Screen Currency 2026

Understanding the value of Australian screen and games

A study in 5 reports with supporting case studies

Report 2 of 5

Audience Insights

Australian Government

Screen Australia

89 DEGREES EAST

Screen Currency 2026

Understanding the value of
Australian screen and games

Audience Insights

The Audience Insights study explores the social and cultural value of Australian screen content and video games from the perspective of the people who watch and play them.

Drawing on national surveys, audience forums, focus groups, interviews, and analysis of online responses, the study examines what Australian audiences are doing and why, what they value in local stories and games, how they discover and engage with them, and the role this content plays in their everyday lives.

Aboriginal and Torres Strait Islander people are advised that this document may contain images and names of people who have passed.

This Screen Currency report was developed by 89 Degrees East with input from Swinburne University, Queensland University of Technology (QUT) and the University of the Sunshine Coast. It was prepared for publication by Mandy Whitford, Impact Words Consulting, with Georgie McClean at The Gist and Screen Australia's Strategic Policy and Insights team.

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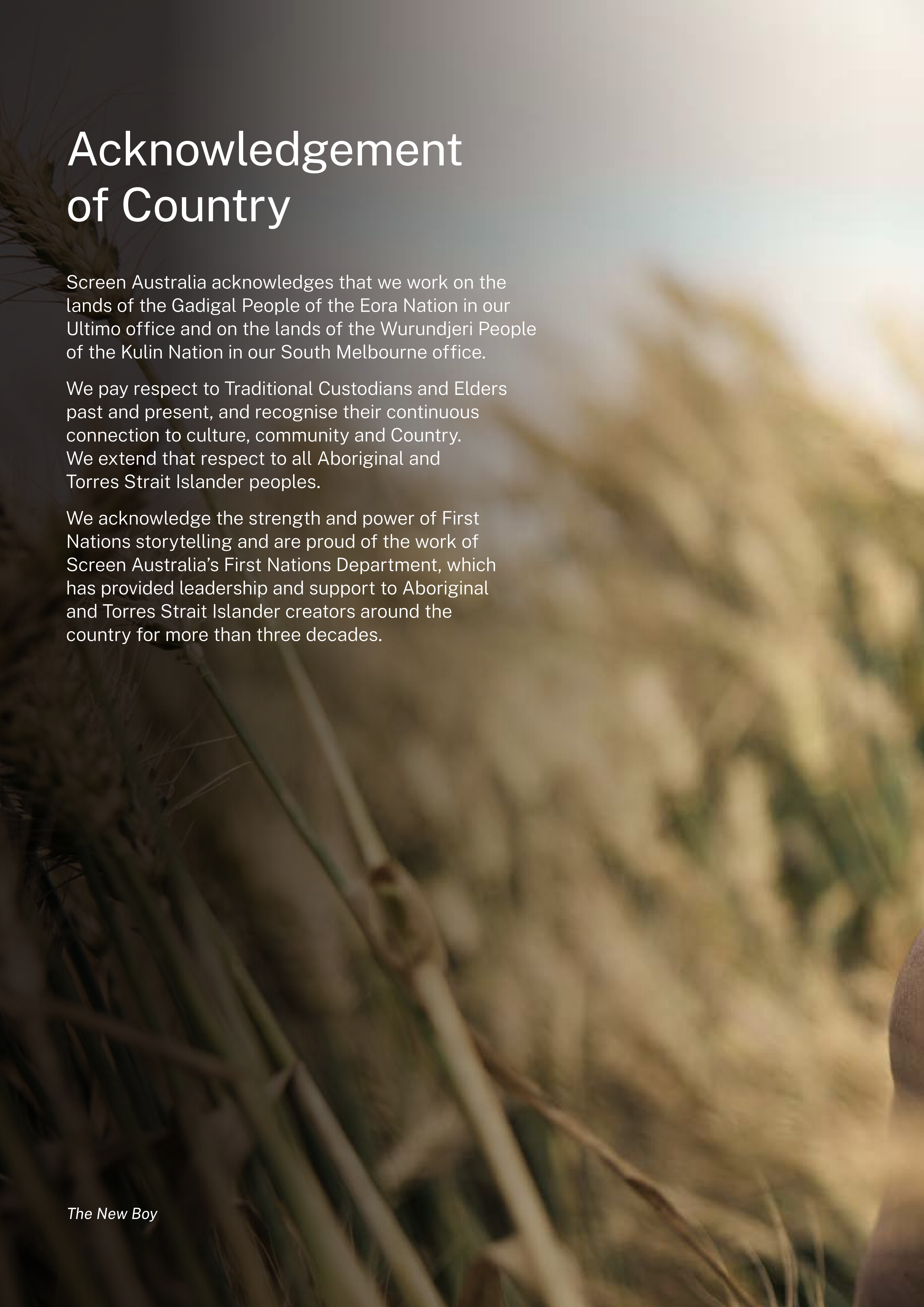
Top End Bub

Acknowledgement of Country

Screen Australia acknowledges that we work on the lands of the Gadigal People of the Eora Nation in our Ultimo office and on the lands of the Wurundjeri People of the Kulin Nation in our South Melbourne office.

We pay respect to Traditional Custodians and Elders past and present, and recognise their continuous connection to culture, community and Country. We extend that respect to all Aboriginal and Torres Strait Islander peoples.

We acknowledge the strength and power of First Nations storytelling and are proud of the work of Screen Australia's First Nations Department, which has provided leadership and support to Aboriginal and Torres Strait Islander creators around the country for more than three decades.



The New Boy

Bay of Fires

About Screen Currency 2026 and this report

The *Audience Insights* report forms part of the Screen Currency 2026 suite of research, exploring the social, cultural and economic value of Australian screen and games.

Screen Currency's purpose is to provide a shared evidence base for government and industry, and to inform decision making and policy – including development of the next National Cultural Policy. The research updates and builds on the inaugural Screen Currency report published in 2016, acknowledging significant changes in the past decade. In doing so, it provides critical benchmarks for future tracking.

Screen Currency 2026 is a multifaceted research study that comprises 5 reports with supporting case studies.

1. Insights Overview

2. Audience Insights | 3. Industry Insights | 4. Economic Insights | 5. Global Insights

Supporting Case Studies

This Screen Currency *Audience Insights* report is also referred to as "the audience study". The findings presented in this report focus on the social and cultural value of Australian screen and games from the perspective of **Australian audiences and video game players.**

The scope of the Screen Currency research spans the broad range of screen and games offerings in Australia, beyond that which Screen Australia supports directly, including:

- **Screen:** feature films, TV drama and comedy, documentary and factual, children's programming, animation, light entertainment and online videos, viewed across all platforms. It does not include news, sport, or user-generated content.
- **Games:** video games played on PC, console and mobile devices, ranging from simple puzzle and word games to immersive storyworlds and large-scale online environments that support social interaction and ongoing engagement.

Screen Currency provides evidence for the value of these critical creative industries to individuals, communities, the economy and the nation.

Click to read the other reports in the series

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First Light

Executive summary

Watching TV and films and playing video games are among Australians' favourite pastimes. Compelling Australian stories and our world-class games reflect and connect us – they educate, inspire, create change, and can resonate for generations.

This audience study forms part of Screen Currency 2026, a landmark research study examining the social, cultural and economic value of Australian screen and games – spanning feature films, TV drama and comedy, documentary and factual, children's programming, animation, light entertainment and online content, alongside PC, console and mobile games ranging from puzzle and word games to immersive storyworlds and large-scale online environments.

Screen Currency's *Audience Insights* report explores how Australians access and consume screen content and games and what drives or limits engagement, as well as Australians' attitudes and perceptions towards Australian-made screen and games, how they are valued, and their impact on daily lives.

The report draws on a range of new qualitative and quantitative research delivered by multidisciplinary teams of researchers from 89 Degrees East, Swinburne University, Queensland University of Technology (QUT), the University of Canberra and the University of the Sunshine Coast. It brings together insights developed through a range of research methods including focus groups, audience forums, national surveys, in-depth home visits or online immersions, analysis of online reviews and video responses, case studies, and new analysis of third-party data sources. For further information on the research methods, see Overview of data sources and Appendix – detailed methods. For key terms used, see Glossary and acronyms.

In bringing together this range of new data, this report provides an evidence base to empower the screen industry to better understand their Australian audiences, markets and impacts; contribute to the Creative Australia *State of Culture* report; and inform decision making and policy, including development of the next National Cultural Policy.

Understanding the complex ways in which audiences consume and value Australian screen content and games will assist creators, broadcasters, decision makers and policy makers in the work they do to ensure the continuing dynamism and sustainability of the industry.

Key findings: screen

Australian screen content continues to matter deeply to Australians. Australians understand that local screen content has value beyond popularity and entertainment – beyond box office performance, TV ratings, views or streams – and beyond the jobs and wealth the industry creates.

While entertainment tends to be the main driver to engage with screen content, audiences readily identify and appreciate the social and cultural value Australian content provides. The value of Australian screen content is grounded in authenticity, emotional resonance, recognition of place, social dynamics, storyline and character.

Audiences recognise that Australians make great screen content, and that it has an important and distinct role in reflecting Australia's unique society, in all its diversity.

Attitudes and perceptions

Screen content plays a central role in the lives of Australians. The Screen Currency screen audiences survey found more than 8 in 10 say it's important to them, including 9 in 10 First Nations respondents. For 1 in 3 Australians, watching screen content is a very important part of daily life.

Australians strongly support local screen content. More than 8 in 10 say it is important that Australians have access to locally made stories, and 3 in 4 express an interest in watching more. The survey and qualitative research phases highlighted that Australian content is vital for preserving Australian culture, reflecting diversity and portraying real-life issues.

> **"Australian screen content shows our own culture, places and humour in a way international content can't. It reflects real Aussie life and helps us see ourselves on screen."**
>
> – Audience forum participant, CALD male parent, aged 44–65, Vic

Entertainment is the primary driver for Australians' screen engagement. Seven in 10 watch to unwind or be entertained, although what is considered entertaining varies. Audiences prioritise relaxation, enjoyment and emotional engagement before recognising other forms of value like social, cultural or educational significance.

Australian screen content holds both "use value" (benefits of personal viewing) and "non-use value" (the value of its existence to Australians, even if they never directly view it). The vast majority of Australians acknowledge broader social and cultural benefits of Australian screen content and the importance of the Australian screen industry, including 8 in 10 who recognise its role in preserving and sharing Australian culture and more than 7 in 10 who say it ensures our stories are remembered for future generations.

Australians recognise the quality of local screen content and value its authenticity. Around 3 in 4 agree Australian screen content is visually distinctive and/or as well-made as international content. For content to feel "Australian," it must be authentic and relatable, featuring familiar accents, humour, landscapes and characters. Forced national identity symbols or exaggerated portrayals risk being perceived as inauthentic. Depending on the type of content, quality can be judged by authenticity and strong storytelling as much as production polish.

There are generational differences in how screen content is both valued and consumed, with Australians aged over 45 more likely to watch free-to-air TV and younger audiences demonstrating more fragmented viewing landscapes across devices and platforms. Older Australians aged 65+ are more likely to recognise the importance of access to Australian screen content and its cultural value, while younger audiences aged 16–24 are less likely to express supportive attitudes.

Shifts in consumption patterns mean engagement is concentrated in smaller, niche audiences. The research highlighted that Australian screen content's value is no longer tied to mass, simultaneous viewing. Instead, it is now created and sustained through shared reference points, ongoing conversation, and cultural recognition across different communities and audiences.

Audiences are seeking diverse and contemporary representations of Australia, alongside historical narratives, with research participants understanding "Australianness" as evolving and contested. First Nations focus groups highlighted a desire for more contemporary First Nations stories that reflect the continuity of culture and lived experience in the present, rather than just historical portrayals, and the value of culturally specific storytelling and humour. In the survey, older Australians were more likely than younger Australians to endorse the importance of seeing particular groups represented, which may reflect that diversity is an unremarkable expectation for younger generations rather than a claim requiring endorsement.

Behaviours and consumption

Levels of support for Australian content are higher than levels of consumption. While 84% of Australians recognise the importance of access to local stories and 75% are interested in watching more, only 35% spend more than a third of their viewing time watching Australian content.

Australian screen content is consumed in a fragmented, platform-driven environment. The research found Australian audiences rarely actively seek out Australian content. Instead, it is discovered through social, algorithmic and cultural recommendation networks. Audiences rarely decide what to watch without some form of recommendation, and 4 in 10 Australians find out about new content through streaming platform recommendations.

Australian content discoverability is a barrier. Audiences express support for Australian storytelling in principle, value it when they do consume it, but most rely on it being in their path rather than actively looking for it. Audiences feel that discovery pathways do not consistently surface this content for consideration – around 1 in 3 Australians say it's easy to find Australian content. Audience forum participants expressed a desire for streaming services to feature Australian content more prominently.

Viewing screen content remains deeply social, even though household co-viewing is less common than in the past. Australians watch content to stay connected with others, join cultural conversations, and bond over shared references, even though viewing is more individualised. This shift does not represent a loss of value, but a change in how value is created and sustained. Social impact is now more likely to be cumulative and relational, built through many stories rather than a single national narrative.

Impacts and actions

Watching screen content supports Australians' emotional wellbeing, with a particular role for local content. More than 7 in 10 Australians watch screen content to relax and unwind, and almost 1 in 4 watch to deal with stress, anxiety or depression, particularly younger audiences and people from historically underrepresented groups. Australian screen content can play a particular role when it comes to watching for comfort and wellbeing given its familiarity, relevance and emotional resonance, and due to the impacts of feeling represented on screen.

Australian screen content supports social connection and cohesion. Around 2 in 3 Australians agree Australian screen stories support feelings of belonging and connectedness, and/or make them think about their place and identity as an Australian. Almost 7 in 10 agree Australian-made screen content helps new migrants learn about Australian culture and everyday life, with agreement higher among culturally and linguistically diverse (CALD) respondents.[1] Australian screen content has an ability to foster dialogue around important social issues, helping audiences connect to culture, history and each other.

Australian screen content often provides educational insights. More than 1 in 3 Australians watch screen content to learn new things or stay informed, and many viewers who primarily watch Australian content for entertainment derive secondary educational benefits or can be inspired to look for further information. Research participants discussed examples where Australian screen narratives had fostered understanding and reflection on social issues, particularly documentaries, children's content, historical content and First Nations-led storytelling.

First Nations storytelling on screen serves as a tool for education, truth-telling and social dialogue. First Nations focus groups articulated its significant role in promoting awareness and healing, especially regarding historical trauma. Across the research phases, non-First Nations participants discussed ways First Nations storytelling had impacted their understanding of First Nations culture, history and communities.

Many Australians are inspired to take action after engaging with local screen content. Most audience forum participants could think of at least one thing they had done as a result of watching Australian screen content, often driven by curiosity and emotional impact. The screen survey found that 7 in 10 Australians say local screen content has inspired them to take some form of action. This could include seeking further information, altering behaviour, or deepening engagement with the issues raised on screen.

1 There are no widely accepted standard definitions of cultural diversity and identity, which are multifaceted. "Culturally and linguistically diverse (CALD)" is an umbrella term that has been used in Australia for some time and while contested, it continues to be used in data collection and reporting on Australia's cultural makeup.

Key findings: games

Australian video games matter to Australian players, even when they are not always visible as Australian. Players express goodwill toward Australian-made games and confidence and pride in local creative capability. This support operates alongside limited recognition of the country of origin of games in global marketplaces, where 3 in 5 Australian players don't know if they have played an Australian game.

Enjoyment is the primary driver of engagement, with Australian origin functioning as an added value rather than a deciding factor. Players expect Australian games to meet the same standards as international titles and evaluate them first and foremost as leisure experiences. The most common motivation for local players to engage with video games is because they are "fun" (87%). When Australianness is recognised, it enhances perception but rarely overrides enjoyment, personal appeal, or quality in decision making.

Video game play is a mainstream, everyday cultural practice shaped by flexibility rather than intensity. In the past 6 months, more than 3 in 4 Australians have played a video game. Participation spans age, gender and life stage, with games embedded in daily routines and adapted to time constraints. While some players engage deeply with game culture, many play regularly without strong identification with gaming communities or a gamer identity.

Discovery of games is shaped by social and platform-driven environments, with uneven influence across the player population. Around 1 in 2 players typically encounter games through recommendations from friends and family, or social media, rather than deliberate search. Younger players are more active in networks through which games are discussed and circulated, contributing disproportionately to how titles gain visibility and momentum.

Games can generate social value even when play is solitary. Although nearly 2 in 3 Australian players prefer to play alone, games continue to support social connection through shared reference points, conversation, community participation and cultural exchange. Social value emerges around games through discussion and shared meaning in addition to co-play. More than 1 in 3 players say that socialising is a reason they play and around 1 in 5 actively participate in video game communities.

Games play a meaningful role in Australians' emotional lives, while impacts are shaped by context and design. Nearly 3 in 4 players report using games to relax and manage stress as part of everyday life. Younger focus group participants described games as supporting emotional resilience and self-efficacy, even when play was framed primarily as entertainment. At the same time, the research recognises that not all gaming experiences are positive, with risks linked to specific environments and design practices rather than to video game play as a whole.

Alongside pleasure and emotional benefits, learning and creative expression are significant drivers of game play. Around 1 in 2 Australian players report playing games to improve their skills or to be creative. Focus groups highlighted feelings of accomplishment, confidence and mastery derived from game play.

Overview of data sources

As part of Screen Currency 2026, Screen Australia commissioned multidisciplinary teams of researchers from 89 Degrees East, Swinburne University, QUT, the University of Canberra and the University of the Sunshine Coast to deliver an audience study.

This report synthesises the key insights from multiple and interconnected phases of qualitative and quantitative research to understand how Australian screen audiences and video game players perceive, engage with and value Australian content in a highly fragmented, algorithm-driven media environment.

It was designed to articulate how value is experienced by Australians, deliver new insights on the Australian market and audience behaviour, and provide a shared evidence base for Screen Australia, government and industry.

Screen audiences data sources

The screen audiences research was delivered by 89 Degrees East. The methods used to develop the insights were iterative. After each phase of the screen work, researchers across the project came together for debriefs and to share insights with those developing other phases, including sharing insights with other research teams at milestone workshops hosted by Screen Australia.

Screen audience forums

Online, exploratory audience forums lasting 3 days with 40 participants to understand how Australians think about and value Australian screen content. Participants were drawn equally from 4 age groups: 16–24, 25–44, 45–64, 65+, including representation of people with disability, parents, people from culturally and linguistically diverse (CALD) and LGBTIQ+ communities, regional Australians and recently arrived migrants. The audience forums were held in November 2025.

Contextual inquiries

Fourteen in-depth (2–3 hour) home visits or online immersions with parents/families, people with disability, people from CALD and LGBTIQ+ communities and young people. Held over November and December 2025, these were conversational, in-context sessions combining discussion with observation, where possible. They were mostly conducted online due to timing and geography, enabling screen-sharing and walkthroughs of real viewing environments, with some in-person sessions.

Australian screen audiences survey

A 10-minute self-report online survey with a nationally representative weighted sample of 2,404 Australians aged 16 years and over, weighted for age, gender and location in line with Australian Bureau of Statistics (ABS) population data. The sample was recruited using an online research panel. It included boosted samples to enable robust analysis for First Nations people (n=247), people with disability (n=392), CALD communities (n=475), LGBTIQ+ communities (n=284), younger Australians aged 16–24 years (n=304), older Australians aged 65 years and over (n=483), and those living in regional and remote areas (n=754). Fieldwork was conducted over mid-December 2025 to early January 2026.

ACMI intercepts

Sixty-three visitor surveys and researcher-led discussions at the Australian Centre for the Moving Image (ACMI) in January 2026.

First Nations focus groups

Three 1.5 hour online focus groups with First Nations participants, involving 10 participants from across the country, recruited and facilitated by First Nations moderators from the Ipsos iMOB research team, with fieldwork over November 2025.

For further details of the methods for each phase, see Screen audiences research methods in Appendix – detailed methods.

Video game players data sources

The games chapter draws on insights from a survey and focus groups developed by researchers at the University of the Sunshine Coast, alongside analysis of third-party data by Screen Australia.

Australian video game players survey

A national survey of 2,208 Australians aged 18 years or over and identified as playing video games on either console, computer or mobile. The sample was recruited using an online research panel. It included people with disability (n=412), people from CALD communities (n=344), younger Australians aged 18–24 years (n=241) and older Australians aged 65 years and over (n=468). Recruitment took place from mid-December 2025 to early January 2026.

Video game players focus groups

Four focus groups with 28 Australian video game players who had played a console or computer game within the past 30 days. The focus groups were conducted in-person and ran for 60 to 90 minutes. Participants came from various backgrounds with the majority aged between 25 and 54, who were working full-time.

Analysis of third-party data sources

Analysis of Australian datasets from the Newzoo 2025 Global Gamer Study.

For further details of these methods and data sources, see Video game players research methods in Appendix – detailed methods.

Additional screen and games data sources

In addition, researchers from Swinburne University and QUT investigated how the value of Australian screen and games is expressed in online review sites and video responses; and researchers from the **University of Canberra** developed methodologically rigorous case studies.

Online reviews and video responses

Analysis of 5,638 online reviews and user-generated video responses for 13 Australian screen and games titles across Letterboxd (26 million users), IMDb (83 million registered users), Steam (69 million daily users), Common Sense Media (hosts 40,000 reviews), Rotten Tomatoes, YouTube and TikTok.

Case studies

Case studies of Australian screen titles and video games, including interviews with producers.

See Appendix – detailed methods for further details of each data source.

Australian screen audiences

Attitudes and perceptions

This chapter explores how Australian audiences think and feel about Australian screen content: what makes content feel Australian, how audiences judge quality and value, and how cultural meaning is formed through everyday viewing experiences.

There is strong underlying support for Australian-made content. The majority of Australians express a desire to watch more local stories and consider access to Australian content important. However, younger people are less likely to express these attitudes and there are generational differences in how Australians both access and value screen content.

