

# Australian content in SVOD catalogs: availability and discoverability

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## About the authors

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## Introduction

Subscription video-on-demand (SVOD) portals are a new and disruptive category of entertainment service. The two leading SVOD portals in Australia are Netflix and Stan.<sup>1</sup> Netflix, which officially entered the Australian market in 2015, is now present in an estimated 9.8 million Australian households. Stan, Australia's first local SVOD, reaches an estimated 2 million Australian households.<sup>2</sup>

This report examines the **availability of Australian film and television content** on Netflix and Stan. It builds on findings from our 2017 pilot report, which we produced for the Department of Communications' Australian Screen and Children's Content Review.<sup>3</sup> Using the same method, we studied the Netflix Australia and Stan catalogs in August 2018 to see how they had changed twelve months later. This report provides an overview of our findings. It also offers suggestions for interpreting this data in relation to larger changes in Australian and global media markets.

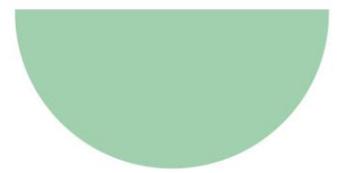
## Key findings

- As of 22 August 2018, the Australian Netflix catalog features 82 Australian titles. This equates to **1.6%** of the catalog – a small decrease from last year, caused by the expansion of the overall catalog.
- The Stan catalog features 172 Australian titles, which amount to **11.1%** of the catalog. This figure is up slightly from last year.
- Much of the Australian television content available on both services has been licensed from the ABC. Almost 60% of Netflix Australia's local television content offering is ABC content.
- Netflix is increasingly important for the international distribution of Australian content. As was the case last year, there is still more Australian content in the Netflix US catalog than there is in the Netflix Australia catalog (this is due to rights issues).
- Netflix and Stan are both investing in Australian production. Stan has produced four Australian original series, six stand-up comedy specials, and an original feature. Netflix uses a complex spectrum of production strategies: it released its first local stand-up special in June 2018, has several Australian original television series currently in production, has invested in numerous co-productions, and it acquires local series and films for exclusive international distribution.

<sup>1</sup> Our study refers to the Netflix Australia catalog (the locally available catalog, geo-restricted for users with an Australian IP address). We have not included Amazon Prime Video in the study due to its low take-up in the Australian market. Note that Foxtel and Foxtel Now are also not included in this study, as they occupy a different market and regulatory category: Foxtel is subject to local content protection measures via the 1992 Broadcasting Services Act, whereas Netflix and Stan are not regulated for local content.

<sup>2</sup> Roy Morgan, "Netflix set to surge beyond 10 million users", press release, 3 August 2018.

<sup>3</sup> Ramon Lobato and Alexa Scarlata, "Australian content in SVOD catalogs: availability and discoverability," submission to the Australian and Children's Screen Content Review, September 2017, <http://apo.org.au/node/134926>



## Background: SVOD catalog research

SVOD catalogs are composed of a finite number of titles, including TV series, movies, and documentaries. By studying catalogs, researchers can better understand the nature of each SVOD service and the kinds of content it makes available to viewers.

In recent years, empirical studies of SVOD catalogs have been conducted in several countries.<sup>4</sup> These studies measure a range of variables, including the amount of imported vs. local content in each catalog, the amount of new-release vs. back-catalog content in each catalog, or the amount of original vs. licensed content in each catalog (and/or across multiple catalogs). Such data is useful to policymakers who wish to understand the dynamics of online audiovisual distribution in each country, or who may be considering new regulatory interventions into the digital media ecology.

For example, the European Parliament has recently approved a minimum 30% European content quota for all major video-on-demand streaming services operating in the EU. Meanwhile, Screen Producers Australia and APRA AMCOS are calling for new regulation to be introduced in Australia, including an expenditure requirement for video-on-demand services and a playlist quota requirement for music streaming services.<sup>5</sup> In the context of this evolving policy debate, catalog research can provide useful baseline information.

This report focuses on one specific issue: the **availability of Australian content within the Australian Netflix and Stan catalogs**. Our aim with this research is to inform policy discussions about local content in the digital environment – an issue that has figured prominently in recent government inquiries, including the *Australian Children's and Screen Content Review* (2017) and the *Senate Inquiry into Australian Content on Broadcast, Radio and Streaming Services* (2018).

