



The growing cultural and economic contribution of streaming services to Australia's creative economy

2025



Executive Summary

Streaming services are committed to the Australian screen industry, **investing in Australian stories** that ensure our audiences feel seen, heard and understood.

2025 marks an important anniversary for Australia's streaming entertainment sector – ten years since the launch of streaming services Stan and Netflix in Australia in 2015.

Since then, Australians have seen unprecedented growth in entertainment options in Australia, with Prime Video, Disney+, Paramount+, Binge and Apple TV+, as well as DocPlay, Garage Entertainment, BritBox, Crunchyroll, Kayo and Optus Sport. Warner Bros. Discovery launched its streaming platform, HBO Max, in Australia in March 2025.¹ User generated content services such as YouTube, Instagram and TikTok are also now offering professionally produced content to their audiences.

This vibrant and ever-evolving screen industry means Australian producers have never enjoyed creative exposure or local and global financial opportunities on this scale, and Australians have never had more access to a wide variety of stories that are **for us, by us, and about us** that ensure our audiences feel seen, heard and understood.

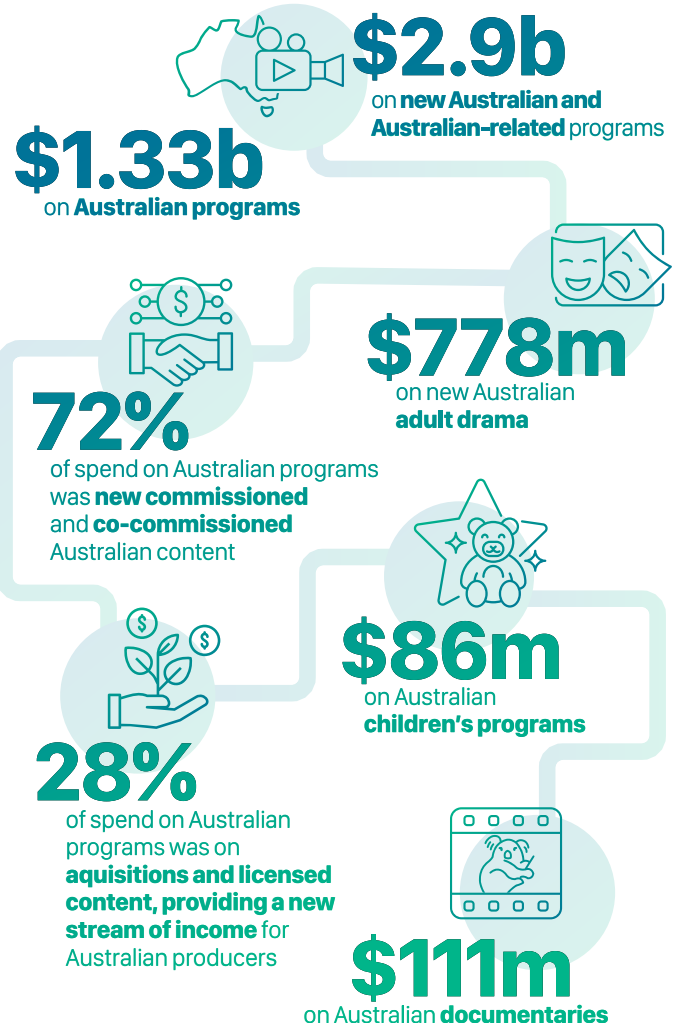
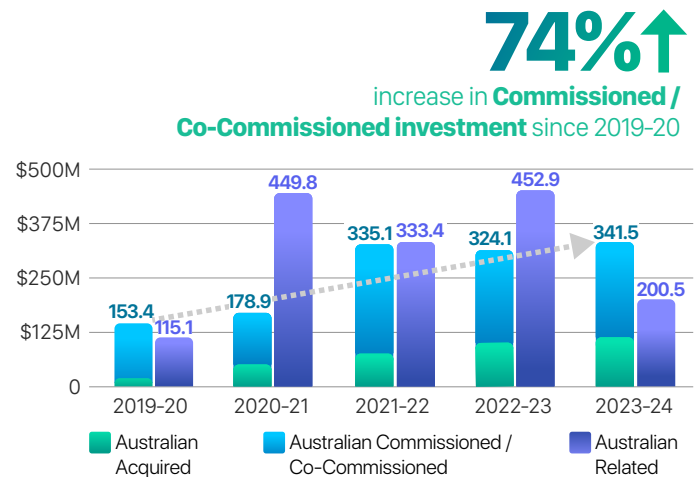
Streaming services are now the largest investors in Australian content.