Across the research, entertainment emerges as the threshold condition for value. Content must first be engaging, enjoyable and watchable before other forms of value become relevant.

Beyond their individual enjoyment and viewing, Australians recognise broader social and cultural benefits of Australian screen content and the importance of the local screen industry. Value is expressed through authenticity, relatability, emotional resonance and recognition of everyday Australian life. Types of value overlap and accumulate over time, with iconic works often gaining layered significance through repeated viewing and shared references.

"Australianness" is understood as evolving and contested, with some audiences seeking more diverse and contemporary representations that reflect modern Australia.

Thou Shalt Not Steal

The importance of screen content in everyday life

Screen content plays an important role in the daily lives of most Australians. Screen Currency's screen audience survey found **85% say it's important**, including 1 in 3 who say it plays a very important role in their everyday routines (33%) and more than half who watch when they can (52%) (Figure 1).

Watching screen content is important to all Australian audience groups of focus in the survey,[2] particularly First Nations respondents, who are the group most likely to report that it's important (91%).

Figure 1: Importance of screen content in daily routine for Australians

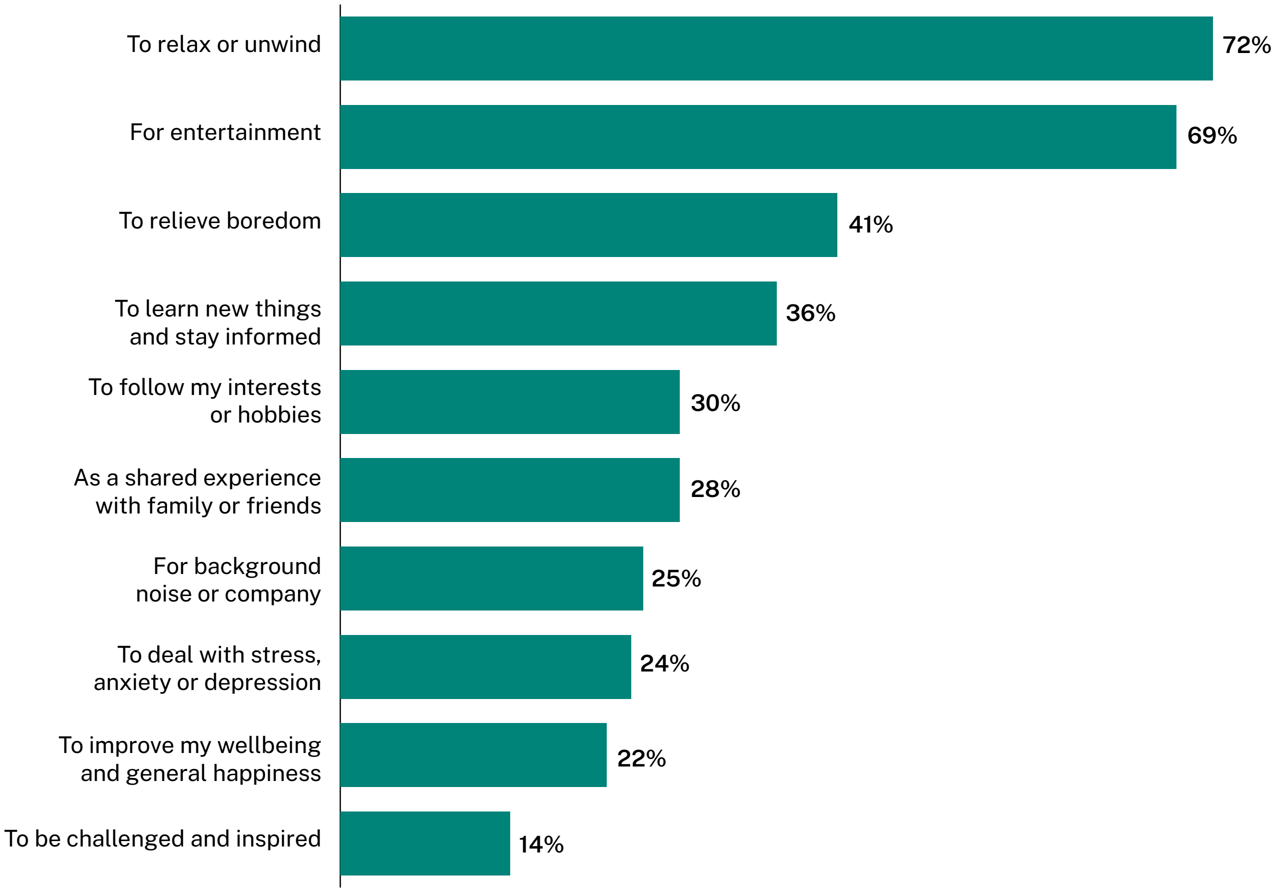
Source: Australian screen audiences survey, responses to the question: "Is watching screen content, like TV programs, movies and series, important in your daily routine?" Weighted base: n=2,404.

The ways audiences watch film and TV content varies across age groups. The screen audiences survey found that Netflix and YouTube dominate for younger viewers while audiences aged 25–45 tend to spread their engagement across the widest range of platforms. Free-to-air TV viewing is far more popular for those over 45 years old and among those who live in regional areas.

Most Australians engage with screen content for relaxation (72%) or entertainment (69%), while a smaller proportion are driven by a desire for learning or information (36%). While many Australians watch screen content to relieve boredom (41%), some follow interests or hobbies (30%). More than 1 in 4 watch as a shared experience with family or friends (28%) and more than 1 in 5 watch to deal with stress, anxiety or depression (24%) or to improve their wellbeing and happiness (22%) (Figure 2).

2 Audience groups in focus include First Nations people (n=247), CALD communities (n=475), people with disability (n=392), parents with children under 15 (n=797), LGBTIQ+ communities (n=284), young Australians aged 16–24 (n=304), older Australians aged 65+ (n=483), regional and remote communities (n=754).

Figure 2: Australians' top 10 drivers of viewing screen content



Source: Australian screen audiences survey, responses to the question: "People watch screen content for many reasons (movies, videos or TV shows, excluding sports and news). What are the main reasons for you? Select all that apply." Weighted base: n=2,404

The qualitative research showed that what is considered "entertaining" differs between and within demographic groups and according to personal preference and mood state. It has also shifted along with changes in the media environment, particularly for younger people.

The national survey evidenced clear generational differences in how Australians are accessing screen content, with older Australians more likely to be using TV screens and watching free-to-air TV, and younger Australians more likely to be using multiple devices including mobile phones, computer and tablets to watch content across a range of digital platforms.

> "Yes [screen habits] have definitely changed … we can watch content easily on mobile devices, especially on the streaming platforms … I want something more interesting and engaging, something that makes sense, something I can learn from, feel relaxed and laugh instead of the boring stuff."
>
> – Audience forum participant, LGBTIQ+ female with disability, 16–24, Qld

The importance of Australian content

Most Australians express strong supportive attitudes towards local content. More than 8 in 10 say it is important that Australians have access to locally made stories (84%), and 3 in 4 say they are interested in watching more Australian content (75%) including almost 9 in 10 First Nations respondents (87%). However, both the audience forum and survey found that **younger people (at 72%) are less likely to express that it's important for Australians to have access to Australian-made content** than other groups (Figure 3).

Figure 3: Importance of local content

Importance of access

84%

believe it is important for Australians to have access to Australian-made movies and TV programs

Higher agreement among over 65s (91%)

Lower agreement among 16–24s (72%)

Appetite for more local content

75%

report they are interested in watching more Australian-made movies and TV programs in the future

Higher agreement among First Nations respondents (87%)

Lower agreement among 16–24s (62%)

Source: Australian screen audiences survey. Responses to the questions: "Overall, how important is it that Australians have access to Australian-made movies and TV programs?" and "Are you interested in watching more Australian-made movies and TV programs in the future?" Respondents were asked to rate each statement on a 5-point scale from "Not important at all"/"Not at all interested" to "Very important"/"Very interested". Weighted base: n=2,404.

Free-text survey comments often referred to **the value of unique Australian stories and culture relative to international cultural dominance on Australian screens.**

> "We need more of Australian movies because TV is flooded with American stuff."
>
> – Australian screen audiences survey respondent, female aged 65+

> "I enjoy watching them [Australian-made shows], it's nice to know Australia is in the entertainment/film industry and it's not all American."
>
> – Australian screen audiences survey respondent, female aged 25–44

Despite this positive sentiment, across the research, audiences describe a persistent gap between interest in Australian content and actual viewing (discussed under Consumption and demand for Australian screen content). Discoverability challenges and the abundance of competing global content means that expressed demand does not always translate into consumption, and participants highlighted that quality matters.

> "It adds interest for me if it is Australian but I don't actively seek it out because of it. The content must stand on its merits."
>
> – Audience forum participant, male with disability, aged 65+, NSW

In the audience forum, where the importance of Australian screen content was asked in the context of how participants spend their viewing time, **only about one-third of participants said it is important that the content they view is Australian** – this was not a stated viewing priority for participants. For those who said it matters, this is largely driven by their support for the Australian industry and local talent, and a desire to see Australian stories and identity represented, protected and promoted.

Together, these findings suggest that Australians care about Australian screen content, but these views are strongest when they think about it outside their own viewing choices. Both audience forum participants and free-text survey responses highlighted that access to Australian-made movies and TV programs is important because it **preserves our unique culture, supports local jobs and talent, and lets Australians see themselves and their stories reflected on screen.**

“I think Australian screen content brings a level of authenticity and relatability to Australians on a different level that international content can.”

– Audience forum participant, LGBTIQ+ female, aged 25–44, NT

“We need to keep our movie and entertainment industry alive”

– Australian screen audiences survey respondent, female aged 65+

War on Waste

“Non-use” value and broader social and cultural importance

Australians perceive broader social and cultural benefits of Australian screen content, beyond their own individual enjoyment – support for Australian content is not limited to direct consumption. All stages of the research indicate that audiences have strong supportive attitudes towards the existence of Australian screen stories even when they do not watch them personally.

In other words, for Australian audiences, Australian screen content holds both “use value” (personal engagement or enjoyment) and acknowledged and significant **“non-use” value** (the value people place on the existence or preservation of something, even if they never directly use it). Viewership alone is not considered the sole measure of value or success.

“It does matter a lot [to have access to Australian screen content]. It tells our stories and challenges our understanding of what it means to be Australian.”

– Audience forum participant, male, parent with disability, aged 45–64, NT

The vast majority of Australians acknowledge the broader social and cultural benefits of Australian screen content, including its role in engendering shared understanding and the preservation of stories for future generations. Eight in 10 agree that certain titles have become cultural icons, reflecting our culture, language and humour (80%). Most Australians believe Australian screen content helps preserve and share Australian culture (78%), reflects Australia’s diversity and voices (75%), and portrays real issues and perspectives (72%), with agreement higher for Australians aged over 65 and lowest among younger Australians aged 16–24 who are less likely to agree with a range of statements about the cultural value of Australian screen content (Figure 4).

Figure 4: Cultural value that Australian content provides to Australians

80% agree "Certain Australian programs or movies have become cultural icons that have captured our unique culture, language and humour." Higher agreement among over 65s (89%) Lower agreement among 16–24s (67%)	**78%** agree "Australian movies/TV help preserve and share our unique history and culture." Higher agreement among over 65s (84%) Lower agreement among 16–24s (64%)	**77%** agree "Well-made Australian movies/ TV make me feel proud of being Australian." Higher agreement among over 65s (83%) Lower agreement among 16–24s (64%)
75% agree "Australian stories reflect the diversity of Australian people and voices." Higher agreement among over 65s (82%) Lower agreement among 16–24s (67%)	**72%** agree "Australian productions portray real issues and perspectives of Australians." Higher agreement among over 65s (78%) Lower agreement among 16–24s (63%)	**70%** agree "Australian screen stories are an authentic portrayal of traditions and culture." Lower agreement among 16–24s (62%)

Source: Australian screen audiences survey, responses to the question: "Thinking about the Australian-made TV shows and films you have seen, how much do you agree or disagree that Australian content provides value to Australians in the following ways?" Respondents were asked to rate their level of agreement with each statement on a 7-point scale from strongly agree to strongly disagree. Weighted base: n=2,404.

Survey responses highlighted that well-made Australian screen content generates pride for Australians (77%), (Figure 4). Participants across the qualitative research also reported feeling pride in Australian screen content, with some titles emerging as cultural touchstones over time.

> "It's pretty cool to know that the country I live in is big enough to produce a lot of world-famous games and films."
>
> – Visitor at ACMI

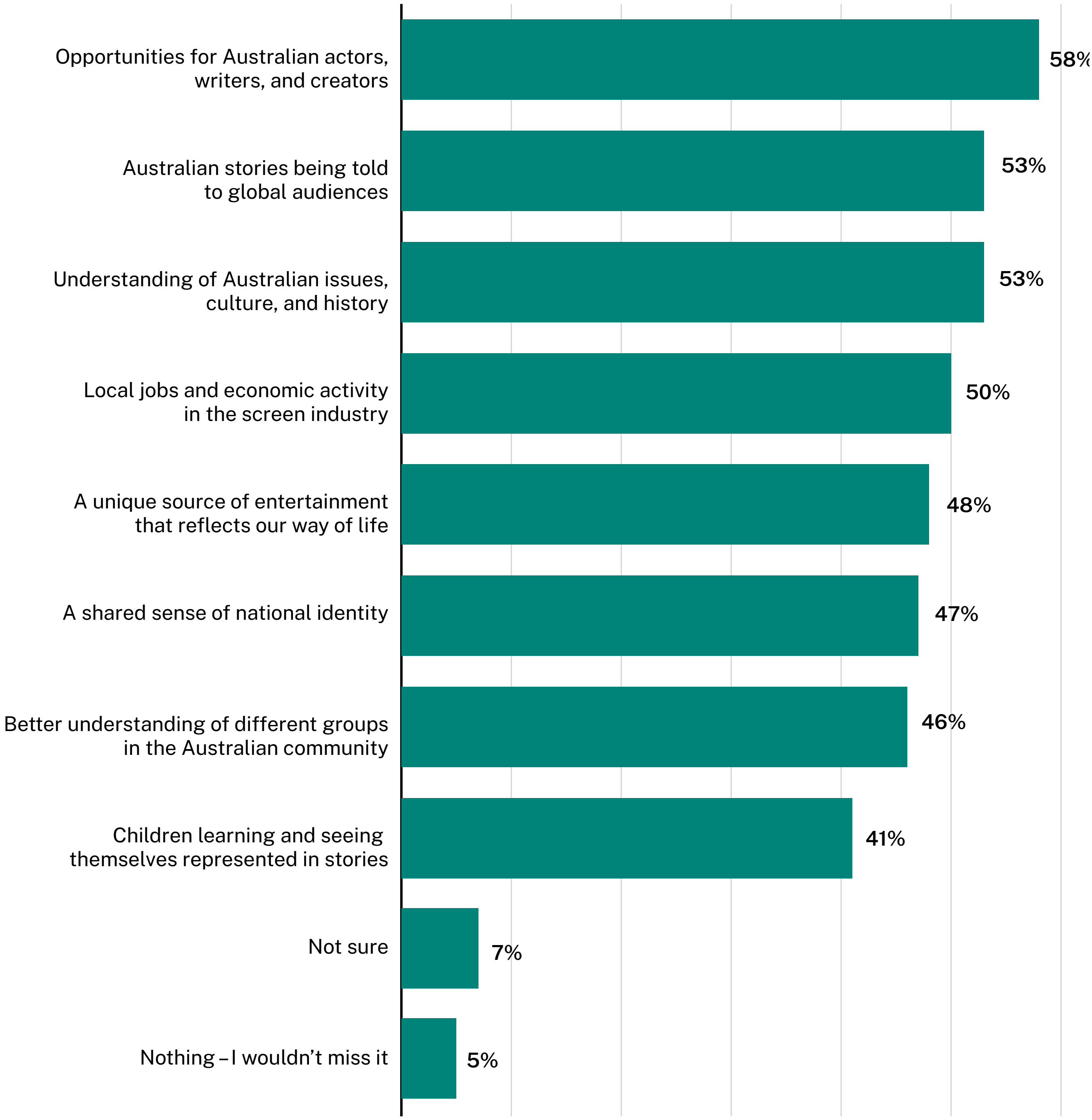
> "I think of the quotes you say time and again. ... 'That's not a knife, that's a knife!' Or 'you're terrible Muriel!'"
>
> – Audience forum participant, female with disability, aged 45–64, ACT

When asked about **what would be lost if Australian-made screen content was no longer available** and only overseas content was shown, responses highlighted the impact on local jobs and global viewers. More than half of Australians say there would be a loss of opportunities for Australian creatives (58%), a loss of Australian stories told to global audiences (53%) and a loss of local jobs and economic activity (50%) (Figure 5).

While a majority of respondents agreed that Australian screen content delivers cultural value, fewer identified cultural impacts when asked what would be lost without the industry.[3]

3 Some of this difference likely reflects the influence of question format, with prompted agreement typically yielding higher endorsement than multi-select questions.

Figure 5: What would be lost if Australian content was no longer available



Source: Australian screen audiences survey, responses to the question: "If Australian-made TV, movies, and online content were no longer available and only overseas content was shown, what do you think Australia would miss out on? (Multi-select)?" Weighted base: n=2,404.

How quality is judged

High budgets or cinematic scale are not always considered prerequisites for value. Instead, quality can also be assessed through authenticity, strong storytelling, credible performances and the emotional resonance of the narrative. Participants emphasised that believable stories can matter more than mere spectacle, and that lower-budget productions can be viewed as high quality when they feel genuine.

Documentary and factual formats such as *Bondi Rescue* and *Love on the Spectrum* were frequently cited across the qualitative research as examples where emotional honesty and relatability outweighed production gloss. At the same time, audiences note that poor execution – including weak acting or unconvincing representations – can undermine authenticity.

Quality is therefore associated with credibility and craft rather than production value alone.

> "We can see ourselves in [Australian screen stories]. They are relatable and give us a sense of home. We can escape and relate. Like with the show *Bump*. I went through stuff in high school, awkward stages, so it had that relatability."
>
> – Visitor at ACMI

Australians' perceptions of the quality of Australian screen content are strong. The survey found that around 3 in 4 agree Australian screen content is creative, original and enjoyable (77%), visually and creatively distinctive (76%) and as well-made as international content (73%). Again, agreement was higher among older Australians and lower among younger ones (Figure 6).

Figure 6: Perceived quality of Australian screen content

77% agree	76% agree	73% agree
"The creativity and originality in Australian productions make them enjoyable to watch."	"Australian stories are visually and creatively distinctive."	"Australian movies/TV programs are well-made and as good as international ones."
Higher agreement among over 65s (82%)	Higher agreement among over 65s (84%)	Higher agreement among over 65s (85%)
Lower agreement among 16–24s (69%)	Lower agreement among 16–24s (66%)	Lower agreement among 16–24s (55%)

Source: Australian screen audiences survey, responses to the question: "Thinking about the Australian-made TV shows and films you have seen, how much do you agree or disagree that Australian content provides value to Australians in the following ways? Respondents were asked to rate their level of agreement with each statement on a 7-point scale from strongly agree to strongly disagree. Weighted base: n=2,404.

Survey respondents were asked to describe what characteristics make a good Australian-made movie or TV program. **Four characteristics emerged that uniquely define quality Australian content:** Australian actors and themes were the most commonly cited (in 26% and 20% of comments respectively) followed by engaging storylines (14%) and recognisable places (9%) (Figure 7).

Boss Cat

Figure 7: Characteristics that make a "good" Australian movie or TV program

Real Australian actors	Authentic Australian themes	Engaging storylines	Recognisable places
26% of comments	20% of comments	14% of comments	9% of comments
Featuring quality actors, that have genuine Australian accents, tone and mannerisms.	Realistic and relatable stories, being down-to-earth and exploring everyday Australian themes.	Interesting storylines that are well written, truthful and entertaining.	Unique Australian settings, locations and places that are familiar and recognisable.

Source: Australian screen audiences survey, responses to the question: "What characteristics make a 'good' Australian-made movie or TV program?" Open ended question, responses were thematically coded for analysis. Weighted base: n=2,404.

What makes content feel "Australian"

Across the qualitative research phases, including the First Nations focus groups, audiences described content as feeling "Australian" when it appears authentic and grounded in lived experience and recognisable places, people and social interactions. "Australianness" is experienced through familiar accents, humour and landscapes – both urban and natural – as well as social dynamics and settings, including workplaces.

> "[*Boy Swallows Universe*] really hit home – the story – and obviously the accents and whatnot matching ours."
>
> – First Nations focus group participant, female, parent

> "The everyday Australian can relate to Australian content in a way that they cannot with international content. The scenery, language and customs are familiar to Australians in everyday life in a way that a show produced in New York cannot [be]."
>
> – Audience forum participant, male 65+, Qld

> "The nuances of local life, including slang, humour, landscapes and social issues that international productions may misrepresent or overlook."
>
> – Audience forum participant, CALD female, 16–24, Vic

Online reviews commonly recognise content as "Australian" but do so in different ways, expressing pride, cringe, novelty, distinction, or cultural resonance. The analysis highlighted that audiences value authentic representations of identity and culture. Many titles were praised for their aesthetic qualities, with reviews often highlighting their use of natural landscapes and distinctive visual design. The rural crime dramas ***Mystery Road*** and ***The Dry*** were praised for their evocative filming of Australia's iconic landscape.