Our pilot research in 2017 followed a method developed by researchers at the European Audiovisual Observatory.<sup>6</sup> Using a variation on this method, we manually inspected the Netflix and Stan catalogs to create a database of Australian films, TV series and documentaries available on each platform, using search terms and content categories to find relevant titles. We also consulted third-party indexing sites to determine the overall size of each catalog.<sup>7</sup> This method proved an effective way to measure the amount of easily discoverable Australian content available on each service, in terms of the number of titles and the proportion of the overall catalog. Having used this method successfully in 2017, we repeated the process a year later, on 22 August 2018, to see how things had changed. We also invited each company to check our figures and respond to the findings. Only Netflix responded to confirm our figures.

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<sup>4</sup> See Gilles Fontaine and Christian Grece, "Origin of films and TV content in VOD catalogues in the EU and visibility of films on VOD services", Strasbourg: European Audiovisual Observatory (2016); Christian Grece and Marta Jiménez Pumares, "The origin of films in VOD catalogues", Strasbourg: European Audiovisual Observatory (2017); Veed Analytics, "Veed snapshot – Old wine in new bottles: originals" (2016); Luis Aguiar and Joel Waldfogel, "Netflix: Global hegemon or facilitator of frictionless digital trade?", *Journal of Cultural Economics* 42.3 (2018): 419-445.

<sup>5</sup> Screen Producers Australia and APRA AMCOS, "Joint SPA-APRA AMCOS submission to the Senate Standing Committees on Environment and Communications Inquiry into Australian Content on Broadcast, Radio and Streaming Services", 11 July 2018.

<sup>6</sup> Fontaine and Grece, "Origin of films and TV content in VOD catalogues in the EU and visibility of films on VOD services".

<sup>7</sup> The number of titles in the Australia Netflix catalog was sourced from Unogs.com (Unofficial Netflix Online Global Search). The number of titles in the Stan catalog was based on data from JustWatch.com.

