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Minister for the Arts

QTB No: QB24-000112

Last Updated by Department: ~~XX 18 November 2024~~ January 2025
Last Updated by Adviser: 18 November 2024

Arts - Australian content obligation on streaming services

HEADLINE

- As outlined in *Revive*, **Engaging the Audience** is critical to ensure continued access to local stories and content and the Government is committed to introducing Australian content requirements on streaming services to do this.

KEY ISSUES

- Through our National Cultural Policy *Revive*, the Albanese Labor Government committed to introducing Australian screen content requirements on streaming platforms to ensure continued access to local stories and content.
- We have brilliant talent in Australia, and we want to make sure that people have access to Australian scripted drama, documentary and children's stories across different platforms.
- The Government is undertaking a genuine consultation process and is taking the time to consider views about the best way to support ongoing investment in, and production of, Australian stories.
- Consultation is taking longer than we would like, but the Government is determined to get this right.
- ~~The Government is aiming to introduce legislation as soon as practicable.~~

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If asked about the Australia – United States Free Trade Agreement (AUSFTA)

- We are well aware of our obligations under relevant trade agreements. We are committed to an evidence-based and consultative approach to get the new obligation right.

s22(1)(a)(ii)

Contact Officer: s22(1)(a)(ii)
Telephone: s22(1)(a)(ii)

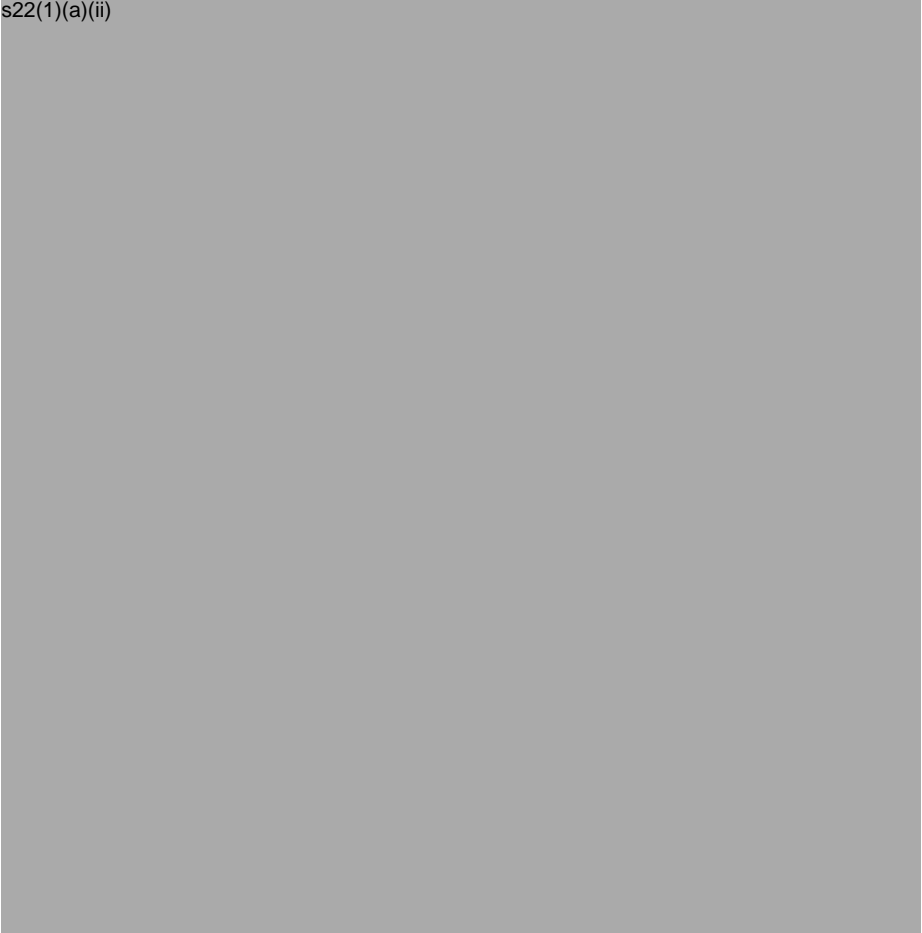
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s22(1)(a)(ii)



~~If asked about the Australia—United States Free Trade Agreement (AUSFTA)~~

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Telephone: s22(1)(a)(ii)

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s22(1)(a)(ii)

Australia – United States Free Trade Agreement (AUSFTA)

- US industry, Congressional Offices and the US Government have made strong representations to Ambassador Kevin Rudd and the Australian Embassy in Washington to convey their opposition to an obligation of more than 10 per cent of expenditure.
- Australian Government officials continue to meet with United States Government trade representatives to discuss progress on the streaming services obligation and possible implications for Australia's trade obligations.