> "Walking into *The Dry*, I didn't realise just how much I was going to understand the entire vibe of this film. The small, rural Victoria town feel, the desperation of the drought, the dryness and the vast vistas of just yellow/brown. It was all so familiar."
>
> – Online review of *The Dry*

> "*The Dry* is a hyper-Australian film. It's about Australia. It's set in Australia. It's got an all Australian cast without exception. It's, you know, it's about us as a country."
>
> – Robert Connolly, *The Dry* case study producer interview

Read *The Dry* case study:

Case Studies

The Dry

Credibility is closely tied to authenticity. Participants in the screen audiences research highlighted that characters that feel real, dialogue that sounds natural and depictions of everyday life that reflect lived experience contribute strongly to their sense of connection. There are many ways that audiences gauge whether a production is good quality, authentic content: from acting to production, accents to storylines, and locations to atmosphere (such as the quality of the light, depictions of public transport, or certain background sounds such as bird noises).

Conversely, overt or forced signalling of national identity is often viewed negatively. Content that appears to exaggerate accents, rely on heavy-handed symbolism or present contrived portrayals risks being perceived as inauthentic or "cringe". Instead, audiences respond most positively when "Australianness" emerges organically from story and character.

Titles frequently cited as **successful examples include *Fisk*, *Utopia*, *Heartbreak High* and *Bluey***, where humour, setting and interpersonal dynamics convey national identity without overt messaging.

First Nations focus groups and contextual inquiries[4] highlighted that **authenticity is particularly important for audiences who have been historically underrepresented** in Australian screen content. For First Nations people, people with disability and those from CALD or LGBTIQ+ communities, accuracy of representation is even more paramount, given past and persistent clichéd and one-dimensional portrayals.

> **"But, you know, you don't have to keep looking back … we do live in these days and times and we should be [portrayed] that way."**
>
> – First Nations focus group participant, female, grandparent, Vic

> **"You know, [in *Love on the Spectrum*] that's just their behaviour. It's quite cruel and heartbreaking … [the show's creators are] trying to be inclusive, but again, it's quite cruel."**
>
> – Contextual inquiry participant, female with disability, aged 65+, ACT

Participants in First Nations focus groups said they value Australian screen content for preserving First Nations history, but many expressed demand for **more stories that reflect contemporary Aboriginal life** rather than positioning First Nations people only in the past. Titles like ***Black Comedy*** and ***Mystery Road*** were referenced as better examples of what participants want to see more of: First Nations people represented in present-day settings with agency and complexity (see The impact of First Nations storytelling for more on this).

Read the *Mystery Road* case study:

Case Studies ›

Australian audiences recognise that Australian identity is not singular. Among participants in the qualitative research there was widespread acknowledgement that historical portrayals have often been narrow – dominated by stereotypical tropes or limited geographic settings – and that contemporary Australia is more culturally and socially diverse.

> **"I do recall seeing quite a lot of outback movies … the multiculturalism of our cities isn't really noted very well in films. Feels like films mainly portray us as a kangaroo-filled desert."**
>
> – Audience forum participant, male, parent, aged 25–44, WA

While audiences note progress in representation, the qualitative research phases surfaced **appetite for more "diversity within diversity"** – a broader range of more sophisticated, contemporary and varied portrayals that move beyond the usual characters, storylines and settings.

> **"While I am [enjoying] typical Australian content, I do feel that including a broader range of cultural diversity would add value and enhance interest and awareness in the audiences both at home and globally."**
>
> – Audience forum participant, CALD female, aged 65+, NSW

4 In-depth (2–3 hour) home visits or online immersions with parents/families, young people, people from CALD and LGBTIQ+ communities, or with disability.

Understanding cultural value in audience terms

Entertainment functions as a baseline requirement for engagement. Across all phases of the audiences research, audiences repeatedly described entertainment as a threshold condition: content must be engaging, enjoyable or emotionally compelling to unlock other forms of value. Entertainment is core to why people watch screen content, including as a main driver for 69% of Australians.

However, entertainment is not synonymous with light or escapist material. Audiences value a broad spectrum of emotional experiences, including comfort, humour, warmth and familiarity, as well as emotionally challenging or thought-provoking narratives when they feel authentic. This was a particular finding from the qualitative research phases. While many viewers return to familiar Australian content for comfort, relaxation and a sense of place, at other times, they seek content that prompts reflection or explores difficult issues, provided it remains grounded in credible storytelling. In this sense, **entertainment is not in opposition to cultural or social value; rather, it serves as the gateway through which those forms of value are accessed.**

When discussing cultural value, research participants intuitively engaged with concepts similar to established cultural value frameworks. For example, they talked about how screen content helps tell shared stories about who Australians are (symbolic value) and ways screen content connects audiences to the past, preserves stories, and helps share them across generations (historical value) (see Tenets of cultural value in the Appendix for discussion of the cultural value framework used to guide this research).

However, audiences do not treat these categories as distinct or hierarchical. Instead, symbolic, social and emotional meanings tend to overlap. Seeing familiar places or cultural references on screen may simultaneously evoke pride (symbolic value), emotional comfort (spiritual or emotional value) and a sense of shared understanding (social value). Across research streams, audiences rarely articulated these forms of value separately, instead describing them as interconnected elements.

Historical value is most often associated with older Australian content and First Nations storytelling, with this content preserving cultural memory and documenting social change.

Symbolic value is frequently linked to longevity. Content that continues to be referenced, quoted or revisited over decades – such as *Kath & Kim* or *The Castle* – is often described as becoming part of Australia's cultural fabric. **Nostalgia plays a role, but audiences emphasise that cultural significance is not limited to legacy content** – contemporary works are also capable of generating lasting symbolic meaning, with *Bluey* being a prime example. **Symbolic value can be accelerated and amplified by social media**, particularly for younger audiences, with viral circulation of snippets of content having powerful reach and more immediate cultural impact.

> **"The other thing that was super advantageous in us finding our audience was TikTok ... accessing Gen Z, it just really blew up with short little fan generated clips and things like that. So it's, kind of of built its own momentum that we didn't have that much control over, but was really advantageous for engaging the audience."**
>
> – Anna Curtis, *Heartbreak High* case study producer interview

The screen survey found strong recognition of symbolic and historical value among Australians: at least 3 in 4 agree Australian screen content contributes to our distinct identity in the world (78%), represents who we are as a nation, including our people, humour and lifestyle (76%), and ensures our stories are remembered for future generations (75%). Seven in 10 agree screen stories connect them to Australia's past and cultural heritage (71%), with agreement higher among First Nations respondents (79%) (see Figure 8).

Contestation, nostalgia and contemporary Australia

Nostalgia was a recurring theme in discussions of cultural value, particularly among older research participants who referenced programs they watched in their childhood and early adulthood as sources of comfort and familiarity. For example, in contextual inquiries, audiences expressed nostalgia for 1980s video games and referenced well-known or "classic" Australian movies such as *The Castle*, *Muriel's Wedding* and *Priscilla Queen of the Desert*.

However, audiences also recognise the limitations of nostalgia. Many participants acknowledged that earlier depictions of Australian identity, while still retaining symbolic value, were narrower and may not reflect contemporary social realities or expectations around diversity and inclusion. For example, there was discussion of whether *The Castle* could be made today and still take its place in the lexicon of iconic Australian content, or whether the Kerrigans would be recast as second or third generation migrants renting an apartment, about to be evicted by a landlord.

Younger audiences, who demonstrate more fragmented viewing landscapes, appear less concerned about the loss of shared national viewing moments. Rather than expecting a single unifying national narrative, they are familiar with multiple stories representing different communities and experiences. This generational shift suggests that **cultural value is increasingly distributed across a wide range of content rather than concentrated in a small number of nationally dominant programs** (for more on this, see Social consumption of screen content: shared moments and shared meaning).

> "It's really hard to pick one movie or show that is a cultural icon. It's hard to choose one because we are so multicultural. It looks like an injustice if I pick one over others. I love that we are a diverse country and so one film or TV show can't really capture that."
>
> – Visitor at ACMI

Figure 8: Symbolic and historical value of Australian content

78% agree	76% agree	75% agree	71% agree
"Australian productions contribute to our distinctive identity in the world."	"Australian screen stories represent who we are as a nation, our people, our sense of humour and lifestyle."	"Australian productions ensure our stories are remembered for future generations."	"They connect me with Australia's past and cultural heritage."
Higher agreement among over 65s (87%)	Higher agreement among over 65s (81%)	Higher agreement among over 65s (82%)	Higher agreement among First Nations respondents (79%)
Lower agreement among 16–24s (64%)	Lower agreement among 16–24s (67%)	Lower agreement among 16–24s (63%)	Lower agreement among 16–24s (61%)

Source: Australian screen audiences survey, responses to the question: "Thinking about the Australian-made TV shows and films you have seen, how much do you agree or disagree that Australian content provides value to Australians in the following ways?" Respondents were asked to rate their level of agreement with each statement on a 7-point scale from strongly agree to strongly disagree. Weighted base: n=2,404.

Importantly, older Australians also expect to see multiple experiences and Australian communities represented. Survey respondents aged 65+ were more likely than those aged 16–24 to say it's important to see a range of groups represented in Australian TV shows and films. When prompted, respondents identified the following groups as important to see represented:

- **First Nations peoples** (80% of those aged 65+ felt it was important to see First Nations people represented, compared to 53% of those aged 16–24)
- **people living in regional or remote areas** (81% of those aged 65+ compared to 48% of those aged 16–24)
- **people from multicultural or non-English speaking backgrounds** (78% of those aged 65+ compared to 46% of those aged 16–24)
- **people with disability** (76% of those aged 65+ compared to 46% of those aged 16–24)
- **all Australians** (71% of those aged 65+ compared to 38% of those aged 16–24).

This reflects **a generational response trend seen across the survey findings**, where younger people are less likely than older people to express enthusiasm about Australian content. It may also reflect that **among younger generations, diversity and inclusion is commonplace.** In contrast to the survey findings, the qualitative research found younger audiences prefer to see a range of experiences and identities represented on screen rather than a single unifying national narrative.

Jimpa

Screen industry practitioners interviewed for **Screen Australia's *Seeing Ourselves 2* research about diversity, equity and inclusion in Australian TV drama** said the market and audiences are demanding diversity, and storytelling informed by lived experience. They said that among younger generations, diversity and inclusion is standard; it does not need a special narrative to exist:

> "Online platforms focusing on Gen Z and early millennial audiences are leaps and bounds ahead in diverse representation; it's not a decision, it just is."
>
> – Producer interviewed for Screen Australia's *Seeing Ourselves 2* research

Practitioners told us there is drive in the industry to tell diverse stories in a way that is nuanced, specific and authentic. There was a general acknowledgement that **authentic content is successful content and attracts audiences**:

> "I see a great opportunity in diverse storytelling because there is an appetite from audiences and more scrutiny and savviness about whether a story rings true."
>
> – Producer/director interviewed for Screen Australia's *Seeing Ourselves 2* research

Interviewees noted that **there is no industry definition of "authenticity", which is a dynamic and contested term.**

> "It's the idea that the story and representation feels true, but who does it feel true to?"
>
> – Writer interviewed for Screen Australia's *Seeing Ourselves 2* research

This contestation was evident in Screen Currency's qualitative research in conflicting responses to shows like *Love on the Spectrum*, with a participant with disability questioning whether it's exploitative, and other audiences highlighting it as a standout example of emotional honesty that gave insights into a community they had limited knowledge of.

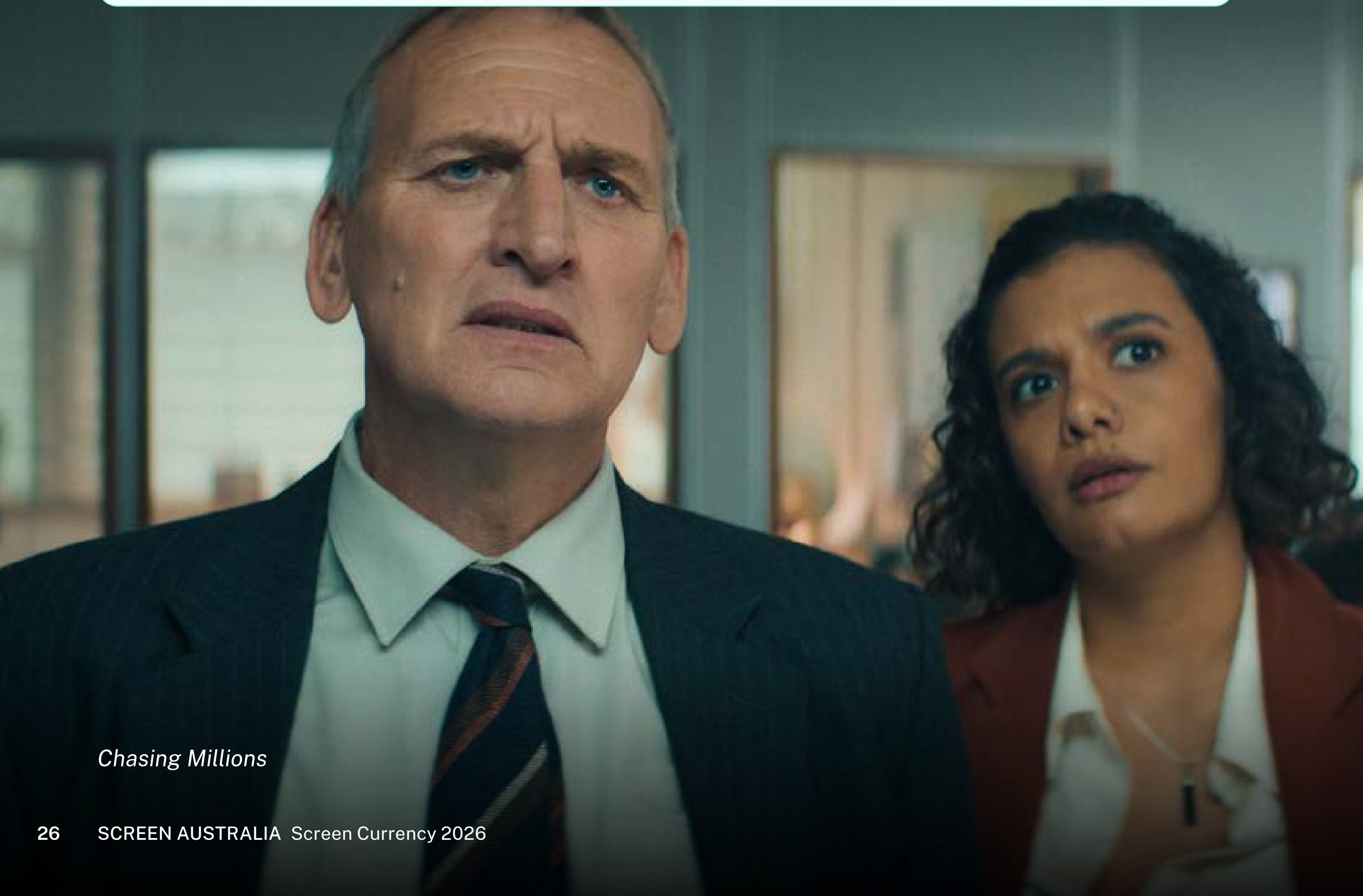
Behaviour and consumption

This chapter examines how Australian audiences engage with screen content in practice – how they decide what to watch, where they discover content, and how Australian content fits into everyday consumption habits.

It highlights a gap between interest and actual viewing. Interest exists alongside discoverability challenges given the sheer volume of global screen content available. Across the research, audiences consistently demonstrated openness to Australian content when they encountered it. A significant barrier was not necessarily a lack of interest but a lack of visibility.

Audiences describe a highly fragmented, platform-driven environment in which choice is abundant, but attention is scarce. In this context, Australian content is rarely intentionally sought out. Instead, it is encountered through recommendation networks – social, algorithmic and cultural – and sometimes recognised as Australian only after it has been watched.

While viewing habits are increasingly individualised, screen content continues to play a critical social role. Meaning, value and connection emerge around content through conversation, shared references and cultural participation – even when viewing itself happens alone.



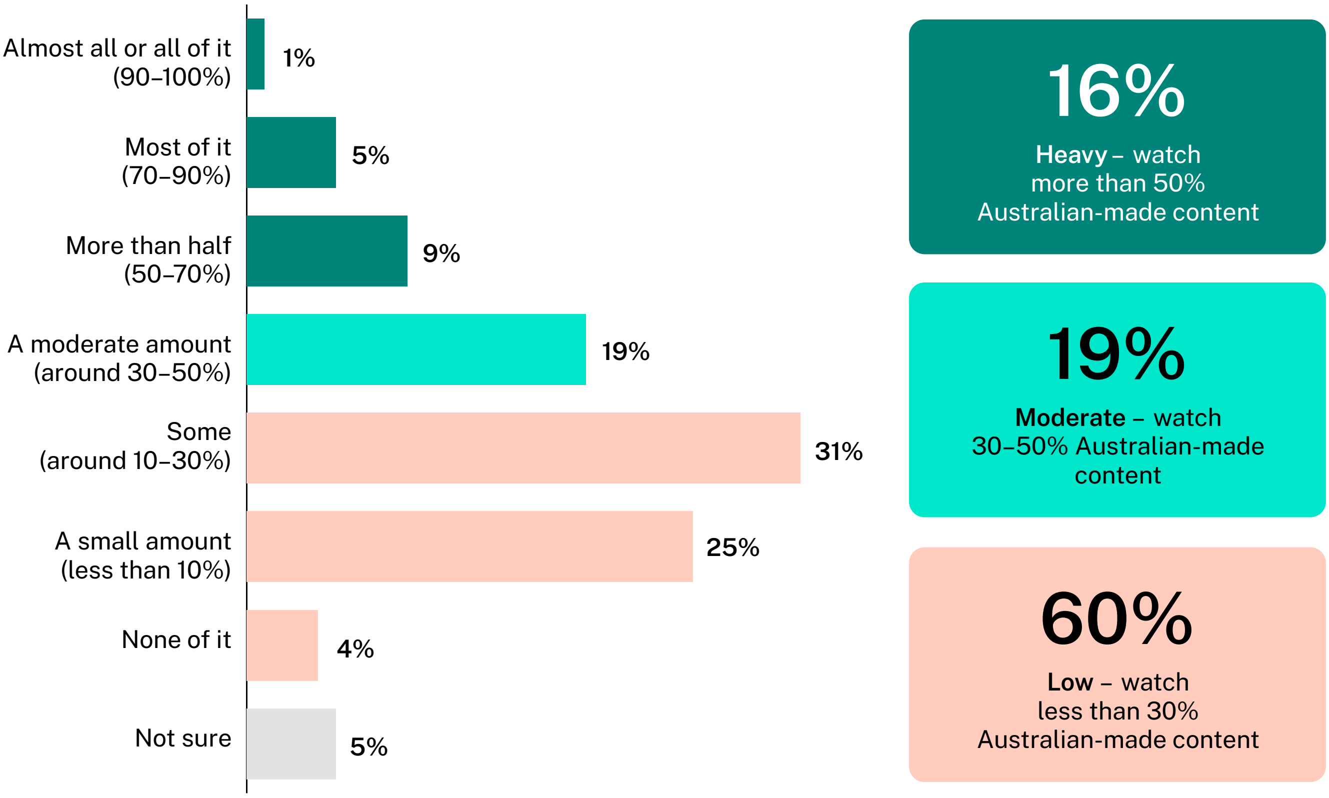
Chasing Millions

Consumption and demand for Australian screen content

The previous chapter highlighted strong support for Australian screen content – 84% of Australians agree it's important for Australians to have access to local content and 75% are interested in watching more (see The importance of Australian content).

However, despite strong stated support, consumption patterns do not align neatly with audience sentiment. For most Australians (60%), local content comprises less than 30% of what they watch (excluding sport and news) (Figure 9). First Nations and CALD respondents are more likely to report watching more Australian-made content.

Figure 9: Proportion of local viewing



Source: Australian screen audiences survey, responses to the question: "Thinking about everything you watch in a typical week, including movies, TV shows and series (excluding sport and news), approximately how much of it do you think is Australian-made?" Weighted base: n=2,404.

Australian screen content is rarely actively sought out. This was indicated through survey responses (see How Australians find content) as well as in audience forums, where most participants stated they had "stumbled" across the last piece of Australian screen content they had enjoyed – it needed to be in their path to find it or recommended to them.

Content origin is not usually a decision driver – participants said they are instead guided by entertainment value, general recommendations and what "looked interesting". Most participants never thought about the amount of Australian screen content they consumed, reflecting a general lack of engagement with this subject prior to the discussion.

> "I don't think I really think about it and there is probably a wider choice of international content."
>
> – Australian screen audiences survey respondent, male aged 65+, Qld

> "I just watch what interests me but would probably watch more Australian if it was available and interested me."
>
> – Audience forum participant, LGBTIQ+ female with disability, aged 65+, NSW

Some parents or carers seek out Australian screen content for their children. Three in 4 parents of dependent children agree that Australian screen content helps provide positive role models for Australian children as they grow up (75%), higher agreement than for all respondents (70%). Audience forum and contextual inquiry discussions touched on desire to expose children to quality Australian content.

Read the *Little J & Big Cuz* case study:

Case Studies

> "If I am streaming content, my niece will be watching *The Wiggles* or *Bluey* if I am looking after her. Those are my choices for her as I prefer she has exposure to [Australian content] and not US content."
>
> – Audience forum participant, female recent migrant, aged 25–44, NT

> "I've heard of toddlers talking with an American accent because they've watched too much [American TV]."
>
> – Contextual inquiry participant, female, parent, aged 45–64, Tas

> "Some kids who watch a lot of American shows or YouTube ... you can hear the American accent coming out of them."
>
> – Contextual inquiry participant, male, LGBTIQ+ parent, aged 25–44, Qld

In the qualitative research, if asked **where they would go if determined to find Australian screen content**, audiences gravitated towards trusted public broadcasters such as the ABC (via platforms like iview in particular) or YouTube channels featuring Australian creators.

> "If I was consciously looking for Australian content, I would probably go straight to iview and look around, see what they are pushing that's new. Maybe go into the drama section, find something that appeals to me, some 'sad girl' crime thing. *Bay of Fires*, that looks interesting, so I would click on that and look through the episode descriptions."
>
> – Contextual inquiry participant

Older audiences are more likely to intentionally seek out Australian content, likely driven by the types of content they consume (particularly a skew to free-to-air in the older groups), whereas younger audiences are less likely to prioritise Australian content.