2025 also marks the five year anniversary of streaming services Disney+, Netflix, Prime Video and Stan voluntarily reporting their Australian content investments to the Australian Communications and Media Authority (ACMA). Paramount+ commenced reporting in 2021-22.

We have a strong story to tell – and we are happy to share this data because the evidence demonstrates that the contribution we have made to Australia's creative economy is meaningful.

During this period, the five reporting streaming services have invested² **\$2.9 billion on Australian and Australian related content.**

Streaming services' investment in Australia, 2019-20 to 2023-24



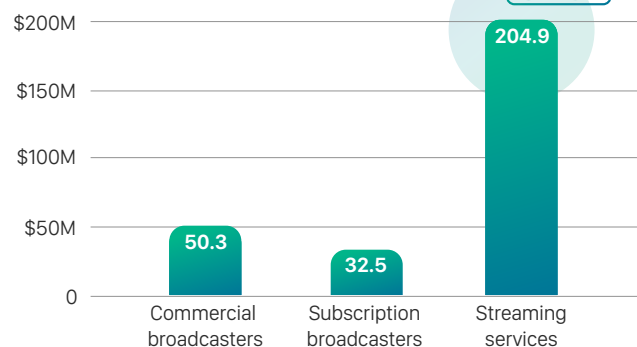
¹ Max was rebranded HBO Max in July 2025.

² See ACMA website for reporting on Spending By Subscription Video on Demand Providers, 2019-20 to 2023-24.

Streaming services are now the largest source of funding for Australian drama.

Comparing available data from 2022-23 shows that streaming services are now investing over three times more than Australian broadcasters on new, commissioned Australian adult and children's drama.³

Investment in Australian Adult and Children's Drama, 2023-24



We are making films and TV shows that Australians love.

Titles commissioned by streaming services received a record 33 Logie nominations at the 2024 Logie Awards (representing approximately 50% of total nominations) and won a total of 15 Australian Academy of Cinema and Television Arts (AACTA) Awards in 2025, with 12 for Netflix's adaptation of *Boy Swallows Universe*.

In 2025 streaming services will continue to provide members a variety of Australian content including:

- *The Artful Dodger* S2 (Disney+)
- *Apple Cider Vinegar* (Netflix)
- *Black Snow* S2 (Stan)
- *Invisible Boys* (Stan)
- *NCIS Sydney* S2 (Paramount+)
- *Playing Gracie Darling* (Paramount+)
- *Scrublands: Silver* S2 (Stan)
- *Son of a Donkey* (Netflix)
- *Sunny Nights* (Stan)
- *Ten Pound Poms* S2 (Stan)
- *The Narrow Road to the Deep North* (Prime Video)
- *The Survivors* (Netflix)
- *Top End Bub* (Prime Video)
- *Ghosts Australia* (Paramount+)
- *The List* (Paramount+)
- *The Inspired Unemployed (Impractical) Jokers* S3 (Paramount+)

Australian programming has also received international recognition, with Australian Netflix titles such as *Heartbreak High Season 1* and *Puff: Wonders of the Reef* winning International Emmy Awards.

We are committed to building a sustainable screen industry.

Streaming services have also invested heavily in supporting the broader film and television production sectors through training and development programs with AFTRS, the Australian Children's Television Foundation, Screenworks, Bus Stop Films, Screen Producers Australia and NIDA. You can find more information about these programs on page 10.

And we are not slowing down.