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Telephone: s22(1)(a)(ii)


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Recent media reports

23 February 2025: Australian Financial Review – New Trump tariff threat to Australia over 'plundering' of tech giants

- In the lead up to Treasurer Jim Chalmers meeting with US Treasury Secretary Scott Bessent, President Trump has accused overseas governments of plundering the revenues of US tech companies.
- Trump went on to say the US would impose tariffs or take other retaliatory steps "to repair any resulting imbalance" created by policies imposed on US tech giants such as Apple, Meta, Alphabet and Amazon.
- In a memo sent by Trump to Bessent, Trump stated "Foreign governments have increasingly exerted extraterritorial authority over American companies, particularly in the technology sector, hindering these companies' success," and went on to say that the US would impose tariffs or take other retaliatory steps "to repair any resulting imbalance" created by policies imposed on US tech giants such as Apple, Meta, Alphabet and Amazon. The memo also focusses on digital services taxes imposed on US companies by a number of EU countries as well as Canada Britain and Turkey.
- Another area that could attract the ire of the US regime is the imposition of regulations on payment platforms such as digital wallets, as well as content quotas being imposed on US streaming platforms.
- Trump also cited laws that require American streaming services to fund local productions saying, "All of these measures violate American sovereignty and offshore American jobs, limit American companies' global competitiveness, and increase American operational costs while exposing our sensitive information to potentially hostile foreign regulators."
- US trade officials have also opposed moves to force streaming platforms such as Netflix, Disney+ and HBO to produce Australian made television and movies, a plan the Albanese government shelved in November.

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Contact Officer: s22(1)(a)(ii)
Telephone: s22(1)(a)(ii)


Date QTB Created: 17 January 2024

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Date QTB Created: 17 January 2024

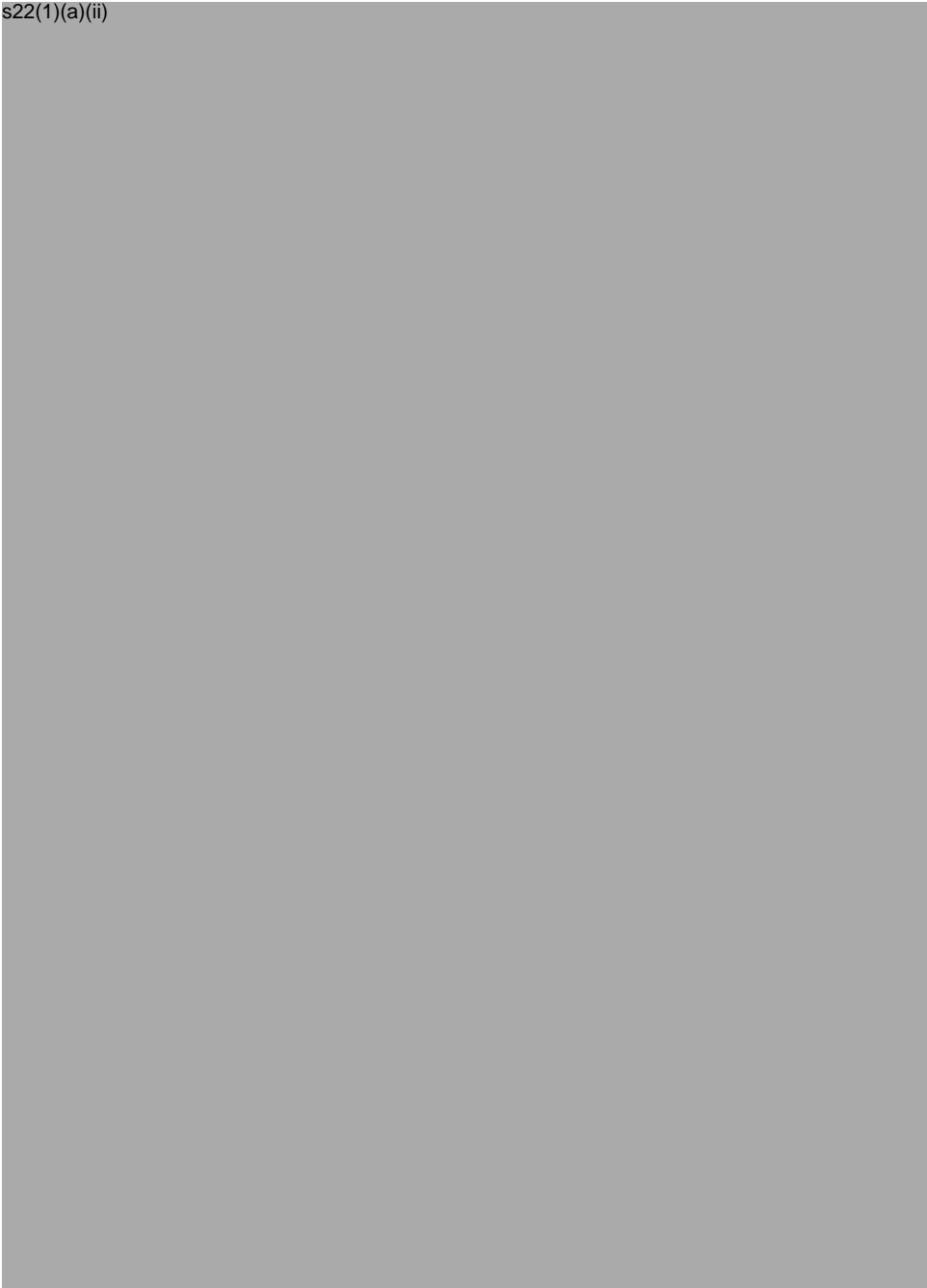
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Telephone: s22(1)(a)(ii)