Study on Australian teenagers' local screen engagement

A 2024 study by researchers from QUT investigated **how Australian teenagers aged 13 to 19 engage with long-form TV drama and movies in their daily lives**, including Australian stories.[5]

It found Australian teens prefer on-demand delivery and have broad tastes, but are not watching much Australian content, although many affectionately remember the Australian drama they watched as children. They listed shows such as *Home and Away*, *Nowhere Boys*, *Kath & Kim* and *H2O: Just Add Water*, but they didn't always classify these shows as "Australian". For example, one workshop participant mentioned *H2O* as their favourite show despite saying they do not watch Australian content.

When asked why they like the streaming services they regularly watch, **33% of participants ranked access to Australian content last out of 6 options**, and 25% ranked it second last (n = 699). The most important streaming feature was being able to watch a whole season on demand.

> "I don't really want to watch shows that are about Australia. I just feel like I pretty much already know what Australia's like."
>
> – Teen research participant

Netflix's reboot of *Heartbreak High* was a marked exception, with teens drawn to the characters and representations of neurodivergence, sexuality, gender and ethnicity, as well as Australian accents and familiar vernacular such as "bin chickens" and "eshays".

***Heartbreak High* was also mentioned by younger participants in the Screen Currency research**, with its popularity ensuring it was easy to find, including being featured in Netflix's Top 10 list.

Read the *Heartbreak High* case study:

Case Studies

5 Macrossan P and Potter A 2024, "'I pretty much already know what Australia's like': what Aussie teenagers told us about not watching local TV", *The Conversation*.
Potter A, Archer-Lean C and Beazley H 2024, *Mermaids and bin chickens: Australian teenagers' engagement with screen stories in the on-demand age*, SAGE Journals.

Heartbreak High

How Australians find content

Across the qualitative and quantitative research, **audiences identified the following primary discovery pathways for screen content**:

- streaming platform homepages and algorithmic recommendations
- social media clips, reels and short-form excerpts
- word-of-mouth from family, friends and colleagues
- podcasts and online commentary
- traditional media reviews and promotion
- cultural visibility or "zeitgeist" moments ("everyone seems to be watching it").

Older Australians are more likely to learn about new content through advertising and friends or family, while younger Australians are more likely to hear about new content through social media.

Direct search by country of origin, Australia or otherwise, is rare. Genre remains an important driver in discoverability over country of origin, with decisions – whether it be in relation to streaming, broadcast TV and theatrical release of films – shaped largely by platform recommendations based on viewing history; or mentions by people they know or in podcasts, traditional media or social feeds.

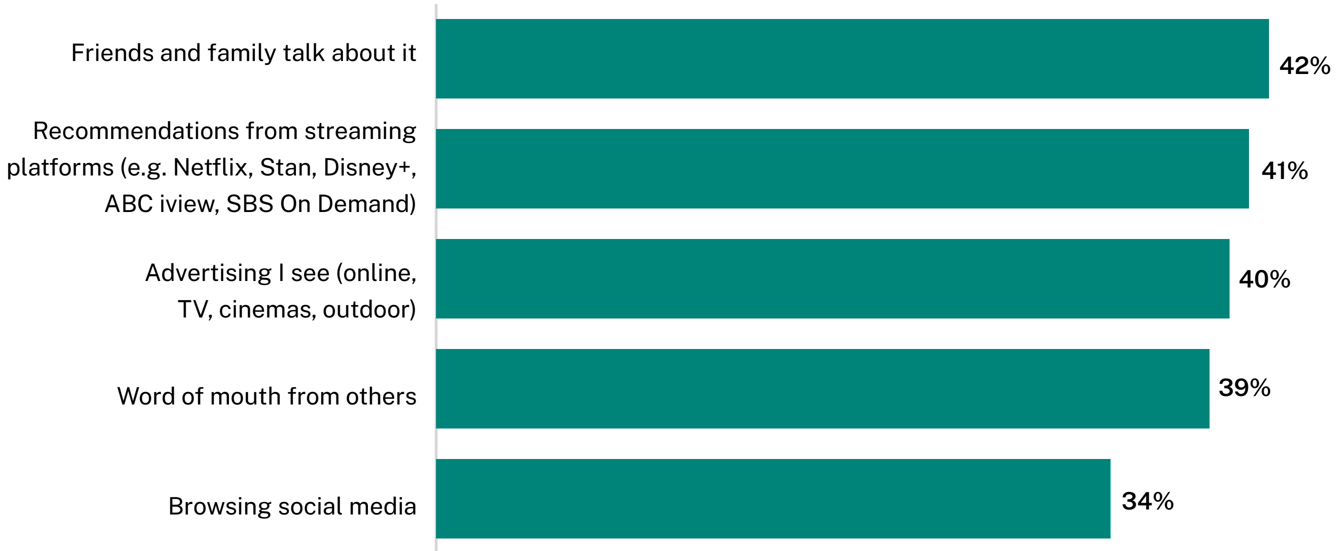
Audiences across research streams consistently reported that they rarely decide what to watch without some form of recommendation, with 41% of Australians reporting that their viewing choices are influenced by recommendation algorithms (Figure 10).

> "Normally, I like the big, popular shows that come out on Netflix that everyone's talking about … I just want to know what it's about."
>
> – Contextual inquiry participant, male aged 16–24, Vic

> "The last Australian thing I discovered and really enjoyed was *Heartbreak High*, and I found it scrolling through Netflix, and it popped up in the 'top 10' section."
>
> – Audience forum participant, CALD male recent migrant, aged 16–24, Qld

Across the qualitative research, audiences reported that **Australian content is often recognised retrospectively.** They described a process of discovering content, enjoying it, working out its origins, then feeling pleasantly surprised or proud. **"Australianness" added value once entertainment and engagement thresholds were met.**

Figure 10: Top 5 ways Australians find out about new Australian screen content



Source: Australian screen audiences survey, responses to the question: "How do you usually find out about new Australian screen content (movies, TV shows, or series)? Select all that apply." Weighted base: n=2,404.

> **“**I stumbled on a movie called *A Perfect Pairing* set in Australia. I didn't realise until recently that the director is Australian. It had the heart of Australia and the quirkiness of Australian authenticity.”
>
> – Audience forum participant, female with disability, aged 45–64, ACT

> **“**I found it via social media mixed with some word of mouth and I found out it was Australian by recognising an Aussie director.”
>
> – Audience forum participant, LGBTIQ+ female, aged 16–24, SA

Barriers to discoverability in a saturated environment

The research highlights a key structural tension related to discoverability. Audiences express support for Australian storytelling in principle, value it when they do consume it, but most rely on it being in their path rather than actively looking for it – and they feel that discovery pathways do not consistently surface this content for consideration.

Discovery is recommendation-led. Content appears in front of audiences rather than being actively sought out, whether through the people around them or the platforms they use. In this environment, discoverability is less about whether audiences want Australian stories and more about whether those stories are embedded within the recommendation ecosystems audiences already inhabit.

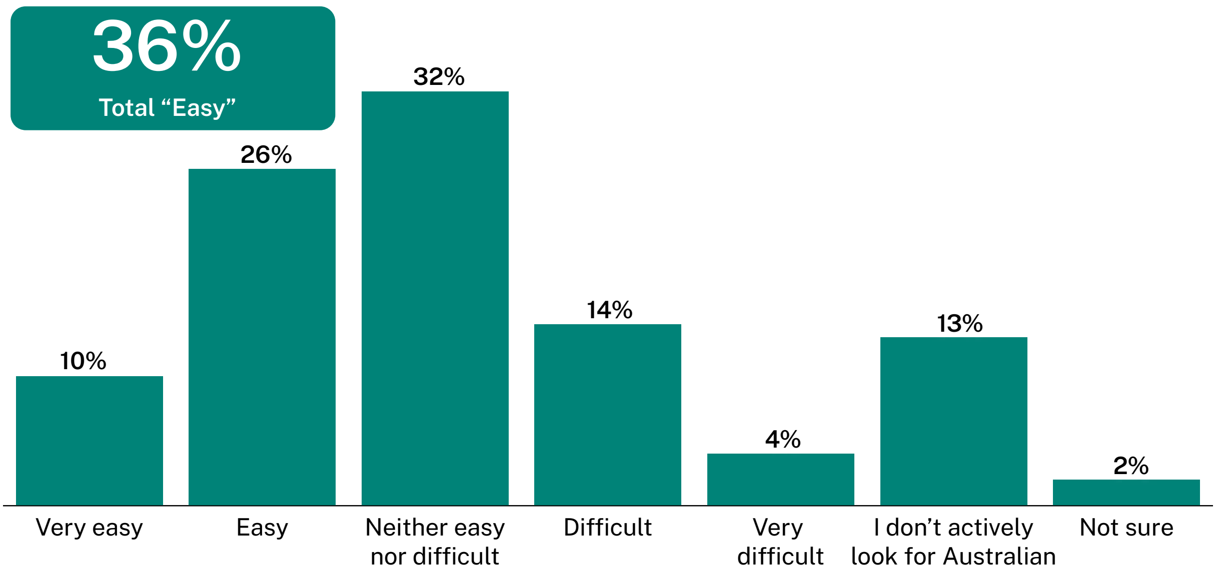
Audiences recognise that in this crowded algorithm-dominated landscape, Australian content needs to be put front and centre or it can be easily lost. **Only around 1 in 3 Australians (36%) say that it is easy to find Australian content** (Figure 11).

In the qualitative phases of the research, **audiences argued for greater efforts to be made to feature Australian content across streaming services.**

> **“**It would be better if all streaming services had a specific category for Australian-made films and series. That way, it's all in the one place for us to find and browse through.”
>
> – Audience forum participant, female with disability, parent, aged 25–44, Tas

> **“**I just don't think there's enough out there. The big streaming platforms only feature big international productions. It would be good to have an Australian section featured across all the streaming services.”
>
> – Audience forum participant, LGBTIQ+ CALD male, aged 25–44, Qld

Figure 11: How easy or difficult is it to find new Australian-made content



Source: Australian screen audiences survey, responses to the question: “How easy or difficult is it to find or discover new Australian-made screen content (such as TV programs, movies, and series)?” Weighted base: n=2,404.

Social consumption of screen content: shared moments and shared meaning

Screen content remains deeply social, although household co-viewing is less common than in the past where broadcast TV and 1 or 2 screens were the norm. Today, households often have multiple screens, with individuals watching different content at the same time across streaming platforms, mobile devices, apps and social media. The research evidences a continued move away from mass, simultaneous viewing toward more dispersed, individual consumption.

However, while content is frequently consumed individually, it's discussed collectively, with participants describing examples of watching a show to avoid being "left out" of conversations. In addition to watching for personal entertainment, audiences also watch:

- to participate in conversations at work or online
- to maintain shared reference points
- to feel connected to distant friends or family
- to continue discussions via messaging apps or social media.

After All

The screen audiences survey found **2 in 3 Australians agree watching Australian films and TV supports feelings of belonging and connectedness** (67%), with similar levels across groups.

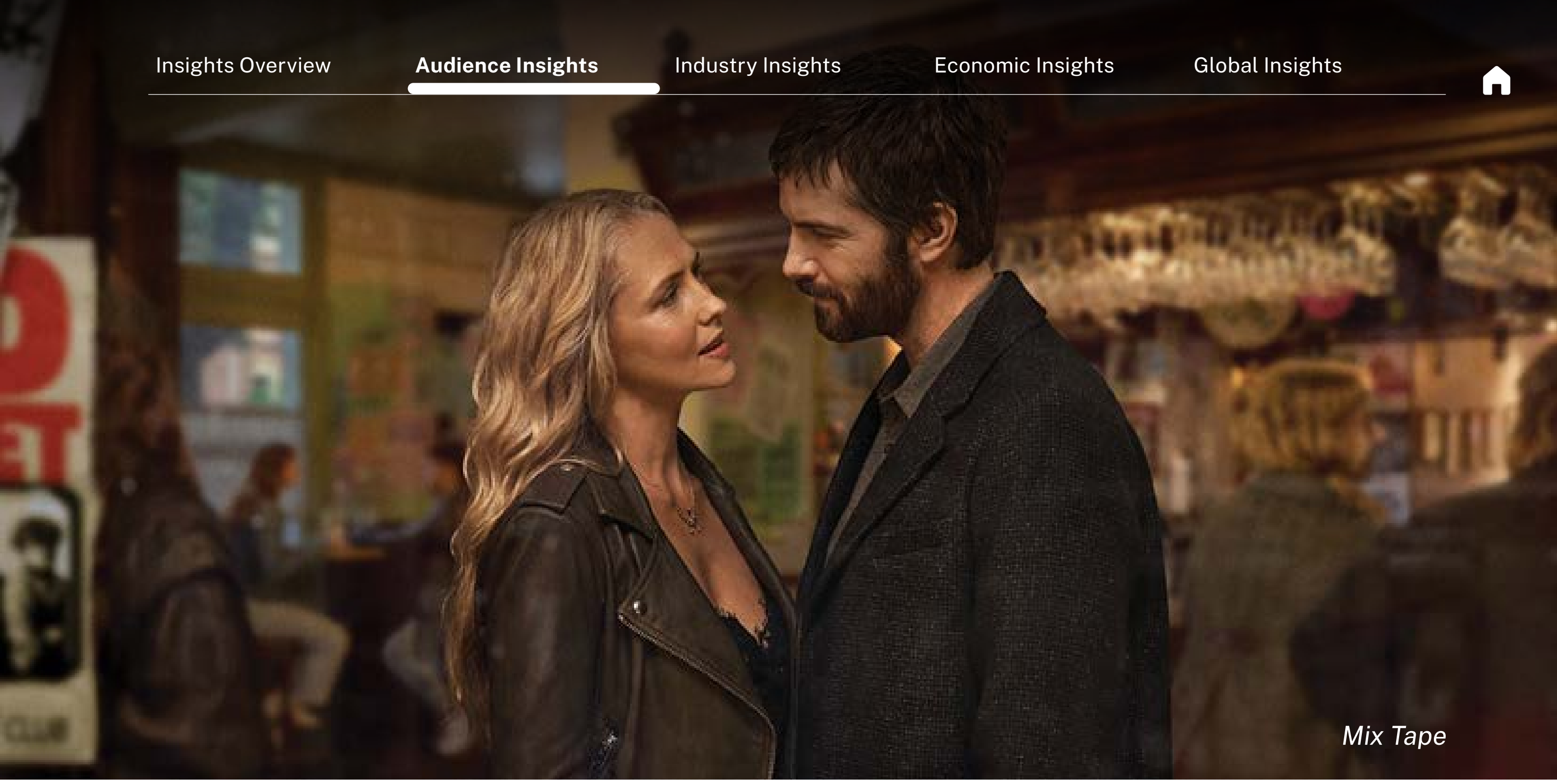
Social screen consumption also extends beyond the home. Cinema-going remains as a screen experience where audiences routinely gather to watch content together, with the shared experience of viewing with friends, family or other audience members continuing to be a key driver for attendance. Around half of Australians consider the social occasion of seeing a film with other people important when deciding to attend the cinema (52%), while a similar proportion value the shared laughter and crowd energy that comes from watching alongside an audience (48%).[6] In this context, value is created not only through the content itself but through collective reactions, discussion and a sense of occasion.

> "I am the 'hostess' within my friend group so I'm the one organising the watch parties for any new series release, like with *Deadloch*. I think I've seen that twenty times or more on my own or with others. I think it's the defining example of Australian queer storytelling."
>
> – Contextual inquiry participant

While shared viewing experiences with family and friends remain a main viewing driver for more than 1 in 4 Australians (28%), **the findings indicate that increasingly individualised viewing has diluted the role of household co-viewing.** Value in Australian screen content now more often emerges through:

- shared reference points
- ongoing conversation
- cultural recognition (both personal and communal) across different communities and audiences.

6 Screen Australia 2026, Theatrical Review.



Mix Tape

When co-viewing does occur, it is often intentional and meaningful, with examples participants mentioned including:

- couples from different cultural backgrounds watching films together with subtitles
- parents watching with children to connect, guide and learn
- groups gathering physically or virtually to binge-watch.

This shift does not represent a loss of value, but a change in how value is created and sustained. Social impact is now more likely to be cumulative and relational, built through many stories rather than a single national narrative. It is a fertile environment for content that appeals to small, niche audiences, and for sub-genres and different kinds of storytelling across different platforms and screen environments.

Analysis of online reviews and video responses confirmed audiences for Australian screen content are multiple, not mass. The study revealed many different audience segments clustered around different online platforms, each with their own (multiple) norms, discourses and expectations – a constellation of sub-audiences and audience cultures.

Generational differences emerged in the screen audiences research. Younger audiences under 30 are generally more comfortable with fragmented media environments and multiple smaller communities of viewers, while **older audiences sometimes express concern about declining shared national viewing experiences**. In qualitative findings, some older Australians also reported frustration with their ability to operate streaming services.

The screen survey found **older Australians aged 65 years and over are much less likely than other Australians to take a range of actions after viewing quality Australian content**, including talking about it with family and friends or recommending it to others (see From viewing to action). This suggests that conversation and recommendation play a smaller role in how older Australians engage socially with screen content.

However, this is not the case for younger audiences who are discussing content collectively both in real life and in online communities of viewers. In today's participatory media environment, for some audiences the experience of screen content goes beyond consumption and discussion to involve sharing, repurposing, and remixing content across multiple platforms and devices.

Most audience forum participants agreed Australian content can still have value even if it does not reach a wide audience. Participants reiterated the belief that **content can spark discussions that reach far beyond the people who originally consumed it.**

> "Even if content isn't enjoyed by millions of people, I think it only matters that it achieves its purpose, like adding a new perspective, retelling history, or starting a discussion."
>
> – Audience forum participant, male with disability, aged 16–24, SA

Impacts and actions

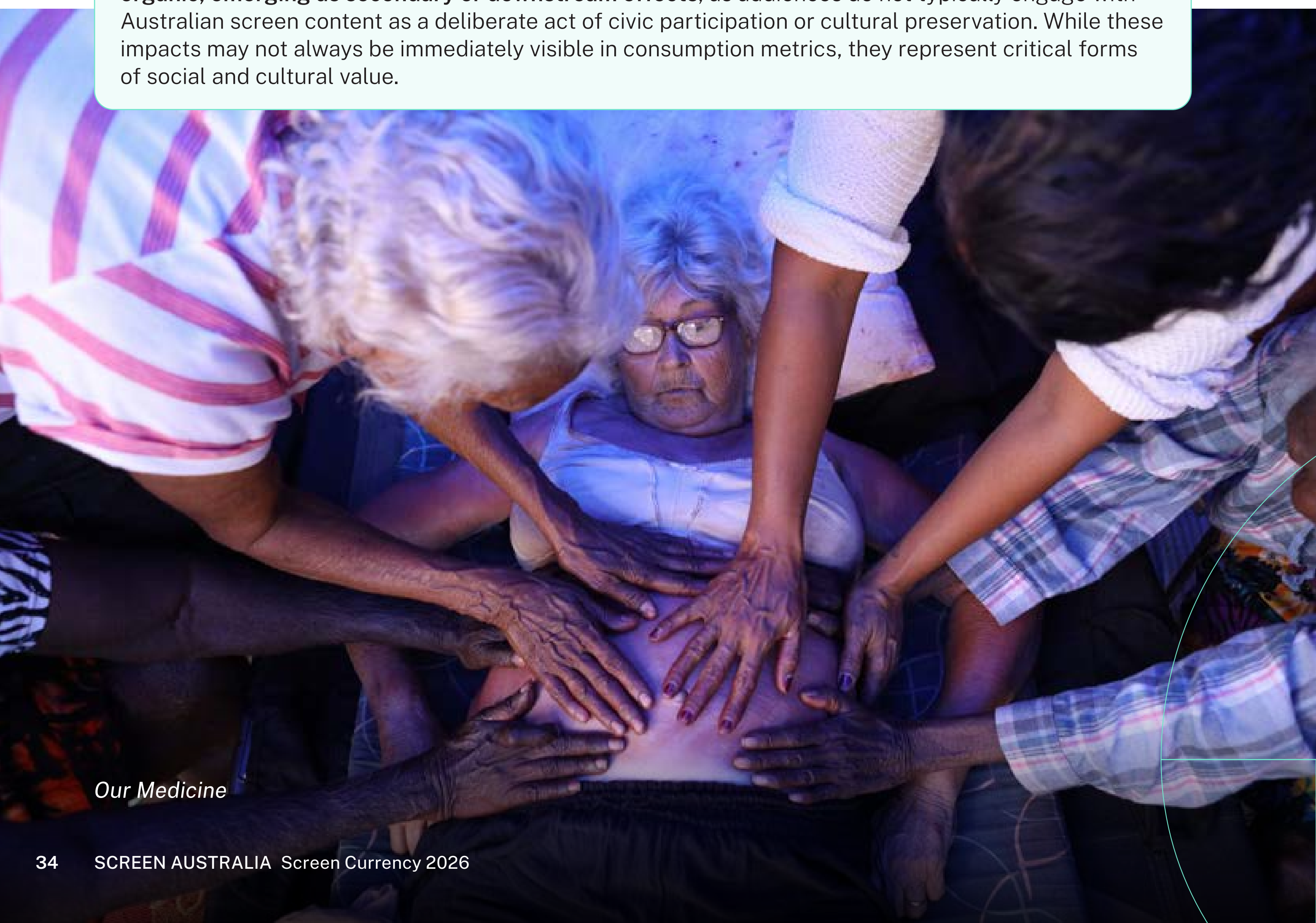
This chapter examines the impacts and actions that flow from engagement with Australian screen content.

These are often subtle, relational and cumulative, compounding over time. These impacts become pronounced when content resonates meaningfully with audiences – when it connects to lived experience, creates space for reflection, and fosters conversation or action.