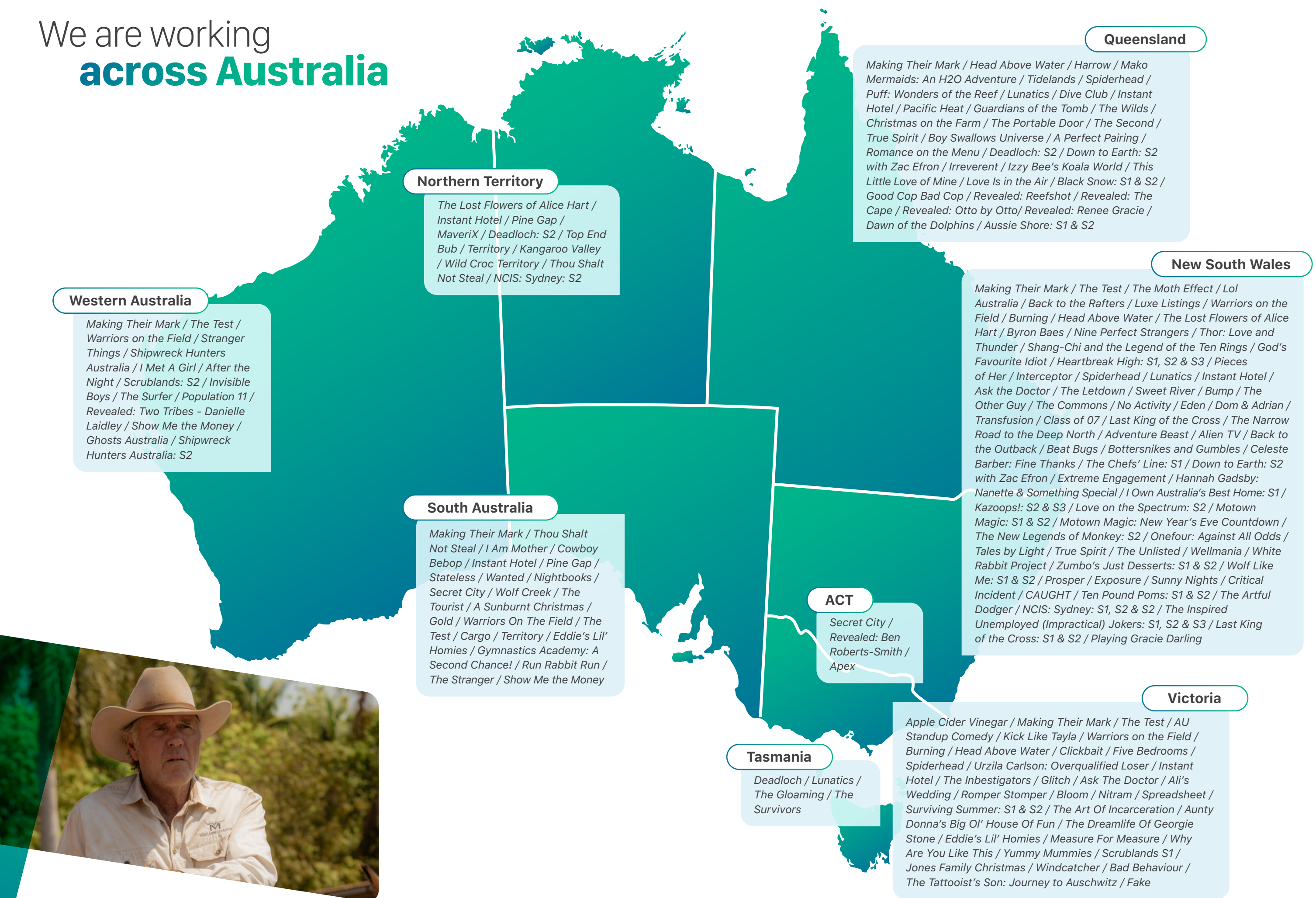
Contrary to unsubstantiated speculation, streaming services are not slowing down their investment in Australian content.