Date QTB Created: 17 January 2024

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~~Protected: Cabinet~~

Australian Government

Department of Infrastructure, Transport,
Regional Development, Communications and the Arts

Meeting Brief: s47C

Timing: 3:00pm-4:30pm, Thursday 1 May 2025

s47C

What do the attendees want: This IDC is held regularly to discuss Australian engagements and policies related to the United States. s47C

s47C

Key Points:

1. Australian content obligations on streaming services have recently been recommitted by the current Prime Minister and Arts Minister. Details of this commitment are at Attachment A.

s22(1)(a)(ii)

s47C

s22(1)(a)(ii)

Contact: s22(1)(a)(ii) | Director – Content Section | P +61 2 s22(1)(a)(ii) M s22(1)(a)(ii)

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~~Protected: Cabinet~~**Attachment A - ALP Election Commitments on Australian Content Obligations****Recommitment from Prime Minister, 3 April 2025:**

- [IN FULL: Prime Minister Anthony Albanese responds to new US tariffs | ABC NEWS](#)
- **Quote:** “We strongly support local content in streaming services so Australian stories stay on Australian screens”.
- **Background:**
 - The Prime Minister’s statement was made in response to Australia being explicitly named in the U.S. Trade Representative’s “Foreign Trade Barriers” report for 2025.
 - The report expressly mentioned Australia’s National Cultural Policy and its intention to introduce “requirements for Australian screen content on streaming platforms to ensure continued access to local stories.”
 - The U.S. government noted it “will continue to monitor this issue to ensure Australia’s compliance with its FTA obligations.”
 - The trade report singles out 13 other territories — including the European Union, Canada, China, India and Korea — for similar measures protecting local content industries.

Recommitment from Minister Burke, 29 April 2025:

- [Opinion: Reviving Australia’s arts and culture \(ArtsHub\)](#)
- **Quote:** In 2013, before any streaming platforms had arrived, there were a lot of conversations about free to air quotas. I was saying then it won’t be long before people are watching the internet through their TV. We needed to get ahead of the game to be able to have a quota system there as well.
Jumping forward to today and no action was undertaken by previous Coalition Governments. However, this government has been consistently consulting with stakeholders to implement streaming quotas.

This process has been slower than we would have liked. However, we have reiterated our commitment to implementing an Australian content obligation on streaming platforms.
We have such a rich history of Australian screen content, and we want this to grow and thrive. So, we’ve increased the Location Offset to encourage large-scale screen productions to film in Australia.



March 11, 2025

The Honorable Jamieson Greer
United States Trade Representative
600 17th Street, NW
Washington, D.C. 20508

Dear Ambassador Greer:

On behalf of the Directors Guild of America (DGA) and the International Alliance of Theatrical Stage Employees, Moving Picture Technicians, Artists and Allied Crafts (IATSE), we are submitting the following comments to assist the U.S. Trade Representative in reviewing and identifying unfair trade practices and initiating all necessary actions to investigate harm to the United States from any non-reciprocal trade arrangements.

