Australian Content in SVOD Catalogs: Availability and Discoverability

2019 edition

Dr Ramon Lobato & Alexa Scarlata
Executive summary

This report examines the availability and discoverability of Australian screen content on three subscription video-on-demand (SVOD) services: Netflix, Stan, and Amazon Prime Video. We find that all services carry some local content, but the amount, age, and genre mix of this content vary considerably.

Stan has the highest proportion of local content: 9% of the titles in its catalog are Australian. In contrast, 1.7% of titles in the Netflix catalog are Australian. Amazon Prime Video also carries a significant amount of local content, however the nature of its catalog makes direct comparisons with Stan and Netflix problematic. The number of Australian original productions is growing across all three services. Netflix has the highest proportion of originals: one in five Australian titles is an original.

We also assess the discoverability of Australian content in each catalog. Netflix and Stan feature dedicated categories for Australian content, which improve discoverability. Finding local content in Amazon Prime Video is much more difficult.

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About this report

This is the third in a series of annual reports into local content availability and discoverability on subscription video-on-demand (SVOD) services in Australia. Since 2017, we have used catalog research methods to study the quantity and characteristics of Australian content carried by Stan and Netflix Australia. Our 2017 report was a submission to the Australian and Children’s Screen Content Review. Our 2018 report assessed the changing SVOD landscape twelve months later.

This year’s report is notable for the addition of Amazon Prime Video, which has a distinctive catalog structure that presents several research and policy challenges. The present report also includes new analysis of the format, genre and age of local content offered across these three services. Data was collected in August 2019.

This study considers only commercial SVOD services with a curated catalog of professional content. Due to the nature of our research questions, we have excluded the catch-up services subject to local content requirements (Foxtel Go/Now, SevenPlus, 9Now, TenPlay), public-service media (ABC iView, SBS On Demand), linear IPTV services (Fetch), video-sharing services (YouTube) and smaller SVODs with limited market share in Australia (Mubi, Hayu). Nor do we consider Apple TV Plus or Disney Plus, which are yet to launch in the Australian market at the time of writing.

Netflix and Amazon Prime Video have different catalogs in each country, however our study refers only to the localised Australian version of each service (i.e., the catalog accessible to users with an Australian IP address).

About the authors

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Introduction

This report examines the availability of Australian film and television content on three subscription video-on-demand services: Stan, Netflix and Amazon Prime Video.

SVOD services are used by an estimated 14 million Australians. Netflix is the market leader, reaching 11 million Australians — roughly half the adult population. Nine Entertainment’s Stan is in second place, reaching 2.6 million users. Amazon Prime Video, a service bundled with Amazon Prime membership, has a very small but growing user base in Australia.

SVOD services are not currently regulated for local content. Unlike Australian free-to-air networks, which are required by law to broadcast 55% local content between 6am and midnight, SVOD services remain outside the scope of regulation. Analysis of SVOD catalogs therefore offers useful insights into the amount and variety of local content that the market is providing in the absence of a quota system.

Our research asks three questions:

1. How much local content are the major SVOD services offering?
2. What are the characteristics of the local content offered by each service?
3. How easy is it to find local content on each service?

Table 1: Key features of Stan, Netflix and Amazon Prime Video

<table>
<thead>
<tr>
<th></th>
<th>Launched in Australia</th>
<th>Estimated Australian users (Feb 2019)</th>
<th>Monthly price</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stan</strong></td>
<td>January 2015</td>
<td>2,615,000</td>
<td>$AU10-17</td>
</tr>
<tr>
<td><strong>Netflix</strong></td>
<td>March 2015</td>
<td>11,262,000</td>
<td>$AU9.99-19.99</td>
</tr>
<tr>
<td><strong>Prime Video</strong></td>
<td>December 2016</td>
<td>574,000</td>
<td>$AU6.99 (Amazon Prime bundle)</td>
</tr>
</tbody>
</table>

Background: SVOD catalog research

SVOD catalogs are composed of a finite number of titles, including TV series, movies and documentaries. By studying SVOD catalogs, researchers can better understand the characteristics of the different services and the kinds of content they make available to viewers.