As is shown on the graph on page 1, in 2023-24 the ACMA reported a record **\$341.5 million** on new and acquired Australian content. The largest percentage – **66% (\$225.2 million)** – of this spend on Australian content was on new commissions and co-commissions.



³ See ACMA website for reporting on Commercial TV Program Expenditure, Subscription TV Industry Spending and Targets, and Spending By Subscription Video on Demand Providers.

We are working across Australia



Company overviews

Launched Nature of Business



**November
2019**

Disney+ launched in 2019 and is the dedicated streaming home for movies and shows from Disney, Pixar, Marvel, Star Wars, and National Geographic, along with The Simpsons and much more. In Australia and New Zealand, it also includes the general entertainment content brand, Star, with content from FX, Searchlight, Hulu, and Originals.

The flagship direct-to-consumer streaming service from The Walt Disney Company, Disney+ offers an unmatched collection of exclusive originals, including feature-length films, documentaries, live-action and animated series, and short-form content. With unprecedented access to Disney's long history of incredible film and television entertainment, Disney+ is also the exclusive streaming home for the newest releases from The Walt Disney Studios.

Local Content for Disney+ and Hulu in the US is made with Australian production partners and local talent, both in front and behind the lens. Our productions bring the best Australian storytelling to local and international audiences. Australian Originals include acclaimed scripted series *The Artful Dodger* (now filming a second season) and *The Clearing*, both recognised with several prestigious guild and craft awards, *Last Days of the Space Age*, *Shipwreck Hunters Australia* (Seasons 1 and 2), *Donna Hay Christmas* and more. Disney+ has a quality development pipeline.

The Walt Disney Company also contributes to a vibrant Australian screen and creative sector through employment, skills development, and use of local businesses on films and productions, including those shot at its Disney Studios Australia facility in Sydney.



**March
2015**

Since the launch of Netflix in Australia in 2015, Netflix has been a significant commissioner of Australian stories. These stories celebrate Australian culture and our diverse experiences and are loved by Netflix members all over the world, with many spending multiple weeks in the Netflix Global Top 10 including *Apple Cider Vinegar*, *Surviving Summer*, *Love is in the Air*, *True Spirit*, *Boy Swallows Universe*, *Heartbreak High* (Seasons 1 and 2) and *Territory*.

Our substantial and growing production activity in Australia provides revenues, jobs and global exposure for Australian creatives. In the five years (2019-2024) that we've reported our investment to the ACMA, Netflix has invested well over \$1 billion AUD on new Australian and Australian-related Netflix films and shows. Between 2020 and 2023: Netflix productions have hired 6,000+ cast and crew in Australia and shot at 250+ locations (towns, cities and suburbs).



**December
2016**

Amazon's Prime Video is an added benefit of Prime and offers customers a wide range of content to view including drama, documentary, comedy, unscripted and stand-up. Prime Video is keenly focussed on Australian stories for Australian customers – we have a reputation for providing great local originals whatever country we operate in – no two countries' content is the same.

In Australia we have invested hundreds of millions of dollars in local productions - which has resulted in more than 2,500 jobs across Australia and a broad range of Amazon local originals available to watch on hundreds of compatible devices.

Since 2019, Prime Video has commissioned over 30 local originals including *The Test* (Seasons 1-3), *The Lost Flowers of Alice Hart*, *Deadloch* (Seasons 1 and 2), *Top End Bub*, *Narrow Road to the Deep North*, *Dance Life*, *Hot Potato the Story of the Wiggles*, *LOL: Last One Laughing Australia with Rebel Wilson*, *Back to the Rafters*, *Dance Life*, *Head Above Water*, award-winning feature-length documentaries *Burning* and *Fighting for Hakeem*, *Kick Like Tayla*, *Warriors On The Field*, the first Australian Amazon Original movie *Five Blind Dates* and the upcoming series *Top End Bub*. Customers can also enjoy hits like Oscar-nominated film *Being the Ricardos*, Golden Globe award-winner *Borat Subsequent Moviefilm*, *Reacher* (Season 3), *The Idea of You*, *Road House*, *The Boys* (Seasons 1-3), *The Summer I Turned Pretty*, *The Lord of the Rings: The Rings of Power*, *The Terminal List*, plus Emmy award-winners *Fleabag*, *The Marvelous Mrs. Maisel*, and other licensed content.