Resonant Australian screen content can foster emotional wellbeing, support social connection and community cohesion, inspire learning and contribute to cultural continuity. Representation in Australian screen content offers audiences from diverse backgrounds the opportunity to see themselves reflected authentically, contributing to a sense of recognition and social inclusion.

For First Nations communities, Australian screen content is valuable when it reflects authentic characters and scenarios and culturally specific humour, as a way to share positive aspects of everyday life. It continues to play a critical role in education, advocacy and community dialogue.

The research indicates that the impacts of engagement with Australian screen content are often organic, emerging as secondary or downstream effects, as audiences do not typically engage with Australian screen content as a deliberate act of civic participation or cultural preservation. While these impacts may not always be immediately visible in consumption metrics, they represent critical forms of social and cultural value.



Our Medicine

Emotional wellbeing

One of the most consistent impacts of screen content described by audiences is around relaxation and comfort. More than 7 in 10 Australians watch screen content to relax and unwind (72%), and more than 1 in 5 watch to improve their wellbeing and general happiness (22%). Almost 1 in 4 watch to deal with stress, anxiety or depression (24%) with agreement significantly higher for younger Australians and respondents who are First Nations, CALD, LGBTIQ+ or living with disability (Figure 12). This may reflect higher prevalence of stress, anxiety and depression among these groups, as well as the potential for screen content to be particularly impactful in reflecting their lived experiences.

Audiences consistently described using screen content to:

- feel comforted or grounded
- experience familiarity and recognition
- regulate mood and escape stress
- alleviate feelings of isolation.

While these insights relate to how Australians feel about all screen content, regardless of origin, qualitative research phases highlighted that **Australian screen content can play a particular role when it comes to watching for comfort and wellbeing given its familiarity and everyday relevance.** Importantly, this emotional value was seen in both new content and in the re-watching of familiar, trusted programs.

> “I love *Kath and Kim*. So, I’ve been watching [the] reruns on Netflix just because after a busy day at work, I want to switch my brain off. You know, when you can watch a show where you can laugh because some of ... their content and how they speak. It’s not taken too seriously, so I enjoy that ... because I think we get the Aussie humour.”
>
> – First Nations focus group participant, female aged 25–44, regional Vic

The qualitative research highlighted that Australian stories, settings, and voices resonate more deeply with local audiences, who value a broad spectrum of emotional experiences, including comfort, humour, warmth and familiarity, as well as emotionally challenging or thought-provoking narratives that prompt reflection, explore difficult issues, or enable Australians to see their lives reflected on screen.

> “We watched [*Red Dog*] as a family ... and the four of us were just an absolute mess ... It’s our culture, and you don’t get that anywhere else, and a medium that shows you both ... human interactions and the beautiful landscapes, it’s just gold.”
>
> – Contextual inquiry participant, female, parent, aged 45–64, Qld

> “*The Letdown*. I had a newborn at the time and it felt familiar, making me feel a little bit better about what I was going through.”
>
> – Audience forum participant, CALD female, parent, recent migrant, 25–44, Qld

> “When I see representations of my experiences on screen, it makes me feel valued, seen and understood.”
>
> – Audience forum participant, female 16–24, ACT

Social connection and cohesion

Australian screen content supports social cohesion by reflecting the nation's diversity, encouraging empathy, and building a sense of connection through shared stories and understanding. Qualitative feedback reinforces this social value, with respondents describing Australian film and TV as a significant source of intercultural learning, helping audiences understand Australia's history, First Nations cultures, regional and outback life, and the diversity of contemporary Australian experiences.

> "It makes up a significant amount of my cultural learning."
>
> – Australian screen audiences survey respondent, male aged 55-64

Australian film and TV also fosters social cohesion by strengthening identity, belonging and social connections. Whether viewing as individuals or collectively, consuming Australian screen content can encourage shared understanding, empathy, interconnectedness and productive conversations.

The screen survey indicates that Australian screen content supports social cohesion among Australians: 2 in 3 agree Australian screen stories support feelings of belonging and connectedness (67%) with similar levels of agreement across groups (Figure 13). Almost 2 in 3 agree Australian screen stories make them think about their place and identity as an Australian (65%), including 3 in 4 First Nations respondents (74%). More than half of Australians say they relate to Australian stories and often share or discuss them socially (59%), and almost 7 in 10 agree Australian-made screen content helps new migrants learn about Australian culture and everyday life (69%), including 74% of CALD respondents and 78% of First Nations respondents.

These findings speak to significant recognition of both the "use value" of Australian screen content (the value of personal engagement) and the **"non-use" value** (the value people place on the existence or preservation of something, even if they never directly use it). This non-use value can manifest in both the recognition of Australian content as important for specific audiences – such as children or migrants – and for its broader social impact, for example, because of its ability to **facilitate discussions on important social issues.**

Figure 12: Australians who watch screen content to deal with stress, anxiety or depression

Young Australians 16-24 years	First Nations people	CALD communities	People with a disability	LGBTIQ+ communities	All Australians
33%	32%	30%	34%	33%	24%
significantly higher	significantly higher	significantly higher	significantly higher	significantly higher	watch screen content to deal with stress, anxiety or depression

Source: Australian screen audiences survey, responses to the question: "People watch screen content for many reasons (movies, videos or TV shows, excluding sports and news). What are the main reasons for you? (Multi-select, "To deal with stress, anxiety or depression" selected)?" Weighted base all Australians: n=2,404. Young Australians aged 16–24 (n=304), First Nations people (n=247), CALD communities (n=475), people with disability (n=392), LGBTIQ+ (n=284).

“It is very important because it connects me to everything about Australia.”

– Australian screen audiences survey respondent, First Nations male aged 25–44

“It makes me feel part of a culture and community, teaches me about Indigenous culture and history.”

– Australian screen audiences survey respondent, female aged 25–44

“It is extremely important to me because I am interested in my country’s culture … It’s important for our children to stay connected with Australian culture.”

– Australian screen audiences survey respondent, CALD female aged 45–64

The qualitative phases showed that the **capacity of screen content to facilitate discussion on important social issues** is particularly important to audiences from First Nations and other historically underrepresented backgrounds for whom screen content can represent a tool for connecting with broader Australian audiences, building understanding and promoting public dialogue.

More than half of the audience forum participants could think of an example of Australian screen content that **helped them to better understand people in Australia who were from other cultures or backgrounds to theirs.** Participants commented that their examples provided realistic and more nuanced portrayals (not just stereotypes) of these groups. Additionally, almost all participants could think of an example or time when screen content had prompted them to **talk about an issue, topic or experience**.

“*The Family Law* was funny and a good insight into different cultures’ experiences moving to Australia.”

– Audience forum participant, male, parent, 25–44, NSW

“It was a movie about an Indigenous person who is wrongfully detained and how he could not cope with life in the big city. Really felt for him and the movie was brilliant IMO [in my opinion].”

– Audience forum participant, CALD male aged 65+, Qld

Figure 13: The social connection and cohesion value of Australian content

67% agree	65% agree	59% agree	69% agree
“Watching Australian movies and TV support my feelings of belonging and feeling connected.”	“Australian screen stories make me think about my place and identity as an Australian.”	“I relate to Australian stories and often share or discuss them socially.”	“Australian-made TV and movies help people from non-English speaking backgrounds and new migrants learn about Australian culture and everyday life.”
No significant differences between groups	Higher agreement among First Nations respondents (74%) Lower agreement among 16–24s (56%)	Higher agreement among First Nations respondents (74%) Lower agreement among 16–24s (52%)	Higher agreement among First Nations respondents (78%) Lower agreement among 16–24s (62%)

Source: Australian screen audiences survey, responses to the question: “Thinking about the Australian-made TV shows and films you have seen, how much do you agree or disagree that Australian content provides value to Australians in the following ways?” Respondents were asked to rate their level of agreement with each statement on a 7-point scale from strongly agree to strongly disagree. Weighted Base: n=2,404.

Shared cultural references

While household co-viewing is less prevalent than in previous generations, Australian screen content continues to support social connection in significant ways. One of the ways this occurs is through the creation of shared cultural references and common language. Participants reported that content provides a prompt for conversation in both professional and personal settings and can provide a shorthand for signalling belonging, understanding or shared identity.

For example, widely recognised Australian programs, particularly those driven by humour, function as cultural signposts. In some cases, content was described as a way to help others understand certain experiences, communities or perspectives.

This reflects a relational aspect of media consumption, where content is not only consumed individually but is actively shared to foster understanding and connection.

These insights reinforce that social value does not come from broad reach alone. Rather, value is generated by connecting smaller groups of people and overlapping networks around shared meaning, which in turn strengthens community ties and promotes understanding across society.

> "I found a colleague who also watched *Boy Swallows Universe* just so I could talk about it."
>
> – Audience forum participant, CALD male with disability, aged 25–44, VIC

> "*Acropolis Now*. That's my family. Growing up Greek, I could recognise those characters but also I could show my non-Greek friends and they could understand a bit, this is what I have to live with!"
>
> – Visitor at ACMI

Bluey

Educational benefits

More than 1 in 3 Australians watch screen content to learn new things or stay informed (36%). The audience forum and survey found that, while education is not typically the primary motivator for engaging with screen content for most Australians, a desire to learn is still a key driver of screen consumption. The research also revealed that many viewers who primarily watch Australian content for entertainment derive secondary educational benefits or can be inspired to look for further information.

Educational benefits are especially pronounced in documentary content, historically grounded stories, and First Nations-led storytelling, as well as in children's content. Six in 10 respondents agree Australian screen content inspires them to learn more about themselves or the places, stories, and experiences shown (60%), with higher agreement among CALD and First Nations respondents. Seven in 10 agree that Australian screen content helps provide positive role models for Australian children as they grow up (70%), with higher agreement among parents with dependent children (Figure 14).

Figure 14: Educational value of Australian screen content to Australians

70%

agree

"Australian-made TV shows and movies help provide positive role models and relatable behaviours for Australian children as they grow up."

Higher agreement among parents with children living at home (75%)

60%

agree

"Australian-made movies and TV often inspire me to learn more about myself, my country, and the places, stories, and experiences shown."

Higher agreement among CALD (67%) and First Nations respondents (75%)

Source: Australian screen audiences survey, responses to the question: "Thinking about the Australian-made TV shows and films you have seen, how much do you agree or disagree that Australian content provides value to Australians in the following ways?" Respondents were asked to rate their level of agreement with each statement on a 7-point scale from strongly agree to strongly disagree. Weighted base: n=2,404.

Throughout the qualitative research phases, audience members frequently reported using Australian content to:

- explain complex social or historical issues to younger generations
- stimulate conversation and reflection within families, workplaces or communities
- gain a deeper understanding of experiences outside their own.

"We need to tell our stories for the next generation."

– Visitor at ACMI

"It brings history to life and explains things easier than a history book."

– Australian screen audiences survey participant, male aged 65+

"It's important to know about the different cultures that live here in Australia with us. We need to know about all the people that live amongst us so we can learn from each other and love each other."

– Australian screen audiences survey participant, female aged 45–64

The impact of First Nations storytelling

In the First Nations focus groups, First Nations audiences articulated more explicit, intentional impacts from Australian screen content. For these groups, Australian content is both a form of entertainment as well as a vital tool for education, truth-telling and social dialogue.

Entertainment remains the entry point for engagement, with First Nations focus group participants highlighting examples of culturally specific storytelling and humour, and valuing authenticity and lived experience as markers of quality.

Across groups, First Nations participants repeatedly emphasised relatability – recognising accents, dialogue, family dynamics, places and social realities. Australian titles most often cited as examples that do this well were *Boy Swallows Universe*, *Black Comedy*, *Rabbit-Proof Fence*, *Mystery Road*, *Bump* and *Top End Wedding*.

***Black Comedy* was repeatedly mentioned as funny and relatable**, and reflective of how Aboriginal people actually talk to each other and the situations they deal with in everyday life.

> "[It's] just funny. And you can see things like in your everyday life that you have to deal with ... some of the comments and reactions ... you can see and relate to a lot of it."
>
> – First Nations focus group participant, male aged 25–44, SA

> "...it's really funny. Every blackfella you know knows what that's like ... that's the way we talk to each other."
>
> – First Nations focus group participant, female, grandparent, Vic

Across focus groups, First Nations participants highlighted the importance of screen content as:

- a means of educating non-First Nations audiences about history and culture
- a tool for starting real-world conversations about justice, responsibility and community cohesion
- a resource for preserving cultural narratives and challenging dominant historical frameworks.

Historical content is valued for its role in correcting historical narratives and preserving critical truths.

> "I think for me, it was satisfying in terms of a process of truth-telling as well. I found it quite cathartic and empowering and relieving of the burden of that history. I felt like the story had been told in some ways, and that I'd in some ways hopefully done justice to those people's stories who did not receive justice in their time, but had at least had their story told ... So yes, it was deeply personal and epic."
>
> – Rachel Perkins, *First Australians* case study producer interview

There is also a clear, consistent call for more contemporary First Nations stories that reflect present-day experiences, challenges, and successes, beyond the focus on historical trauma.

> "I'll get really proud because then I can sit down with my kids and I say, 'this is the reason why I've always been in justice and education my whole working career, because I am my grandfather's son, his dreams and stuff."
>
> – First Nations focus group participant, male, parent, regional Vic

First Nations participants called for more balanced portrayals that also highlight the positive aspects and ordinary lives of First Nations people, thus offering a fuller, more accurate representation of their communities. They expressed frustration with the prevailing focus on negative or deficit-based representations.

> "...you see so much political stuff, and it always has such a negative spin of First Nations ... but also there's so much good stuff going on in how we're working together. Where we're supporting each other, how we're still trying to live our culture in a society where it's not as recognised anymore."
>
> – First Nations focus group participant, parent, WA

Across the research phases, **non-First Nations participants discussed valuing Australian screen content focusing on First Nations stories** as a way to understand First Nations culture, history and community.

> *Gurrumul*, that documentary was profound to me. Living in the Northern Territory, I try to find screen content that helps me understand the people from this land."
>
> – Audience forum participant, female recent migrant, 25–44, NT

> You know, you don't want to get carried away because it is just a TV show, but I think that conversation about the evolution of relationships between First Nations communities and nations, with the interaction with white Australia, talking about issues and history... I think it has been part of that conversation because it's rated widely and it's been in people's rooms. And, I guess, it's relatively high profile in that sense and it's free and it's accessible."
>
> – David Jowsey, *Mystery Road* case study producer interview

This impact was also evident in online comments and reviews and in case study interviews, with *First Australians* a standout example.

> I'd get online the next day and watch all the comments, you know, coming in. And the overwhelming thing that people said, was just: 'Why weren't we told?' ... Again and again that came up, which I found really sad, you know. People were angry that they hadn't been provided that knowledge as part of being Australian, it just had been denied them."
>
> – Rachel Perkins, *First Australians* case study producer interview

Read the *First Australians* case study:

Case Studies >

This highlights the distinctive role of First Nations storytelling as both a cultural resource and a social instrument. It serves not only to educate and entertain, but also to build community and connection, advance advocacy and inspire real-world action.

The Australian Wars

From viewing to action

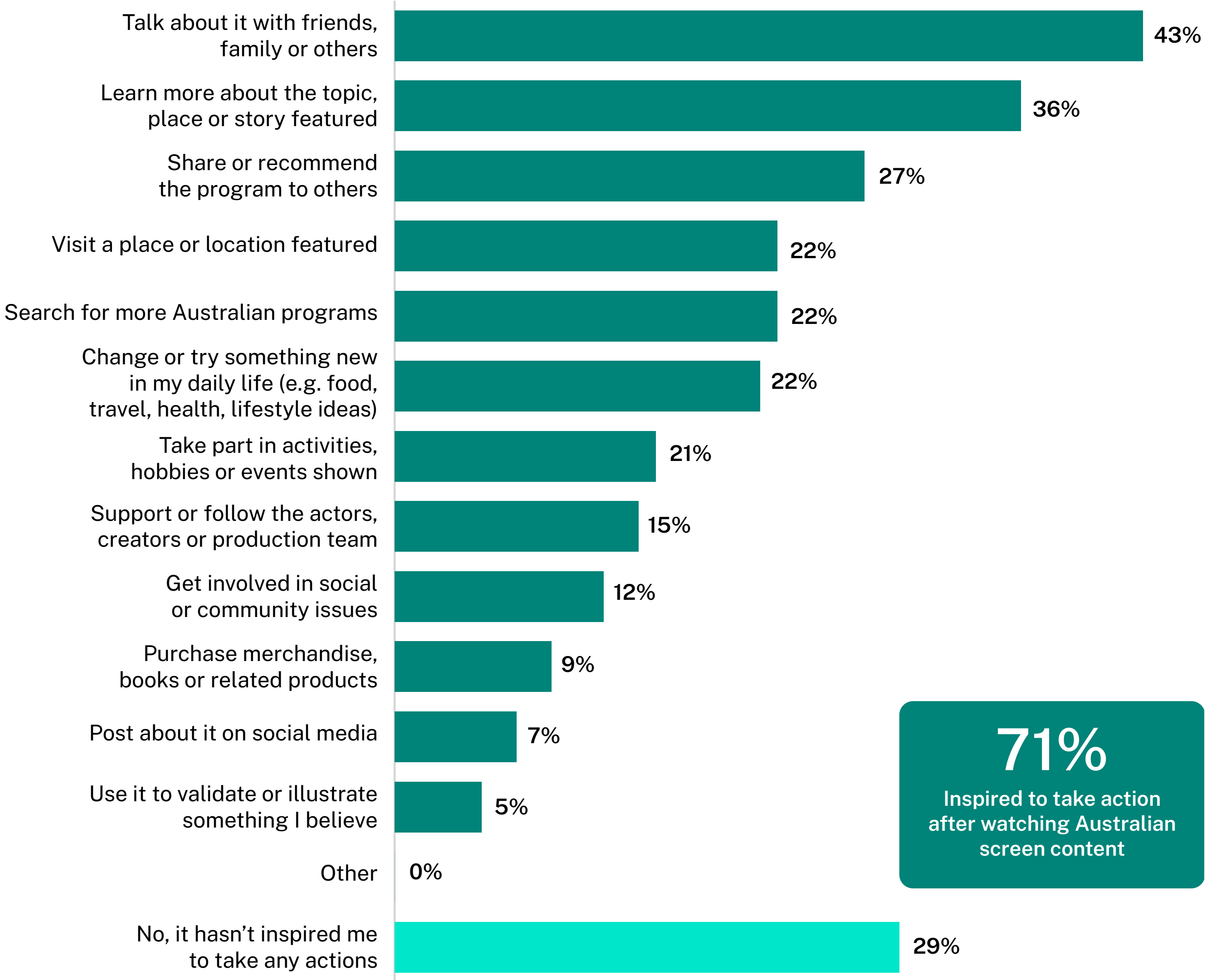
The screen survey revealed that a strong majority of Australians (71%) say their favourite Australian movies or TV programs have inspired them to take some form of action. This ranges from seeking further information or talking about the content with others, through to changing behaviour or getting involved in the issues raised on screen (Figure 15).

Notably, action is particularly pronounced among younger, CALD and First Nations respondents, who are more likely to:

- **Share or recommend the program to others** (33% of 16–24s, 36% of CALD and 41% of First Nations respondents compared to 27% of all respondents).
- **Take part in activities, hobbies or events shown** (21% of 16–24s, 22% of CALD and 28% of First Nations respondents compared to 15% of all respondents).
- **Support or follow the actors, creators, or production team** (20% of 16–24s, 18% of CALD and 23% of First Nations respondents compared to 14% of all respondents).
- **Get involved in social or community issues** (18% of 16–24s, 19% of CALD and 24% of First Nations respondents compared to 12% of all respondents).

Older Australians aged 65+ are significantly less likely to take any of the actions asked about.

Figure 15: Actions taken after watching quality Australian screen content



Source: Australian screen audiences survey, responses to the question: "After watching your favourite Australian movies or TV programs, do you ever feel inspired to take any of the following actions?" (Multi-select). Weighted Base: n=2,404.

"A lot of people took that idea on board themselves, local community groups ... there was a whole bunch of localised, little war on waste, neighbourhood and street campaigns that cropped up after the series, which is really encouraging."

– David Galloway, *War on Waste* case study producer interview

Most audience forum participants could think of at least one thing they had done as a result of watching Australian screen content, including travel, engaging with related creative content and investigating the subject further, often driven by curiosity and emotional impact.

"I have visited many locations because of my discovery of them on some TV show or film ... remote Tasmania because I saw the landscape on the TV series *The Kettering Incident*."

– Audience forum participant, male with disability, 65+, NSW

"After watching *Fisk*, I started Googling other shows produced by Kitty Flanagan and also attended one of her comedy shows."

– Audience forum participant, LGBTIQ+ CALD male, 25–44, Qld

"Most recently, *Nitram* inspired me to learn more about the Port Arthur Massacre. The story shocked me, honestly. When a show/film is based on real events, I feel the need to verify how true the content is."

– Audience forum participant, LGBTIQ+ female with disability, 16–24, Qld

However, action is not always directly linked to the viewing experience itself. Rather, it sometimes emerges when the content deeply resonates with personal experience and is reinforced through social discussion, which includes social media discussion in today's participatory media environment. This suggests that while Australian screen content can inspire reflection and dialogue, its direct influence on behaviour or social change can sometimes be more complex and nuanced.

Audience uses of Australian screen and games content: examples based on our analysis of online reviews and video responses

As part of the Screen Currency study, researchers from Swinburne University and QUT analysed 5,638 online reviews and videos posted about 13 Australian screen and games titles across Letterboxd, IMDb, Steam, Common Sense Media, Rotten Tomatoes, YouTube and TikTok.[7]

The analysis identified more than 40 different ways that audiences (in Australia and globally) use or respond to Australian content, including behaviour change, self-education, social connection and emotional support.