Since 2016, empirical studies of SVOD catalogs have been conducted in several countries. These studies investigate the amount of imported and local content in each catalog or across multiple catalogs, as well as the age and other characteristics of such content. Catalog data has proven useful for policymakers, especially where new regulatory interventions are being considered for digital media services. A prominent example is the European Union’s 30% EU content quota for major SVOD services, including Netflix and Amazon Prime Video. This quota has been legislated by the European Parliament and will come into effect in EU member states soon.

In Australia, industry groups including Screen Producers Australia and the Australian Directors’ Guild have called for the introduction of similar regulation. They have also advocated for a production investment requirement for SVODs, similar to that which applies to pay-TV (Foxtel). Analysis of production investment is beyond the scope of this report, which focuses exclusively on SVOD catalogs and distribution. Our findings therefore inform one aspect of a larger policy debate.
All SVOD services in the study offer some local content, but the amount and nature of the content varies significantly.

**Stan has the highest proportion of local content**: 9% of the titles in its catalog are Australian.

**Netflix has the least local content**: 1.7% of titles in its catalog are Australian. However, its local content is more recent than the other services – almost three quarters of the Australian titles on Netflix were produced within the last five years.

**Amazon Prime Video** has a surprisingly large number of Australian titles (over 400). It offers relatively older content, including many short-form documentaries. The nature of the Amazon catalog makes direct comparison with Netflix and Stan problematic.

**The number of original productions is growing across all services**. Stan and Netflix are actively producing new Australian original TV series and one-off comedy specials. One in five Netflix Australian titles is an original. Amazon has also recently announced a series of Australian comedy originals.

**Australian movies are scarce**. The Netflix catalog contains only 17 Australian feature films. Amazon Prime Video offers the largest number of Australian movies – more than Stan and Netflix put together.

**Discoverability matters**. Each service has a different search and category structure. Netflix and Stan feature dedicated categories for Australian content, which improve discoverability. Finding local content in Amazon Prime Video is much more difficult.
How much local content is available?

The proportion of local content in each service is relative to the size of the overall catalog. Stan’s catalog is the smallest, with around 1800 titles. Netflix carries around 5000 titles, while Amazon Prime Video carries more than 8000 titles. The number of titles is constantly changing as content licenses expire and new content comes online.

Our research finds that the proportion of Australian content, relative to the overall catalog is 1.7% for Netflix and 9% for Stan. These figures have remained roughly steady over the last three years, with minor fluctuations from year to year (see Fig 1, Table 2).

Why Amazon is different

We were not able to calculate a local content percentage for Amazon Prime Video due to its unique catalog structure (see pages 12-13). We have identified 424 Australian titles in the Amazon Prime Video catalog – the highest of any of the three services covered in this report. However, around half of these are documentaries and other miscellaneous content. For this reason, the Amazon Prime Video catalog cannot be directly compared to Stan and Netflix, which specialise in scripted, professionally produced entertainment content.

Figure 1: Australian titles on Stan and Netflix, 2017-2019

Table 2: Australian titles on Stan and Netflix, 2017-2019

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Australian titles</td>
<td>138</td>
<td>142</td>
<td>162</td>
</tr>
<tr>
<td>% of total catalog</td>
<td>9.5%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Netflix</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Australian titles</td>
<td>88</td>
<td>82</td>
<td>82</td>
</tr>
<tr>
<td>% of total catalog</td>
<td>2-2.5%</td>
<td>1.65%</td>
<td>1.7%</td>
</tr>
</tbody>
</table>
What kind of local content is available?

The local content offered on Netflix, Stan and Amazon Prime Video varies considerably in format and age.

Netflix prioritises TV series over movies and documentaries in its local content licensing and production. Stan has a roughly even mix of Australian movies and TV, but fewer documentaries. The Amazon Prime Video catalog is notable for its high proportion of documentaries.