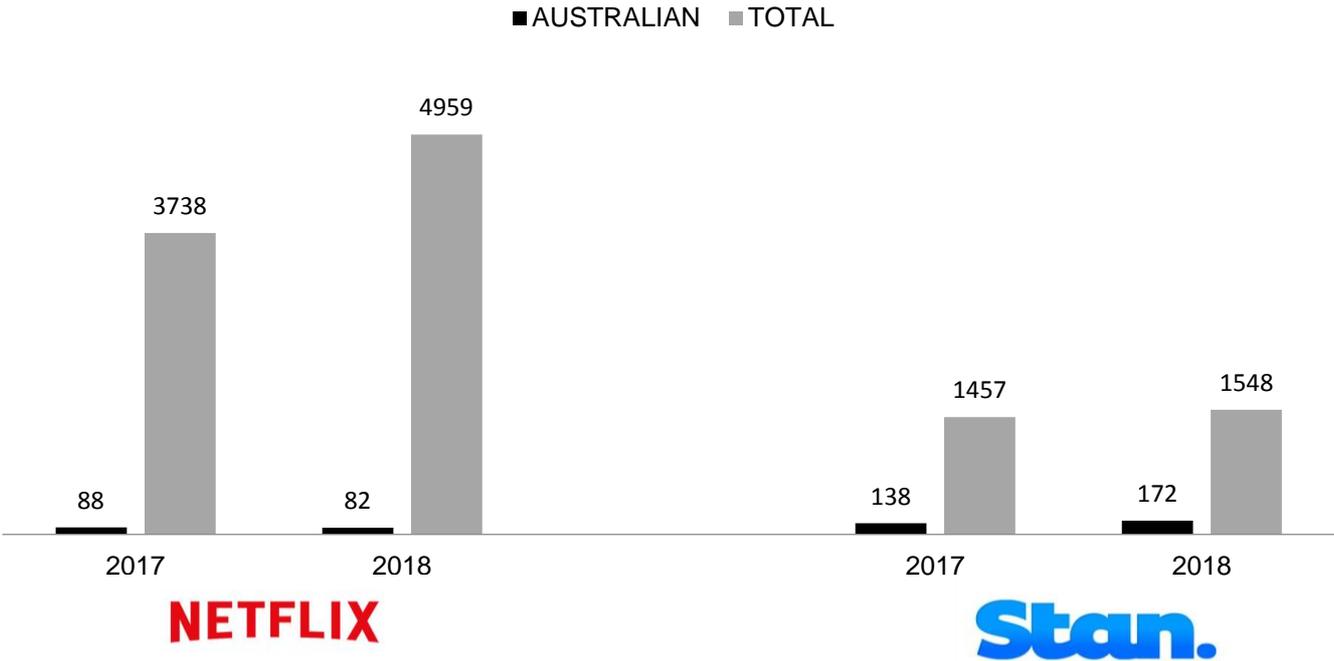


It is important to note the **limitations** of this method. First, catalog research cannot tell us about how SVOD services are used, experienced, or algorithmically personalized; it can only investigate the titles in the catalog. Second, catalogs are constantly changing as new content comes online and older content expires, which means our study provides a static snapshot of an evolving infrastructure. Third, Australian content may be present in the catalog without being tagged as such in metadata, so it is possible that some titles have been missed in our analysis.<sup>8</sup> Finally, the definition of “Australian” content is always open to dispute. As explained on page 11, the Australian-ness of content might be based on creative input, funding source, casting, and a range of other factors. Our analysis largely follows the categorization used by the portals themselves, which we found to be in line with the definitions of Australian content used in Australian screen policy – albeit with a few exceptions (see page 11).

## How much Australian content is available on Netflix and Stan?

Our analysis of the Netflix and Stan catalogs found that the level of Australian content on both services is modest compared with domestic broadcast quotas. Stan’s catalog comprises **11.1% Australian content**, while the local Netflix catalog comprises **1.6% Australian content**.

Fig. 1: Titles in each catalog, 2017-2018



<sup>8</sup> To control for this, we manually checked a selection of categories in each catalog for untagged Australian content and cross-checked with the 2017 local content database. A small number of additional titles were discovered this way, and were included in the results.



Drilling down further into these results, we observed that the Netflix Australia catalog contains the following number of Australian titles:

- 27 Australian movies
- 24 Australian documentaries
- 50 Australian TV series (including one Netflix original, *The White Rabbit Project*)
- 1 Australian stand-up special, Hannah Gadsby's *Nanette* (also a Netflix original)

After adjusting for double counting/categorisation, the total number of discrete Australian titles available was 82. This amounts to **1.6% of the overall Australian Netflix catalog** of 4,959 titles.

Local content levels naturally fluctuate as license terms expire and come online. For example, studies of **Netflix's** Australian catalog conducted shortly after the local launch in 2015 found that approximately 34 of the 1,047 films available on Netflix in Australia and 30 of the 317 television series available were Australian content, or at least categorised as such by Netflix. At the time, this amounted to 4% of the catalog.<sup>9</sup> Twelve months ago, when we completed our first study, the level of Australian content had fallen to 2-2.5% of the Netflix catalog, though the catalog's overall size had increased by 25%.<sup>10</sup> This report observes a further relative fall in Netflix's local content level, to 1.6%. The main reason behind this apparent decrease **is growth in the overall catalog size**. When we look at the number of titles, the amount of Australian content available in Netflix's local catalog has remained more or less steady since last year – but this content now sits within a much larger pool of titles, including a rapidly growing portfolio of around 700 original productions.<sup>11</sup>

In comparison, the Stan catalog offers the following amounts of self-described Australian content:

- 63 Australian movies (including 1 Stan original feature)
- 59 Australian TV series (including 4 Stan original titles and a series of 6 comedy specials)
- 13 Australian documentaries
- 46 Australian titles in an “ABC Kids” category

This equates to 172 discrete titles – 90 more than on Netflix Australia. In relation to Stan's current overall catalog of 1,548 discrete titles, Australian content therefore makes up **11.1%** of the total content available.

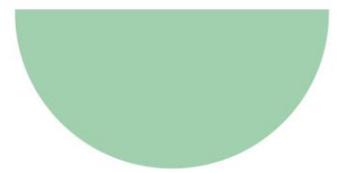
Compared to last year, Stan's overall catalog size has remained steady (1,457 titles in August 2017 to 1,548 in August 2018) while the proportion of local content within the overall catalog has increased slightly.

