill) or "whether the game is worth it" **is 2.3x more likely to be a barrier than the catalogue**

NET	STATEMENTS	% OF PLAYERS
Commitment	Hard to know what's worth playing · cost of subscriptions or content · takes too long to play through · too difficult to progress or win	37%
Navigation/ discovery	Too much choice · difficult to find content matching interests · not many new or appealing options	16%

3

RETHINKING GAMING'S PLACE IN CULTURE

THE NEXT GAMING
COHORT WILL ARRIVE
WITH PERMISSION

GAMING SPENT DECADES BEING JUDGED

(By people who didn't play it.)



For years, gaming's reputation was set by non-players.

"The adults who say games are more harmful than helpful are generally adults who don't play games themselves. It's a stereotype, plain and simple."

Dr Jeff Brand, Bond University (2008)

TODAY, THOSE
PEOPLE ARE THE
MINORITY.



86%

of Australians describe
themselves as
occasional, casual,
regular or avid gamers.

69%

expect to keep gaming at
about the same level, while
13% expect to game more
over the next 12 months.

31.6 HOURS

of gaming per month,
on average.

THAT'S BECAUSE GAMERS AGED, BUT NEVER AGED OUT



35 YEARS OLD

the average Australian player today, **up from 24** in 2005.

14 YEARS

how long the average player has been playing.

IT'S NOW SO MAINSTREAM IT BECAME PART OF OUR SOCIAL INFRASTRUCTURE



40%

Say they play
multiplayer games.

The Growth Distillery

47%

of 18 to 34 year olds
**have made friends
through games.**

Australia Plays 2025

74%

said **games help maintain
relationships**, and nearly a
quarter used in-game
communication tools.

Australia Plays 2025

AND AS THE PERCEPTION FRAMING MOVES FROM HARM TO HEALTH



89%

of Australians aged 18 to 34 play to improve their mental health.

75%

of Australian players say games help them feel less stressed.

THE NEXT-GEN HABIT IS INCREASINGLY BEING FORMED WITH A PARENT BESIDE THEM

89%

of Australian parents play video games with their children.

49%

believe games help their kids learn, naming problem-solving at **48%** and creativity at **39%**.

54%

of Australian parents who play with their children do it as a way for the family to connect.



THE TRUTH IS

GAMING BECAME ORDINARY AND
THAT'S WHAT MADE IT
POWERFUL - THE NEXT
GENERATION WILL NOW GROW
UP WITH GAMING AS A GIVEN.



The media you meet as a teenager is the media you keep.

People's favourite books, films and records all cluster in the years they were 16 to 20, and the effect is strongest for the media they returned to most often.

Janssen, Chessa and Murre, 2007

The pattern repeats in gaming too.

A Curtin-led study of 417 gamers, 61% Australian, found nostalgia's pull on purchase intent is strongest for people who were teenagers when the original released.

Butcher and Toh, 2025

UNPACKING THE OPPORTUNITY

MISCONCEPTION

Gaming's social value mainly comes from playing together.

The main friction in gaming is choice overload.

Gaming is still a niche interest and hobby.

TRUTH

Conversation is the real engine that drives social value and discovery.

What consumers struggle with is judging if the commitment is worth it

Gaming became ordinary and the next-gen will arrive with permission

NEED

FUEL

REASSURE

RITUALISE

OPPORTUNITY

Fuel conversation with purpose

Look beyond reach and engagement to support and enable conversations aiming to drive real social value.

Own the moment of doubt

Become the authority voice that steadies the decision before they make it

Build on and for the moments that matter

Earn a standing invite by helping the rituals become memorable

Reading reviews is the **#1** way
audience engagement extends
beyond the game itself

(The Growth Distillery)

FUEL THE CONVERSATION WITH PURPOSE



THE INSIGHT:

While playing together opens the door, co-play alone is only half the story. The real drivers of organic discovery, gamer identity, and long-term belonging live in the discourse generated around the game. When brands chase only reach and engagement, they miss the chance to shape the conversations where player identity and community actually take root.

STRATEGIC OPPORTUNITY:

Look beyond reach and engagement to intentionally support, enable, and join the conversations that drive real social value, identity and belonging.

What it looks like in practice:

- **Design for shareable currency:** Equip players with lore, debate-worthy mechanics, or unique milestones that give them social currency to trade in group chats and community forums.
- **Foster identity-building discourse:** Create narrative choices, play styles, and community badges that allow players to express who they are through how they talk about the game.
- **Nurture community hubs with purpose:** Invest directly in platform channels (Discord, Reddit, creator discourse) by supplying meaningful conversation hooks rather than generic promo drops.
- **Create post-play hooks:** Develop shareable recap assets and personal player stats engineered to transition naturally from a play session into everyday messaging and social feeds.

OWN THE MOMENT OF DOUBT



THE INSIGHT:

Consumers struggle to judge if the commitment is worth it until they've already paid the cost. Nearly half of undecided players default to the platform's own conversion engine, and everything else, reviews, trends, influencers, is too scattered to add up to a single answer.

STRATEGIC OPPORTUNITY:

Become the authority voice that steadies the decision before they make it.

What it looks like in practice:

- **Create commitment labels:** time investment, monetisation aggressiveness, difficulty curve, social/multiplayer requirement, at a glance, before purchase
- **Consolidate the noise:** aggregate scattered opinion (reviews, trends, influencers) into a single, consistently-scored number per category, instead of forcing players to triangulate a dozen takes
- **Establish 'safe harbor' recommendations:** Curate a trusted seal of approval for games free from predatory monetization patterns.

BUILD ON AND FOR THE MOMENTS THAT MATTER



THE INSIGHT:

Gaming stopped being a niche hobby and became a household habit, parents and kids already co-play together, and the real payoff, nostalgia-driven purchase intent, lands years later, once today's co-playing kids reach their teens with money of their own.

STRATEGIC OPPORTUNITY:

Earn a standing invite by helping the rituals become memorable.

What it looks like in practice:

- **Add weight to the ordinary session:** a small addition that gives a regular co-play evening something worth remembering, without needing a special occasion to earn its place
- **Design for shared moments:** build for the moments parents and kids experience, as well as other co-play moments (couples, friends, long distance friends, etc)
- **Sponsor the co-play environment:** Position your brand directly inside shared gaming moments - from family game nights to adult social catchups - where positive associations form naturally.
- **Anchor shared milestones:** Provide digital or physical rewards, session recaps, or collectibles that commemorate co-play achievements and shared family accomplishments over time.
- **Turn routine play into traditions:** Introduce weekly challenges, seasonal events, or shared rewards that convert casual co-play into predictable household routines.