- **Behaviour change**
  - Environmental awareness
  - Changing household habits (e.g. recycling)
  - Positive parenting
  - Increased empathy for others
  - Support for local industry
- **Education**
  - Self-education
  - School curriculum use
  - Parental self-education
- **Mental health and wellbeing**
  - Relaxation/wind-down
  - Distraction
  - Emotional catharsis
  - Therapeutic support
  - Coping
  - Resilience
  - Sleep aid/bedtime use
  - Identity validation
  - Empathy and understanding
- **Social connection and cohesion**
  - Family connection
  - Co-viewing with family/friends
  - Co-playing with family/friends
  - Understanding others' experiences
  - Sense of common purpose
- **Affective experience**
  - Shock
  - Thrills
  - Laughs
- **Aesthetic experience**
  - Contemplation
  - Beauty
  - Nostalgia
  - Technical appreciation
  - Music discovery through accompanying soundtrack
- **Entertainment**
  - Distraction
  - Spectacle
  - Passing the time
  - Escapism
  - Comfort viewing
- **Creativity**
  - Inspiration
  - Remixing
  - Storyworld extension
  - Enabling new creative production
- **Critique**
  - Questioning
  - Benchmarking
  - Cultural comparison
  - Symbolic interpretation

7 See Online reviews and video responses in the Appendix for details of the analysis.

Australian video game players

Attitudes and perceptions

This chapter examines how Australian video game players think about Australian-made video games, including how they interpret what makes games feel Australian, and the role of national origin in shaping expectations and value.

Across the research, players express goodwill toward Australian games and confidence in local creative capability. However, this does not always translate into clear awareness of which games are Australian. This gap largely reflects limited visibility of the country of origin of games within a highly globalised games market.

Players consistently describe evaluating games first on enjoyment and quality, with national origin operating as a secondary or "bonus" consideration. Australian games are rarely sought out because they are Australian and are often recognised as local only after play has begun.

Where Australian origin is recognised, it is most associated with creativity, humour and experimentation rather than overt symbolism. As a result, Australian games are valued in principle, but frequently indistinct within everyday purchase or play decisions.

The Master's Pupil

The importance of video games to Australian players

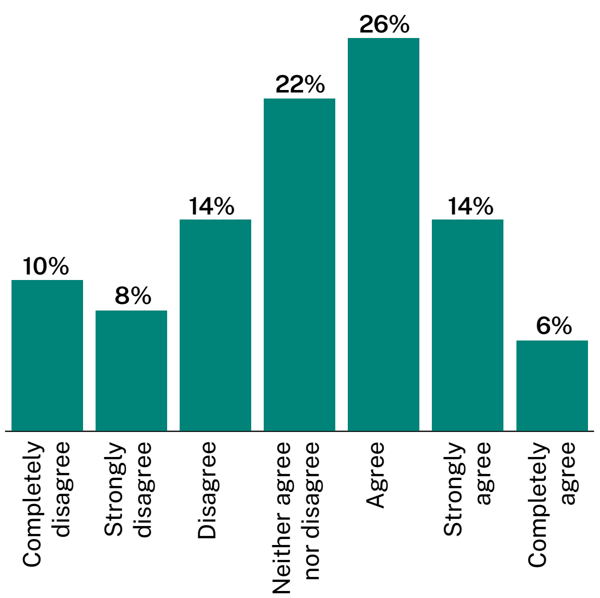
Video games play an important role in Australian life, though that role varies in depth and intensity. More than 3 in 4 Australians report having played a video game in the past 6 months (78%), underscoring the extent to which video games are embedded in everyday leisure practices.

Among those who have played a game in the past 6 months, **nearly half (46%) say that games are a significant part of their life**, including 1 in 5 who feel this strongly (20% strongly agree or completely agree) (Figure 16).

At the same time, **playing video games does not hold the same level of significance for everyone**, even if play is frequent. Around 1 in 3 players disagree that games are a significant part of their life (32%), while a further 22% neither agree nor disagree.

Rather than pointing to disengagement, this pattern aligns with evidence that **a large share of Australians engage with games in a casual and low intensity way.** An example of this is seen in trends of preferred platform and time-spent playing. Game play on mobile is the dominant platform in Australia (42% of time spent), and tends to be played for relatively short periods of time, 18% play for less than one hour per week, 27% spend 1–2 hours, and 19% spend 2–3 hours.

Figure 16: Significance of video game play to Australian players



Source: Newzoo 2025 Global Gamer Study. Base: n=1,529. Responses to the statement "Gaming is a significant part of my life", recorded on a 7-point Likert scale.

What makes games feel Australian

For Australian video game players, a game is most clearly perceived as Australian when it is made in Australia by Australian developers. Focus group participants consistently prioritised production context over setting alone, rejecting the idea that the use of Australian landscapes or symbols automatically confers national identity if the creative team is based elsewhere.

> "If it was like an Australian setting, but the people who made it were not Australian, I wouldn't consider that an Australian game, because that's just like they're using the setting, but they're not themselves [Australian]."
>
> – Video game players focus group participant

Australian games are most associated with independent development. Participants expected local games to be smaller in scale, experimental in form and distinctive in tone, often describing them as shorter experiences or titles with stylised, 2D or platform-based art styles. These expectations reflected awareness – even among players with limited industry knowledge – that Australian game development is dominated by small and founder-led studios.

Rather than a single defining aesthetic, participants described Australian games as being marked by creative risk-taking and originality. Many linked this to a perceived willingness to experiment with unconventional ideas, mechanics or narratives, positioning Australian games as offering "something different" rather than competing directly with large-scale international blockbusters.

Humour emerged as a particularly distinctive marker. Participants frequently described Australian games as having an "oddball," self-aware or tongue-in-cheek sensibility, often expressed through understated comedy or playful subversion of genre conventions. This humour is seen as distinctly Australian, resonating with players through tone rather than overt national symbolism.

Visual and narrative references to Australian animals, environments or everyday life are also associated with Australianness, though participants expressed ambivalence about over-reliance on these cues. While recognisable settings and fauna increase memorability, they can also be considered potentially clichéd if not handled with care.[8] Participants recalled valuing instances where Australian elements felt integrated into broader storytelling rather than treated as surface-level markers.

> "It's also a game deeply rooted in Brisbane, from the VJ boards of her childhood home, to the boyfriend's apartment in Kangaroo Point overlooking the Story Bridge, to the one-bed woolshed conversion in Newstead; so many little architectural and cultural touches root this game squarely in my own home town."
>
> – Online review of *Unpacking*

Support for the local industry

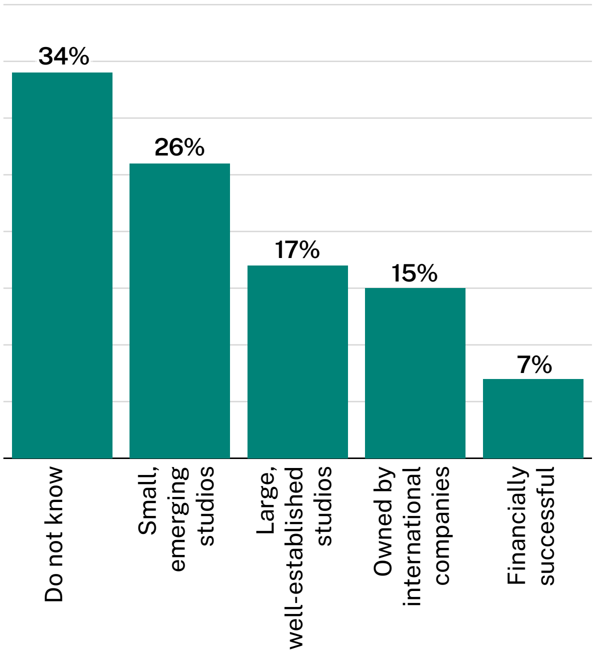
Australian players express broad goodwill toward the local digital games industry[9], but this support is often abstract rather than grounded in awareness of the industry or Australian games. While focus group participants responded positively to the Australian digital games industry when discussed, survey findings indicate limited knowledge of what constitutes the local industry among players. Most respondents were unsure if they had played an Australian game (60%), and understanding of the overall make-up of the industry was mixed with 1 in 3 reporting that they do not know much about Australian games studios (34%) (Figure 17). This is consistent with how games are encountered and chosen, where national origin, and support for the industry more broadly, is neither a decision factor nor prominently surfaced in marketplaces.

Despite this limited awareness, Australian players express strong pride in local creative success and support for the continued development of Australian-made games. Focus group participants described feeling good about playing Australian games and supporting local developers, framing this support as an expression of broader cultural values rather than a deliberate purchasing strategy.

> "If it's a good game, that should stand on its own. The Australian part just makes it better."
>
> – Video game players focus group participant

> "When I realised this game was created and based in Brisbane (where I live) I fell in love with this game immediately. Seeing the Story Bridge, the weird honeycomb bars in the windows and other things that are associated with Australia where I am at the moment makes me smile every time I play this game."
>
> – Online review of *Unpacking*

Figure 17: Australian video game players' perceptions of Australian video game studios



Source: Australian video game players survey, base: n=2,208. Responses to: ""Which option best describes most video game studios in Australia?"

8 Speed L 2025, "Adventures in fantasy Australia: Australian settings, international video games", *Studies in Australasian Cinema*, 18(2–3): 122–138.
9 This report uses "digital games industry" as a formal term to refer to the Australian games sector at the overall industry level.

Focus group participants consistently emphasised that quality remains the primary driver of choice, with Australian origin operating as an additional or "bonus" factor when options are otherwise comparable. As is the case with Australian screen consumption, support for local content exists alongside an expectation that games will meet the same standards of enjoyment and quality as international titles.

Importantly, when players spoke about supporting the industry, this support was not framed solely in terms of individual consumption. Focus group participants linked the success of Australian games to conditions of care, time and funding support, expressing concern that under-resourced studios may struggle to realise their creative ambitions. In this sense, support for the local industry reflects a form of non-use value: players place importance on the existence and sustainability of Australian game development even when this does not directly shape their immediate play choices.

Representation and inclusion in games

Based on findings in the Newzoo 2025 Global Gamer Study, representation and inclusion carry meaningful, though varied, significance for Australian video game players. Most players report feeling represented in the games they play (61%). This is strongest among younger cohorts, with around two-thirds of Gen Alpha, Gen Z and Millennials expressing agreement. Feelings of representation decline with age, suggesting that contemporary games may align more closely with the experiences, identities or play preferences of younger players. It may also reflect the types of games different age cohorts are drawn to and the extent to which people are reflected (as opposed to puzzles, for example).

Beyond personal representation, Australian video game players show broad support for diversity in video games. Nearly 2 in 3 agree that games should reflect a wide range of cultures and backgrounds (62%), indicating recognition of the social value of inclusive design. As with other measures, agreement is highest among younger players and moderate among older cohorts, reflecting generational differences in expectations around representation and cultural storytelling in games.

Figure 18: Australian video game players' perceptions of representation in games

61% agree	62% agree
"I feel well represented in video games that I play"	"Video games should reflect a wide range of cultures and backgrounds"

Source: Newzoo 2025 Global Gamer Study. Base: n=1,620. In response to the statements, "I feel well represented in video games that I play" and "Video games should represent various cultures and backgrounds to create a more inclusive gaming environment."

> "The queer rep[resentation] was amazing and something I didn't expect to see."
> – Online review of *Unpacking*

Read the *Unpacking* case study:

Case Studies

While most players feel well represented, exclusion remains a notable factor for a substantial minority. Three in 10 players report having avoided games that felt "not made for them" (30%), reflecting moments where tone, mechanics, aesthetic or community norms signalled a lack of fit. Younger players, who are more sensitive to whether a game feels welcoming or aligned with their interests and identity, are more likely to report this experience.

Importantly, representation influences purchase choice for a significant segment of the audience. Almost 1 in 2 Australian players (49%) say that inclusion and representation are important enough to affect whether they choose to buy a game. This influence is strongest among Millennials (54%) and Gen Z (53%), suggesting that inclusive design has growing relevance for future audiences. However, representation rarely operates in isolation; it interacts with perceptions of quality, enjoyment and fit rather than acting as a standalone decision driver.

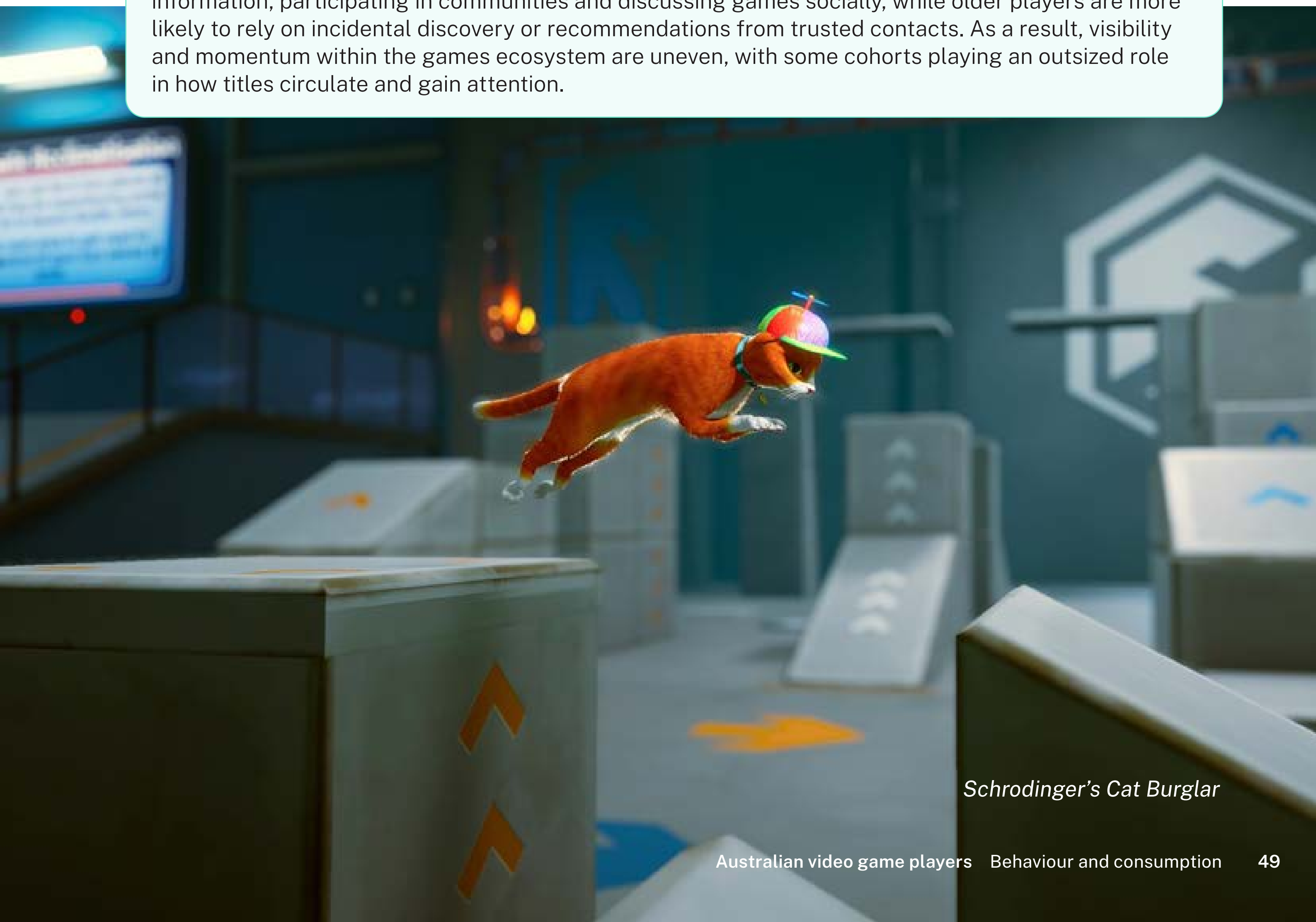
Behaviour and consumption

This chapter examines how Australian players engage with video games in practice including how often and in what ways they play, how they decide what to play next, and how games are discovered and taken up within everyday life.

Participation in playing video games spans age, gender and life stage, with games embedded in daily routines rather than confined to a specialist or high-intensity audience. While some players engage deeply with game culture, news and communities, many play regularly without participating in broader gaming discourse.

Players describe a platform-driven environment in which choice is abundant and discovery is ongoing. Games are rarely sought out through deliberate search; instead, they are encountered through browsing, recommendations and subscription services, with discovery shaped by social and algorithmic cues rather than intentional exploration.

Patterns of engagement and discovery differ by age. Younger players are more active in seeking information, participating in communities and discussing games socially, while older players are more likely to rely on incidental discovery or recommendations from trusted contacts. As a result, visibility and momentum within the games ecosystem are uneven, with some cohorts playing an outsized role in how titles circulate and gain attention.



Schrodinger's Cat Burglar

Patterns of game play and engagement

Based on findings in the Newzoo 2025 Global Gamer Study, video game play in Australia is characterised by breadth rather than concentration. More than 3 in 4 Australians report having played a video game in the past 6 months (78%), with participation spanning age, gender and life stage, positioning game play as a mainstream form of cultural engagement (Figure 19).

Figure 19: Australians' engagement with video games in the past 6 months

78% of Australians have played a video game in the last 6 months	**54%** of players are male	**46%** of players are female	**<1%** of players are non-binary

13% of players are Gen Alpha	**33%** of players are Gen Z	**31%** of players are Millennials	**19%** of players are Gen X	**5%** of players are Baby Boomers

Source: Newzoo 2025 Global Gamer Study, base: n=1,996. Respondents could select male, female, or non binary.

Among Australians who have played video games in the past 6 months, participation is relatively balanced by gender, with 54% identifying as male and 46% as female. Game play also spans the life course. Younger Australians represent the largest share of players, with Gen Z accounting for 33% of players and Millennials 31%. However, participation remains substantial beyond early adulthood, with Gen X comprising 19% of players and Baby Boomers 5%. Gen Alpha already accounts for 13% of players, signalling the continued growth of video game play among children and early adolescents.

While participation is widespread, the relationship players have with games varies considerably. Differences emerge not only in how often people play, but in how central games are to their leisure, identity and cultural engagement. This is most pronounced among younger men: 71% of men aged 26–30 say games are a significant part of their lives, compared with 46% of Australian players overall, and 64% seek out new or trending titles. Others play regularly without engaging in related discourse, media or communities.

These gender differences extend to how engagement is expressed. Australian males who play video games are more likely than females to identify strongly with video game culture: 53% identify as a "gamer", half report keeping up with video game news (50%), and 46% say they spend time exploring new platforms or hardware. Females, by contrast, are less likely to adopt a "gamer" identity (33%) and place less emphasis on games as a significant aspect of their lives (38%), despite high levels of participation. These patterns reflect differences in how players identify with video game culture rather than in access or frequency of play.

Age similarly shapes how Australians relate to video games. Younger players are more likely to see game play as a significant part of their lives, with Gen Alpha the most likely to agree at 62% compared to 46% of all Australian players. They are also more likely to seek out new and trending games (56%) and engage in gaming-related events (41%). Older players are less likely to adopt gamer identities or follow gaming news – only 1 in 4 Gen X players (25%) and just over 1 in 10 Baby Boomers (11%) report keeping up with video game news – but many continue to play regularly, often in more casual or routine ways.

Focus group participants described balancing play with work, study and family responsibilities, often favouring shorter sessions during weekdays and longer play periods on weekends. Many expressed a desire to play more frequently than time allowed, highlighting how engagement is shaped by everyday constraints rather than lack of interest.

Patterns of platform use reinforce this picture of flexibility. Newzoo data shows mobile accounts for the largest share of game play by platform in Australia (42%). Console play is also strong, with 25% of Australian players choosing to play on console, alongside 18% who prefer to play on PC. In terms of time spent, mobile play is typically characterised by short, casual sessions – most commonly 1 to 2 hours per week (27%) – while console and PC play support longer, more immersive sessions, particularly among younger players and men.

> “Every moment of my life can be punctuated by different games I play. So every moment in my life is a different game memory. I float from game to game, console to PC. I like all games.”
>
> – Video game players focus group participant

Drivers of game play

Australian players most commonly frame their engagement with video games in terms of enjoyment, flexibility and emotional payoff. For most players, a primary motivation for playing games is simple enjoyment, with 87% agreeing that they play to have fun (Figure 20). This positions video games first and foremost as a leisure activity, valued for their capacity to deliver pleasure, immersion and moment-to-moment engagement.

Convenience also plays a defining role. Three in 4 Australian players say they play games to pass the time (76%), reflecting how games fit within the fragmented rhythms of contemporary life. The ability to pause play easily, to engage for short or extended sessions, and to play across different devices makes games particularly well suited to modern patterns of work, study and family responsibility. Rather than being planned events, gaming sessions are often embedded into everyday routines.