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<sup>9</sup> Alexa Scarlata, “Australian streaming services and the relationship between viewing data and local television drama production”, paper presented at the Australia Screen Production Education and Research Association conference, Flinders University, 15-17 June 2015, <http://www.aspera.org.au/research/australian-streaming-services-and-the-relationship-between-viewing-data-and-local-television-drama-production/>

<sup>10</sup> Lobato and Scarlata, “Australian content in SVOD catalogs: availability and discoverability”, p. 5.

<sup>11</sup> Karl Quinn, “Netflix originals at 700 globally, but where are the Australian shows?”, *The Sydney Morning Herald*, 1 March 2018.



## What kind of Australian content is being produced and licensed for each service?

The Netflix Australia and Stan catalogs contain a mix of original productions and licensed content. While the number of Australian originals on both services is growing, licensed content still accounts for most of the available Australian titles. Each catalog has its own characteristics, as discussed below.

### i. Netflix

As of 22 August 2018, the Netflix Australia catalog includes a mix of Netflix-branded Australian **originals** (*Hannah Gadsby: Nanette*, *White Rabbit Project*) and **co-productions** (including *Glitch* seasons 2-3, *Beat Bugs*, *Bottersnikes and Gumbles*, and *Mako Mermaids: An H2O Adventure*). While the number of Netflix-produced titles available in the Australian catalog is still relatively low, due to coproduction partners having initial exclusivity, there is a significantly larger number of Australian titles available in international Netflix catalogs (see page 9). Several Netflix-financed Australian originals are also currently in production (see page 7).

Of the **licensed Australian television** titles available in the local Netflix catalog, the majority are drama, documentaries, and kids programming, with some comedy also available. Several reality series (*Zumbo's Just Desserts*, *Cheapest Weddings* and *Towies*) have also been added in the last twelve months. Apart from the classic children's series *Round the Twist* (1989), most Australian television content available in the Australian Netflix catalog was produced after 2010.

Almost 60% of the licensed local television content on Netflix comes from the ABC (that is, the content was initially commissioned and distributed by the ABC and its multichannels). This reflects the importance of the ABC as a supplier within the overall SVOD ecosystem. A number of ABC titles, including *Rake* and *Janet King*, are also available on Stan, suggesting that the ABC is licensing some content on a nonexclusive basis.

The proportion of local television titles licensed by Netflix from the Australian commercial free-to-air networks (Seven, Nine, Ten) was much lower at 18%. This is due in part to the reluctance of the free-to-air networks to licence content to a perceived competitor. Hence, the level of Australian content on Netflix partly reflects what content rights are available in the market – a factor beyond the control of any individual buyer.

The **licensed Australian movies** in the Netflix catalog include a mix of mainstream and independent titles, such as *Son of a Gun*, *The Sapphires*, and *The Reef*. Since August 2017, high-profile movies *Rogue* and *The Babadook* have expired, while classics like *Mad Max* and *Muriel's Wedding* have been added. Interestingly, Baz Luhrmann's *Australia* is available but is not categorised by Netflix as an Australian film (though we have defined it as such).



## ii. Stan

Stan has also increased its original **production** in the last twelve months. As well as Stan's first suite of original titles – Australian comedies *No Activity* and *The Other Guy*, and a spin-off *Wolf Creek* series – Stan released their *Romper Stomper* reboot series in January 2018, and distributed their first feature film, *The Second*, as a near-simultaneous theatrical and streaming release in July 2018. Stan has also produced a second season of *Plonk* and contributed to the Channel 4/Amazon Video co-production *Philip K Dick's Electric Dreams*, promoted on the platform as a Stan original series.

As is the case with Netflix, much of the **Australian TV** content on Stan comes from the ABC (37%) or from Stan's co-owner (potentially soon-to-be sole owner) Nine (30%), which continues to supply shows such as *House Husbands*, *Love Child*, and the *Underbelly* and *Hamish & Andy* franchises. There is a significant focus here on comedy and variety entertainment.