Collectively we represent nearly 200,000 filmmakers that comprise the directorial, technical, and artistic teams that power the American film and television industry. Our mission is to protect the creative and economic rights of our members. Film and television production spurs economic growth, and other countries, realizing this, have sought to draw production to their shores and produce film and television programs intended for the U.S. marketplace.

Often under the guise of protecting culture, other countries have erected trade barriers that disadvantage the work of our members and undermine the protections we have collectively bargained for in the U.S. These countries have increasingly turned to non-tariff barriers to disadvantage the works created by our members, particularly in the digital marketplace. Local content quotas on streaming services, predatory tax regimes, local-content-investment obligations, and a myriad of unfair trade practices limits legitimate access to American content and drive foreign audiences toward online piracy.

Adverse trade practices have been impacting the United States' film industry for decades. The United Kingdom, several members of the European Union, and many other countries have erected barriers to the distribution of American-made film and television programs. These barriers not only depress legitimate licensing and sales, but in some cases add insult to injury by redirecting money that should flow back to the United States by trapping it abroad to fund foreign content production, further exacerbating runaway production. This occurs when distributors collecting foreign revenue on our members' work must siphon off parts of that revenue to pay for productions within foreign countries instead of returning it fully to the United States and to the DGA's and IATSE's members. In France, for example, this comes as an investment obligation in French production equating to 25% of net annual French revenues by video on-demand services.

These trade barriers undercut the ability of American creative workforce to compete fairly in the global marketplace, and we immediately see the damaging effects on U.S. employment. Our industry has seen a 40% decline in television production in the U.S. relative to 2022 levels. Contrast this with the United Kingdom, for example, where 65% of the total production costs spent on film in 2024 came from the five major American studios (Disney, Universal, Sony Pictures, Paramount, and Warner Bros.) and three major U.S. streaming platforms (Netflix, Apple, and Amazon) – representing a 49% increase over 2023. While some U.S. states have established their own incentive programs to mitigate runaway production, this piecemeal approach will not achieve significant success in remedying the problem without action at the federal level – including through the elimination of foreign trade barriers.

In addition to the job losses suffered by our members due to runaway production, offshoring significantly reduces residuals and thereby jeopardizes the economic safety net our members have worked their lives to earn. Residuals sustain our members between jobs in a freelance industry and directly fund our health, pension, and other benefit plans. For example, in 2023, the DGA collected \$550 million in residuals – funds that were then distributed as direct compensation to our members and to help fund the DGA's world-class union pension plan. Similarly, IATSE collected over \$500 million in residuals for its primary health and pension plans that provide health benefits and retirement security to IATSE members.

When other nations erect trade barriers that undercut the ability of American creative workforce to compete fairly in the global marketplace, we immediately see the damaging effects on U.S. employment.

We thank your office for soliciting input on this critical issue. Open, free, and reciprocal trade ensures that American filmmakers can compete fairly, earn a living from legitimate foreign sales as guaranteed by our hard-fought contracts, and promote the global exchange of free speech. The DGA and IATSE supports this Administration's efforts to address foreign trade barriers and looks forward to working with you to prevent the continued discrimination by foreign countries against our industry and members.

Sincerely,



Russell Hollander
National Executive Director
Directors Guild of America



Matthew D. Loeb
International President
International Alliance of Theatrical
Stage Employees

###

The Directors Guild of America (DGA) represents more than 19,000 directors and members of the directorial team—which includes Unit Production Managers, Assistant Directors, Associate Directors, Stage Managers, and Production Associates—who create feature films, television programs, commercials, documentaries, news, sports, and other motion picture productions. Its mission is to protect the creative and economic rights of DGA members.

The International Alliance of Theatrical Stage Employees, Moving Picture Technicians, Artists and Allied Crafts (IATSE) is a labor organization representing over 170,000 members in the United States and Canada working in all forms of live theater, motion picture and television production, trade shows and exhibitions, television broadcasting, and concerts as well as the equipment and construction shops that support all these areas of the entertainment industry. We represent virtually all the behind-the-scenes workers in crafts ranging from motion picture animator to theater usher.

