

Online & On Demand 2017

Trends in Australian online viewing habits



Australian Government



Online & On Demand 2017: Introduction

Most Australians use the internet to watch professionally produced screen content. Online viewing is a new normal - one that supplements and challenges cinema and broadcast television, and that evolves as quickly as the technology that drives it.

Screen Australia provides research on industry facts and trends to inform government, industry and audiences. In 2014, Screen Australia released the 'Online and on Demand' report using Nielsen data, which showed how Australian audiences were using new online options. This updated report examines major changes since 2014, including the Australian launch of subscription platforms such as Netflix and Stan, the evolution of TV broadcaster online services, and the growth of YouTube, Facebook and other social services.

The findings are extensive. Australian video on demand users still watch via traditional platforms, and they are watching more video - using broadcaster, subscription and advertising-driven options. They are pirating less. They choose what to watch based on old and new factors. And with the world's content at their fingertips, Australian VOD users are seeking out Australian content, and want new Australian screen stories.

This report is designed to help the industry understand its audience, and to inform anyone interested in the place that screen stories have in a modern, online Australia.

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Online & On Demand 2017: Key findings

- **Convenience and price point still drive online viewing**

Video on demand is valued for offering greater choice and flexibility around content, viewing times, cost and fewer advertisements.

- **Discovery and choice influenced by a variety of sources**

Friends and family are still the most influential when it comes to viewing choices, with further factors influenced by age: older users consult professionals and program guides, while younger users prefer online recommendations based on past choices and social media personalities/bloggers.

- **Most VOD viewing is in-home, but out-of-home on the rise**

1 in 4 are watching VOD out of home at least once a month.

- **VOD users are watching screen content via social media**

The majority of VOD users active on social media are watching screen content via these services. YouTube, Facebook and younger audiences dominate but there is potential for growth across all demographics.

- **Broadcaster catch-up, other AVOD and SVOD dominate VOD use**

YouTube is still the most used service, Netflix has become a major player, with broadcaster catch-up services close behind.

- **VOD users still watch content via existing platforms**

Despite disruption from SVOD, overall use of broadcast TV remains fairly stable, while other existing platforms such as broadcaster catch-up and other AVOD (e.g. YouTube) have seen an increase.



Online & On Demand 2017: Key findings

- **Piracy is down but not yet out**

Use of pirated and illegal services has fallen. Those that continue to pirate tend to be younger.

- **SVOD is changing attitudes and viewing behaviors**

Around half of all SVOD users watch less free-to-air TV, are downloading fewer programs from TVOD and feel they download/stream via illegal sites less often than they used to.

- **Solo viewing of online content is increasing**

VOD users are watching more screen content alone than they used to.

- **VOD users want new and diverse Australian content**

Most VOD users agree that Australian dramas and documentaries influence conversations around social and cultural issues, and help us to debate and understand our national identity.

- **Parents value Australian programs made for children**

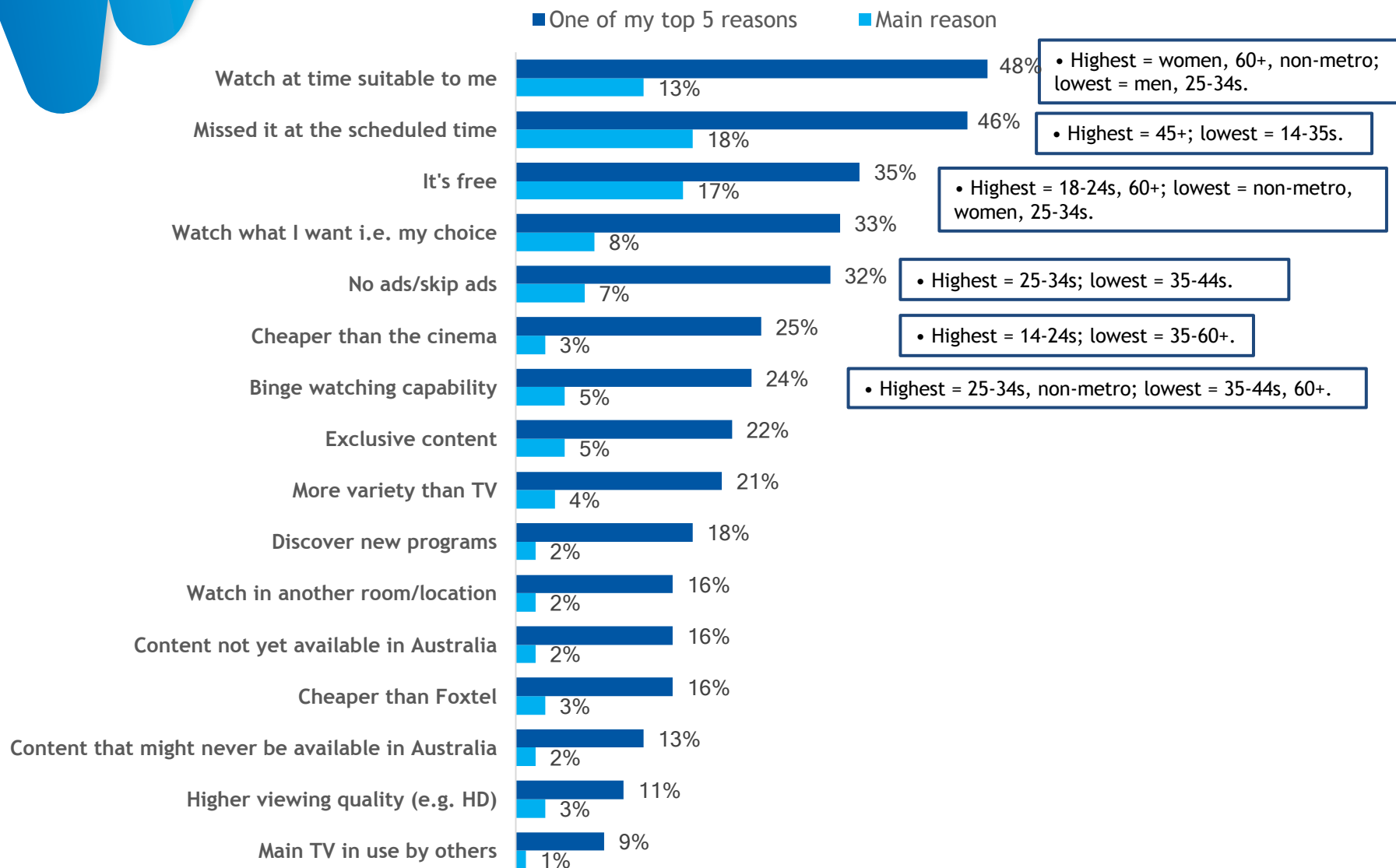
Most feel it's important that children can access Australian dramas and documentaries made especially for them, and feel these programs give children a different view of the world.

- **400 titles named as all-time Australian favourites**

Australian features and TV drama still resonate, with *The Castle*, *Mad Max*, *Home and Away*, *Crocodile Dundee* and *Offspring* topping the list of all-time favourite Australian productions.

What drives us to watch VOD?

Convenience & price-point are the main motivators behind online viewing



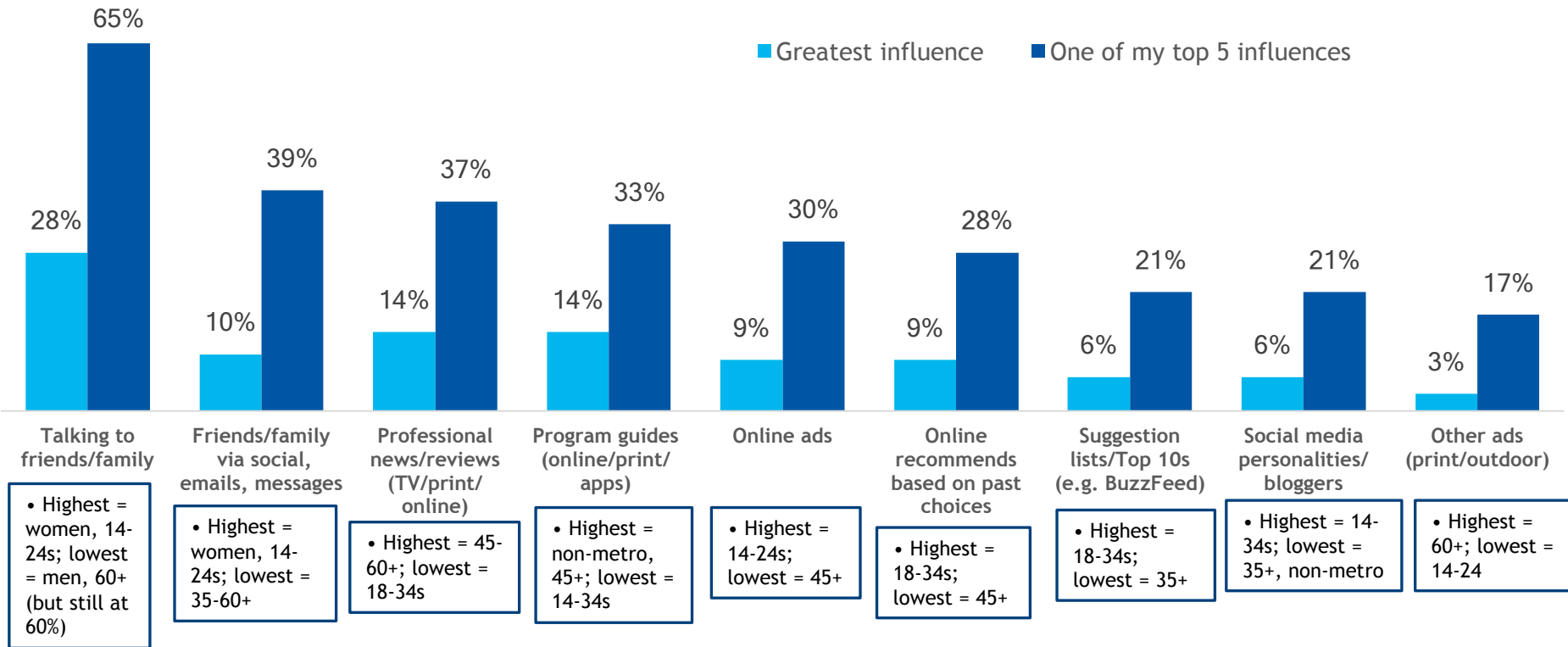
Q. Why do you watch movies and/or TV shows via the internet? Please select up to 5 reasons and then rank them. NB: Highest/lowest figures are based on those that skew most from the Total. Base: All respondents: (n=1,683).

Who and what influences content discovery and choice?

Friends and family still most influential, other factors determined by age

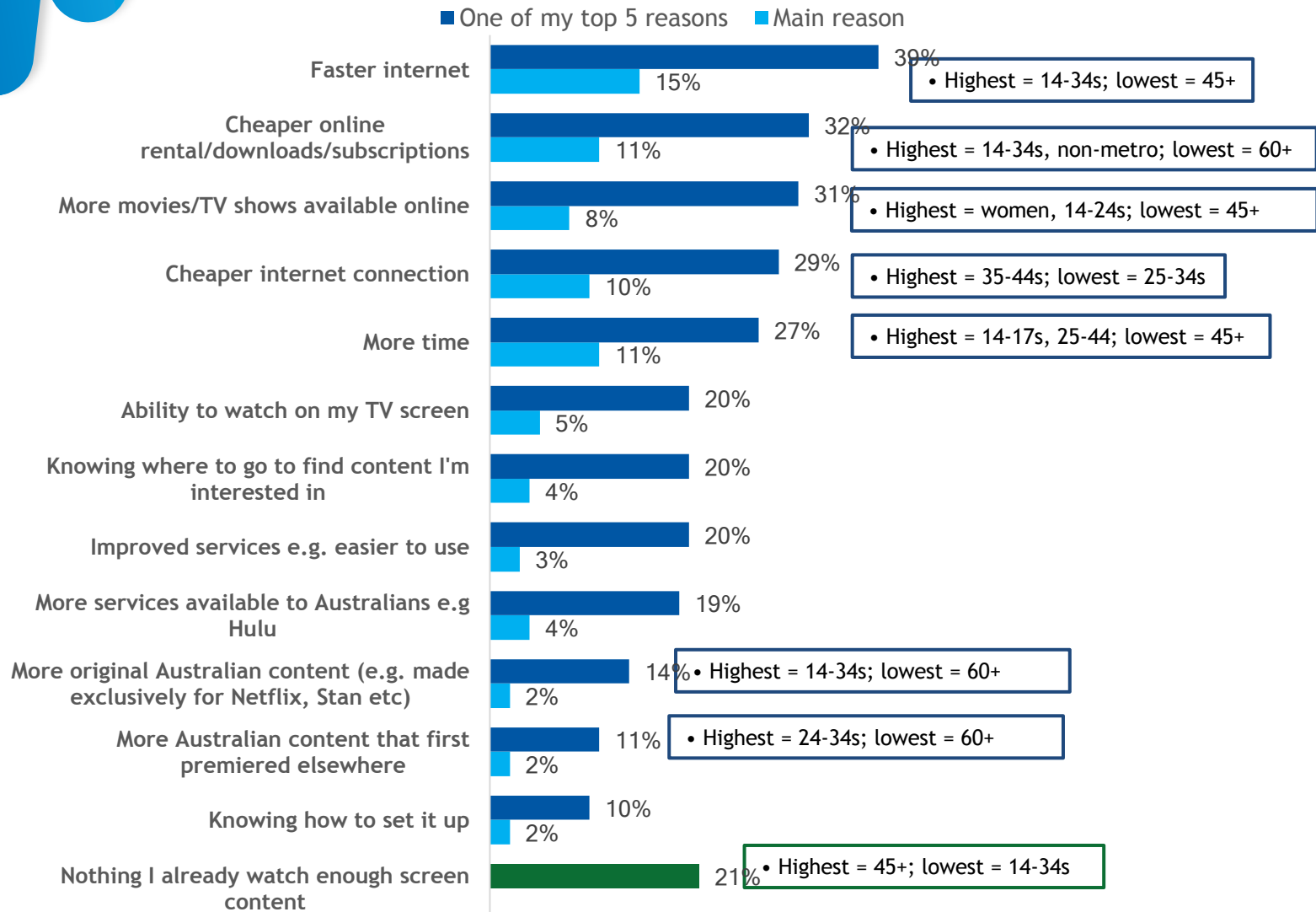
A variety of sources can play a role in how VOD users find content and make viewing choices. Friends and family remain the greatest influencers but then age starts to have an impact.

Older VOD users are more likely to consult professional reviews and program guides, while online recommendations based on past choices and from social media personalities/bloggers are popular amongst younger viewers.



What holds us back from watching more online?

Faster internet, cheaper costs and more content are the main barriers to watching online. However 1 in 5 feel they already watch enough.