Other Australian TV content available through Stan includes titles initially screened on Ten (*Hamish & Andy* titles), SBS (*The Great Australian Race Riot*), and Foxtel (*Banished*).

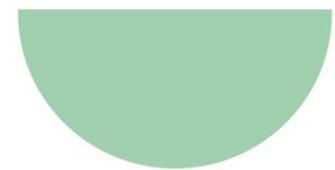
The **Australian films** available on Stan will be more recognisable to Australian audiences than those available on Netflix. Local classics such as *The Castle*, *The Adventures of Priscilla, Queen of the Desert*, and *Romper Stomper* all appear in the catalog. Compared to Netflix, Stan features fewer local documentaries.

## Upcoming titles

Both Netflix and Stan have made considerable production commitments in Australia over the last 12 months. Each service has a number of original titles in production that are not yet available in the catalog, and therefore not captured in our data.

**Netflix** originals/co-productions currently in production here in Australia include *Motown Magic*, *Pine Gap*, *Tidelands*, an untitled Chris Lilley project, and live stand-up comedy performances by Joel Creasey and Nazeem Hussein. **Stan** has several originals in production that are not yet available on the platform, including the new drama series *Bloom* and *The Gloaming*. In addition, Stan's recently announced partnership with Screen Queensland (the Screen Queensland and Stan Premium Drama Development Fund 2018) is expected to produce up to four new drama series.

We expect that when we repeat this study next year the number of Australian originals available on both services will be higher.



## Contextualising local content performance

To understand the significance of the data presented here, it is important to consider how SVOD fits within the wider audiovisual ecology. Much also depends on how we classify services like Stan or Netflix, and what we compare them to.

### i. Cross-market comparisons

For example, when compared to Australian free-to-air commercial television – where a legislated 55% minimum quota applies for Australian and NZ content during prime time – the local content performance of SVOD services seems very low.

When compared to other indicators, however – such as Australian movies’ share of the local box office (historically around 4% per year) or the amount of Australian content screened on some pay-TV channels – the figures are more in line with historical averages.

*Table 1: Australian content share within national film and television markets*

	<b>AU share</b>
<b>Cinema box office</b>	9% per year <sup>12</sup> <i>(AU share of total number of films released in AU cinemas; long-term annual average)</i>  4% per year <sup>13</sup> <i>(AU movies’ share of the AU box office; rolling 3-year average since 2010)</i>
<b>Free-to-air television</b>	55% of schedule <i>(legislated minimum quota for AU commercial networks, between 6am-midnight, on primary channels)</i>

In other words, the local content performance of Stan and Netflix depends very much on which market we consider these services to be in. If we see SVOD services as forms of commercial television then their local content performance will inevitably disappoint. But if we see SVOD services as cinema releasing platforms – or as digital media services competing within a global rather than national market – then different expectations may apply.

<sup>12</sup> Screen Australia, Fact Finders resource, 2017, <https://www.screenaustralia.gov.au/fact-finders/cinema/industry-trends/films-screened>

<sup>13</sup> Screen Australia, Fact Finders resource, 2017, <https://www.screenaustralia.gov.au/fact-finders/cinema/industry-trends/box-office/australian-box-office>





## ii. International comparisons

Another way to situate the findings is to consider the international context. The European Audiovisual Observatory's latest research suggests that on average, across the major SVOD catalogs of services operating in the EU, **20%** and **38%** of film and TV titles respectively are European (i.e., from one of the 28 member states).<sup>14</sup> In the case of Netflix, these figures are slightly lower. The level of *local* (i.e., national) content in SVOD catalogs varied from country to country, however. Netflix's UK and German catalogs tend to have a lot of local content, while smaller countries have little or no local content.

The Observatory data suggests that Netflix is making an attempt to license both national and other European content for its various European catalogs, especially in major markets like Germany and the UK. However, Netflix subscribers in smaller countries should not expect to find much in the way of national content. In this sense, the situation is not dissimilar from Australia: Netflix appears to assume that most subscribers will be content with majority Hollywood content.

## Australian content in international Netflix catalogs

While there is relatively little Australian content within the Netflix Australia catalog, there is significantly more Australian content – including numerous Netflix-branded Australian originals and exclusives – to be found in other countries' Netflix catalogs. This content is not easily accessible to Australian consumers due to geoblocking. Nonetheless, its presence should be taken into account when considering the role of SVOD in promoting Australian content overseas.