From: s22(1)(a)(ii)
To: s22(1)(a)(ii) ; s22(1)(a)(ii)
Cc: s22(1)(a)(ii) ; s22(1)(a) ; s22(1)(a)(ii) ; s22(1)(a) ; s22(1)(a)(ii) ; s22(1)(a)(ii) ; Lillian's 2
Subject: RE: For Office of the Arts advice and clearance: Talking Points: s33(a)(iii) [SEC=OFFICIAL]
Date: Monday, 5 May 2025 5:57:07 PM
Attachments: [image001.jpg](#)

OFFICIAL


Hi s22(1)(a)(ii)

Thank you for your quick work to clear these – greatly appreciated. We have made some small revisions to tighten the language. Not edits to the 'if raised' provide by Arts – for which thanks.

The below has been shared with the Trade Minister's office. You are welcome to share it with your minister and other officers, for consistency.

//

s33(a)(iii)



//

Kind regards

s22(1)(a)
(ii)

s22(1)(a)(ii)

Assistant Director | DFAT US Trade Taskforce
P +61 2 s22(1)(a)(ii) | M +61 s22(1)(a)(ii)

From: s22(1)(a)(ii) <s22(1)(a)(ii)@arts.gov.au>

Sent: Monday, 5 May 2025 5:11 PM

To: s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>; s22(1)(a)(ii)
<s22(1)(a)(ii)@INFRASTRUCTURE.gov.au>

Cc: s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>;
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<s22(1)(a)(ii)@dfat.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@Arts.gov.au>; s22(1)(a)(ii)
<s22(1)(a)(ii)@arts.gov.au>

Subject: RE: For Office of the Arts advice and clearance: Talking Points: s33(a)(iii)
[SEC=OFFICIAL]

OFFICIAL

Hi s22(1)
(a)(iii)

Thank you very much for sending these through – they look good to us. We just have some minor suggestions in red. We currently have a staff member in South Africa for G20 negotiations. Do you mind if we provide these to her? Additionally, I have included our standard words on streaming in relation to this announcement below.

s33(a)(iii)

s33(a)(iii)

Best,

s22(1)(a)(ii)

Director • Content • Screen and Arts Workforce Development

P +61 2 s22(1)(a) M s22(1)(a)(ii)

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From: s22(1)(a)(ii) urne <s22(1)(a)(ii)@dfat.gov.au>

Sent: Monday, 5 May 2025 4:28 PM

To: s22(1)(a)(ii) <s22(1)(a)(ii)@INFRASTRUCTURE.gov.au>; s22(1)(a)(ii)

<s22(1)(a)(ii)@arts.gov.au>

Cc: s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>;

s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>; s22(1)(a)(ii)

<s22(1)(a)(ii)@dfat.gov.au>

Subject: For Office of the Arts advice and clearance: Talking Points: s33(a)(iii)

[SEC=OFFICIAL]

OFFICIAL

Hi s22(1)(a)(ii) s22(1)(a)(ii)

The Trade Minister's office has requested talking points be developed on the potential announcement of tariffs on the film industry.

To ensure we aren't duplicating effort – and noting Minister Burke has issued a statement – would you be able to share any talking points already prepared for Government? We would then share with our office.

If you haven't – we have developed some quick TPs below. We would welcome your clearance to share these with our Office.

//

s33(a)(iii)

s33(a)(iii)

//

Kind regards

s22(1)(a)
(iii)

s22(1)(a)(ii)

Assistant Director | US Trade Taskforce
 Department of Foreign Affairs and Trade
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Cc: s22(1)(a)(ii) ; s22(1)(a)(ii) ; s22(1)(a)(ii) ; s22(1)(a)(ii) ; s22(1)(a)(ii) ; s22(1)(a)(ii)
Subject: RE: Suggested response to if raised on s33(a)(iii) [SEC=OFFICIAL:Sensitive]
Date: Friday, 13 June 2025 10:36:00 AM
Attachments: [image002.jpg](#)
[image003.png](#)

OFFICIAL:Sensitive

Hi s22(1)(a)(ii)

We've added some information below and made a few minor edits. Feel free to reach out if you have any questions.

s33(a)(iii)



Kind regards

s22(1)(a)

s22(1)(a)(ii)

Assistant Director • Content Section • Screen and Arts Workforce Development

s22(1)(a)(ii) @arts.gov.au

P +61 2 s22(1)(a)