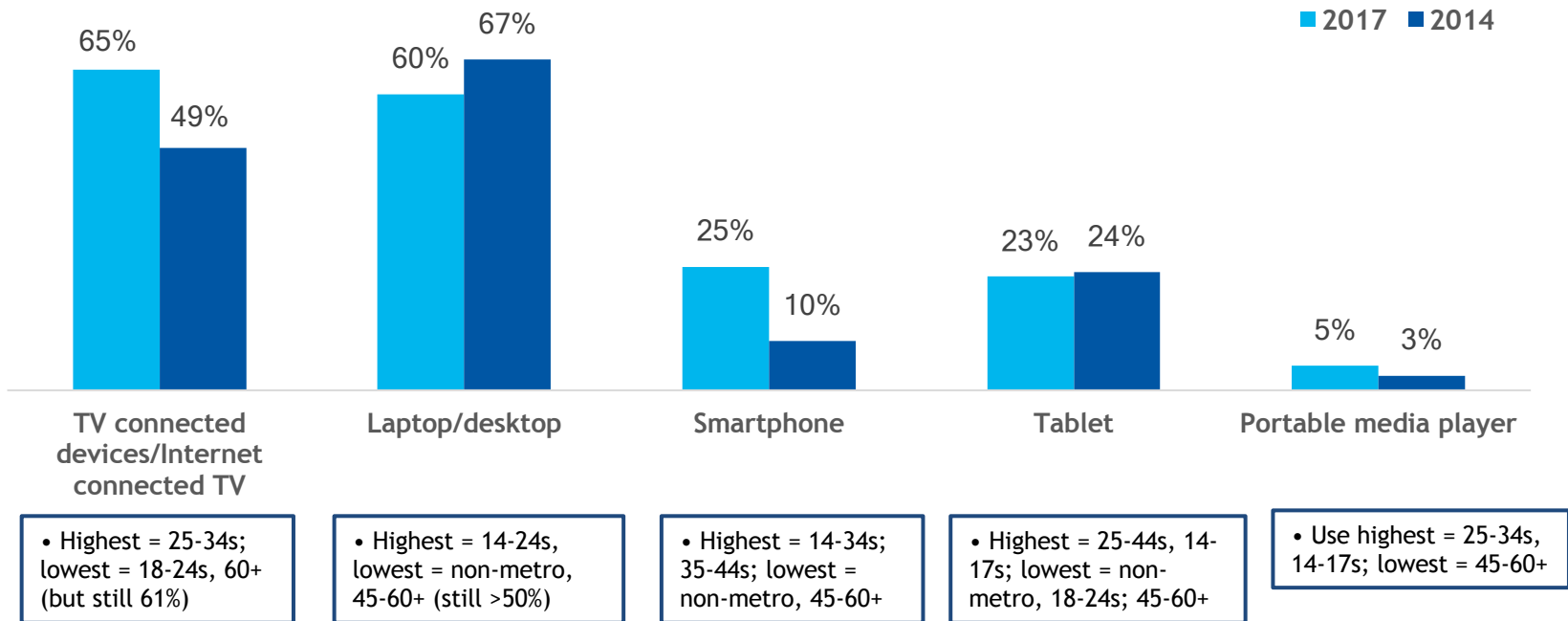
Q: What needs to change in order for you to watch more professionally produced screen content via the internet. Select up to 5 answers and then rank.
 NB: Highest/lowest figures are based on those that skew most from the Total. Base: All respondents: (n=1,683).

How we watch: Which devices are used for VOD?

Bigger screens are still preferred but portability is important

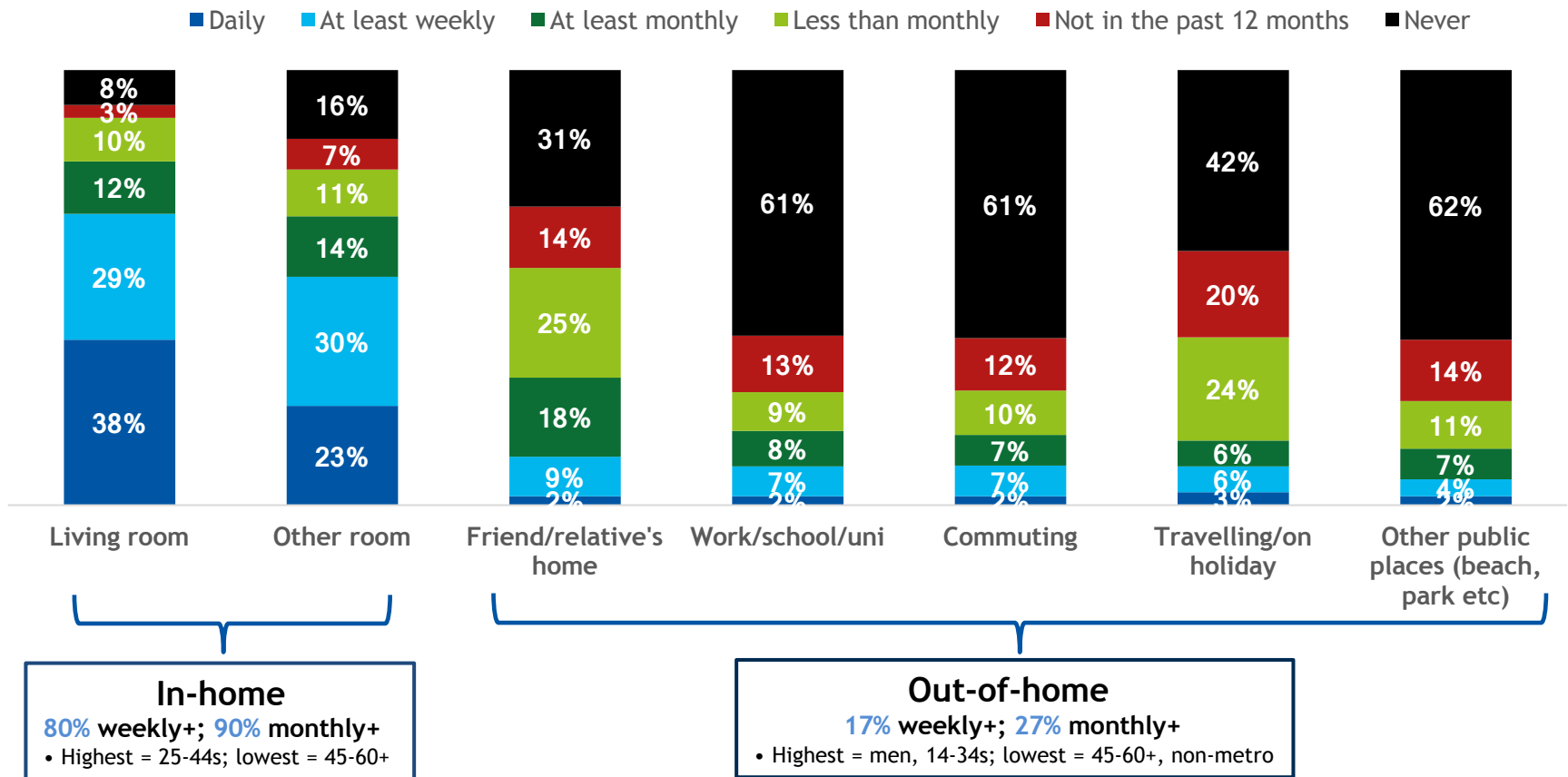
Australian VOD users watch online content through a variety of devices. Bigger screens are still generally preferred with an increase to 2 out of 3 watching via internet capable TV's/connected devices.

However, online viewing seems to be valued for its convenience, flexibility and portability: while use of standalone laptop/desktops and use of tablets is relatively steady, viewing via smartphones increased 150% to 1 in 4 respondents.



Where do we watch VOD: Location and frequency?

Most VOD viewing is still done in-home, with 80% of people watching online content at home at least weekly. However out-of-home viewing is on the rise, with 1 in 4 (27%) watching VOD out-of-home at least once a month. Out-of-home viewers are most likely to be males and those aged 14-34.



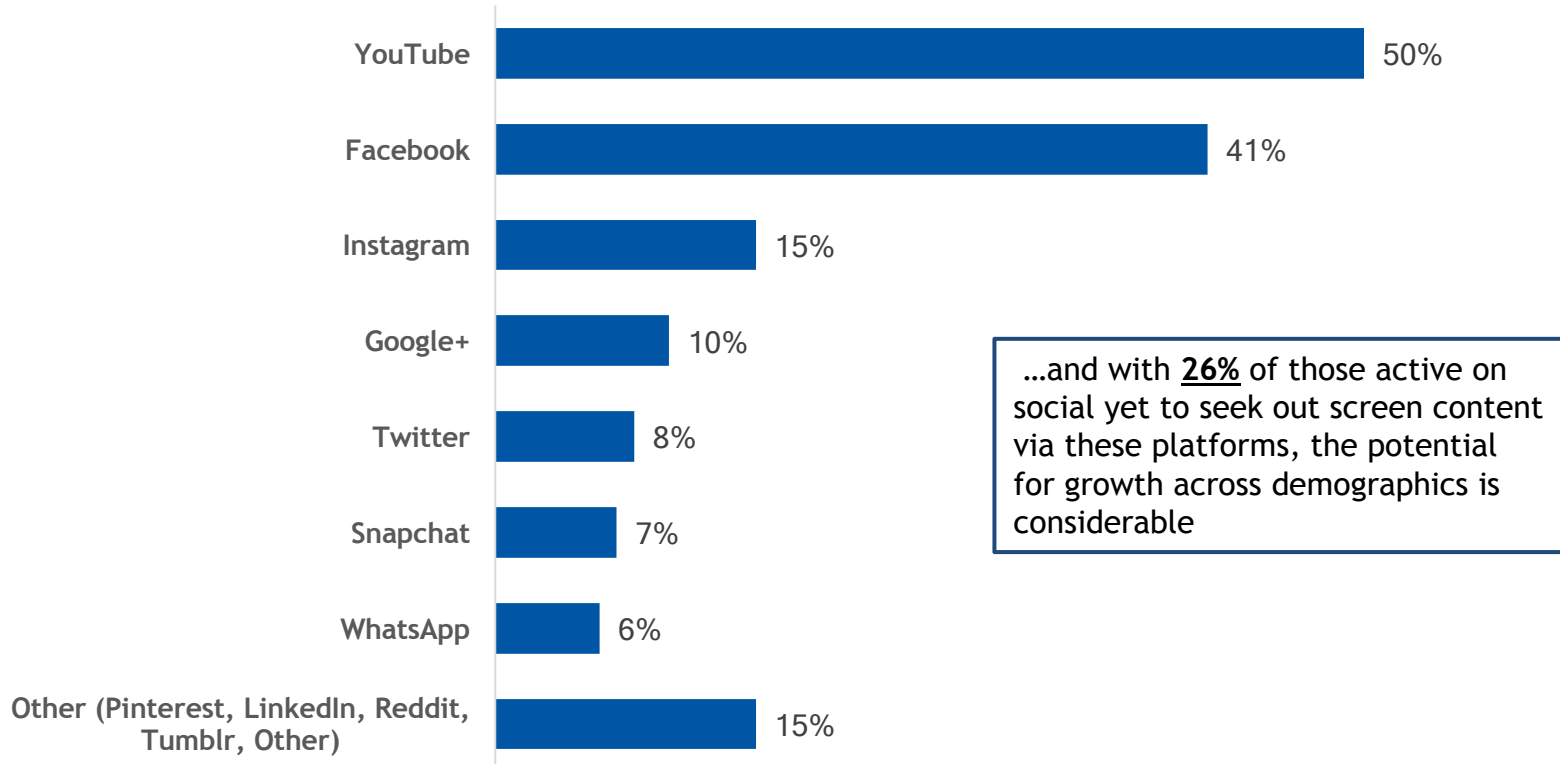
Q. In the past 12 months, how often have you watched TV shows and movies via the internet in the following locations? NB: Highest/lowest figures are based on those that skew most from the Total. Base: All respondents: (n=1,683).

Are we using social platforms to find and watch VOD?

YouTube and Facebook most popular social platforms for content

Social media platforms are increasingly becoming a place to discover and watch professionally produced content. 90% of VOD users are active on social media and 74% have viewed screen content via social platforms in the last 12 months.

YouTube and Facebook were strongest for screen content overall in the context of social platforms, due to their significant content offering and audience awareness (across all demographics).



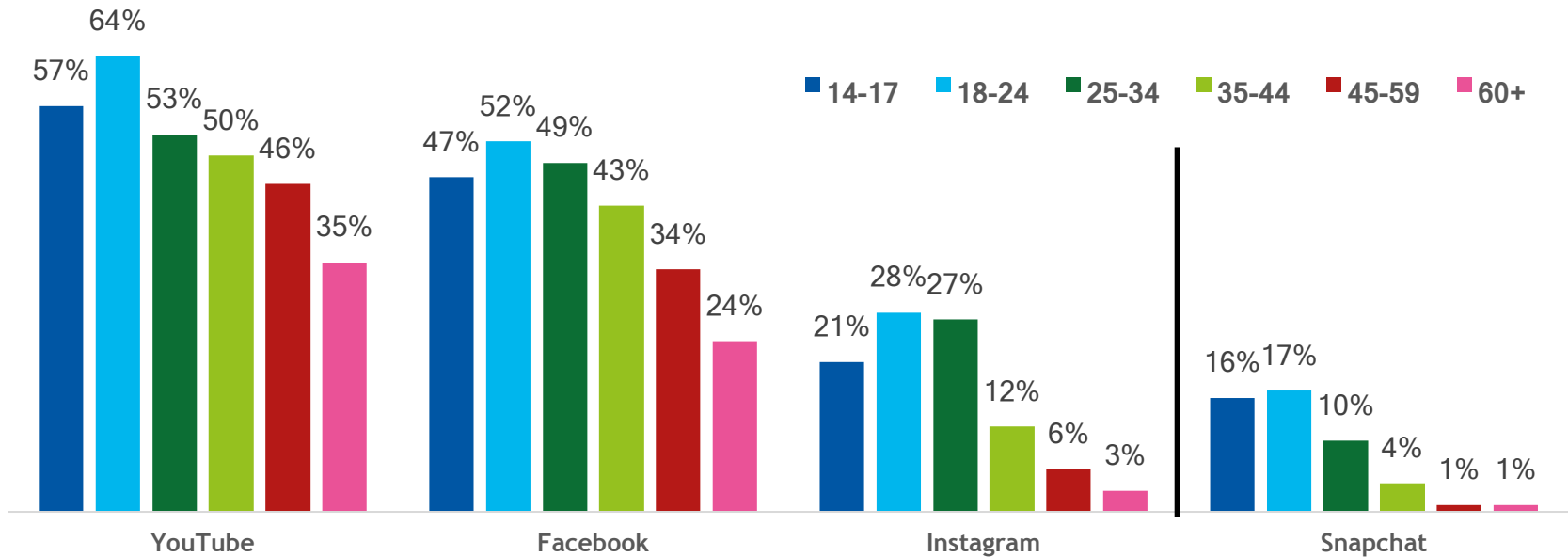
Younger viewers dominate viewing via social

But older audiences are also represented across the main platforms

18-24s were most likely to watch professionally produced screen content via the main social platforms in the last 12 months: 64% via YouTube and 52% via Facebook. 14-17s were also strong.

Instagram was strongest amongst 18-34s; and outside the top 3 platforms, Snapchat had traction amongst 14-24s. Amongst 60+s, 1 in 3 have viewed screen content via YouTube and 1 in 4 via Facebook.

Non-metro viewers were a little less likely to view via social than metro markets.