**August
2021**

Paramount+ is a global digital subscription video streaming service featuring a mountain of premium entertainment for audiences of all ages with more than 79 million subscribers worldwide. Paramount+ features an expansive library of original series, hit shows and popular movies across every genre as well as a robust offering of local and international football and premier Australian content. Since its Australian launch in August 2021, Paramount+ has commissioned 31 local productions, 18 of which are scripted.

In 2024, Paramount reached 25.3 million Australians, that's 94% of the population, across Paramount+, free-to-air broadcaster Network 10 and broadcast video-on-demand service 10 Play.

Paramount Australia has a holistic content investment strategy commissioning productions for its entire content ecosystem so that local content developed for Paramount+ is also made available for free, to audiences on 10 and 10 Play. This means that local content reaches large-scale audiences delivering more high quality, unique local entertainment to even more Australians.

Paramount Pictures is also a major production company that brings premium film and television projects to Australia, such as children's live-action film *Dora and the Lost City of Gold* filmed on the Gold Coast, and the Australian book-turned-series *Shantaram* filmed in Melbourne for Apple TV+.



**January
2015**

Stan launched in January 2015 and today stands as Australia's only locally-owned streaming service, wholly owned by Australia's most trusted and culturally significant media companies Nine Entertainment Co.

Stan commissioned its first local production, *No Activity*, within 2 months of launching. Over the subsequent decade it has commissioned over 100 Australian titles across scripted drama, children's, documentaries and reality; making Stan one of Australia's most significant and important commissioners of local programming. Stan Originals proudly showcase the work of emerging, as well as some of the best known, Australian screen creatives. To date, Stan has invested in Australian films and programs with production budgets exceeding A\$835 million, with filming and production spanning every State and Territory of Australia.

Australian audiences have never enjoyed access to **so many content choices**, across a wide variety of content services.

Internet delivery of content has changed how consumers access content. Consumers now have an unprecedented abundance of choice, and an unprecedented level of control, over how to exercise their viewing choices across a range of platforms, including:

- **Television broadcast services** have multiplied – with 36 free multi-channels to choose from as well as over 600 fast channels.
- **Traditional linear television** providers and national broadcasters' provide free, on on-demand content through 10 Play, 9Now, ABC iview, SBS On Demand.
- **Subscription TV services**, Foxtel and Fetch are providing audiences with aggregated content with a wide variety of local and international channel offerings across an array of genres.
- **Global streaming services** provide a broad range of Australian and international content to their subscribers, including Netflix, Disney+, Prime Video, Apple TV+, Paramount+ and Warner Bros. Discovery who launched their streaming platform, HBO Max, in Australia in March 2025,⁴ as well as Britbox, YouTube Premium, Tubi, iQiyi, hayu, iwonder, Acorn TV, Bein Sports, Shudder, Crunchyroll and Mubi.
- A growing number of **Australian streaming services** are emerging including Stan, DocPlay, Garage, Binge, Kayo and Optus Sports.
- **User generated content services** such as YouTube, Instagram and TikTok are now supporting creators to create professionally produced content and build their audiences.