How old is the available local content?

Analysing the age of content reveals interesting differences. Netflix's local content is very new, with 71% of titles being less than five years old. Stan’s local content is also quite recent.

Amazon Prime Video’s local content is significantly older, especially its Australian movies (see Fig 3). The median year of production for Australian movies in the Amazon catalog is 1986.

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**Figure 2: Australian content by format**

<table>
<thead>
<tr>
<th>Format</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Movies</td>
<td>30%</td>
</tr>
<tr>
<td>Documentaries</td>
<td>40%</td>
</tr>
<tr>
<td>TV Series</td>
<td>30%</td>
</tr>
</tbody>
</table>

**Figure 3: Age of Australian movies**

- **Netflix**
  - Oldest movie: 2007
  - Newest movie: 2018
  - Median: 2009

- **Stan**
  - Oldest movie: 1970
  - Newest movie: 2018
  - Median: 2009

- **Amazon Prime Video**
  - Oldest movie: 1933
  - Newest movie: 2019
  - Median: 1986
Stan is Australia’s national SVOD service. It has the highest proportion of local content, but with a smaller catalog overall.

The Stan catalog contains:

- **62** Australian movies including 1 Stan original feature
- **78** Australian TV series including 6 Stan original titles, a Christmas special, and a series of 6 comedy specials
- **22** Australian documentaries

This equates to 162 discrete titles – 21 more than last year, and almost double Netflix’s total local offering. In relation to Stan’s current overall catalog of 1,791 discrete titles, Australian content therefore makes up 9% of the total content available.

Stan’s overall percentage of local content has remained steady year on year, despite growth in the catalog size (See Methodology Note #1).

The Stan catalog contains 14 locally-produced **originals**: one feature film, seven television series/specials, and six stand-up comedy specials. These originals represent 9% of the Australian content available on Stan, and account for less than 1% of Stan’s catalog overall. Of these 14 Stan originals, three quarters are comedy titles.

New additions this year include a No Activity Christmas special and six-part supernatural drama series *Bloom*. A second season of the latter is now in production. Stan’s eight-part Australian drama *The Gloaming* is due to premiere later this year or in early 2020. Future releases announced but not yet available in the catalog include a second season of Matt Okine’s comedy series *The Other Guy*, drama series *The Commons*, and the original film *True History of the Kelly Gang*.

In November, Stan and Film Victoria launched the Stan and Film Victoria Development Fund. As with Stan’s existing partnership with Screen Queensland, this two-year program will fund the development of up to four high-end projects per year for Stan’s commissioning consideration.

“**THREE QUARTERS OF STAN’S ORIGINALS ARE COMEDY TITLES**”
Last year, Stan Chief Executive Mike Sneesby explained that Stan originals are being created specifically for Australian audiences, which serves as a key differentiator between Stan and Netflix. In other words, Stan claims to be producing this content with a specifically Australian audience in mind.

Analysis of Stan’s licensed content reveals – unsurprisingly – that the major supplier is Stan’s owner, Nine Entertainment Co. Stan also offers 19 titles first screened on the ABC, including Pulse, Newton’s Law, Janet King and Rake. Several of these same titles are also available on Netflix.

A notable change since last year is the disappearance from the Stan catalog of Chris Lilley’s shows (Angry Boys, Ja’mie: Private School Girl, Jonah from Tonga, Summer Heights High, We Can Be Heroes), which have moved to Netflix. The Stan catalog also contains a number of Australian drama biopics first aired on Seven, including Catching Milat, INXS: Never Tear Us Apart and Peter Allen: Not the Boy Next Door.

Most of Stan’s Australian TV titles are less than five years old, although Stan also offers some older series including Mother & Son, Frontline and McLeod’s Daughters. The median year of release for Stan’s TV content is 2015.

The Netflix catalog contains a small number of Australian titles, with a growing number of originals. Their local content is newer and has high production values.

The total number of Australian titles available on Netflix in August 2019 was the same as last year: 82 titles. This amounts to 1.7% of the overall Australian Netflix catalog of 4,859 titles.