VOD Services: Platform groupings reference guide

The individual VOD services have been grouped into four online platforms:

- **Broadcaster catch-up TV/live streaming services**

e.g. ABC iview, Plus7, 9Now, Tenplay, Foxtel Go, Freeview Plus

- **Subscription Video on Demand (SVOD) services**

e.g. Netflix (Aus), Stan, Foxtel Play/Now, Amazon Prime, Ozflix, DocPlay, Quickflix Red Carpet

- **Transactional Video on Demand (TVOD) services**

e.g. iTunes, Ozflix, Dendy Direct, Google Play, Bigpond, Fetch TV rentals/purchases, Quickflix Access

- **Other Ad-based Video on Demand (Other AVOD)**

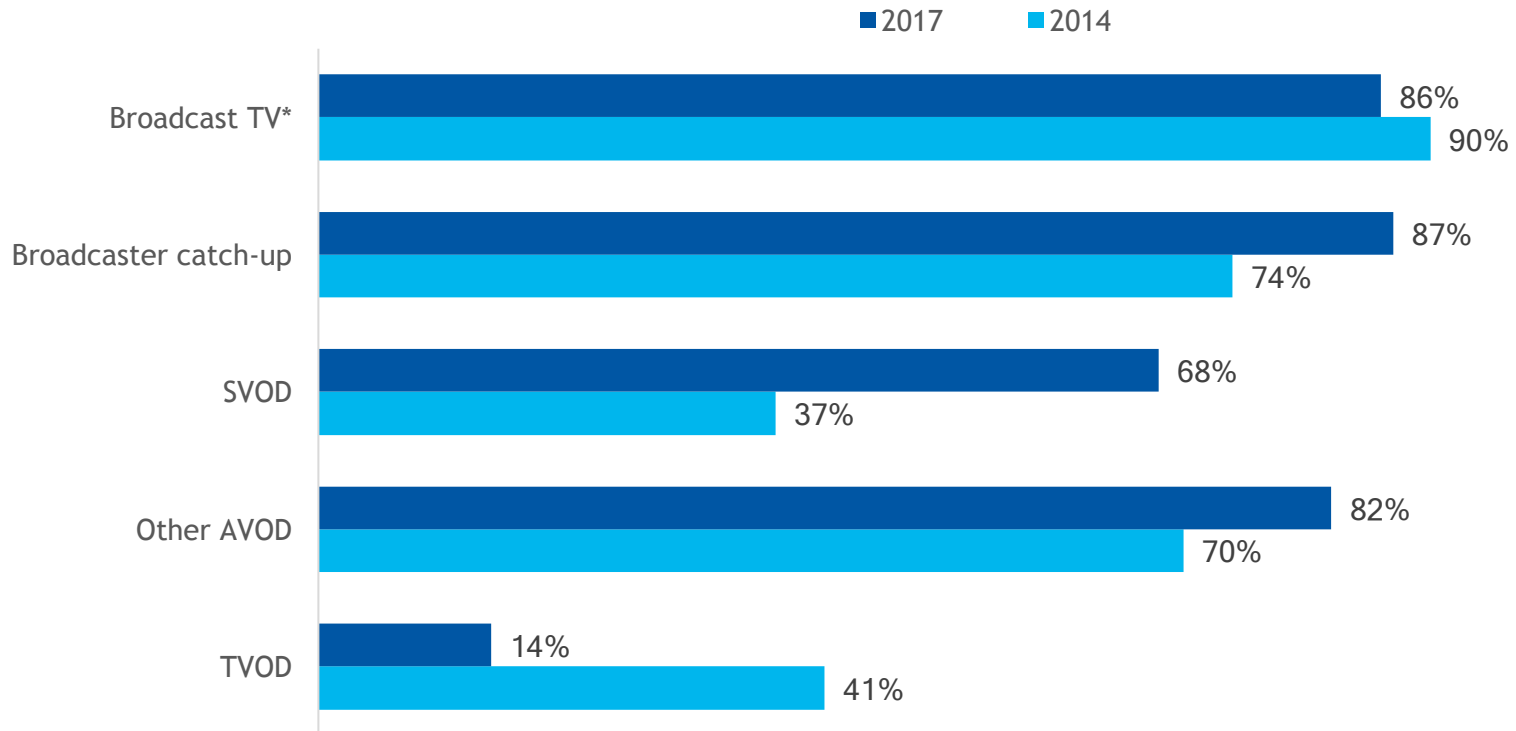
e.g. YouTube, Facebook, SMH/TV, The Age.TV etc (excludes broadcaster catch-up services that show advertising)

VOD users: Overall platform use 2017 vs 2014

Existing platforms remain relatively stable despite disruption from SVOD

The biggest disruption to the Australian VOD landscape since 2014 has been the entry of new SVOD services. 2 out of 3 Australians who watch content online are using SVOD services, just a few years after their launch.

But while SVODs have had an impact on TVOD services, overall use of the other existing platforms continues to be strong. Broadcast TV has remained relatively stable, while use of broadcaster catch-up services and other AVOD services such as YouTube has increased.



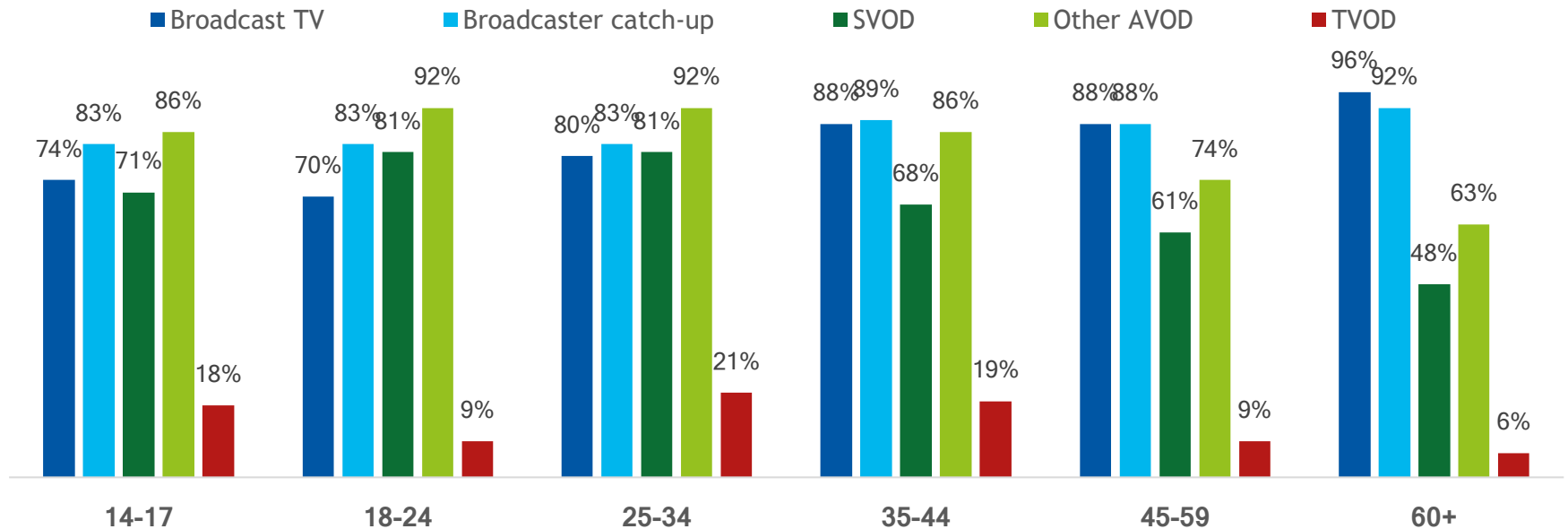
Q. Use/awareness of individual VOD services has been cross referenced with the question 'In which of the following ways do you watch TV shows, movies, documentaries and other screen content' and grouped into four topline categories. *NB: Broadcast TV figure for 2014 excludes time-shift. Base 2014: All respondents (n=1,593); 2017: All respondents: (n=1,683).

Who is watching: Age profile of viewing platforms

A look at platform use by age shows that VOD users are watching professionally produced content via multiple viewing platforms.

Whilst broadcast TV and catch-up services are still most popular amongst older viewers, close to half are also using SVOD services and 6 out of 10 are using other AVOD services like YouTube.

But perhaps more interesting is use amongst younger viewers. Although other AVOD is strongest for 14-24s overall, more than 7 out of 10 are also watching broadcast TV, 8 out of 10 are watching via broadcaster catch-up and around the same number are using SVOD services. TVOD use tends to be highest amongst 25-44s, but is still only 1 in 5.



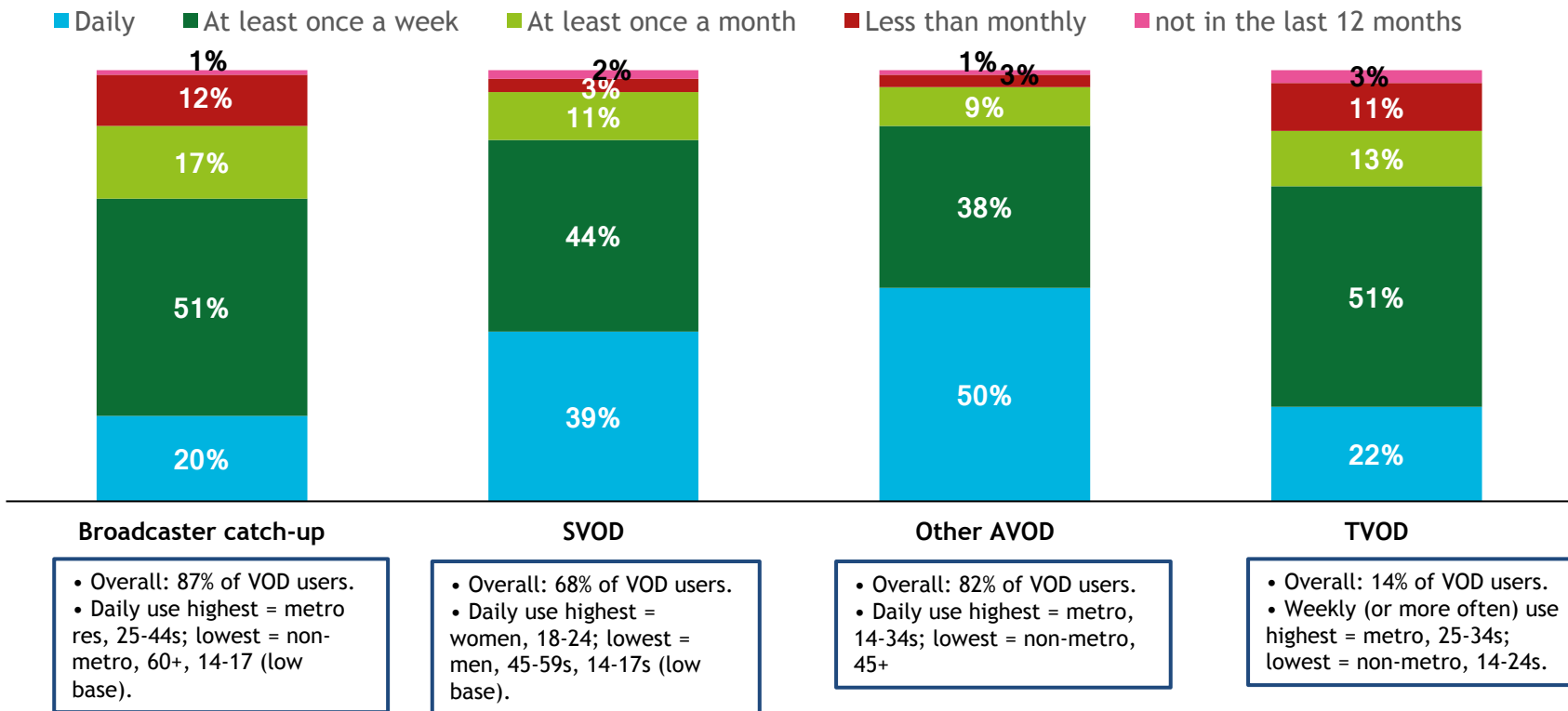
Q. Use/awareness of individual VOD services has been cross referenced with the question 'In which of the following ways do you watch TV shows, movies, documentaries and other screen content' and grouped into four topline categories. Base: 14-17 (n=100), 18-24 (n=190), 25-34 (n=260), 35-44 (n=292), 45-59 (n=437), 60+ (n=404).

VOD users: Use & frequency

Other AVOD users are the most frequent viewers

Whilst broadcaster catch-up is the most used VOD platform overall for watching professionally produced screen content, other AVOD services such as YouTube and Facebook have the highest frequency of use, with half of all users watching daily and most (88%) watching at least once a week.

83% of SVOD users watch screen content via the platform at least once a week, with 39% watching daily. SVOD users are slightly more likely to be women or aged 18-24.



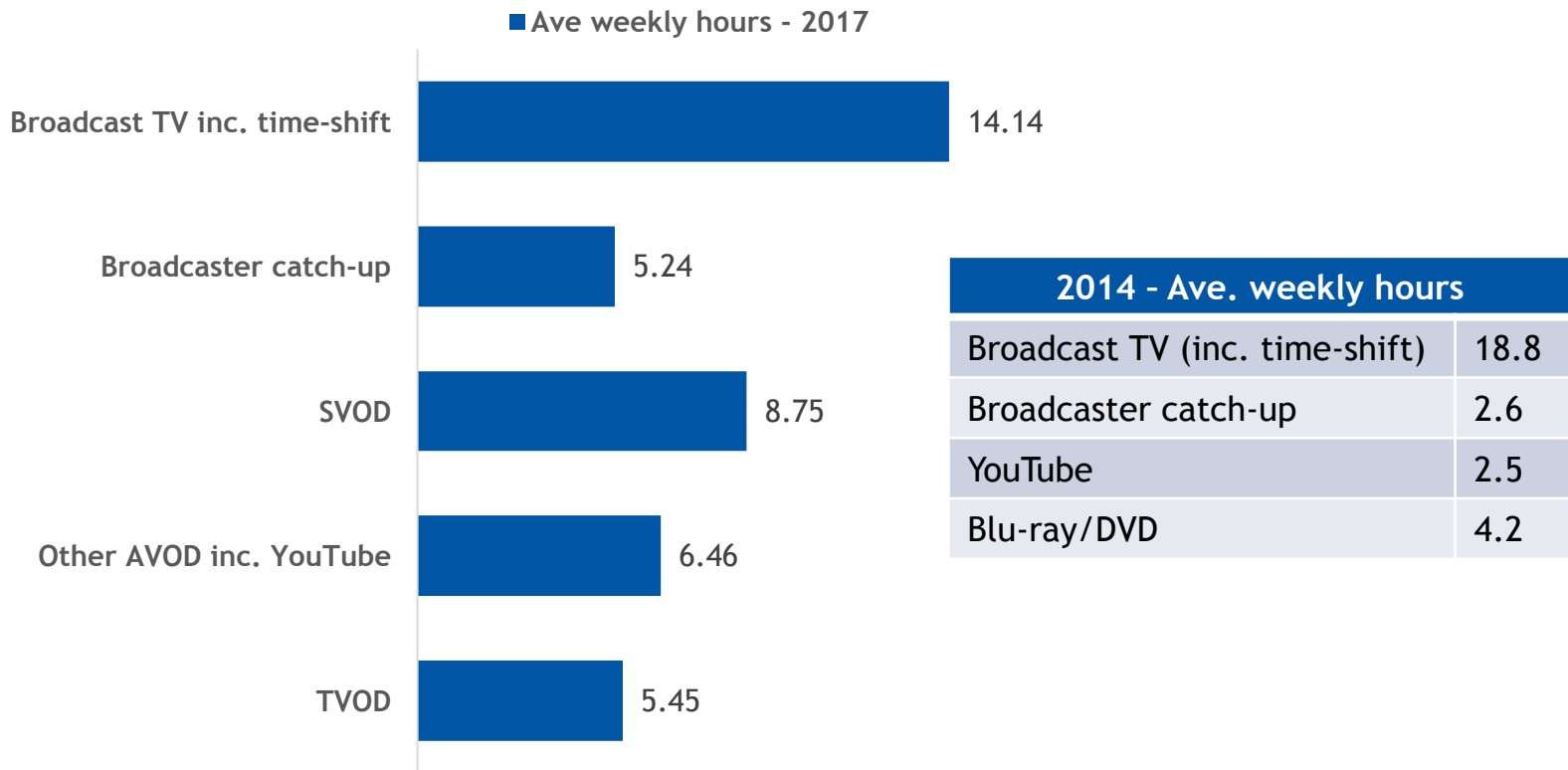
Q. In which of the following ways do you watch TV shows, movies, documentaries and other screen content? - note data here has NOT been cross referenced with use/awareness of individual VOD services. Base: All respondents (n=1,683). NB: Highest/lowest figures are based on those that skew most from the Total. Figures may not sum to 100% due to rounding.

Which platforms do we spend the most time viewing?

Broadcast TV still dominates but SVOD has significant traction

On average, VOD users spend more than 8 hours a week (1.25 hours a day) using SVOD services - a testament to the growing popularity of the platform in Australia.

Despite a fall since 2014, VOD users still watch most screen content via broadcast TV (including time-shift), averaging 14 hours a week. Mitigating the fall has been a doubling of the average time spent using broadcaster catch-up services, from 2.6 hours to more than 5 hours a week, and bringing the total time spent using broadcaster services to close to 20 hours a week.