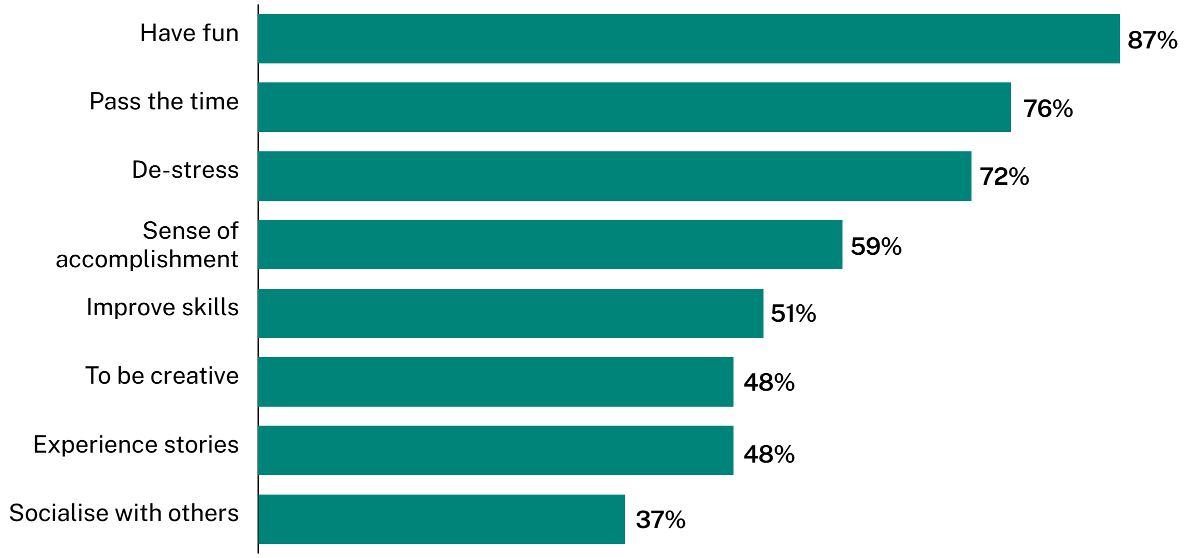
Beyond entertainment and convenience, emotional regulation emerges as a central driver of play. Nearly 3 in 4 players report using games to de-stress (72%), reinforcing the role of game play as an emotional outlet and coping mechanism. Whether through calming puzzle mechanics, familiar game play loops or immersive narrative worlds, games offer players a way to mentally disengage from external pressures and regain a sense of control or calm.

> “It’s just a bit of escapism for me ... I can jump into a different world and forget about everything completely.”
>
> – Video game players focus group participant

Alongside pleasure and emotional benefits, learning and creative expression are additional drivers of game play. Around 1 in 2 Australian players report playing games to improve their skills (51%) or to be creative (48%), highlighting the role of games as spaces for personal development as well as entertainment. These motivations position games not only as consumptive media, but as participatory environments where players actively practice, experiment and build competence.

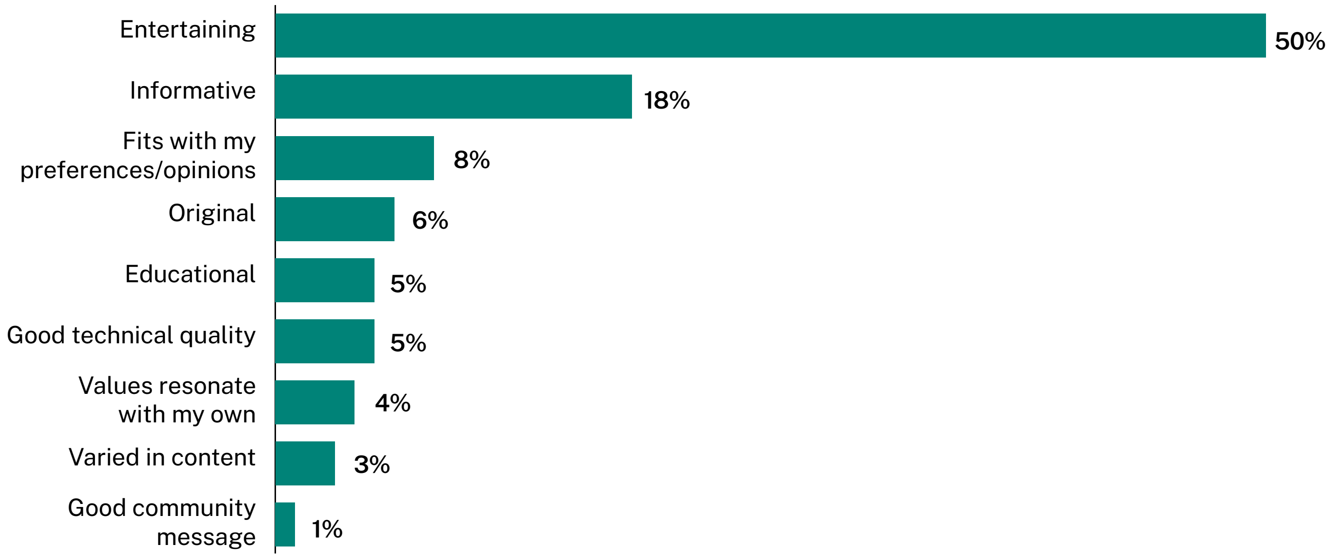
When players are deciding what to play, enjoyment remains the overriding criterion. Half of all respondents ranked “being entertaining” as the single most important factor when choosing a game (50%), far outweighing considerations such as narrative depth, social features or technical sophistication. This reinforces that, for most Australians, games are evaluated primarily as leisure experiences (Figure 21).

Figure 20: Key drivers of game play for Australian players



Source: Survey of Australian video game players, n=2,208. Responses to: “Please indicate your strength of agreement with the following statements. I play video games to…” Agreement with each statement was rated on a 5-point scale from strongly disagree to strongly agree.

Figure 21: Most important reasons to select a game



Source: Survey of Australian video game players, n=2,208. Responses to: “Please rank the following video game characteristics on how important each is to you when choosing a game to play, from most important (1) to least important (9).” The figure shows the responses ranked “most important”.

Figure 22: How Australian players find games

56% of players	46% of players	27% of players
learn about games through friends and family	learn about games through social media	learn about games through advertising

Source: Australian video game players survey, n=2,208. Responses to: "How do you find out information about video games? (Select all that apply)."

Discovery: how players find games

Discoverability plays a central role in shaping which games Australian players encounter, trial and continue to engage with. Rather than being a single decision point, discovery is an ongoing process embedded within everyday digital behaviour. Players encounter games through a combination of social recommendation, platform browsing, algorithmic recommendations and media exposure, often without actively seeking out specific titles.

The Screen Currency survey shows that interpersonal recommendation is the most influential discovery pathway, with more than 1 in 2 players learning about new games from friends or family (56%) (Figure 22). Social media (46%) and advertising (27%) also contribute, while digital storefronts and subscription platforms act as spaces of passive discovery where players browse what is new or trending.

> "If I've nearly finished a game, I'll start looking through the store ... scan Steam, check Game Pass, see what's coming."
>
> – Video game players focus group participant

Discovery behaviours differ by age. Younger players are more active in seeking out new information, following gaming news, participating in online communities and discussing games socially. Data from the Newzoo 2025 Global Gamer Study shows that between 28–30% of Gen Alpha and Gen Z players report never visiting game news sites or engaging in online communities, compared with over 60% of Gen X and nearly 80% of Baby Boomer players. Younger players are also more likely to discuss games with peers, while older players tend to rely on incidental discovery or recommendations from trusted contacts.

This matters because discoverability is not evenly distributed across the player population. While Australians of all ages play games, younger players are more actively involved in the networks through which information, recommendations and discussion circulate. As a result, youth-oriented platforms, networks and cultural spaces play a disproportionate role in shaping which titles gain visibility and momentum within the discovery ecosystem.

Within this environment, country of origin rarely travels with games at the point of discovery. In the Screen Currency Australian video game players survey, when asked whether they play Australian-made games, 60% of Australian players reported being unsure. Recognition of Australian origin sat at around 50% even for well-known case-study titles, suggesting that Australian games are reaching players but without their national identity being clearly visible or retained.

Focus group participants frequently recognised and enjoyed Australian-made games without being aware of their origin, recalling titles in terms of humour, quality or genre rather than place of production. While most expressed goodwill toward Australian games, country of origin tended to function as a secondary consideration rather than an initial driver of choice.

> "If I find out it's Australian, I do pay more attention ... I like supporting the arts. But it's not the first thing I look for."
>
> – Video game players focus group participant

Impacts and actions

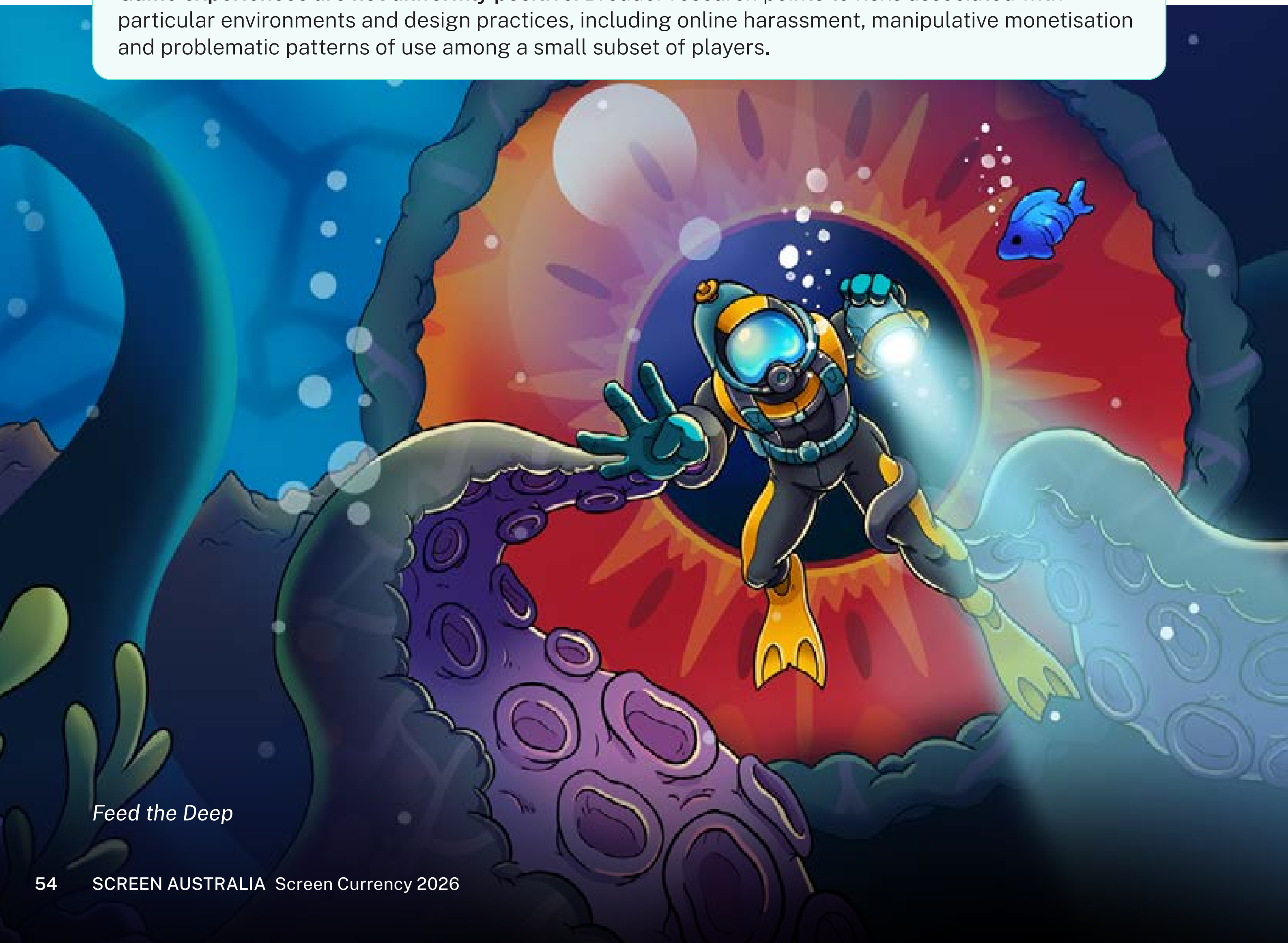
This chapter examines the impacts of video game play for Australian players, focusing on social connection and mental wellbeing.

It considers how value is generated through play, both for individuals and through wider forms of social participation.

While game play is often experienced individually, the research shows that games can support social connection. Meaning and value can emerge through shared reference points, conversation and community participation, even when play itself occurs alone.

Many players report using games to relax and manage stress, with games functioning as a flexible form of leisure that fits around daily routines. At the same time, the findings show that impacts are shaped by context and design, with some environments undermining wellbeing.

Game experiences are not uniformly positive. Broader research points to risks associated with particular environments and design practices, including online harassment, manipulative monetisation and problematic patterns of use among a small subset of players.



Feed the Deep

Game play and social value

Video game play in Australia is most often experienced as a solo activity, with social play representing a complementary rather than dominant mode of engagement. The Screen Currency Australian video game players survey found nearly 2 in 3 Australian players prefer to play alone (63%), while smaller proportions prefer playing with friends in the same room (15%) or online with friends or strangers (12%). A further 10% move between solo and social play depending on time, availability and context.

While direct social play is not the primary mode for most players, social value remains an important aspect of how games are experienced. More than 1 in 3 Australian players say that socialising with others is one of the reasons they play video games (37%). While not the most common driver of participation, socialising is a reason to play for a substantial minority of players and operates alongside other motivations such as enjoyment, relaxation and escapism.

Age plays a key role in shaping how social value is expressed. Younger players are more likely to engage in games as shared or connected experiences, including cooperative play and online multiplayer interaction. IGEA's research shows that players aged 18–34 who play socially are more likely to engage in collaborative play (67%), than those aged 65+ (55%), and are more likely to report making new friends through games. Older players, by contrast, are more likely to use game play as a way of maintaining existing relationships with friends or family, rather than forming new social connections, and are more likely than younger players to prefer competitive play.[10]

Social value in gaming extends well beyond the act of playing together. Many players experience social connection through talk, observation and shared reference, rather than direct co-play. Online discussions, streaming, reviews, forums and community spaces allow players to share experiences, debate quality and exchange recommendations. The Screen Currency survey found that 19% of Australian players actively participate in video game communities and 16% regularly post about games, indicating a meaningful layer of social engagement that surrounds play itself.

These practices reflect a broader pattern in which games function as social touchpoints even when played alone. Focus group participants described games as conversation starters, shared jokes, or reference points that facilitate connection with others who play the same titles. In this way, games operate similarly to screen content, generating social value through shared meaning rather than shared viewing or play alone.

> "It could even change the dynamic of a game ... if you play it by yourself you'll probably be terrified, but then you play with friends and it just turns into one big joke."
>
> – Video game players focus group participant

Game play and mental wellbeing

One of the most consistently reported impacts of video game play described by Australian players relates to emotional regulation, relaxation and stress relief. Findings from the Screen Currency survey show that nearly 3 in 4 Australian players use video games to de-stress (72%).

Focus group participants consistently described using games to unwind after work or study, to "switch off," and to create mental distance from external demands. Games were frequently characterised as emotionally responsive, allowing players to select experiences that matched their mood or energy levels at a given time.

> "It's just a bit of escapism for me from my own life ... I can kind of just jump into a different world and forget about everything completely."
>
> – Video game players focus group participant

Across focus groups, players described using video games to:

- manage stress and mental fatigue
- disengage from external pressures through escapism or immersion
- return to familiar games or play styles as part of routine leisure time.

10 Interactive Games & Entertainment Association (IGEA) 2025, *Australia Plays 2025*.

Bits & Bops

Importantly, participants did not associate emotional benefit exclusively with extended or intensive game play. Many reported that short sessions – particularly on mobile devices – are sufficient to deliver emotional relief, suggesting that the wellbeing value of games lies in their flexibility rather than duration or depth.

In addition to stress relief, some players described broader emotional outcomes associated with game play. Focus group discussions highlighted feelings of accomplishment, confidence and control derived from mastering challenges or making progress within games. These outcomes were most raised by younger participants, who described games as supporting emotional resilience and self-efficacy, even when play was framed primarily as entertainment rather than wellbeing-oriented activity.

While players predominantly described positive emotional effects, existing research acknowledges that game play can also present risks to wellbeing in certain contexts. Broader Australian research[11] has identified concerns relating to online harassment and bullying, the use of manipulative design practices,[12] and patterns of excessive or problematic play among a small subset of players.[13] These risks were generally discussed in relation to particular game environments or design features rather than as inherent to video games as a medium.

Given the widespread prevalence of video game play, contemporary research increasingly emphasises the importance of addressing harms without stigmatising healthy engagement. Evidence from the Screen Currency study suggests that for most Australian players, video games operate as a positive and accessible form of entertainment and relaxation within a broader mix of leisure activities, supporting balanced and beneficial use.

11 Office of the eSafety Commissioner 2018, *Youth and online gaming – state of play*.
12 Gupta C, Campbell M, Robards B, Fordyce R 2025, *Playing the Player: Unfair digital gaming practices and their impact on Australians*, Consumer Policy Research Centre.
13 Ballou N, Hakman T, Vuorre M, Magnusson K, Przybylski A 2025, "How Do Video Games Affect Mental Health? A Narrative Review of 13 Proposed Mechanisms", *Technology, Mind, and Behavior*, 6(2).

Glossary and acronyms

ACMI

Australian Centre for the Moving Image. ACMI is Australia's national museum of screen culture, located in Federation Square, Melbourne.

AGDS

Australian Game Development Survey. Annual survey of Australian game developers, run by the Interactive Games and Entertainment Association (IGEA).

Audience access

The ability for content to reach, be found and be used by audiences, shaped by platforms and distributors, marketing and algorithms, and availability across services, devices and screens. It also reflects practical barriers to access, including affordability (subscriptions, tickets and other costs), required technology or connectivity, and accessibility for people with disability (e.g. captions, audio description and interface design).

CALD communities

Culturally and linguistically diverse communities. There are no widely accepted and used standard definitions of cultural diversity and cultural identity, which are multifaceted.[14] "Culturally and linguistically diverse (CALD)" is an umbrella term that has been used in Australia for some time and while contested, it continues to be used in data collection and reporting on Australia's cultural makeup. People from CALD communities were included as an audience group of focus in this research based on self-identification. Within the screen audience qualitative research there was emphasis on inclusion of people with experiences of cultural and racial marginalisation.

Discoverability

The extent to which content can be found by audiences, particularly on digital platforms or storefronts. Discoverability is often influenced by algorithms, promotion, timing and competition for attention.

Diversity

Diversity, by definition, is about multiplicity. It can mean different things in different contexts and to different people. This research focuses on several aspects of diversity among participants including First Nations identity, cultural background, gender, sexual orientation, disability, age and location, and intersections between these aspects. In measuring these aspects of diversity, the ultimate aim is that all the many and varied voices in Australia have the opportunity to have their views heard and be represented in local screen content.

First Nations

First Nations refers to Aboriginal and Torres Strait Islander peoples, who are the original custodians of the land of Australia and have maintained continuous cultures, knowledge systems and connections to Country for tens of thousands of years.

Games

Video games played on PC, console and mobile devices, ranging from simple puzzle and word games to immersive storyworlds and large-scale online environments that support social interaction and ongoing engagement.

Gen Alpha

Refers to video game players born 2010–2024. Note: In this study, the Gen Alpha sample includes children aged from 10 years old.

Gen Z

Refers to video game players born 1995–2009.

Millennials

Refers to video game players born 1981–1994.

Gen X

Refers to video game players born 1965–1980.

14 Mousaferiadis P, Moieni R and McCredie C 2025, *Culture, Cultural diversity and cultural identity: towards precise, functional, universal definitions to enhance intercultural understanding*, UNESCO World Conference on Cultural Policies and Sustainable Development Technical Paper. DCA/University of Sydney Business School (D'Almada-Remedios R, Groutsis D, Kaabel A and O'Leary J) 2021, *Counting Culture: Towards a standardised approach to measuring and reporting on workforce cultural diversity in Australia*.

Baby Boomers

Refers to video game players born 1946–1964.

LGBTIQ+

LGBTIQ+ is an umbrella term used to describe people who identify as lesbian, gay, bisexual, transgender, intersex, queer or questioning, as well as other diverse sexual orientations, gender identities and sex characteristics. The "+" recognises identities not explicitly listed.

Non-use value

Non-use value is the value people place on a good or service even if they never personally use it, such as valuing its existence, its protection for future generations, or the benefit it provides to others.

Parents

Refers to parents of children under 15.

Platform

A digital service or marketplace that distributes content to audiences, such as streaming services or games storefronts, often controlling access, data and commercial terms.

People with disability

Refers to people who self-identified as living with disability. To reflect and respect stakeholder input to the Australian Government's *Equity: The Arts and Disability Associated Plan*, people-first terminology has been used when talking about disability among audiences and the wider community. We recognise that many in the cultural sector prefer to use identity-first language (such as d/Deaf and disabled) to describe themselves.

Regional Australians

Refers to people who live outside major cities, in regional, rural or remote parts of Australia.

Screen content

Feature films, TV drama and comedy, documentary and factual, children's programming, animation, light entertainment and short-form online videos, viewed across all platforms. It does not include news, sport, or user-generated content.

Use value

Use value is the value people obtain from a good or service through direct or indirect use, such as using it for recreation, production, or other everyday activities.

Video game players

Video game players (or just "players") refers to people who play video games on PC, console and mobile devices, from simple puzzle and word games to immersive storyworlds and large-scale online environments that support social interaction and ongoing engagement. Respondents to the Australian video game players survey were required to be active players. Focus group participants were required to have played a video game on a console or computer at least once in the past month.

Appendix – detailed methods

Tenets of cultural value

Screen Currency applied a broad and nuanced understanding of cultural value. To help develop a shared set of reference points for exploration, research teams tested and applied an adapted version of prominent Australian cultural economist David Throsby's tenets of cultural value in arts and culture.

Throsby's model defines 5 core tenets of cultural value, which have been retained and contextualised for Australian screen content. The categories used as reference points for analysis were:

- **Social value** – The role of screen content in fostering connection, shared understanding and social cohesion, reflecting the diversity of Australian communities and strengthening collective identity.
- **Historical value** – The extent to which screen content connects audiences to the past, preserves stories and traditions, and supports intergenerational memory and continuity.
- **Symbolic value** – The capacity of screen content to act as a repository of shared meaning, representing who Australians are and how Australia is seen in the world.
- **Aesthetic value** – Perceptions of creative quality, originality, craftsmanship and production excellence, including visual and artistic appeal.
- **Spiritual value** – The ability of screen content to prompt reflection, emotional resonance, deeper meaning and personal connection.