While the discrete number of titles is modest, it is important to note that locally produced Netflix originals are growing in number. Local originals now make up a third of the Australian television titles available in the Netflix Australia catalog – the highest of the three services. For the purposes of this study, we define originals as titles produced with substantive Netflix involvement, including co-productions.

In the last year Netflix released three Australian original series: the supernatural drama *Tidelands*, Chris Lilley’s mocumentary *Lunatics* (both shot in Queensland with Screen Queensland funding), and the reality series *Extreme Engagement*. No renewals (second seasons) for these titles have been announced at the time of writing.

Local co-productions that have been added to the Netflix catalog since 2018 include *Motown Magic* (kids’ animation), *The New Legends of Monkey* (family fantasy) and *Pine Gap* (drama). New seasons of two ABC/Netflix co-productions, *Glitch* and *The Let Down*, were distributed as Netflix originals outside Australia but were not available on Netflix’s Australian service at the time of writing; they will be added to the local catalog later in 2019, once ABC’s exclusive window has expired.

On New Year’s Day 2019, Netflix premiered its *Comedians of the World* series of stand-up comedy specials, recorded at the Just for Laughs Festival in Montreal.

The Netflix catalog contains:

- **17** Australian Movies
- **52** Australian TV Series including 3 New Netflix Original Series and 3 Original Stand-up Specials
- **13** Australian Documentaries

**Quote:**

“**KIDS/FAMILY IS A PRIORITY GENRE FOR NETFLIX**”
Australian comedians Joel Creasey and Nazeem Hussain each recorded a set for the series.

In November 2018, the Australian horror film Cargo was added to the local catalog. Cargo is distributed outside Australia as a Netflix global original.

In August 2019, Netflix announced the commissioning of its second Australian original drama series, Clickbait. This eight-part cyber-crime thriller will be produced in Victoria by Tony Ayres Productions, Matchbox Pictures and Heyday Television, although it will be set in the United States. Clickbait will be among the first productions to benefit from recent changes to the federal government’s tax offset incentive. Netflix will receive $4.9m from the Australian government for the project.

While the number of originals is rising, we note a year-on-year drop in the number of licensed Australian movies and documentaries currently available on Netflix. Notably, the Netflix catalog contains only 17 Australian movies, not including documentary content. If we consider scripted fiction feature films only (excluding kids and telemovies), the list gets even shorter – only Adoration, Cargo, Emo: The Musical, I Am Mother, Mabo, Mad Max: Fury Road, Otherlife, Paper Planes and Rogue.

Changes to the Netflix catalog since last year include the expiration of well-known movies Mad Max, The Sapphires and Muriel’s Wedding (which has moved to Stan). New arrivals include sci-fi thriller I Am Mother and family favourite Paper Planes.

Netflix is heavily reliant on the free-to-air broadcasters – especially the ABC – for its licensed TV content. Almost half of the licensed Australian television titles on Netflix were first screened on the ABC. New additions to the catalog this year include Kath & Kim and Ronny Chieng: International Student.

Chris Lilley’s back catalog of five series is now exclusive to Netflix, having been also available on Stan in 2017 and 2018. This concentration of Chris Lilley titles supplements the release of Netflix’s original Lilley series, Lunatics.

Netflix has a variety of Australian genres. Licensed TV titles are split fairly evenly across the key genres of drama, comedy, kids/family, documentary and reality. Kids/family is a clear priority genre for Netflix, constituting around half of the Australian Netflix originals currently available.

Finally, we note that Australian content on Netflix is generally very new. The oldest Australian TV series in the catalog is Kath & Kim (2002-07); most other movies and TV titles on Netflix were released within the last five years.

Figure 7: Lilley’s content is now exclusive to Netflix
Amazon Prime Video offers the highest number of Australian titles, including many classic films. However, more than half of its local content is documentary or unscripted.