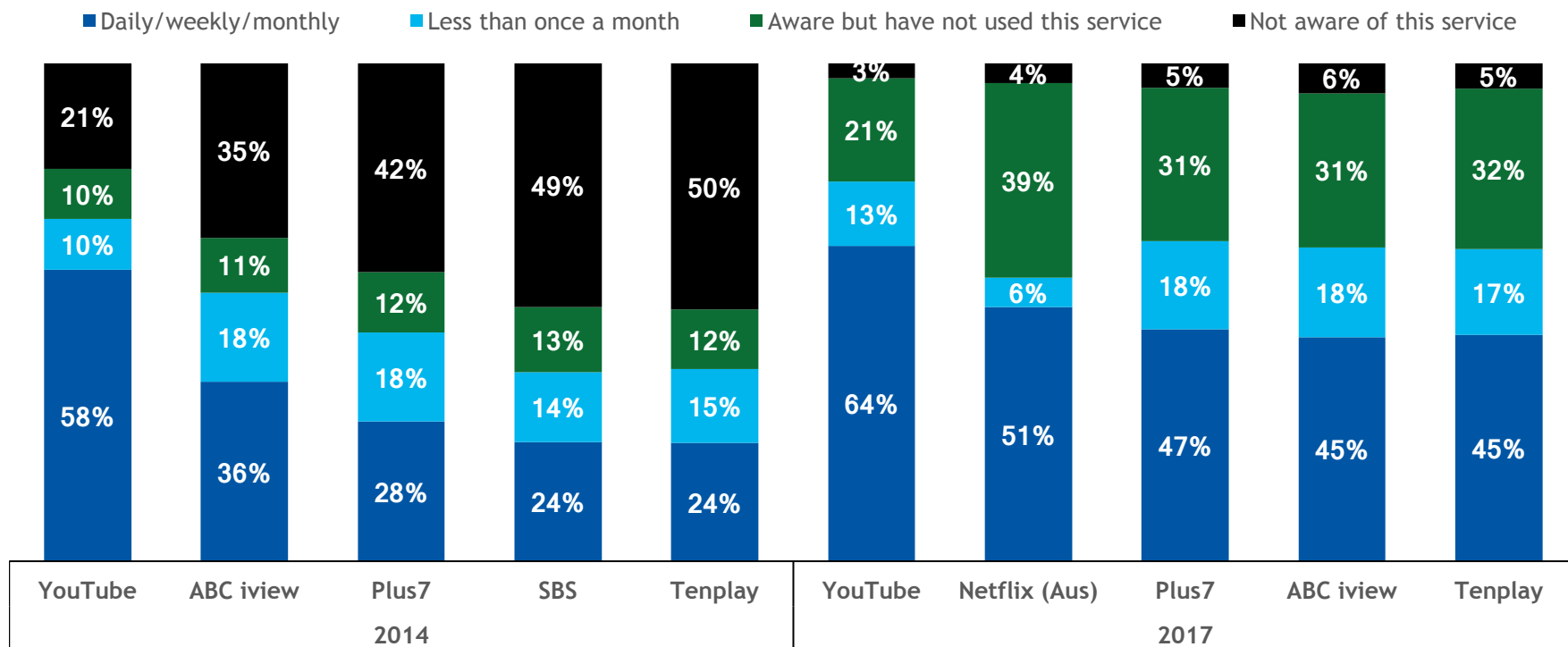


What are the most-used VOD services: 2014 vs 2017?

Netflix (Australia) is now amongst the most used services for VOD each month

Awareness and use of the individual VOD services has increased considerably since 2014, with almost all users in 2017 aware of the five most viewed services, based on monthly use.

YouTube remains the most frequently used service, with around 2 out of 3 VOD users watching professionally produced screen content on YouTube at least monthly. And while it only launched in March 2015, half of all VOD users watch via Netflix (Australia) at least once a month, and almost all are aware of it.

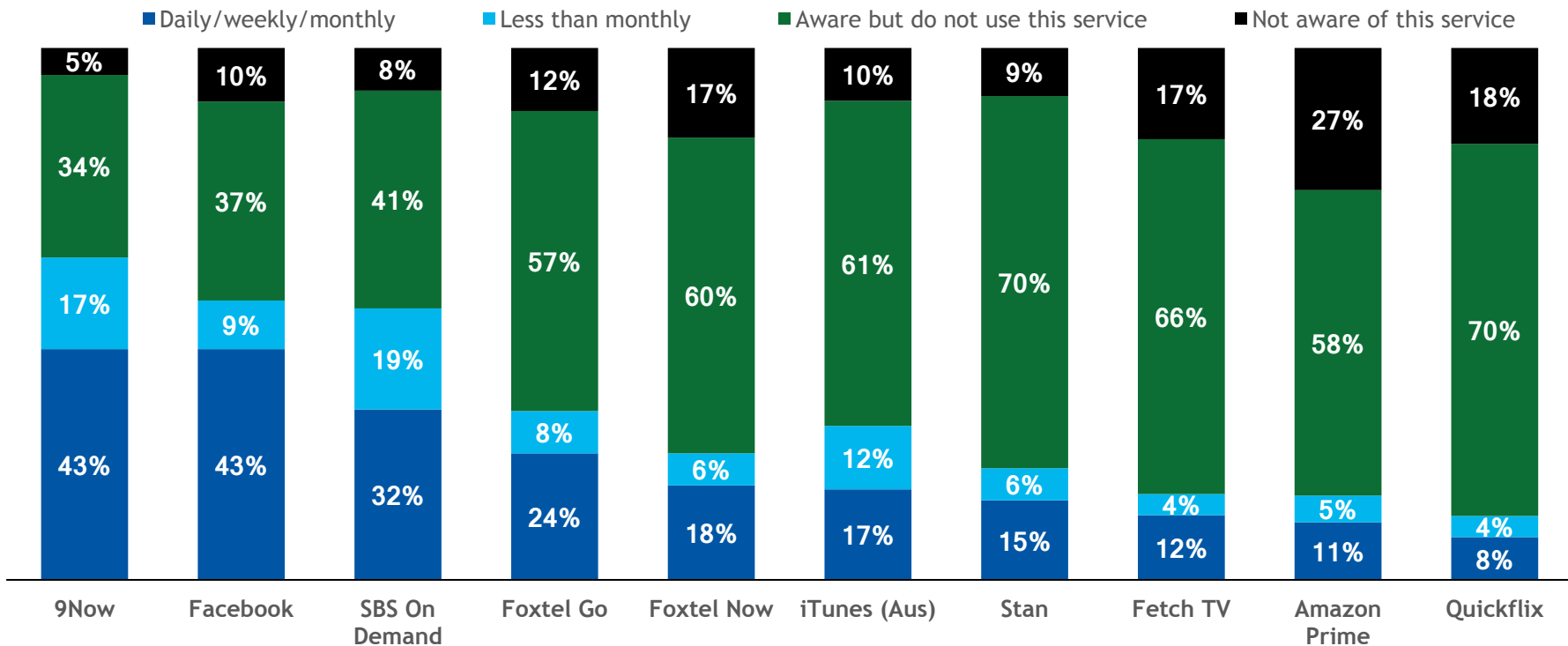


How frequently are other VOD services used?

Other broadcaster services and Facebook have high monthly use

Many VOD users are also watching via 9Now and Facebook each month, with daily viewing of screen content on Facebook at 26%. 1 in 3 also watch via SBS on Demand each month.

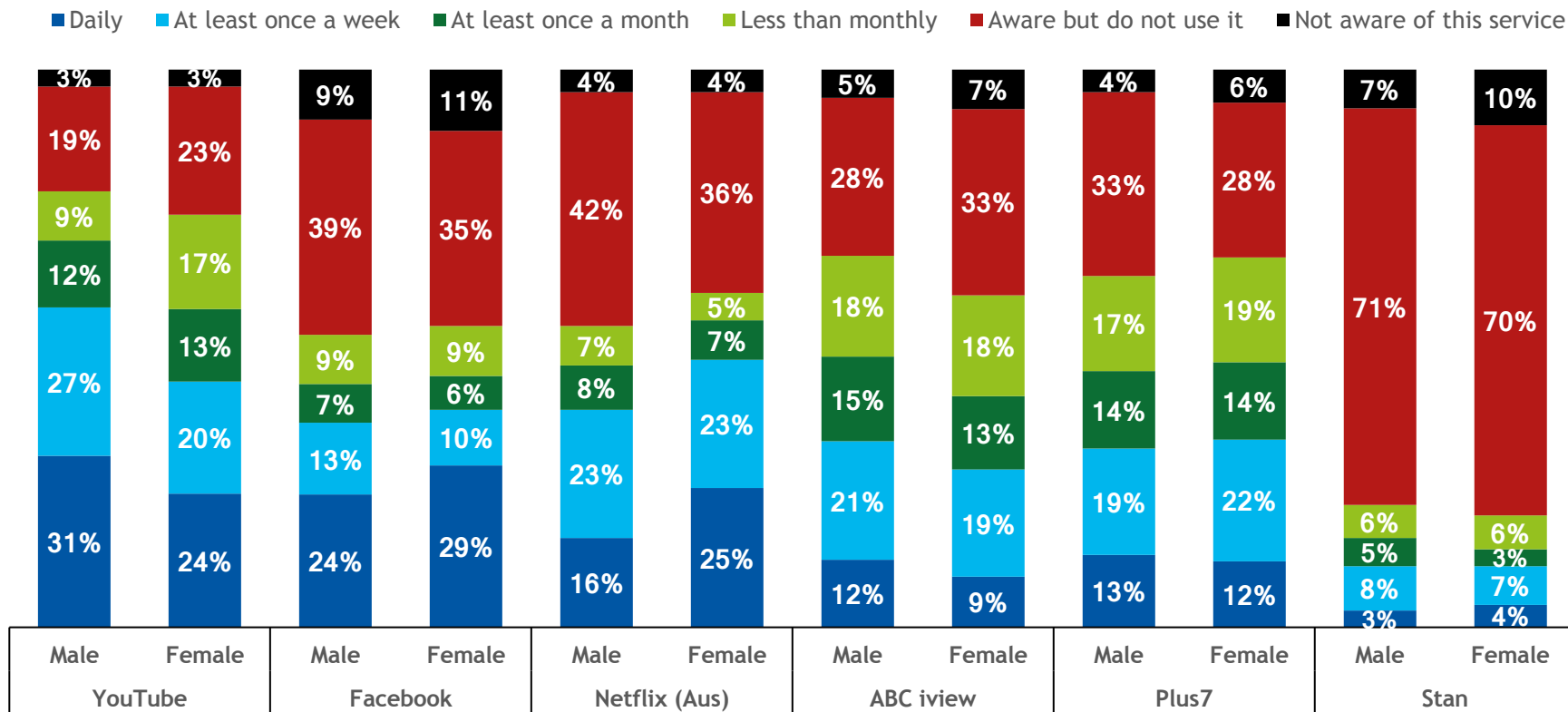
3 out of 4 VOD users are aware of Amazon Prime less than a year after its soft launch in Australia.



Does gender influence use of VOD services?

Awareness and service use varies amongst women and men

Gender can have an influence on frequency of use, with women more likely to be daily viewers of content via Netflix (Australia) and Facebook, while men are more inclined to watch daily via YouTube and ABC iview. Plus7 and Stan on the other hand tend to be more gender neutral.

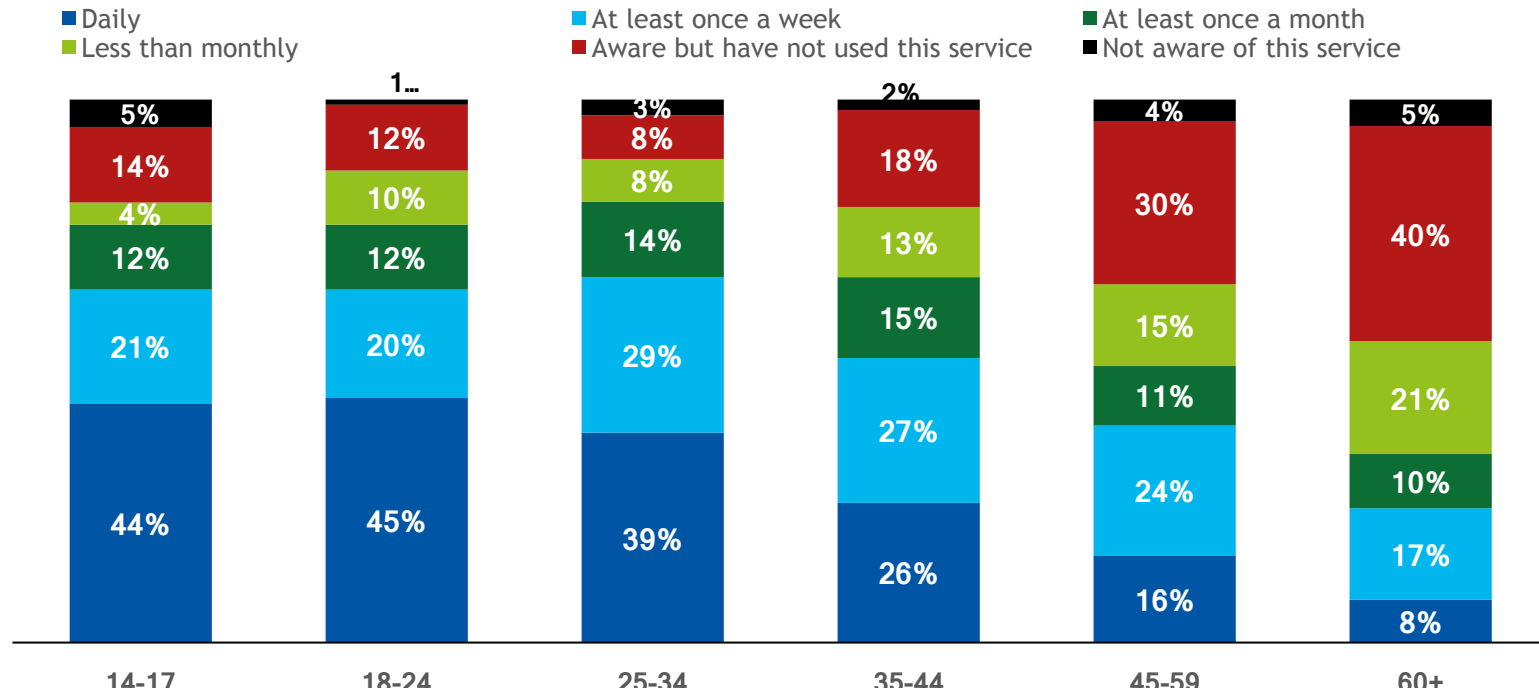


VOD services: YouTube by age

Younger viewing via YouTube equal to that of traditional platforms

Although younger viewers are still watching professionally produced screen content via traditional platforms, online services such as YouTube are now being accessed in equal measure, with 2 out of 3 aged 14-17 watching YouTube at least weekly, 4 out of 10 watching daily and the same results for users 18-34.

YouTube's unique content offering and massive global footprint has reached broader Australian audiences, with 1 in 3 aged 60+ watching professional screen content via the service at least monthly.

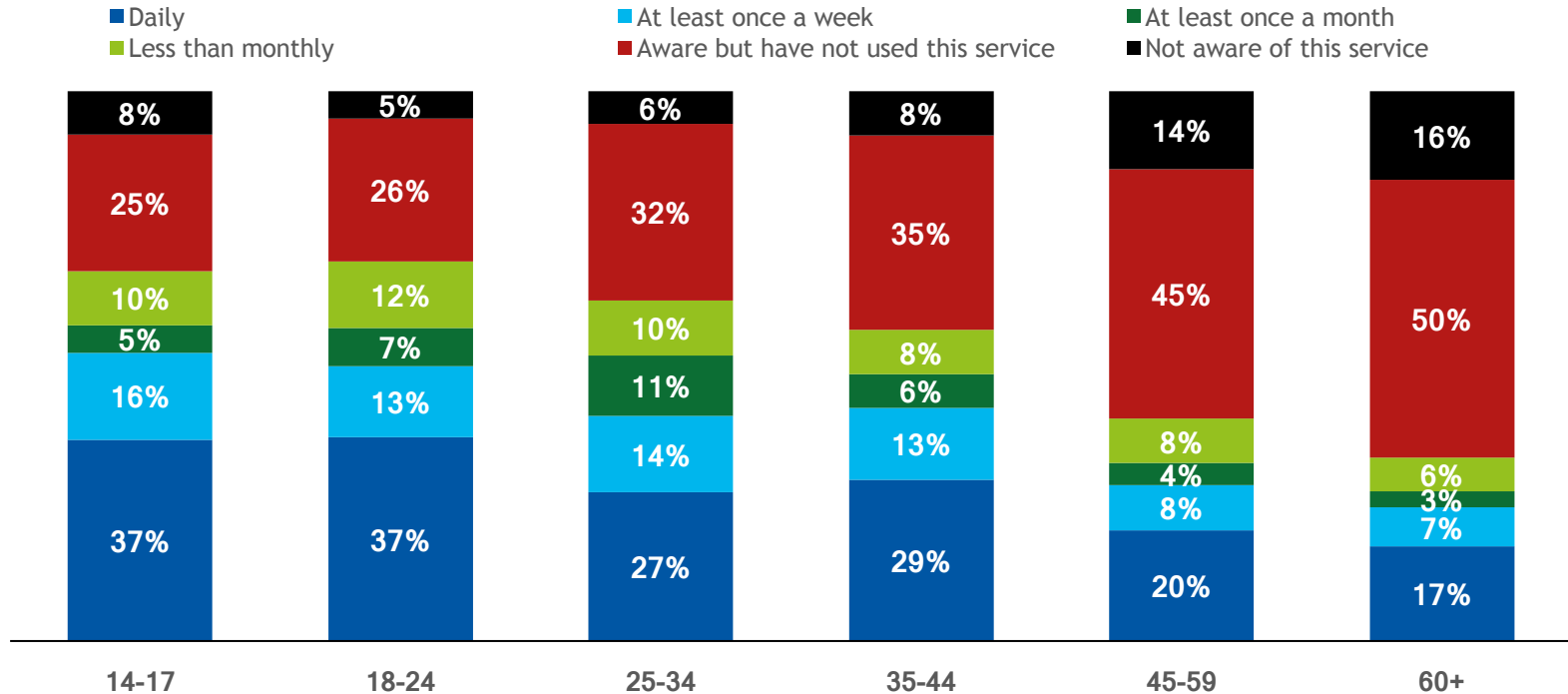


VOD services: Facebook by age

Younger viewers dominate but potential for growth amongst older audiences

Facebook is similar to YouTube in that its most frequent viewers of professional content are more likely to be 14-24s, but combined daily and weekly viewing for this age group is a little lower at 50%.