Based on exploratory audience research, the framework was extended to include additional dimensions of value that emerged as distinct and meaningful to audiences:

- **Entertainment value** – The value derived from enjoyment, escapism, relaxation and emotional fulfilment.
- **Authenticity value** – The extent to which screen content is perceived as genuine, truthful and reflective of real experiences, voices and perspectives.
- **Educational value** – The degree to which audiences gain learning, insight or life lessons through engagement with screen content.

These concepts were applied as relevant to the research methods employed across the fieldwork as an interpretive lens, not a prescriptive model. The study is designed to articulate how value is experienced by audiences and players. In exploratory audience forums, respondents were asked to define the value of local content in their own words, after which these concepts were offered up to encourage further consideration of a range of forms of value, and to see whether they resonated (which they broadly did). Value statements aligned to these refined concepts were tested with a larger sample of respondents in the national survey. The analysis of online comments used these as preliminary coding categories, but unearthed and recognised a wide range of nuanced forms of value reflected in the organic audience responses to the programs (including, for instance: behaviour change, mental health and wellbeing, creativity and critique). The analysis applied across the varying studies acknowledges that these attributes may coexist, or not. Some programs resonated across multiple interconnected domains of value and others clearly aligned with a single attribute.

Screen Currency's research evidenced that engagement, and the value ascribed to it, drew on a mix of attributes which were identifiable to, and clearly expressed by, Australian audiences.

Screen audiences research methods

The screen audiences research was delivered by 89 Degrees East, led by Rebecca Huntley. The methods used to develop the insights were iterative. After each phase of the screen work, researchers across the project came together for debriefs and to share insights with those developing other phases, including sharing insights with other research teams at milestone workshops hosted by Screen Australia.

This report was developed with some assistance from Artificial Intelligence (AI) tools. AI tools were used to support tasks such as data analysis, summarising information and editing. All AI-generated outputs were subject to human review and verification to ensure accuracy and alignment with the research objectives. Screen Australia uses AI in accordance with its AI Guiding Principles.

Aims of the screen audiences research included to:

- Advance the understanding and measurement of the social and cultural value of Australian screen content among the Australian population.
- Explore how Australians articulate and experience value, recognising the multiple ways cultural impact is understood and the varied roles screen content and games play in people's everyday lives.
- Establish a robust and contemporary value framework to assess the impact of Australian screen content across diverse communities and experiences.
- Identify the perceptions, motivations and drivers shaping content consumption choices, and examine the cultural and social benefits that arise from different forms of engagement.

Audience assumptions tested:

This research also sought to test and examine a set of audience assumptions informed by existing research,[15] sector knowledge and public policy intent. These assumptions include:

- Australian audiences derive distinct cultural and social value from locally conceived and produced screen and content that cannot be fully replicated by content produced overseas.
- Australian-made film and TV contribute to individual and collective identity, shaping how Australians see themselves and each other.
- Australian screen content supports engagement with culturally, politically and geographically relevant issues, reflecting lived experiences, perspectives and stories specific to Australia.
- The realisation of these cultural and social benefits depends on content being engaging and high quality, as well as diverse, culturally relevant, accessible and discoverable to audiences.

Screen audiences research phases:

- Literature review
- Screen audience forums
- Contextual inquiries
- Australian screen audiences survey
- ACMI intercepts
- First Nations focus groups.

Further detail on the method for each phase is provided in the following sections.

Screen audience forums

The purpose of the screen audience forums was to conduct exploratory research to understand how Australians think about and value Australian screen content. Participants also assessed a set of potential case studies to explore how cultural value is recognised and attributed in practice. This work formed the first stage of 89 Degrees East's screen audiences research, with the findings laying the foundation for subsequent phases, including contextual inquiries and the Australian screen audiences survey.

Audience forums

- These audience forums were run via an online, structured discussion and tasks using the Recollective platform.
- The forums ran over 3 days: Tuesday 11, Thursday 13 and Friday 14 November 2025.
- A total of 40 participants were recruited across 4 age groups (16–24, 25–44, 45–64 and 65+; n=10 per group). 37 participants completed the discussion, with a further 2 partially completing.
- Participants completed activities independently and responded to each other's reflections over the 3 days. The discussion was reviewed and moderated by experienced researchers from 89 Degrees East.
- Participants were drawn from across Australia and included a range of screen consumption habits.
- Representation was included of LGBTIQ+ communities, people with disability, parents, culturally and linguistically diverse (CALD) communities that experience cultural and racial marginalisation and recently arrived migrants.

15 Including a literature review undertaken by 89 Degrees East for Screen Currency.

Contextual inquiries

The contextual inquiries (CI) were designed to dig deeper into the mindset and motivations of key audience groups, building on insights from the audience forums.

They involved 14 in-depth CIs (2–3 hours) conversational, in-context sessions combining discussion with observation where possible, conducted late November and December 2025. Sessions were mostly conducted online due to timing and geography, enabling screen-sharing and walkthroughs of real viewing environments. There were some in-person sessions.

The participants 89 Degrees East spoke to were from the following audience groups:

- parents/families.
- young people aged 18–25.
- people with disability.
- CALD communities.
- LGBTIQ+ communities.

The discussion guide focused on exploring value in a more comprehensive way to build on the audience forums, as well as delving into participants' behaviours, motivations and perceptions when it comes to Australian and general screen content.

It explored how participants choose content, what feels "Australian," perceptions of identity, Throsby's tenets of value (described in Tenets of cultural value) and reactions to shortlisted case studies.

Tasks and contexts 89 Degrees East were able to observe:

- how to find Australian content
- recommendations from streaming providers based on viewing history
- family member interactions
- familiarity and reactions to 26 shortlisted case studies.

Questions posed included:

- How do you decide what to watch?
- What makes content Australian?
- What is Australian screen identity?
- What is the estimated amount of Australian content you watch?
- Should content comfort or challenge audiences?
- What might we lose if there was less Australian content?
- Audience-specific questions posed for different groups including LGBTIQ+, parents/families, young people and those in CALD communities.

Australian screen audiences survey

This research was conducted using a **10-minute** self-complete online **survey with a nationally representative sample of 2,404 Australians aged 16 years and over** weighted for age, gender and location in line with Australian Bureau of Statistics (ABS) population data.

Summary:

- **Survey:** 10-minute self-complete online survey.
- **Fieldwork:** 8 December 2025 – 11 January 2026.
- **Recruitment:** Online research panel (CINT).
- **Sample:** n=2,404 Australians aged 16+ (weighted).
- **Weighting:** Age, gender, location (weighted to ABS population data).
- **Boosted samples:** Subgroups for analysis.

A total of 2,420 surveys were completed. Results are reported on a weighted base of n=2,404, with data weighted to ABS population benchmarks by age, gender and location for national representativeness. The effective sample size after weighting is n=2,328.

The maximum margin of error for the total sample of n=2,404 is ±1.99 percentage points at the 95% confidence level, with rounding differences of ±1 percentage point. Throughout the report, statistically significant differences (at the 95% confidence level) are denoted using ▲ (significantly higher) and ▼ (significantly lower).

Participants were recruited via an online research panel provider (CINT). Sampling included quotas for age, gender and location, aligned to ABS population proportions.

In addition to the general population sample, boosted samples were included to support robust analysis of the following communities: Aboriginal and Torres Strait Islander peoples, people with disability, culturally and linguistically diverse (CALD) communities, LGBTIQ+ communities, younger Australians aged 16–24 years, older Australians aged 65 years and over, and those living in regional and remote areas. **Minimum quotas were applied in the sampling structure to ensure sufficient representation for subgroup analysis.**

Survey results presented in this report are rounded to the nearest whole number. As a result, percentages may not add up to exactly 100%. Where sub-group sample sizes are less than n=30, results should be interpreted with caution and treated as indicative.

Sample frame overview

Australia	Weighted %	Sample base n=	Margin of error
Total			
All Australians 16+	100%	n=2,404 (Unweighted n=2,420)	±1.99%
Gender			
Male	49%	1,182	±2.85%
Female	51%	1,229	±2.80%
Age			
16–24 years	12%	304	±5.62%
25–34 years	19%	463	±4.56%
35–44 years	17%	402	±4.89%
45–54 years	17%	403	±4.88%
55–64 years	15%	365	±5.13%
65+ years	20%	483	±4.46%
Region			
NSW	32%	776	±3.52%
VIC	25%	628	±3.91%
QLD	20%	492	±4.42%
SA	8%	198	±6.97%
WA	10%	222	±6.58%
ACT	2%	49	±14.00%
NT	1%	12	±28.29%
TAS	2%	43	±14.95%
Priority subgroups			
First Nations communities*	10%	247	±6.24%
CALD communities*	20%	475	±4.50%
People with disability*	16%	392	±4.95%
Remote and regional communities*	31%	754	±3.57%
LGBTIQ+ communities*	12%	284	±5.82%

* Boosted sample, down weighted to ABS proportions in the nationally representative weight scheme. Reported as total sample bases in subgroup analysis.

Sample profile

	Australia	Unweighted %	n=	Weighted %	n=
Age	16–24 years	13%	304	12%	300
	25–34 years	19%	463	19%	462
	35–44 years	17%	402	17%	396
	45–54 years	17%	403	17%	402
	55–64 years	15%	365	15%	364
	65+ years	20%	483	20%	480
Generation	Gen Z (16–30)	24%	573	23%	568
	Millennial (31–45)	27%	647	27%	641
	Gen X (46–60)	24%	571	24%	570
	Boomer (61–79)	23%	559	23%	555
	Silent Generation (80+)	3%	70	3%	70
Gender	Female/woman	51%	1229	51%	1222
	Male/man	49%	1182	49%	1182
Identify as LGBTIQ+	Yes	12%	284	11%	279
	No	87%	2112	88%	2103
	Prefer not to say	1%	24	1%	22
First Nations background	Yes	10%	247	10%	244
	No	88%	2135	88%	2123
	Prefer not to say	2%	38	2%	37
Identify as a person from a culturally and linguistically diverse (CALD) background?	Yes	20%	475	19%	472
	No	78%	1898	79%	1885
	Prefer not to say	2%	47	2%	47
Living with a disability?	Yes	16%	392	16%	388
	No	81%	1957	81%	1947
	Unsure	2%	43	2%	42
	Prefer not to say	1%	28	1%	27
Location live – metro vs rural	In or around a capital city	68%	1653	69%	1650
	Outside a capital city (regional, rural or remote area	31%	754	31%	742
	Prefer not to say	1%	13	0%	15
Where do you live?	Greater Sydney	21%	515	21%	515
	Rest of NSW	11%	261	11%	259
	Greater Melbourne	20%	476	19%	476
	Rest of VIC	6%	152	6%	151
	Greater Brisbane	10%	245	10%	244
	Rest of QLD	10%	247	10%	247
	Greater Adelaide	6%	147	6%	146

	Australia	Unweighted %	n=	Weighted %	n=
Where do you live?	Rest of SA	2%	51	2%	50
	Greater Darwin	0%	5	1%	5
	Greater Perth	7%	180	8%	178
	Rest of WA	2%	42	2%	42
	Greater Hobart	1%	21	1%	21
	Rest of Tas	1%	22	1%	21
	ACT	2%	49	2%	49
Highest level of education completed?	Less than high school	5%	124	5%	123
	High school certificate or equivalent	24%	591	24%	584
	Vocational or technical qualification (e.g. trade, TAFE, diploma)	28%	667	28%	662
	Bachelor's degree (undergraduate)	29%	697	29%	695
	Graduate/postgraduate/professional degree (e.g. Masters, PhD)	14%	331	14%	330
	Prefer not to say	0%	10	0%	10
Current employment status?	Employed full-time	42%	1008	42%	1005
	Employed part-time or casual	17%	410	17%	409
	Self-employed or freelance	5%	132	6%	131
	Unemployed	7%	159	6%	156
	Student	4%	90	4%	90
	Retired	19%	450	19%	447
	Not currently in paid work (e.g. carer, home duties)	7%	162	7%	158
	Prefer not to say	0%	9	0%	8
Have dependents aged under 18 who live with you?	Yes	37%	894	38%	893
	No	63%	1526	62%	1511
Ages of the children who live with you?	Children under 15	89%	797	89%	796
	Under 2 years	16%	140	17%	140
	Preschooler (aged 2–5 years)	27%	244	28%	243
	Early primary school (aged 6–9 years)	31%	281	31%	281
	Later primary school (aged 10–12 years)	24%	216	24%	216
	Secondary school (aged 13–15 years)	28%	253	29%	253
	Later secondary school (aged 16–18 years)	20%	177	20%	177
	Over 18+ years old	6%	52	6%	52

ACMI intercepts

ACMI's Story of the Moving Image exhibition offered a useful location for research on perceptions of Australian screen content. Researchers from 89 Degrees East worked with ACMI staff to develop a short survey on visitors' experiences of the exhibition and their views about Australian screen content.

89 Degrees team members conducted short researcher-led intercepts with visitors to the exhibition on the week of 12 January 2026. In addition, QR Code survey posters linking to a longer survey were strategically placed near case studies, bathroom doors and other locations at the museum from 8 January until 19 January 2026.

The survey explored the following questions/ evaluations:

- Classification as either a citizen or a resident
- The reason for visiting ACMI
- The personal importance of Australian movies, TV shows and games
- The value of Australian screen content
- The reflection on case studies and titles featured in the exhibition
- The importance of Australian screen content versus overseas content.

63 surveys were completed by citizens, permanent residents and visitors to Australia. Reporting combined both survey types in the analysis, but quotes used in this report are from Australian citizens or residents.

First Nations focus groups

The First Nations focus groups were recruited and facilitated by First Nations moderators from the Ipsos iMOB research team, drawing on their experience in First Nations qualitative research. 89 Degrees East developed the discussion guide, with input from the iMOB team.

iMOB conducted 3 online focus groups with 3–4 participants per group, totalling 10 First Nations participants. Discussions ran for approximately 90 minutes each and were held over November 2025.

Limitations:

- The focus group findings cannot be viewed as representative of all Aboriginal and Torres Strait Islander people. Large scale representative research with First Nations participants is challenging due to the cultural, linguistic and geographic diversity of First Nations people, and it was beyond the scope of the current study.
- The initial intention was 4 focus groups, however, one was cancelled due to extreme weather conditions.
- Analysis was based on transcripts of discussion only, not audio or video recordings.

What was explored in groups:

- Participants' understanding of Australian screen content, including what defines it, how it differs from international content and what makes content feel "Australian".
- Screen consumption behaviours, including where and how participants find content, who they watch with, and the extent to which available content reflects their identity and community.
- Participants' views on representation and cultural relevance of Australian screen content, with a focus on how First Nations peoples, stories, histories and contemporary lives are portrayed across all screen formats.
- The personal and cultural value of Australian screen content, including exploring Throsby's cultural value tenets (described in Tenets of cultural value).

Video game players research methods

Researchers from the University of the Sunshine Coast employed a mixed-methods approach to examine how Australian video game players engage with, perceive, and value Australian-made video games. Qualitative focus groups were used to explore players' experiences, language, and perceptions in depth, while a quantitative survey provided population-level evidence on patterns of play, attitudes, and segmentation among Australian players. The findings have been triangulated and supplemented with supporting data analysed by Screen Australia.

Australian video game players survey

An online survey was conducted with Australian video game players and administered via an online market research panel provider (Dynata). The final sample comprised **2,208 respondents** and was structured using quotas to broadly align with known demographic characteristics of the Australian population by age and gender. **Respondents were required to be active video game players.** Participants who did not complete the survey were excluded from the final dataset. Item-level non-response resulted in small variations in base sizes across some variables; percentages are reported using valid responses for each item.

Respondents were asked demographic questions, including age, gender identity, disability status, cultural and linguistic background, and education level, as well as questions relating to video game play behaviours such as frequency of play, preferred device, and location of play.

Respondents were then shown an image of a Steam product page for one of three Australian video games: *Unpacking*, *Hollow Knight: Silksong*, or *Untitled Goose Game*. Steam was selected as it is a widely used digital marketplace and provides a standardised and familiar format for presenting video game information.

If respondents indicated that they had played the featured game, they completed a series of questions relating to that specific title. These questions employed validated scales measuring attitudes, involvement, novelty, engagement, perceived quality, and social and emotional value. Respondents were also asked questions concerning consumer ethnocentrism and their knowledge of the Australian video game industry. Ethnocentrism items were positioned at the end of the survey to minimise potential priming effects.

If respondents had not played the initial title shown, they were sequentially shown the remaining titles. Respondents who had not played any of the three case-study games completed the attitudinal measures in relation to a different video game they had played.

Survey data were analysed using descriptive and multivariate techniques.

Participation was voluntary, informed consent was obtained from all respondents, and all data were collected and analysed in anonymised form.

Table 1: Age, gender and education of Australian video game player survey respondents

Age cohort	Number of respondents	Percent
18–24	241	10.9
25–39	623	28.2
40–54	564	25.5
55–64	312	14.1
65+	468	21.2
Total	2,208	99.9
Gender		
Female/woman	1,112	50.4
Male/man	1,080	48.9
Non-binary/gender fluid	9	0.4
Other gender identity (please self-describe)	2	0.1
Prefer not to say	1	0.0
Total	2,204	99.8
Highest education level		
Less than high school	73	3.3
High school certificate or equivalent	462	20.9
Vocational or technical qualifications (e.g. trade, TAFE, diploma)	691	31.3
Bachelor’s degree (undergraduate)	703	31.9
Graduate/postgraduate/professional degree (e.g. Masters, PhD)	277	12.6
Prefer not to say	1	0.0
Total	2,207	100

Video game players focus groups

Four focus groups were conducted with a total of 28 Australian video game players. Participants were recruited via a panel provider to ensure diversity across age, gender, ethnicity, disability status, and metropolitan and regional location. **To participate, individuals were required to have played a video game on a console or computer at least once in the past month.**

Focus groups ran for between 60 and 90 minutes and followed a semi-structured format. Sessions began with broad, familiar questions about participants’ video game preferences, play contexts, and devices, before moving to more reflective discussion about perceptions of Australian video games and the Australian video game industry. Participants were shown Steam product pages and game play clips from three Australian video games – *Unpacking*, *Hollow Knight: Silksong*, and *Untitled Goose Game* – to support discussion and prompt reflection.

All focus groups were recorded and transcribed. Transcripts were analysed using an iterative thematic analysis approach, following established procedures for inductive qualitative analysis. Analysis involved repeated familiarisation, coding, and refinement of themes to identify shared patterns and points of divergence across participants.

Table 2: Video game player focus group participants' demographics

Age cohort	Number of respondents	Percent
18–24	5	17.9
25–39	17	60.7
40–54	6	21.4
Total	28	100
Gender		
Male/man	19	67.9
Female/woman	8	28.6
Non-binary/gender fluid	1	3.6
Total	28	100
Disability status		
Yes	6	21.4
No	21	75
Prefer not to say	1	3.6
Total	28	100
Identifies as a person from a CALD background		
Yes	4	14.3
No	24	85.7
Total	28	100
Highest education level		
Vocational etc.	10	35.7
High school	7	25
Bachelor	10	35.7
Postgraduate	1	3.6
Total	28	100
Employment status		
Employed full-time	17	60.7
Employed part-time	7	25
Self-employed	2	7.1
Unemployed	1	3.6
Student	1	3.6
Total	28	100

Triangulation and supporting data

Findings from the focus groups and Australian survey were interpreted alongside additional sources (such as Newzoo and IGEA), including industry research, market data, and analysis of online user reviews and commentary. These sources were used to contextualise player perspectives, validate points of convergence across methods, and support interpretation of patterns observed in the primary research.

Additional screen and games data sources

Online reviews and video responses

Thirteen Australian screen and games titles were selected for an analysis of online comments, reviews and videos relating to them. Swinburne University and QUT academics conducted the analysis, drawing on their experience in audience cultures for Australian cinema, children's content, documentary, and First Nations media.

This research used qualitative analysis to manually code each review against Throsby's cultural value tenets (described in Tenets of cultural value) **to understand:**

- why the title was valuable to the audience
- what specific forms of cultural value are thought to exist (e.g. entertainment, symbolic, social, historical value, etc.)
- how the audience "used" the title, if at all (e.g. recommending it, discussing it with others, re-watching with loved ones, creating content related to the title, etc.).

Data was collected from 2 categories of platforms:

- **review platforms** such as Letterboxd, IMDb, Rotten Tomatoes, Common Sense Media and games distribution platforms such as Steam
- **video platforms** such as YouTube and TikTok, which host user-generated content such as explainer videos, edits, reaction videos, and cosplay.

For each title, where possible, a sample of at least 200 reviews and video responses per platform were analysed. In practice, the sample size was often smaller because titles, especially documentary and children's series, had limited online engagement. In these cases, whatever reviews and video responses were available were analysed. A total of 5,638 reviews and user-generated videos were analysed. For video game titles, metadata of up to 20,000 reviews was also available and included in the analysis.

Table 3: Number of reviews and responses analysed for each title

	Reviews	Video responses	Total
Furiosa: A Mad Max Saga	900	300	1,200
Talk to Me	490	300	790
The Dry	552	–	552
Bluey	662	300	962
Deadloch	624	–	624
First Australians	66	–	66
Heartbreak High	179	300	479
Little J & Big Cuz	1 (46)	–	47
Mystery Road	200	–	200
War on Waste	0 (118)	–	118
Untitled Goose Game	200	–	200
Unpacking	200	–	200
Hollow Knight: Silksong	200	–	200
TOTAL	4,438	1,200	5,638

Analysis of online platforms cannot offer a full account of the overall reception of a screen title; it can only explore a sample of platforms as used by a particular subset of people. This analysis does not capture the wider cultural life of a screen title – what it really means to everyone, out in the world. Indeed, the majority of the audience for any given title does not post online reviews. However, **review analysis does offer useful insights into the forms of value identified by those audiences who choose to share their views online.** This is both the strength and limitation of qualitative research generally: a focus on depth over breadth.

Case studies

See *Screen Currency: Insights Overview* for details of the method used for the case studies.

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