GPO Box 2154 Canberra, ACT 2601

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Department of Infrastructure, Transport, Regional Development, Communications and the Arts
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*I would like to acknowledge the traditional custodians of this land on which we meet, work and live.
 I recognise and respect their continuing connection to the land, waters and communities,
 I pay my respects to Elders past and present and to all Aboriginal and Torres Strait Islanders.*

From: s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>
Sent: Thursday, 12 June 2025 3:34 PM
To: s22(1)(a)(ii) <s22(1)(a)(ii)@arts.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@INFRASTRUCTURE.gov.au>
Cc: s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@arts.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>
Subject: RE: Suggested response to if raised on s33(a)(iii)
 [SEC=OFFICIAL:Sensitive]

OFFICIAL: Sensitive

Hi s22(1)(a)(ii)

As we have cleared these TPs up the line we have received the below suggestions/changes in s33(a)(iii). Is this information Office of the Arts would have?

Very happy to discuss further.

////

s33(a)(iii)

////

Kind regards,
 s22(1)(a)(ii)

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Director | US Trade Taskforce
P +61 2 s22(1)(a)(ii) M s22(1)(a)(ii)

From: s22(1)(a)(ii)
Sent: Wednesday, 11 June 2025 5:23 PM
To: s22(1)(a)(ii) <s22(1)(a)(ii)@arts.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@INFRASTRUCTURE.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>
Cc: s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@arts.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>
Subject: RE: Suggested response to if raised on s33(a)(iii)
[SEC=OFFICIAL:Sensitive]

OFFICIAL: Sensitive

Many thanks s22(1)(a)(ii)

s33(a)(iii) but perhaps reach out to PMC
(s22(1)(a)(ii)) for what is included.

Kind regards,
s22(1)(a)(ii)

Director | US Trade Taskforce
P +61 2 s22(1)(a)(ii) M s22(1)(a)(ii)

From: s22(1)(a)(ii) <s22(1)(a)(ii)@arts.gov.au>
Sent: Wednesday, 11 June 2025 5:03 PM
To: s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@INFRASTRUCTURE.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>
Cc: s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@arts.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>
Subject: RE: Suggested response to if raised on s33(a)(iii)
[SEC=OFFICIAL:Sensitive]

OFFICIAL: Sensitive

Hi s22(1)(a)(ii)

Thanks for reaching out. s33(a)(iii)

s33(a)(iii)

Kind regards,

s22(1)(a)(ii)

Director • Content • Screen and Arts Workforce Development

P +61 2 s22(1)(a) M s22(1)(a)(ii)

OFFICIAL:Sensitive**From:** s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>**Sent:** Wednesday, 11 June 2025 4:36 PM**To:** s22(1)(a)(ii) <s22(1)(a)(ii)@INFRASTRUCTURE.gov.au>; s22(1)(a)(ii)

<s22(1)(a)(ii)@dfat.gov.au>

Cc: s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>;

s22(1)(a)(ii) <s22(1)(a)(ii)@arts.gov.au>; s22(1)(a)(ii) <s22(1)(a)(ii)@arts.gov.au>;

s22(1)(a)(ii) <s22(1)(a)(ii)@dfat.gov.au>

Subject: Suggested response to if raised on s33(a)(iii)

[SEC=OFFICIAL:Sensitive]

OFFICIAL: Sensitive

s22(1)(a)(ii) and s22(1)(a)(ii)

s33(a)(iii)

Grateful any input by **noon tomorrow**.

Kind regards,

s22(1)(a)(ii)

s22(1)(a)(ii)

Director | US Trade Taskforce

Department of Foreign Affairs and Trade

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Explainer: Section 301 of the Trade Act of 1974 (US)

Sections 301–310 of the Trade Act of 1974 (titled “Relief from Unfair Trade Practices”) allow the US to investigate and potentially take unilateral retaliatory action to respond to certain foreign trade acts, policies and practices, including those the US considers to be:

- inconsistent with a trade agreement; or
- unreasonable or discriminatory and burdensome or restrictive of US commerce.

Retaliatory actions can include tariffs on goods from the countries being investigated and the suspension of the concessions made by the US under any trade agreements with those countries.

The core steps of a s301 investigation process are summarised below.