Facebook has only just begun evolving into a platform for viewing professional content, and its enormous potential for growth could be a sign of what's to come from other social media platforms - particularly as it already boasts considerable awareness and reasonable use amongst those aged 45-59 (1 in 3) and 60+ (1 in 4).

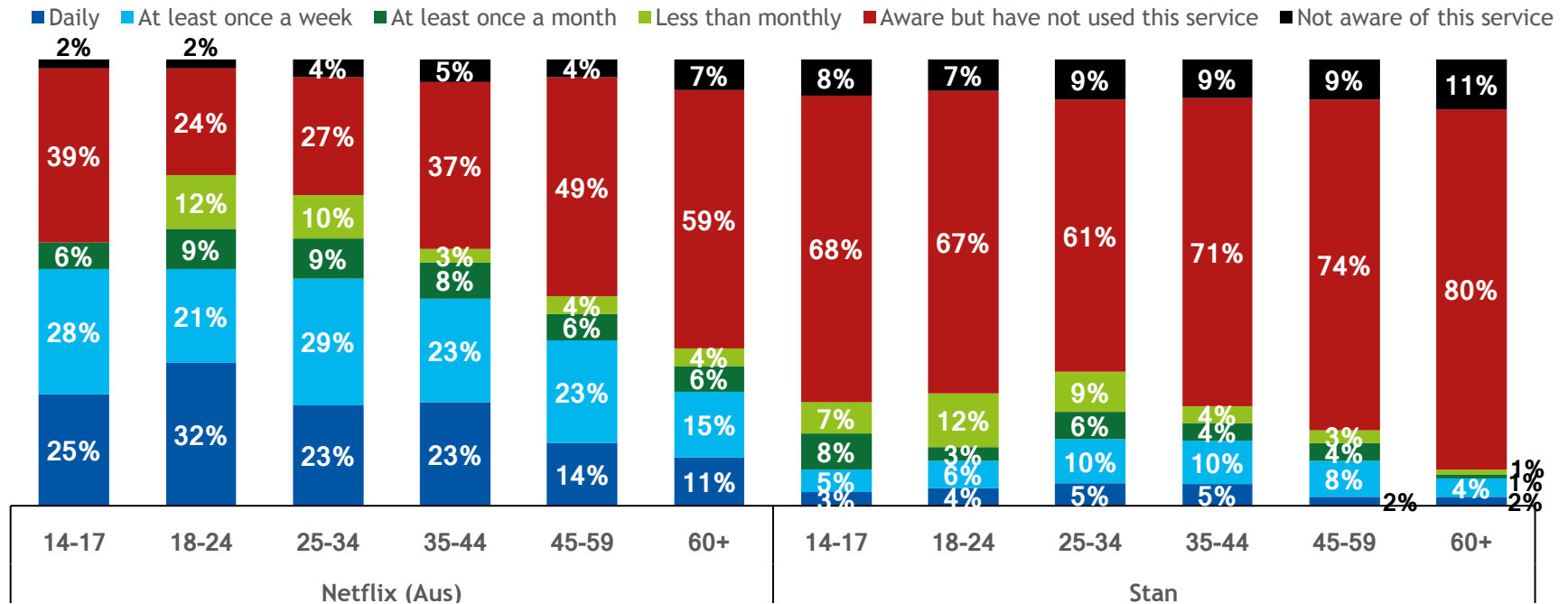


VOD services: Netflix (Australia) and Stan by age

Netflix attracts younger viewers but casts the net a little wider

Netflix's growth is driven by its considerable investment into content (particularly exclusive commissions), high awareness and even use of the service before its launch in Australia. Like YouTube and Facebook, its most frequent users are younger (half of 14-34s use it at least weekly), but its appeal is broader, with 35-44s not far behind and more than 1 in 3 aged 45+ using it at least monthly.

While Stan lacks Netflix's billion dollar production budget and global awareness, it has put considerable resources into building up a content library, including exclusive Australian content which it claims has been very popular. Most Stan viewers tend to be aged 25-44.



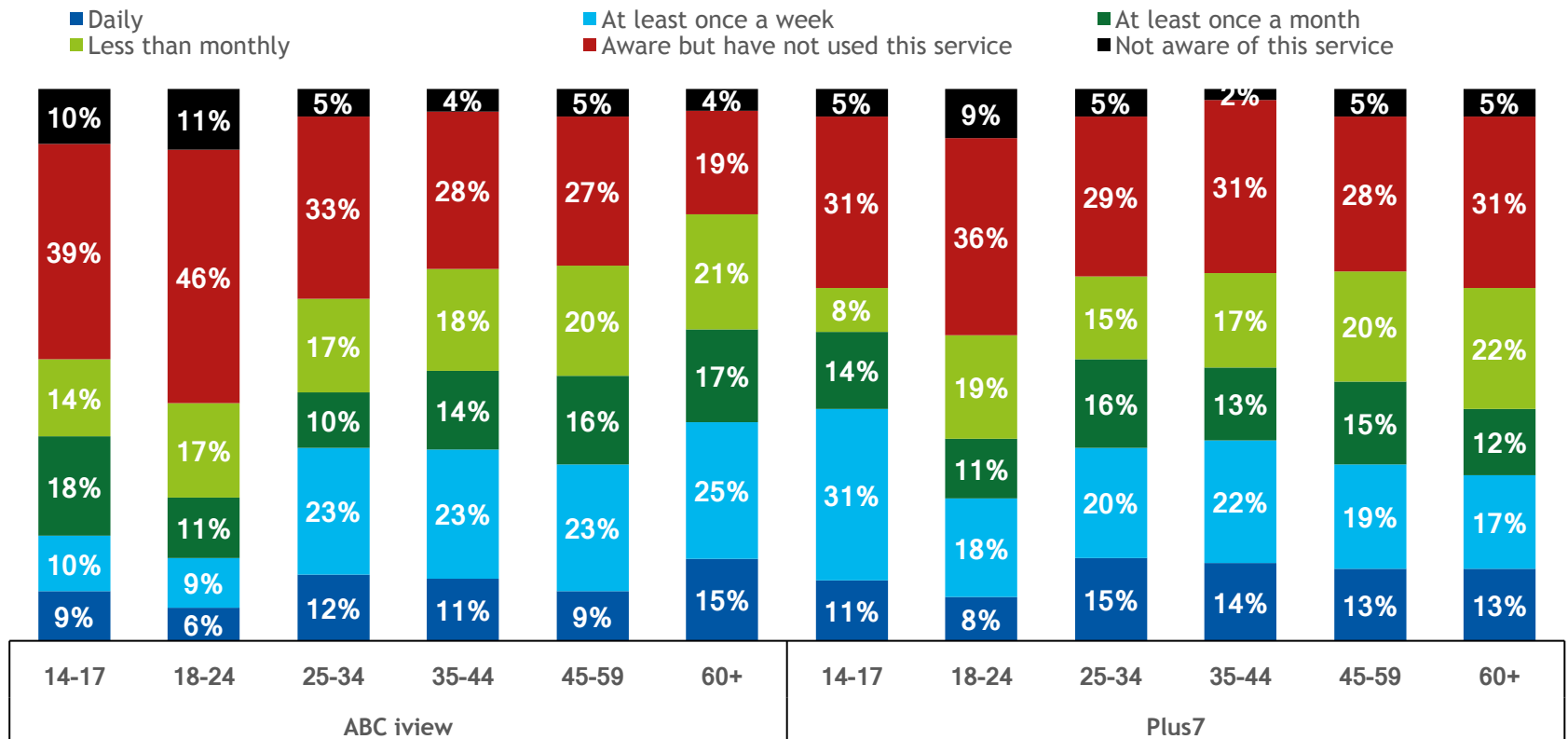
Q: Which of the following internet TV and movie services, if any, are you using/aware of to view professionally produced content, and how often?
 Base: 14-17 (n=100), 18-24 (n=190), 25-34 (n=260), 35-44 (n=292), 45-59 (n=437), 60+ (n=404).

VOD services: ABC iview and Plus7 by age

ABC iview skews older while Plus7 is a little broader

A look at the demographic profile of the two most popular broadcaster services shows similarities and differences. ABC iview use is strongest amongst those aged 60+, while more than a third (37%) of those aged 14-17 use the service on at least a monthly basis.

At least monthly use of Plus7 is strongest amongst 14-17s and 25-34s; and lowest amongst 18-24s.



Q: Which of the following internet TV and movie services, if any, are you using/aware of to view professionally produced content, and how often? Figures may not sum to 100% due to rounding. Base: 14-17 (n=100), 18-24 (n=190), 25-34 (n=260), 35-44 (n=292), 45-59 (n=437), 60+ (n=404).

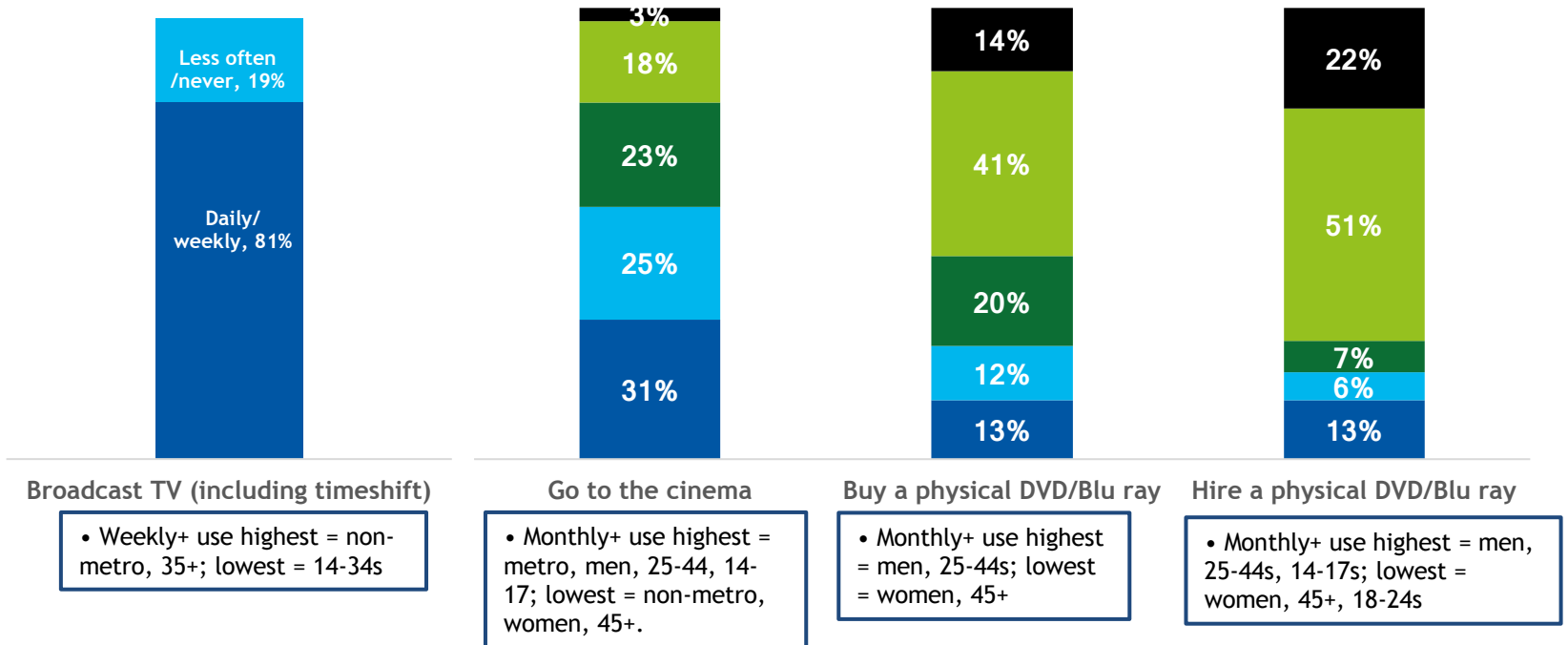
More traditional viewing platforms: Overall use

VOD users are still watching content via traditional platforms

More than 80% of VOD users watch broadcast TV each week (particularly those aged 35+).

A third go to the cinema at least monthly and more than half (57%) go at least every 2-3 months; while 1 in 4 purchase, and 1 in 5 hire a DVD/Blu-ray every 2-3 months (particularly males and those 25-44).

■ At least monthly ■ Every 2-3 months ■ 2-3 times a year ■ Not in the last 12 months ■ Never



Q. In the last 12 months, how often, if ever did you do each of the following. NB: Highest/lowest figures are based on those that skew most from the Total. Figures may not sum to 100% due to rounding. Base: All respondents (1,683).

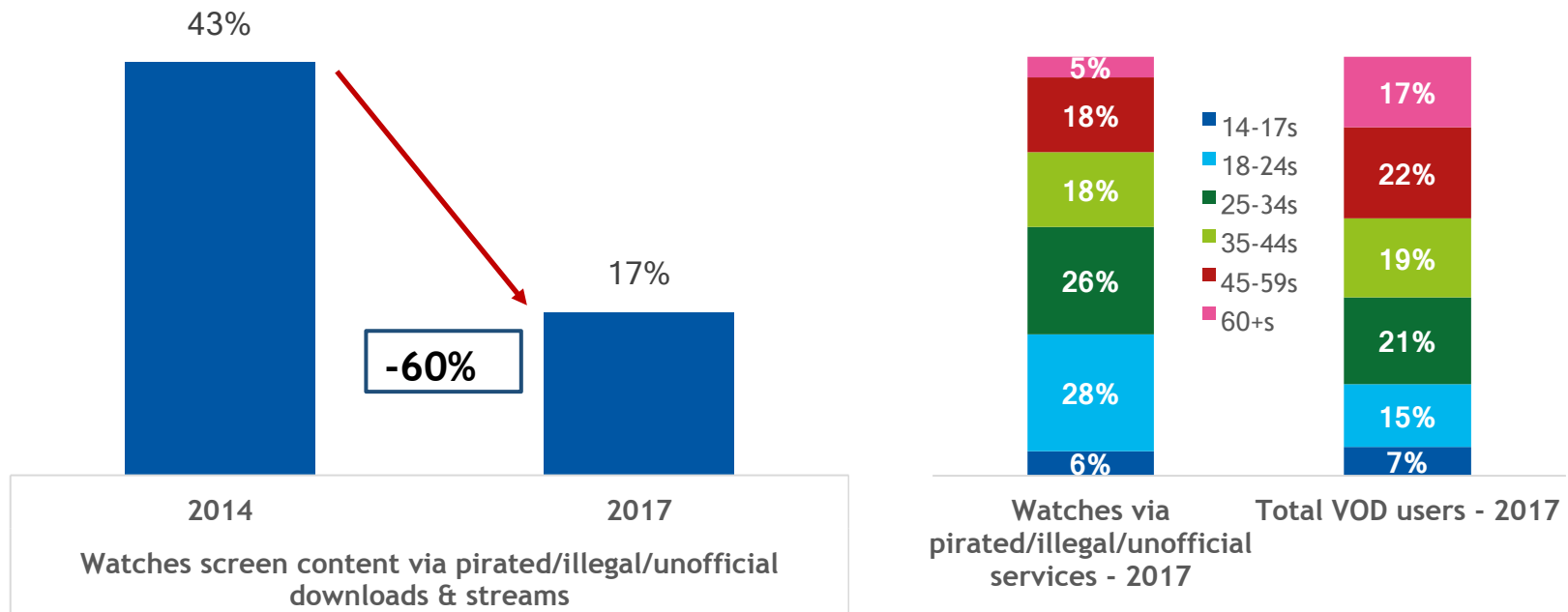
Have piracy levels changed since 2014?