The Amazon Prime Video catalog contains:

- **116** AUSTRALIAN MOVIES
- **80** AUSTRALIAN TV SERIES
- **228** AUSTRALIAN DOCUMENTARIES

The total number of discoverable Australian titles available on Amazon Prime Video in August 2019 was **424**. We could not determine what percentage of the overall catalog this constitutes due to the service’s unique catalog structure.

Unlike Netflix and Stan, Amazon Prime Video is not a standalone video service. Instead, it is an added-value service bundled with Amazon Prime, a loyalty programme designed to drive sales on Amazon’s e-retail platform.

Amazon Prime Video has not yet released any original Australian programming. However, several titles are reportedly in production, including an Australian version of the Amazon original concept *LOL: Last One Laughing* hosted by Rebel Wilson, and a series of stand-up specials featuring Australian comedians (Tom Gleeson, Celia Pacquola, Tommy Little, Judith Lucy, Lano & Woodley, Anne Edmonds, Zöe Coombs Marr, Tom Walker, Dilruk Jayasinha, Alice Fraser). Interestingly, several of these comedians – notably Tom Gleeson and Celia Pacquola – have already filmed specials for Stan’s One Night Stan series, dating back to 2017. Rebel Wilson also starred in Stan’s pre-launch advertising campaign in 2015.

The licensed local content in Amazon Prime Video is very eclectic. Many of the Australian titles in the catalog have been licensed from niche distributors including Umbrella Entertainment, which carries a diverse back-catalog of Australian and independent movies. Amazon’s Prime Video Direct programme also allows individual rights-holders to self-upload to the Prime Video platform in multiple territories.
Examples of titles available through Amazon Prime Video include:

- well-known classic TV series such as *Blue Heelers* and *Heartbreak High*
- more than a hundred Australian movies from the 1930s through to the present, including 25 titles from Australia’s 1970s cinematic renaissance including *The Adventures of Barry McKenzie*, *Don’s Party*, *Sunday Too Far Away* and *Walkabout*
- more than 200 documentaries, including short-form and specialist titles (e.g., *Travel Wild*, *Paranormal Investigators UnCut*)
- individual episodes of television light entertainment series from the 1960s
- 20 episodes of ABC’s *Four Corners* presented as standalone documentaries

A distinctive feature of the Amazon Prime Video catalog is that more than half (54%) of the Australian content is documentary or unscripted content. This includes TV concerts, long-form investigative journalism, historical documentaries, and numerous travel and food series.

Unusually, the Amazon Prime Video catalog often presents individual episodes or seasons as discrete titles, which makes direct comparison with other services even more difficult. For example, of the 424Australian titles in the Amazon Prime Video catalog, 38 of these are from a set of short, very low-budget documentaries about Australian cities, flora and fauna. Titles such as these have inflated Amazon Prime Video’s total in comparison to Netflix and Stan.

For this reason, and because of the relatively high amount of lower-value and documentary content in the catalog, we caution against direct comparison between Amazon Prime Video and Netflix or Stan, because the latter services offer higher-value, professional content only.
Discoverability

So far our study has referred only to the availability of Australian titles within Stan, Netflix and Amazon Prime Video. However, for such content to be enjoyed by viewers it also needs to be discoverable – whether through search, recommendations or categorisation.

Discoverability is a challenging research topic because the effects of interface personalisation are difficult to measure in a standardised fashion. We used newly created user profiles to minimise these effects during data collection. Also, services may offer different discoverability features – including dedicated rows for Australian content – in different parts of the interface (e.g., on the Movies page but not on the Home page).

Despite these limitations, our study found significant differences between the three services in terms of local content discoverability (see table 4).