Using VPNs (virtual private networks) and third-party index sites such as Unogs.com, we were able to investigate this topic. We found that many well-known Australian TV series remain available to international Netflix audiences, including *Offspring*, *The Code*, *The Principal*, *Miss Fisher's Murder Mysteries*, *Cleverman*, and *Wentworth*. There are currently **108 discrete Australian titles** available in the Netflix US catalog, compared to the 82 available via Netflix Australia. In relative terms, this amounts to **1.8%** of the US catalog – slightly higher than the proportion of Australian content in the Australian catalog (1.65%).

The US catalog remains the largest Netflix library, with over 5,700 titles<sup>15</sup>, but in terms of both the number of discrete available titles and the overall proportion of Australian content in the respective catalogs, **there is more Australian content in the Netflix US catalog than in the Netflix Australia catalog**. Indeed, in the last twelve months the number of Australian television titles available to American audiences has increased by 30%, thanks in large part to Netflix's exclusive international distribution of series such as *Wanted*, *Secret City*, *The Letdown*, *Glitch*, *Sisters* and *Zumbo's Just Desserts*. Comparatively, the number of Australian movies in the

<sup>14</sup> European Audiovisual Observatory, "The origin of films in VOD catalogues – 2017 edition", p. 8; European Audiovisual Observatory, "The origin of TV content in VOD catalogues in Europe – 2017 edition", p. 4.

<sup>15</sup> Data sourced from Unogs.com, 21 September 2018.

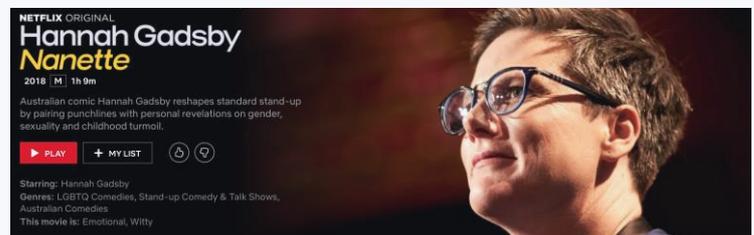


Netflix US catalog has dropped by approximately 25% (but now also includes exclusive local film acquisitions *Ali's Wedding* and *Cargo*, both marketed as Netflix Originals outside Australia).

Seen from this perspective, Netflix provides a powerful global platform for the distribution of Australian content and Australian stories. While viewing data is not released publicly by Netflix, the company has disclosed some information about the distribution of Australian titles. For every 100 hours of *Mako Mermaids: An H2O Adventure* watched on Netflix around the world, more than 95 hours are watched outside of Australia. The company claims similar figures for other Australian titles including *Miss Fisher's Murder Mysteries* and *Glitch*.<sup>16</sup> This confirms our previous finding, detailed in the 2017 report, that the local content performance of Netflix within Australia must be considered alongside the platform's capacity to distribute Australian content outside Australia.

### Case study: stand-up comedy specials

One of the fastest-growing SVOD program types is stand-up comedy. Stand-up is cost-effective to produce, compared to scripted programming. As a niche genre, it is also well suited to SVOD distribution, especially given the limited availability of stand-up on free-to-air television.



Since 2013 **Netflix** has released more than 150 stand-up specials from artists including Dave Chappelle, Jerry Seinfeld, Aziz Ansari, Ali Wong, Tig Notaro and Amy Schumer. In 2018, Netflix released its first Australian comedy original, Hannah Gadsby's *Nanette*, which has had an extraordinary international impact. Gadsby's multi award-winning 69 minute show, filmed live at the Sydney Opera House and produced by Guesswork Television, was released exclusive to Netflix on 19 June 2018 and garnered widespread critical acclaim. Ironically, Gadsby's caustic and provocative social commentary, which was intended to be her comedy swan song, has launched her onto the world's stage. *The New York Times* described Gadsby as a "major new voice in comedy"<sup>17</sup>, and her appearance at the 2018 Emmy Awards was met by calls for her to host next year.<sup>18</sup> In email correspondence, Netflix advised us that *Nanette* has been viewed in over 190 countries (i.e., almost all of Netflix's territories) and has generated more than 270.9K Twitter mentions.<sup>19</sup> Stand-up specials have also been part of **Stan's** original content strategy. In March 2017 Stan released a six-part series, *One Night Stan*, featuring performances by Australian comedians Wil Anderson, Judith Lucy, Tom Gleeson, Celia Pacquola, Tom Ballard and Sam Simmons. These stand-up specials constitute a significant and growing proportion of Stan's Australian content offering. Stan's focus on local comedians is in line with the platform's overall ambition to be a distinctively Australian SVOD service.