Piracy down (significantly) but not yet out amongst Australian VOD users

Changes in the Australian VOD landscape since 2014 have had a positive effect on our tendency to download or stream illegal screen content.

Just 17% of VOD users indicated watching screen content via pirated/illegal services, down from 43% in 2014 - that's a 60% drop to less than 1 in 5!

A look at the age profile of illegal VOD users in 2017 confirms a skew towards 18-34s, however it should be noted that the small number of VOD users who still pirate are also watching via legal means, with 82% watching broadcast TV, more than half using SVOD and 4 out of 10 using other AVOD services.

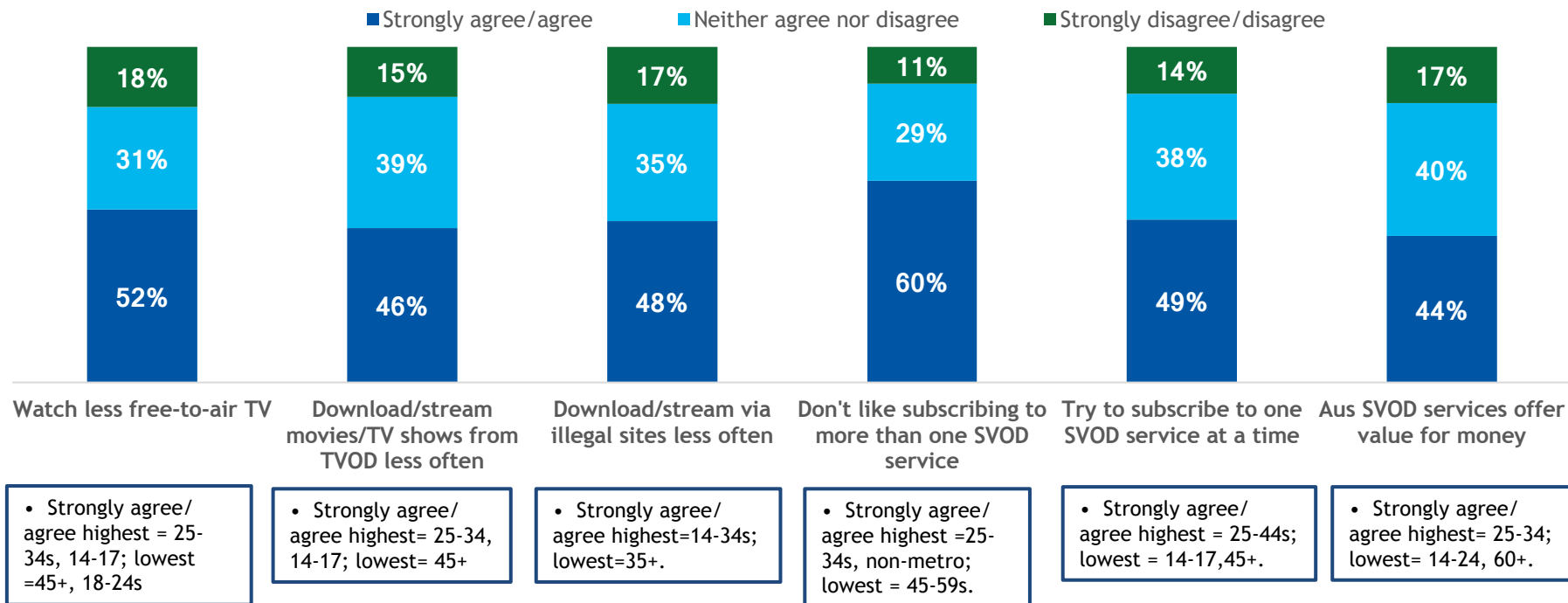


Q: In which of the following ways do you watch TV shows, movies, documentaries and other screen content: Pirated/illegal/unofficial downloads & streams (excl. YouTube). Figures may not sum to 100% due to rounding. Base: All respondents 2014 = (n= 1,593); 2017 (n=1,683).

Have SVOD services had an impact on viewing attitudes?

With SVOD services now used by 2 out of 3 viewers we were interested to gauge attitudes towards these services and whether the model is changing viewing behaviours.

Half of all SVOD users feel that they watch less free-to-air TV (52%) and download fewer programs from TVOD services (46%) than they used to. Encouragingly almost half (48%) also feel they download/stream via illegal sites less often - with those under 35 most likely to agree. While 60% don't like having to subscribe to more than one SVOD service to access content they are interested in, only 49% try to subscribe to one service at a time.



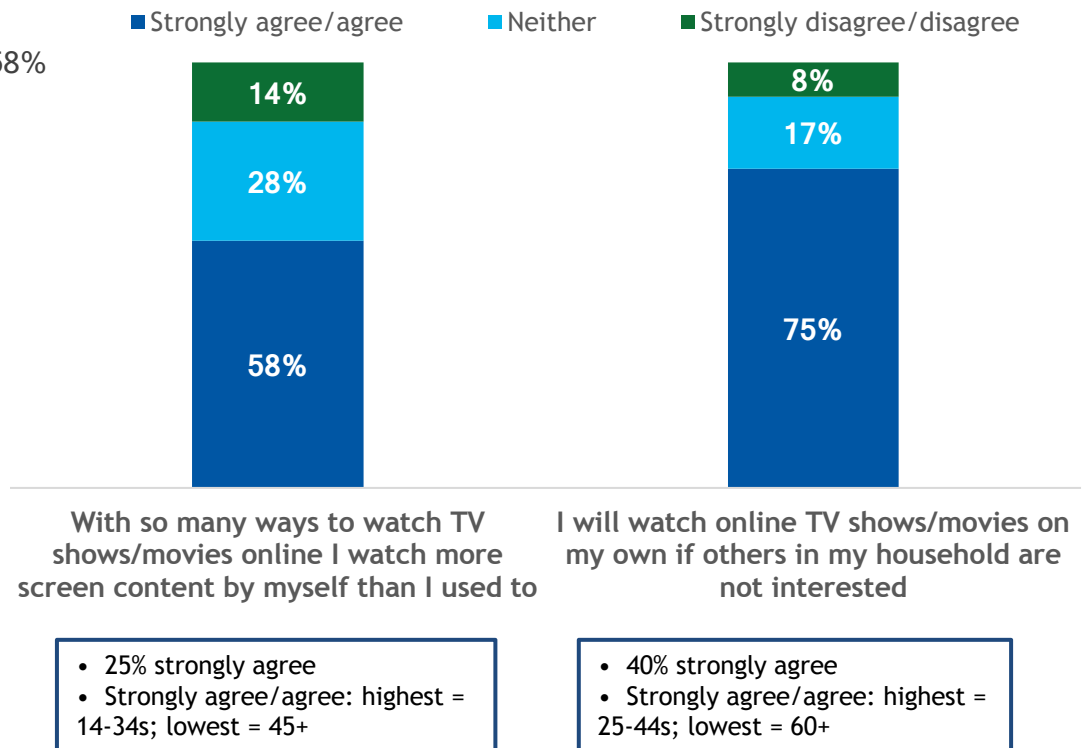
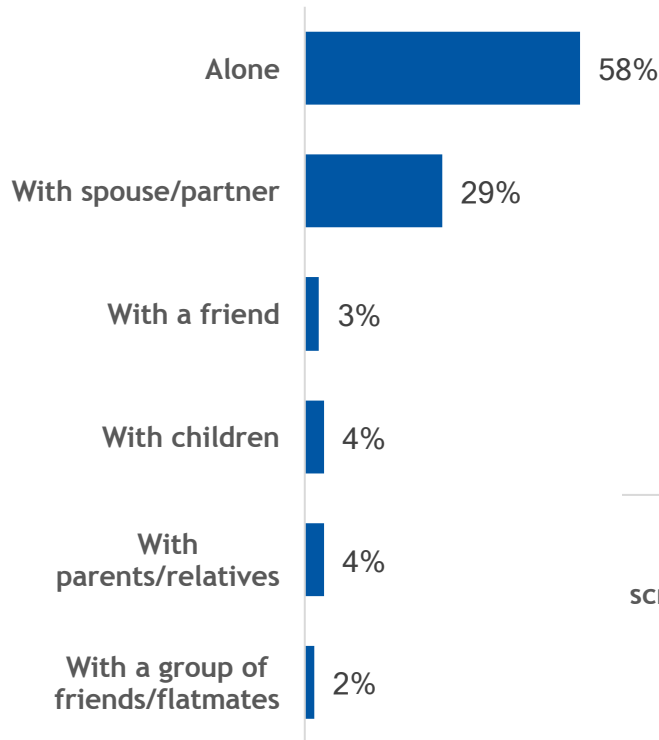
Q. Indicate how strongly you agree or disagree with these statements: I watch less FTA TV since subscribing to SVOD services; I download movies/TV shows to rent/own less often from TVOD since subscribing to SVOD services; I don't like having to subscribe to more than one SVOD service to access all I'm interested in; I try to subscribe to one SVOD service at a time; Australian SVOD services offer value for money, I download/stream movies/TV shows via illegal sites less often since subscribing to SVOD services. NB: Highest/lowest figures are based on those that skew most from the Total. Figures may not sum to 100% due to rounding. Base: SVOD users (n=874).

Do new ways to watch impact who we watch with?

Viewing companions: Solo viewing of online content is increasing

In 2014, 58% of respondents indicated they most commonly watched online movies and TV shows alone...

...In 2017, 58% of VOD users agreed that with so many ways to view online they're watching more screen content alone than they used to. The majority (75%) also agreed they would watch online content on their own if others in their household were not interested.



Q. Please indicate how strongly you agree or disagree with the following statements: With so many ways to watch TV and movies online I feel I watch more screen content by myself than I used to; I will watch online TV shows and movies on my own if others in my household are not interested. NB: Highest/lowest figures are based on those that skew most from the Total. Base: ALL respondents (n=1,683).

VOD platforms: SVOD & Broadcaster catch-up

Viewers of select Australian and foreign formats

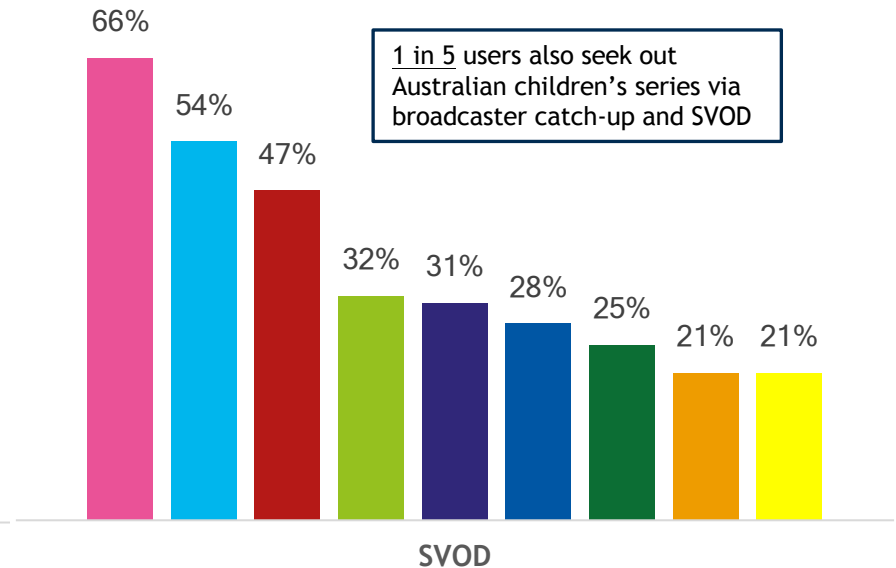
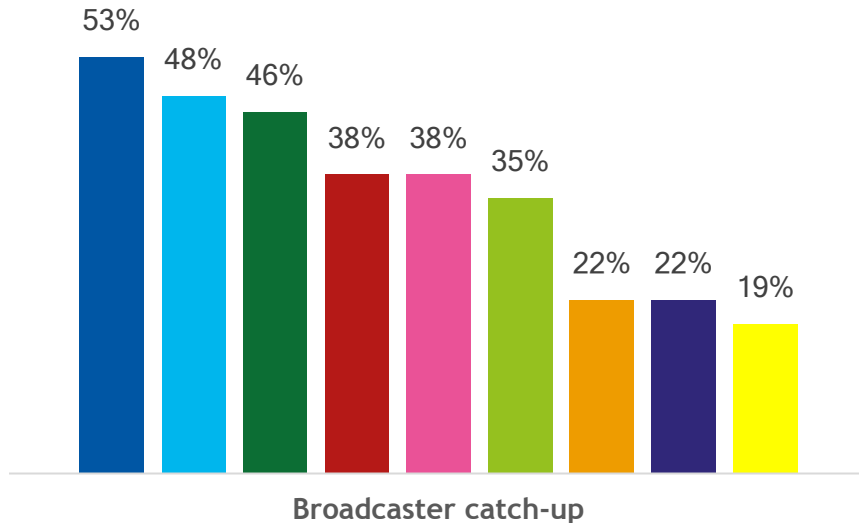
The most watched formats amongst VOD users on each platform are generally those highest in volume.

Broadcaster catch-up users

More than half (53%) watch Australian series (drama/comedy), slightly higher than for foreign series. Australian documentaries were stronger than foreign.

SVOD users

While foreign content dominates, almost half (47%) of users are already viewing Australian movies and 1 in 4 are viewing Australian series and documentaries via the platform. Audiences for local content on SVOD are expected to increase as more Australian content is made available to view on these platforms.



1 in 5 users also seek out Australian children's series via broadcaster catch-up and SVOD

- Aus series: highest = women, 25-44s, non-metro; lowest = men
- Aus movies: highest = 35-59s, metro; lowest = 18-34s, 60+, non-metro

- Aus series: highest = women, 14-24s, 45-59s; lowest = 35-44, 60+.
- Aus movies: highest = 25-59s, non-metro; lowest = 18-24s, 60+, metro

VOD platforms: TVOD & Other AVOD

Viewers of select Australian and foreign formats

TVOD users

Hollywood movies and foreign series (drama/comedy) are the most popular formats to watch via TVOD services.

However, 1 in 5 also seek out Australian movies, series (drama/comedy), documentaries and children's programs.



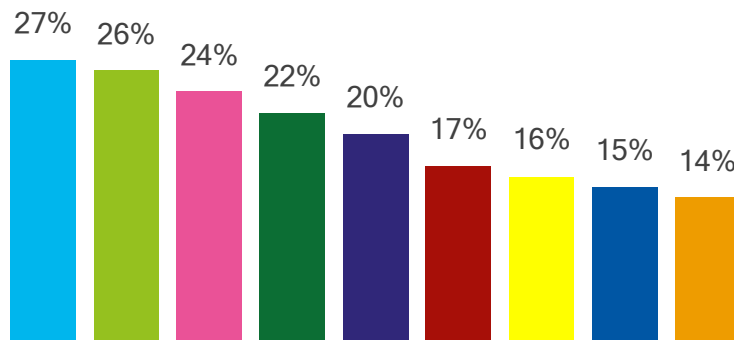
TVOD

- Aus series highest = 14-17s (low base), 25-34s; lowest = 35-44s, 60+, non-metro.
- Aus movies highest = women, 14-17s, 35-44s; lowest = 18-34, 45-60+

Other AVOD users

Availability of content and cut-through potential has seen foreign content dominate viewing via other AVOD platforms.