<table>
<thead>
<tr>
<th>Australian cinema drop-down category</th>
<th>Stan</th>
<th>Netflix</th>
<th>Amazon Prime Video</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australian TV drop-down category</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Australian cinema recommendation row</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Australian TV recommendation row</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Netlix has the most advanced discoverability features. The Netflix interface includes dedicated drop-down categories for Australian movies and TV series. Other, more specific categories (e.g., Critically Acclaimed Australian Movies, Australian Crime TV Shows) also appear as search term suggestions. Recommendation rows for Australian content may also appear for some users depending on their viewing history. Netflix’s country-of-origin metadata are generally quite reliable, allowing for easy searching by country. There are some quirks, however. Interestingly, Netflix’s most successful Australian original (Hannah Gadsby’s Nanette) is not tagged as Australian.

Stan also has good discoverability features. While there are no drop-down categories for Australian film or TV content, the Stan interface reliably includes recommendation rows such as “Homegrown comedy” and “Australian docos”. The relatively higher level of Australian content in Stan’s catalog means that Australian titles are naturally more visible in all categories compared to Netflix. Stan’s metadata have improved since last year, and most Australian titles are now discoverable through search terms. Exceptions include The Castle and Wolf Creek which did not appear in search returns for “Australia” or “Australian” during data collection but were nonetheless available for viewing.

Amazon Prime Video is a more challenging environment for local content discoverability. Categories and recommendation rows do not make reference to country of origin. Australian content in the catalog is not consistently tagged as such. Searching via keywords also returns many titles where Australia appears in the episode description but is not the country of origin (e.g., Dogs with Jobs). Consequently, Amazon Prime Video represents a more complex discovery environment for local content.
International distribution

It is important to note that both Netflix and Amazon Prime Video operate multi-nationally, and many Australian titles are being distributed through these services to markets overseas even if they are not available in the local Australian catalogs. For example, Ali’s Wedding, Miss Fisher’s Murder Mysteries and Cleverman are all available on Netflix in the US even though they are unavailable on Netflix Australia. This should be taken into account when considering the role of SVOD in promoting Australian content overseas. For example, our previous two studies found more Australian titles in the US Netflix catalog than in the Netflix Australia catalog, although this year the numbers are roughly even.

International distribution through SVOD services is becoming increasingly important for many Australian producers. Zumbo’s Just Desserts, a baking reality show produced by the Seven Network, did not rate well with local audiences but was commissioned by Netflix for a second season due to its popularity outside Australia.

Some titles have split distribution in different territories. For example, the Australian movie Head On is available on Amazon Prime Video in Australia and Netflix in the US, while Holding the Man is available on Stan in Australia but Netflix in the US.

Content fragmentation

The complexity of licensing arrangements means that some well-known media properties are spread across SVOD services, or move between them in unpredictable ways. For instance, the Tomorrow When the War Began movie is on Stan, while the Tomorrow When the War Began TV series is on Amazon Prime Video.

Figure 10: ABC’s Cleverman is available on Netflix in the US but not in Australia
Methodology

Catalog research provides a useful insight into the relative availability of local content to SVOD audiences in Australia. However, it is subject to certain limitations. First, catalog research can only investigate the availability of titles in a catalog; it does not capture viewing activity or usage, nor can it account for the effects of interface personalisation and algorithmic recommendation. Second, because catalogs are constantly changing as new content comes online and older content expires, our study provides a static snapshot of an evolving infrastructure. Third, Australian content may be present without being tagged as such in metadata, so it is possible that we have missed some titles in our analysis, although we have mitigated against this where possible.

This study follows a method of video on-demand catalog analysis developed by the European Audiovisual Observatory. We have been adapting this approach for use in our Australian SVOD catalog studies since 2017.

Where practicable, we have followed the genre and format classifications used by the services. Documentary, as both a format and a genre, is double-classified in the Netflix and Stan catalogs (e.g., in both Documentary and Movie or TV format categories). We classify these titles as Documentary to avoid double-counting.

Data collection for the 2019 study was conducted on 2 August 2019.

Note #1:
Previous reports relied on self-classification of Australian content by platforms. This year we have shifted to a manual classification method for greater accuracy. As a result, the 2018 local content level for Stan has been adjusted from 11% to 9%. This reflects exclusion of a number of non-Australian titles that Stan carries in its ABC Kids section.
Further reading


References

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