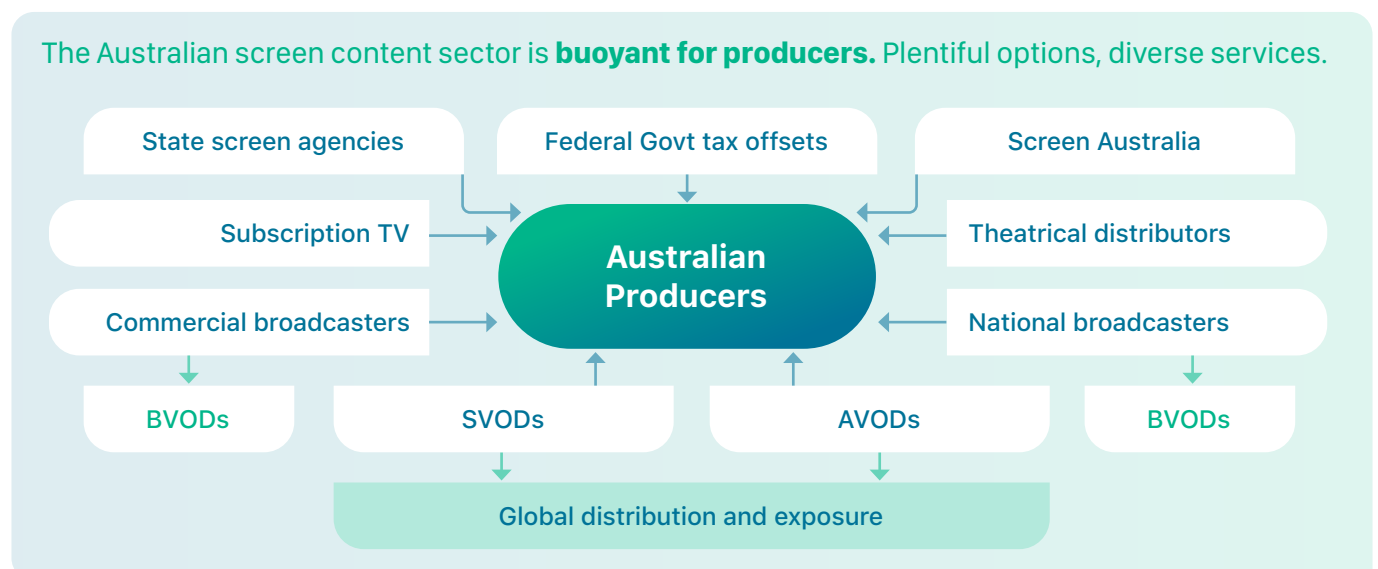


Content providers therefore operate in a highly competitive environment. In order to win viewers' attention we must commission content that meets audience preferences.

This landscape provides an **unprecedented opportunity** for the Australian screen industry.

As shown in the diagram below, Australian producers have never enjoyed creative exposure or local and global financial opportunities on this scale.

This interrelationship between content producers, broadcasters and streaming entertainment plays a key role in building and strengthening Australia's screen sector: increasing competition encourages higher quality productions, and contributes to Australia's national identity by showcasing our locations, culture and creative talent around the world.



⁴ Max was rebranded HBO Max in July 2025.

We are committed to commissioning **Australian films and series that are loved** by Australians and audiences around the world.

Australia has all the right ingredients that make it a highly desirable place to operate our businesses:

- Quality cast and outstanding crew.
- Talented writers and directors.
- Stable governments with a strong economy.
- Excellent locations – that can be both iconic or made to look like anywhere in the world.
- World-class post-production and visual effects facilities.
- English-language.
- Attractive production incentives.

With these attributes, it is no surprise that we are committed to growing our businesses and employing more Australians.

We understand the cultural value of making and telling Australian stories, and we know that Australian voices should be reflected on our screens – especially Australian drama, documentary and children's content.

We are doing this by making original content, building partnerships with local broadcasters and local producers, and supporting and developing a creative talent pool of Australian writers, actors, directors, producers, crew and post-production talent.

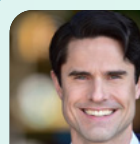
"We invest in local content because that's what our audiences want to watch. Our talented local writers, cast and crew consistently produce high quality and engaging content from our unique Australian perspective that resonates with audiences both here and abroad."

Daniel Monaghan
Senior Vice President Content & Programming,
Paramount Australia



"Prime Video is committed to commissioning Australian local originals and we are always on the lookout for new creative talent and fresh ideas across scripted and unscripted formats."