However, watching Australian content via AVOD is expected to grow as more productions are made for distribution via services such as YouTube and Facebook.



AVOD

- Aus series highest = 25-34s, 45-59s; lowest = 18-24, 60+, non-metro
- Aus movies highest = 35-44s, 18-24s; lowest = 14-17, 45+, non-metro

Traditional Platforms: Broadcast TV & Cinema

Appetite for Australian content on traditional platforms continues

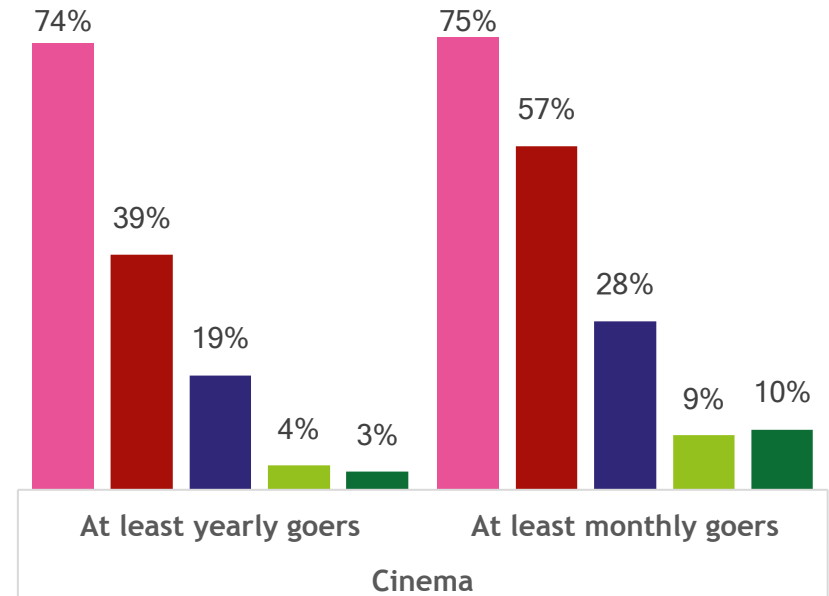
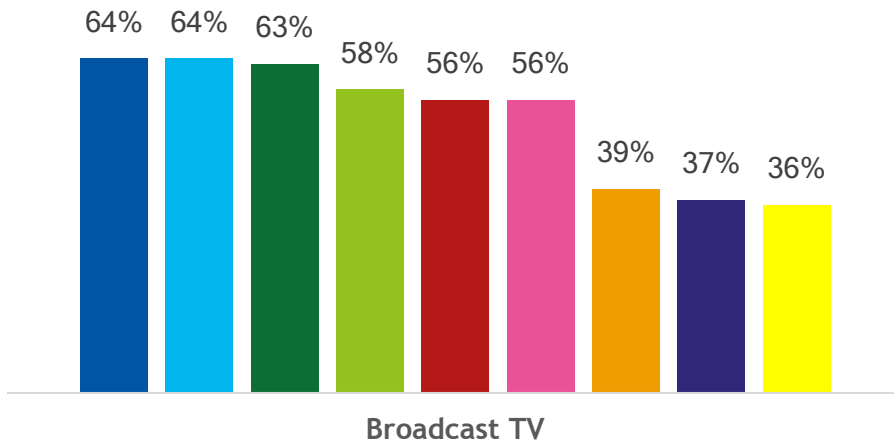
Broadcast TV viewers

Australian and foreign series (drama/comedy) and documentaries dominate viewing on broadcast TV. More than half (56%) also seek out Australian and foreign movies; while more than a third watch Australian children's series.

Cinema-goers

Whilst Hollywood movies are the most popular format to watch at the cinema, more than a third (39%) of VOD users that go to the cinema at least yearly and more than half (57%) that go at least monthly are seeking out Australian movies on the big screen.

- Aus series (drama + comedy)
- Aus doc's
- Aus movies
- Aus children's programs
- Foreign children's programs
- Foreign series (drama + comedy)
- Foreign doc's
- Hollywood movies
- Indie movies



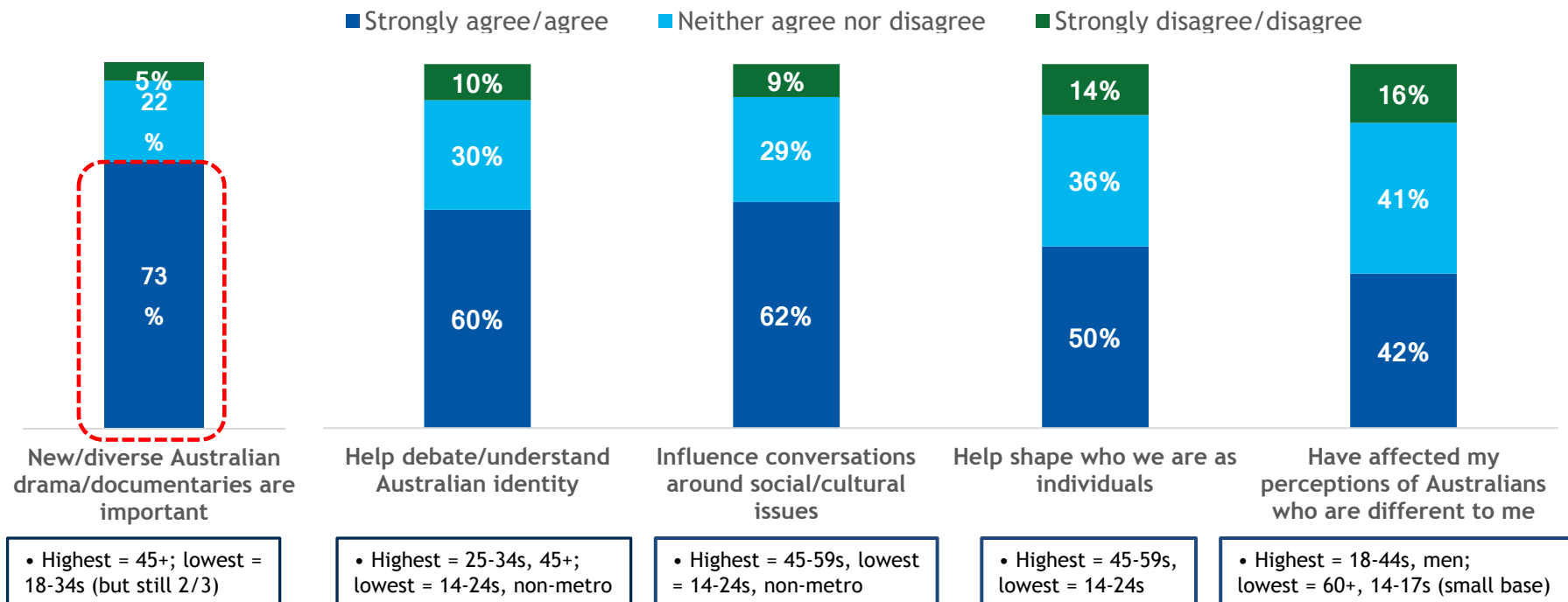
What are the attitudes towards Australia content?

Australian dramas and documentaries are valued

3 out of 4 VOD users who watch Australian content feel that new and diverse Australian drama and documentaries are important. Support is most likely to come from those aged over 45, however the result amongst those aged 18-34 is still 2 out of 3.

Interestingly, however, viewers of Australian content aged 18-44 are most likely to agree that Australian drama and documentaries have affected their perceptions of those who are different to them.

Very few respondents disagreed with statements about various impacts of Australian content.



Q. Please indicate how strongly you agree or disagree with the following statements: I think it's important to have new and diverse Australian dramas and documentaries; I feel Australian dramas and documentaries have really affected my perceptions of Australians who are a bit different to me; I think Australian dramas and documentaries help shape who we are as individuals; Australian dramas and documentaries influence conversations around social and cultural issues; Australian dramas and documentaries help us to debate and understand Australia's national identity. Base: Respondents who watch Australian content (n = 1,401).

Attitudes toward paying for Australian content

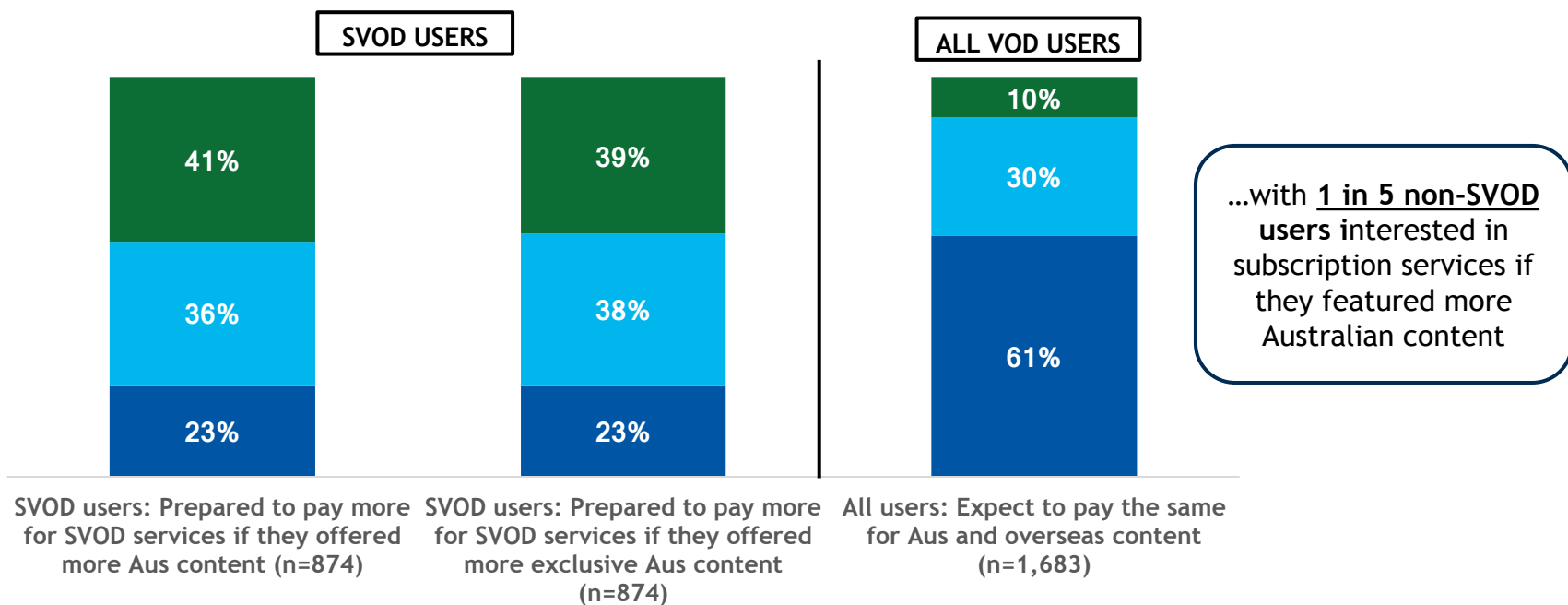
1 in 4 SVOD users would pay for more/exclusive Australian content

With only limited local content currently available on Australian SVOD services we were keen to gauge if there would be an appetite for more Australian programs on these services if it came at an additional cost.

While 60% of VOD users expect to pay the same for Australian and overseas content, around 1 in 4 SVOD users would be prepared to pay more for subscriptions if they offered more or exclusive Australian content.

But perhaps of most interest is the attitudes of non-SVOD users, which shows that 1 in 5 would be interested in subscription services if they featured more Australian content.

■ Strongly agree/agree ■ Neither agree nor disagree ■ Strongly disagree/disagree



...with **1 in 5 non-SVOD users** interested in subscription services if they featured more Australian content

Q. Indicate how strongly you agree or disagree with the following statements: I'd be prepared to pay more for my SVOD subscription if it had more Australian content to choose from; I'd be prepared to pay more for my SVOD subscription if it offered more exclusive Australian content; I would expect to pay the same for online access to Australian and overseas movies or TV shows. NB: Highest/lowest figures are based on those that skew most from the Total. Figures may not sum to 100% due to rounding. Non-SVOD users (n=809).



Profile: non-SVOD users vs SVOD users

Given the significant take-up of SVOD services in recent years we were interested to understand more about those who have yet to watch content via this platform.

In general, non-SVOD users are:

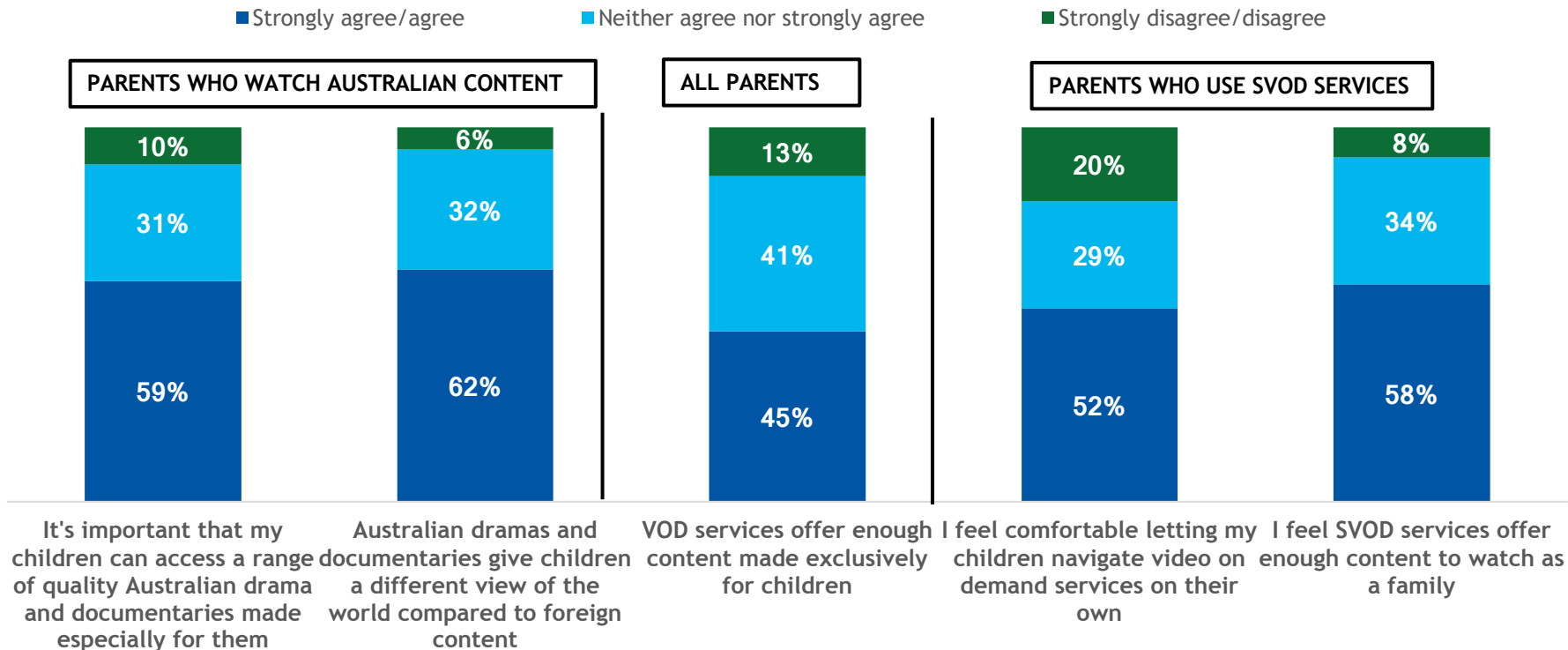
- More likely to be older and not have children still living in the household than SVOD users.
- More likely to watch traditional broadcast TV daily and less likely to use broadcaster catch-up services than SVOD users (but still at more than half).
- Less likely to make viewing choices based on online sources, more likely to consult professional reviews and program guides than SVOD users.
- More likely to watch VOD for convenience and because it's free than SVOD users and less likely to watch for the variety, to binge and to skip ads than SVOD users.
- More likely to feel that they already watch enough screen content online than SVOD users.
- More likely to think diverse Australian drama and documentaries are important than SVOD users (though there was just an 8% gap, with non-SVOD users at 79% and SVOD users are at 71%).
- More likely to value Australian children's content than SVOD users.