Process

- **Initiation:** The first step in a s301 proceeding is the initiation of a **formal investigation** by USTR. This must be publicly announced.
- **Public consultation:** USTR consults relevant interagency committees, requests and receives submissions from the public, and may hold a public hearing. Typically, this occurs within weeks/months after USTR announces the investigation.
- **Consultation with affected government and potential use of FTA dispute settlement procedures:** USTR is also required to request consultations with the relevant foreign government/s. These consultations occur in parallel with the USTR’s investigation and public consultation processes.
 - Ordinarily there is no prescribed timeframe for USTR to conclude those consultations.
 - If the investigation involves a trade agreement, then consultations are to be completed within 150 days (or if the trade agreement contains a shorter consultation period, then that period). If consultations do not produce a mutually acceptable resolution, **USTR is required to request dispute settlement proceedings under the relevant agreement.**
- **USTR is then required to determine** whether the foreign government’s act, policy or practice:
 - (1) violates, or is inconsistent with, or denies benefits to the US under, a trade agreement, or results in US rights under a trade agreement being denied;
 - (2) is unjustifiable, and burdens or restricts US commerce; or
 - (3) is unreasonable or discriminatory, and burdens or restricts US commerce, and USTR determines that action is appropriate.
 - This determination will be published. Previous USTR determinations have typically been accompanied by a detailed report outlining how and why USTR considers the relevant measure to be discriminatory, unreasonable, or otherwise ‘actionable’ under s301, including extracts of submissions from affected US industry participants.
 - USTR typically needs to make this determination **within 12 months** of initiating the investigation. (If the investigation involves a trade agreement, then USTR must make the determination either shortly after any dispute settlement proceedings are concluded, or within 18 months after initiating the investigation.)
- **USTR must then determine what action should be taken to respond to the measure.** Depending on the finding of the investigation, in certain cases USTR is legally required to take action within 30 days of its determination; in other cases, USTR is only required to take action if it judges it appropriate, and subject to the specific direction, if any, of the President.

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- **Actions** can generally be taken against any economic sector, and do not have to target the same sector that was harmed. Actions can include:
 - suspending, withdrawing or preventing the application of benefits of trade agreement concessions;
 - imposing duties or other import restrictions or fees on goods and services from the relevant foreign country;
 - entering into binding agreements with the relevant foreign country to either: (1) eliminate the conduct in question or the burden or restriction on US commerce; or (2) compensate the US with satisfactory trade benefits.

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Arts - Australian content obligation on streaming services

HEADLINE

- As outlined in *Revive*, **Engaging the Audience** is critical to ensure continued access to local stories and content and the Government is committed to introducing Australian content requirements on streaming services to do this.

KEY ISSUES

- Through our National Cultural Policy *Revive*, the Albanese Labor Government committed to introducing Australian screen content requirements on streaming platforms to ensure continued access to local stories and content.
- We have brilliant talent in Australia, and we want to make sure that people have access to Australian scripted drama, documentary and children's stories across different platforms.
- The Government is undertaking a genuine consultation process and is taking the time to consider views about the best way to support ongoing investment in, and production of, Australian stories.
- Consultation is taking longer than we would like, but the Government remains committed to finding an outcome.

If asked about the Australia – United States Free Trade Agreement (AUSFTA)

- We are well aware of our obligations under relevant trade agreements. We are committed to an evidence-based and consultative approach to get the new obligation right.

If asked about the proposed US tariffs on films produced overseas

- The Australian Government is aware of recent statements from the Trump administration proposing tariffs on movies filmed overseas entering the United States.
- The impact of any proposed tariffs on the Australian screen industry is unclear and will depend on the scope of the proposal and how it is to be implemented.

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- We will continue to monitor the situation as it develops and further details about the proposal become available.
- The Government will continue to stand up for the rights of the Australian screen industry.
- The Australian Government, through the National Cultural Policy, *Revive*, is committed to supporting a strong domestic screen sector to make sure that quality Australian content can continue to be produced for local and international audiences. In 2023-24, the Government invested a total of \$878 million in the screen sector through direct funding or incentives.
- The Government also remains committed to introducing Australian screen content requirements on streaming platforms to ensure continued access to local stories and content as set out in *Revive*.
- We will continue to consult and take the time to consider how best to support investment in, and production of, Australian stories.

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BACKGROUND

- On 30 January 2023, the Australian Government launched the **National Cultural Policy, *Revive: a place for every story, a story for every place.***

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Australia – United States Free Trade Agreement (AUSFTA)

- Australian Government officials continue to meet with United States Government trade representatives to discuss progress on the streaming services obligation and possible implications for Australia's trade obligations.