Tyler Bern
Head of Content,
Prime Video Australia



"We want amazing Australian storytellers to know that they can tell their incredible stories right here in Australia. They don't need to go to Hollywood, they don't need to go somewhere else, but they can tell hugely ambitious stories, authentic stories at significant scale right here, and we will help them find an amazing audience in Australia, in New Zealand, and around the world."

Greg Peters
Co-CEO,
Netflix



We are making high quality content in Australia, **and exporting it to the world**



CASE STUDY: **Deadloch**

Deadloch has become one of Prime Video's most successful Australian Originals – reaching

the Top 10 TV Shows in more than 165 countries and territories in 2023. *Deadloch* has been nominated for three Logie Awards including Best Scripted Comedy Program and Kate Box and Madeleine Sami are both nominated for the silver Logie for Best Lead Actress in a Comedy. The series won five AACTA Awards including Best Acting in a Comedy for Kate Box and Best Screenplay in Television for Kate McCartney and Kate McLennan. Additional accolades include an Equity Ensemble Award for Outstanding Performance by an Ensemble in a Comedy Series; a Screen Music Award for Best Music in a Television Series (Amanda Brown).

Prime Video has renewed *Deadloch* for a second season, making it the 30th Australian Original commissioned in the last five years. Guesswork Television, OK Great Productions and Amazon Studios are excited to be bringing it to screens.

Created, written and executive produced by Kate McCartney and Kate McLennan, Season Two of the crime comedy sees the return of Kate Box (Dulcie Collins), Madeleine Sami (Eddie Redcliffe), Nina Oyama (Abby Matsuda) and Alicia Gardiner (Cath York).

Deadloch Season 2 is financed with the assistance of Screen Territory through its Production Attraction Incentive Program and is further supported by the Queensland Government through Screen Queensland's Production Attraction Strategy.



CASE STUDY: **Black Snow**

Stan Original Series *Black Snow* brought together Australia's top acting, directing and production

talent. The all-Australian cast starred Travis Fimmell alongside a stand-out ensemble.

Filmed in Queensland, the series was produced by Goalpost Pictures and was written by Lucas Taylor. A second season was commissioned by Stan in 2024. Internationally, the series aired on Sundance Now in the US and the BBC in the UK, and was sold globally by All3 Media International.



CASE STUDY: **NCIS: Sydney**

NCIS: Sydney is the first local iteration of the NCIS franchise to be filmed outside of the United States and is now in production on its third season.

The debut season featured eight episodes and set the scene where an eclectic team of U.S. NCIS Agents and Australian Federal Police, were grafted into a multi-national taskforce to keep naval crimes in check, in the most contested patch of ocean on the planet.

The global launch of season one was on Paramount+ in Australia in November 2023 with New Zealand, the UK, U.S. and Canada following soon after. The series reached a cumulative audience of 10 million viewers in the US across CBS and Paramount+.

The second season grew to 10 episodes and premiered in Australia on Paramount+ in early February 2025 followed by The CBS Television Network in the U.S. and additional international markets.

A third season was announced in early 2025, testament to the popularity and success of the action-packed series both locally and globally.

Iconic Australian locations and landmarks feature throughout the series, making them must-visit tourist hot spots for millions of fans globally, including the spectacular Sydney harbour and Darwin in the Northern Territory.

Produced by Endemol Shine Australia for CBS Studios and Paramount Australia, *NCIS: Sydney* has employed approximately 750 cast and 2,000 crew; over 20 training placements have been made across the three seasons in various departments including script, camera, art, production, locations, accounts and direction; and ran development programs for 10 emerging screenwriters resulting in two participants joining the writing team for series two and three.

The production continues to support the Australian screen industry and invest in the professional development of local screen creatives.

Breathing life into Australian content

Our streaming services play host to **thousands of classic Australian titles** that we are licensing and distributing through our services in Australia and around the world.

This gives producers an additional revenue stream and actors a supplementary income source so they can

share in the commercial success of a program well after filming. It has the added benefit of introducing a new generation of Australians to some of our favourite stories and it gives local content more views and exposure.