What are the attitudes of parents towards Australian children's programs and SVOD services?

We were interested to know how various parent groups felt about Australian children's content.

The majority of parents who watch Australian content value Australian programs made especially for children. Across all parents, 4 out of 10 agreed that VOD services offer enough of this type of content.

Amongst parents who use SVOD, half agreed that these services offer enough content to watch as a family and more than half are comfortable letting kids navigate them unsupervised.



Q. Please indicate how strongly you agree or disagree with the following statements. NB: Highest/lowest figures are based on those that skew most from the Total. Base: Parents who watch Australian content (n=327; 537); All parents (n=628), Parents who use SVOD services (n=247).



Profile: Parents vs non-parents

In general, parents are:

- Less likely to watch VOD for convenience, to skip ads, because it's free and for the variety, than non-parents.
- More likely to be prepared to pay more for SVOD services if they featured more exclusive Australian content, than non-parents.
- Less likely to think diverse Australian drama and documentaries are important than non-parents (though there was just an 6% gap, with parents at 70% and non-parents at 76%). But also more likely to feel these programs have affected perceptions of those that are different to them, than non-parents.
- More likely to use SVOD, spend fewer hours a week watching broadcast TV (though catch-up hours are comparable) and fewer hours using TVOD service, than non-parents.
- More likely to use Netflix, Facebook and YouTube at least monthly than non-parents.
- Less likely to watch Australian movies and drama/comedy series on iview, more likely to watch Australian content on Netflix (based on users of these services), than non-parents.

What are VOD users' all-time favourite Australian titles?

A mix of classic and contemporary titles feature amongst the most loved

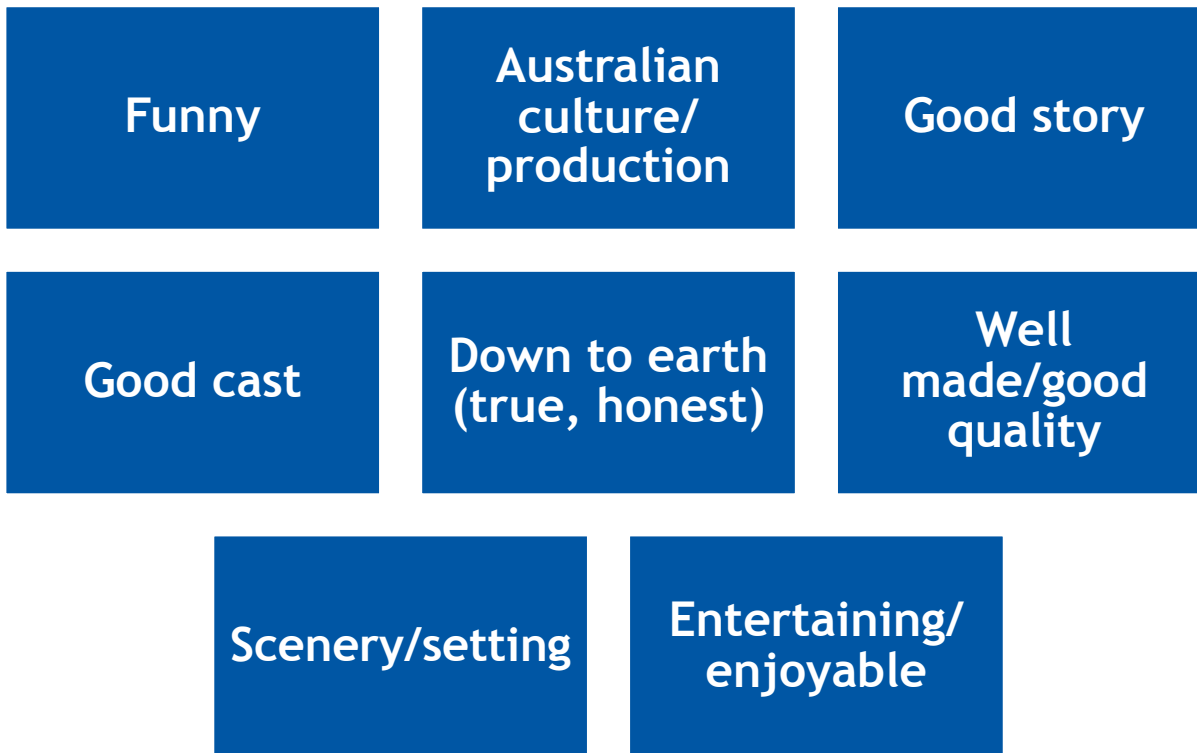
When asked to name **three** all-time favourite Australian titles of any genre or format, VOD users responded with around **400** individual titles.

The five most referenced productions were all feature films and TV dramas (not other formats such as reality or news) and almost all were universally loved by all ages and genders.

Why is it one of your favourites?	
<i>The Castle</i>	Iconic, classic, (political) satire, family life, Australian culture/ production
<i>Mad Max</i>	Iconic, classic, ahead of it's time, exciting, good cinematography, action/adventure, good movie
<i>Home and Away</i>	Family friendly, easy to watch, good drama, long running
<i>Crocodile Dundee</i>	Iconic, good comedy, childhood favourite/memories, funny, Australian culture/production
<i>Offspring</i>	Different/quirky/original, relatable, thought provoking/ emotive, funny

What are the main reasons why titles are favourites?

Humour, representations of Australian culture and the quality of the story and cast were just some of the reasons why titles were considered all-time Australian favourites.



VOD users' Australian favourites: Feature films

The volume and variety of the feature films listed by VOD users as all-time Australian favourites suggests Australian cinema still resonates with audiences.

VOD users' favourite Australian feature films

<i>The Castle</i>	<i>The Sapphires</i>	<i>Mad Max</i>	<i>Lion</i>
<i>Picnic at Hanging Rock</i>	<i>Breaker Morant</i>	<i>The Piano</i>	<i>Red Dog</i>
<i>Crocodile Dundee</i>	<i>The Dressmaker</i>	<i>The Dish</i>	<i>Gallipoli</i>
<i>The Man From Snowy River</i>	<i>The Proposition</i>	<i>The Wog Boy</i>	<i>Shame</i>
<i>Priscilla Queen of the Desert</i>	<i>Beneath Hill 60</i>	<i>Paper Planes</i>	<i>Proof</i>
<i>The Man Who Sued God</i>	<i>Young Einstein</i>	<i>Hacksaw Ridge</i>	<i>Cosi</i>
<i>The Water Diviner</i>	<i>Travelling North</i>	<i>Jindabyne</i>	<i>Kenny</i>
<i>Strictly Ballroom</i>	<i>Odd Angry Shot</i>	<i>Storm Boy</i>	<i>Malcolm</i>
<i>My Brilliant Career</i>	<i>Beautiful Kate</i>	<i>Ned Kelly</i>	<i>Jedda</i>
<i>Sunday Too Far Away</i>	<i>Charlie & Boots</i>	<i>Dead Calm</i>	<i>Shine</i>
<i>Looking for Alibrandi</i>	<i>Moulin Rouge</i>	<i>The Babadook</i>	<i>Napoleon</i>
<i>Rabbit Proof Fence</i>	<i>Ten Canoes</i>	<i>Two Hands</i>	<i>Australia</i>
<i>The Great Gatsby</i>	<i>The Loved Ones</i>	<i>52 Tuesdays</i>	<i>Kokoda</i>
<i>Muriel's Wedding</i>	<i>Japanese Story</i>	<i>Romper Stomper</i>	<i>Somersault</i>
<i>Dating the Enemy</i>	<i>Samson & Delilah</i>	<i>The Nugget</i>	<i>Soft Fruit</i>
<i>The Boys are Back</i>	<i>Wake in Fright</i>	<i>Tomorrow, when the War Began</i>	

VOD users' Australian favourites: TV drama

Australian TV drama was also well represented, with audiences showing appreciation for a variety of titles past and present.

VOD users' favourite all-time Australian TV dramas

<i>Miss Fisher's Murder Mysteries</i>	<i>Please Like Me</i>	<i>Offspring</i>	<i>Rake</i>
<i>A Place to Call Home</i>	<i>Love My Way</i>	<i>Love Child</i>	<i>Glitch</i>
<i>INXS: Never Tear Us Apart</i>	<i>Blue Murder</i>	<i>Neighbours</i>	<i>Wilfred</i>
<i>The Secret Daughter</i>	<i>The Wrong Girl</i>	<i>Doctor Doctor</i>	<i>Rosehaven</i>
<i>The Doctor Blake Mysteries</i>	<i>House of Bond</i>	<i>Janet King</i>	<i>Stingers</i>
<i>McLeod's Daughters</i>	<i>Top of the Lake</i>	<i>The Circuit</i>	<i>Tangle</i>
<i>The Kettering Incident</i>	<i>Blue Heelers</i>	<i>Redfern Now</i>	<i>Rush</i>
<i>Packed to the Rafters</i>	<i>The Shiralee</i>	<i>Anzac Girls</i>	<i>Prisoner</i>
<i>A Country Practice</i>	<i>The Sullivans</i>	<i>Water Rats</i>	<i>Spirited</i>
<i>The Flying Doctors</i>	<i>Secrets & Lies</i>	<i>Carson's Law</i>	<i>Underbelly</i>
<i>Upper Middle Bogan</i>	<i>Catching Milat</i>	<i>Beautiful Lie</i>	<i>Bodyline</i>
<i>Here Come the Habibs</i>	<i>Brides of Christ</i>	<i>Mother & Son</i>	<i>The Slap</i>
<i>Winners & Losers</i>	<i>House Husbands</i>	<i>Janet King</i>	<i>The Code</i>
<i>All the Rivers Run</i>	<i>Day of the Roses</i>	<i>Home & Away</i>	<i>Halifax FP</i>

VOD users' Australian favourites: Children's programs

Many children's programs also featured amongst the all-time favourite Australian titles, a testament to the quality of the programs made especially for children in Australia and an indication of the long lasting impact they can have.

VOD users' favourite all-time Australian children's programs

<i>Round the Twist</i>	<i>Ocean Girl</i>	<i>Skippy</i>
<i>Nowhere Boys</i>	<i>Bananas in Pyjamas</i>	<i>Playschool</i>
<i>Dance Academy</i>	<i>Bushwacked!</i>	<i>Parallax</i>
<i>H2O: Just Add Water</i>	<i>Blinky Bill</i>	<i>Mr Squiggle</i>
<i>The Henderson Kids</i>	<i>The Wiggles</i>	<i>Mortified</i>
<i>Fat Cat & Friends</i>	<i>Spellbinder</i>	<i>Old Tom</i>

VOD users' Australian favourites: Documentary & other

Many documentaries also featured amongst VOD users' all-time Australian favourites, along with several reality, light entertainment and news/current affairs programs.

VOD users' favourite all-time Australian documentary & other formats

<i>Go Back to Where You Came From</i>	<i>The Checkout</i>	<i>Landline</i>
<i>Who Do You Think You Are?</i>	<i>The Bachelor</i>	<i>Rage</i>
<i>Filthy Rich & Homeless</i>	<i>Good News Week</i>	<i>Catalyst</i>
<i>The Chaser's War on Everything</i>	<i>Struggle Street</i>	<i>Roy & HG</i>
<i>Grand Designs Australia</i>	<i>60 Minutes</i>	<i>The Panel</i>
<i>Have you Been Paying Attention?</i>	<i>Masterchef</i>	<i>Rove Live</i>
<i>Married at Fight Sight</i>	<i>It's a Knockout</i>	<i>Survivor</i>
<i>The Force, Behind the Line</i>	<i>Little Big Shots</i>	<i>The Block</i>
<i>River Cottage Australia</i>	<i>Gogglebox</i>	<i>Gruen</i>
<i>Look Me in the Eye</i>	<i>My Kitchen Rules</i>	<i>X Factor</i>
<i>Ready Steady Cook</i>	<i>The Project</i>	<i>Insight</i>
<i>So You Think You Can Dance</i>	<i>Australian Story</i>	<i>Q&A</i>
<i>Australian Idol</i>	<i>Media Watch</i>	<i>The Voice</i>
<i>Selling Houses Australia</i>	<i>Gourmet Farmer</i>	<i>Living Black</i>
<i>Small Business Secrets</i>	<i>Bondi Vet</i>	<i>News</i>

Online & On Demand: Background & Methodology

2nd time running...

Screen Australia commissioned Nielsen to conduct the quantitative research that forms this report. It re-asks several questions from the 2014 *Online and on demand* study, and also asks new questions, reflecting changes in the Video On Demand landscape

Online survey

The quantitative methodology used includes an online survey deployed via email surveying 1,683 Australians who watch professionally produced screen content online. The survey was in field 29/08/17 - 07/09/17.



Sample representativeness

The sample was achieved by screening for respondents who watch professionally produced screen content online. The demographics fell out naturally - no hard quotas on age, gender, location. Final data was weighted by the estimated distribution of the target population by age, gender, and location based on data from the Australian Bureau of Statistics (ABS). The ABS estimates there are 20.1 million Australians 14+ and the data for this report represents approximately 12.3 million Australians 14+ who watch professionally produced screen content online.

Please note: The data is not weighted towards the total Australian online population 14+ (18.1M) as Nielsen Digital Monthly Ratings currently does not offer location splits.

Online & On Demand: Sample

The survey samples have been weighted towards the Australian population aged 14+

Sample	Australian population 14+ (n=20,138m)	VOD survey 2017 (n = 1,683)	VOD survey 2014 (n = 1,593)
Male	49%	52%	52%
Female	51%	48%	48%
14-17s	6%	7%	5%
18-24s	11%	15%	18%
25-34s	18%	21%	22%
35-44s	16%	19%	17%
45-59s	23%	22%	20%
60+	25%	17%	17%
Metro	70%	72%	66%
Non-metro	30%	28%	34%

Please note: The data is weighted towards the Australian population 14+ (20,138m) as Nielsen Digital Monthly Ratings currently does not offer location splits



Online & On Demand 2017: Other Key terms

- **Professionally produced screen content**
Not trailers or user generated content (videos self recorded by users and bloggers, celebrities)
- **Broadcast TV**
Free-to-air broadcasters, Foxtel (cable/satellite)
- **Time-shift**
TV programs recorded through a PVR and played back within 28 days of broadcast.
- **Services not officially available in Australia**
Netflix (US), Hulu, Amazon Prime (US), BBC iPlayer, LoveFilm Instant, ITV Player
- **Pirated/illegal/unofficial downloads and stream**
Screen content downloaded or streamed from pirated/unofficial sources such as Pirate Bay, BitTorrent, Usenet (excludes YouTube)
- **Social media platforms**
Facebook, Google+, Instagram, LinkedIn, Pinterest, Reddit, Snapchat, Tumblr, Twitter, Whatsapp, YouTube, Other

VOD viewers describe their Australian favourites

Priscilla, Queen of the Desert

“So many things are so amazing about this movie ... most importantly it helped to bring more acceptance of the LGBTQIA community” ... “Still makes me feel good about other people being so ... other”

Doctor Doctor

“This is a brilliantly made series that reflects issues in a country town ... and as a country boy I see a lot of what I know about life in a small town displayed”

Crocodile Dundee

“Dundee was the epitome of the tough outback Aussie and he won the hearts of the whole world ... and began the opening up of our country's modern independent spirit”

Neighbours

“I like the suburban Melbourne feel to it. It's what I can relate to”

Ten Canoes

“A movie that involves our original occupants and creates discussion about their place in modern Australia”

Living Black

“Explains how we know nothing about day to day Indigenous lives and struggles”

The Kettering Incident

“Top rate sci-fi, with the atmosphere of Tasmanian rainforest” ... “different to the usual TV series, set in iconic locations of Tasmania”

Last Cab to Darwin

“I loved how this movie portrayed the dying wishes of the average hard-working Australian trying to find peace ... it brought a sense of reality ... and it connected with a range of audiences”

Russell Coight's All Aussie Adventures

“Russell Coight is just so fabulously inept, you can't help but find his accidentally pernicious character endearing ... He even inspired us to have our own 'All Aussie Adventure', driving to the NT, with his opening soundtrack for company!”

Rabbit-Proof Fence

“I like learning more about the Aboriginal cultures that were or still are part of our country. More of these stories need to be told and appreciated.”

Secret Life of Us

“Lots of local talent on show and loved that it was filmed around St Kilda”