<sup>16</sup> Personal communication, Josh Korn, Global Policy Manager, Netflix, 27 September 2018.

<sup>17</sup> Jason Zinoman, "Introducing a major new voice in comedy (who also attacks comedy)", *The New York Times*, 19 March 2018, <https://www.nytimes.com/2018/03/19/arts/hannah-gadsby-comedy-nanette.html>

<sup>18</sup> Patrick Lenton, "Hannah Gadsby was the absolute best things about the Emmys", *Junkee*, 18 September 2018, <https://junkee.com/hannah-gadsby-emmys/175497>.

<sup>19</sup> Email communication, Josh Korn, Global Policy Manager, Netflix, 27 September 2018.





## “Australianness”: metadata, definitions, discoverability

Our ability to search and tally the “Australian” content available on Stan and Netflix has been constrained by how each service categorises and tags its content.

Most of the Australian content identified in this study can be found in distinct “Australian” categories on both Stan and Netflix Australia.<sup>20</sup> By cross-checking with the 2017 list of titles, we were able to identify some local content not included in the platforms’ own categories. For example, the ABC series *Agony* and *Black Comedy* remain available on Netflix Australia, but were not categorised as Australian TV Shows. Similarly, on Stan, neither the *Wolf Creek* film franchise nor the Stan original television series *Wolf Creek* were among the titles available in the Australian Cinema or Australian Television categories when we conducted our search, though they are included in the First on Stan category.

This raises the wider question of how to define Australian content – a perennial problem in film and television policy, where definitions can be based on a range of factors including creative input, funding source, script, location, language, and casting. Our research revealed many borderline cases. For example, Baz Luhrmann’s *Australia* was not categorised as an Australian Movie by Netflix Australia, but the various iterations of the German-produced National Geographic documentary *Wild Australia* were.<sup>21</sup> These metadata vagaries in each platform also reflect the complexity of national content as a policy concept.

## Conclusion

This report has established that the number of Australian titles in the Stan and Netflix Australia catalogs has not changed substantially over the last 12 months, though Netflix’s catalog has grown substantially during that time. The overall proportion of Australian content in each catalog has decreased on Netflix (to 1.6%), but has increased on Stan (to 11.1%).

Numerous new original Australian titles are expected to become available on both platforms over the next year. This is good news for Australian screen producers, who now have an enlarged pool of buyers and new sources of production finance. However, the addition of these new productions to both catalogs is unlikely to materially increase the overall levels of local content available in each service. This underscores a key finding from the 2017 report: that we cannot expect SVOD to do the job of broadcast television. Absent government regulation, SVOD services’ local content performance is likely to remain at low levels due to factors including audience familiarity with U.S. content, a challenging rights market, and the high costs of production in Australia.

<sup>20</sup> That is, as subgenre categories listed under format (Movies/TV Shows) on Netflix, or genre (drama, comedy, documentary) on Stan.

<sup>21</sup> By comparison, discoverability of Australian content on the Netflix US service is more complex. On the Netflix US service, Australian content categories are not immediately visible but can be discovered by an “Australian” search, which then provides the user with particular subcategories (Australian Movies, Australian TV Shows, Australian Movies + TV Shows, Australian TV Comedies, Exciting Australian TV Shows, Critically-Acclaimed Australian Movies, etc.) as well as other content with relevant metadata. For example, the Australian TV Show category in the Netflix US service included 42 titles, but we found a further 21 Australian titles in various subcategories (e.g., Australian Documentaries, Australian TV Drama, Australian TV Comedies, Exciting Australian TV Shows).