For example, *Fisk* became one of the top 10 shows on Netflix globally in its second week on the platform. *Bluey* has achieved worldwide success since being made available globally on Disney+, and is now on its way to cinemas around the world.



Investing in the sustainability of the Australian screen industry

Streaming services are not only focussed on investing in great content. **We believe it is important to support the growth and sustainability of the local industry.**

This is particularly important in Australia, as record levels of production have resulted in skills shortages, capacity constraints and rising production costs. For example, in 2023 the ABS reported that between 2015-16 and 2021-22, increases in production resulted in a 64.5% increase in production costs for film and video, and a 143% increase in labour costs and a doubling of rent, leasing and hiring costs.⁵

We therefore ensure each of our productions focus on employment opportunities building capacity for local cast and crew.



CASE STUDY: **Boy Swallows Universe**

Netflix's adaptation of Trent Dalton's award winning

Australian novel, *Boy Swallows Universe*, became an instant hit on Netflix, enjoyed both locally and globally. The production provided strong employment and training opportunities: employing 175+ cast; employing 225+ crew; engaging over 800 Australian supports; and supporting six individuals with paid traineeships throughout the production.

The impact of the series goes beyond our screens, generating more than AUD \$45M of total Gross Value Added, the added value of goods and services produced across the Australian economy.

We are trainers and sponsors.

As well as investing in storytelling, streaming services are committed to investing in skills initiatives and on-the-job training programs. These initiatives support the sustainability of the screen industry, addressing critical production capacity constraints resulting from the unprecedented expenditure in the Australian screen industry over recent years. Our programs include but are not limited to:

- In August 2021, Netflix announced a partnership with Screenworks to support new career pathways in the screen industry for Australians in regional and rural locations. Since 2021, **Netflix has supported more than 10 interns through the Program**, providing them with training and paid, on-set placements.
- Stan's partnership with the Australian Children's Television Foundation will include the **production and development of Australian live action projects for young and family audiences**. Stan also has several active development initiatives in place with State screen agencies.

- Prime Video has a continued \$150,000 partnership with NIDA to **develop new writers and directors**. Across 2024 and 2025 this partnership **focused on women and applicants with intersectional backgrounds**, including but not limited to gender identity, cultural identity or people with a disability.
- Disney's Industrial Light and Magic (ILM): An Ecosystem Designed to Attract and Retain Talent. ILM is a leading-edge technology initiative that fosters significant long-term employment and specialised skills development. **ILM in partnership with the NSW government co-invested up to AUD \$6 million in the Sydney-based Jedi Academy, helping to create as many as 500 jobs over five years**. Roles include computer graphic artists, technical directors, engineers, systems and technical innovation, and project and client managers.
- Paramount+ *NCIS: Sydney* season one. With support from Screen Australia, six emerging Australian writers participated in a 10-week full-time paid program that immersed the screenwriters in all facets of the script department and development process. Season three also saw four participants in an eight-week early career script writing program. Two screenwriters from the inaugural program wrote episodes in series one and then joined the writing team for series two and three, demonstrating the capacity to develop careers via this program. This support allows emerging practitioners to gain valuable experience and clearly illustrates the production's continued investment in the professional development of local screen creatives.

"This was a wonderful opportunity that made me more confident in my ideas and my ability to connect with potential collaborators."

Participant in **Australians In Films and Netflix Pitching Workshop**

We also run trainee programs on our local productions. These programs provide paid, on set training opportunities to early and mid career creatives to build a pipeline of experienced practitioners. For example, when filming *The Office*, Prime Video worked with producing partners Bunya Entertainment and BBC Studios, **to support four mid-level crew to work alongside Heads of Departments (HODS) for eight weeks**. Netflix, in partnership with Fremantle Australia, **has supported more than 15 interns in paid positions across various departments during production of *Heartbreak High***.

⁵ ABS, Film, Television and Digital Games Australia, June 2023.



For further information contact
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