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Recent media reports

9 May 2025: SBS News – A \$767 million question: What Trump's movie tariff plan could mean for Australia

- The article reports that United States President Donald Trump has announced he would be pursuing a 100 per cent tariff on all movies "produced in foreign lands".
- The article reports that foreign productions are big business for Australia's screen industry — and some fear Donald Trump's proposed movie tariffs could send "shockwaves" through it.
- The article notes that while there aren't concrete details on how this tariff would be executed, those in the Australian filmmaking scene are already "shocked and surprised".

6 May 2025: ABC News online – Trump has threatened a tariff on movies made outside the US. Here's what we know

- The article reports that United States President Donald Trump is eyeing Hollywood for his next round of tariffs, threatening to target all films produced outside the US at a rate of 100 per cent.'

26 March 2025: Capital Brief – Labor to push ahead on streaming quotas despite Trump trade fears

- The article suggests that the Labor government will shrug off fears of retaliation from the Trump administration and proceed with plans to force Netflix, Amazon and other streaming platforms to invest in Australian content after nearly securing an agreement on quotas in late 2024.

20 March 2025: The Guardian – Trump urged to target 'coercive and discriminatory' Australian media laws by Musk's X, Apple, Google and Meta

- The article reports that the Office of the United States Trade Representative (USTR) issued a request for 'comments to assist in reviewing and identifying unfair trade practices and initiating all necessary actions to investigate harm from non-reciprocal trade arrangements.'
- Members of the Computer and Communications Industry Association (CCIA) have responded to the request by drawing the USTR's attention to the Australian Government's proposed Australian screen content requirements for streaming services.
- The CCIA's trade policy manager, Amir Nasr, wrote that: 'companies could be required to pay anywhere between 10% and 20% of their local expenditure on Australian content, with qualifications that will likely make it very difficult for U.S. companies to qualify.'
- Nasr added that 'Australia's online video streaming market is estimated to generate up to \$2.3 billion of annual revenue, with the majority of it earned from U.S. companies. If the Australian government pursues the 20% expenditure mandate it has floated in the past year, that would put this revenue at risk.'

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Last Updated by Department: 24 March 2025

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23 February 2025: Australian Financial Review – New Trump tariff threat to Australia over 'plundering' of tech giants

- The article reports that President Trump has accused overseas governments of plundering the revenues of US tech companies.
- President Trump is quoted as saying "Foreign governments have increasingly exerted extraterritorial authority over American companies, particularly in the technology sector, hindering these companies' success," and went on to say that the US would impose tariffs or take other retaliatory steps "to repair any resulting imbalance" created by policies imposed on US tech giants such as Apple, Meta, Alphabet and Amazon.
- The article reports that the imposition of regulations on payment platforms such as digital wallets, as well as content quotas being imposed on US streaming platforms could also attract the ire of the US regime.
- President Trump also cited laws that require American streaming services to fund local productions saying, "All of these measures violate American sovereignty and offshore American jobs, limit American companies' global competitiveness, and increase American operational costs while exposing our sensitive information to potentially hostile foreign regulators."
- The article reports that US trade officials have opposed moves to force streaming platforms such as Netflix, Disney+ and HBO to produce Australian made television and movies, and states that the Albanese government shelved these plans in November 2024.

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Arts - Australian content obligation on streaming services

HEADLINE

Through our National Cultural Policy Revive, the Albanese Labor Government committed to introducing Australian screen content requirements on streaming platforms to ensure continued access to local stories and content.

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KEY ISSUES

s22(1)(a)(ii)

- We have brilliant talent in Australia, and we want to make sure that people have access to Australian ~~scripted drama, documentary and children's~~ stories across different platforms.
- The Government is undertaking a genuine consultation process and is taking the time to consider views about the best way to support ongoing investment in, and production of, Australian stories.
- Consultation is taking longer than we would like, but the Government remains committed to finding an outcome.

If asked about the Australia – United States Free Trade Agreement (AUSFTA)

We are well aware of our obligations under relevant trade agreements. We are committed to an evidence-based and consultative approach to get the new ~~obligation requirements~~ right.

If asked about the proposed US tariffs on films produced overseas

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- The Australian Government is aware of recent statements from the Trump administration proposing tariffs on movies filmed overseas entering the United States.
- The impact of any proposed tariffs on the Australian screen industry is unclear and will depend on the scope of the proposal and how it is to be implemented.
- We will continue to monitor the situation as it develops and further details about the proposal become available.
- The Government will continue to stand up for the rights of the Australian screen industry.

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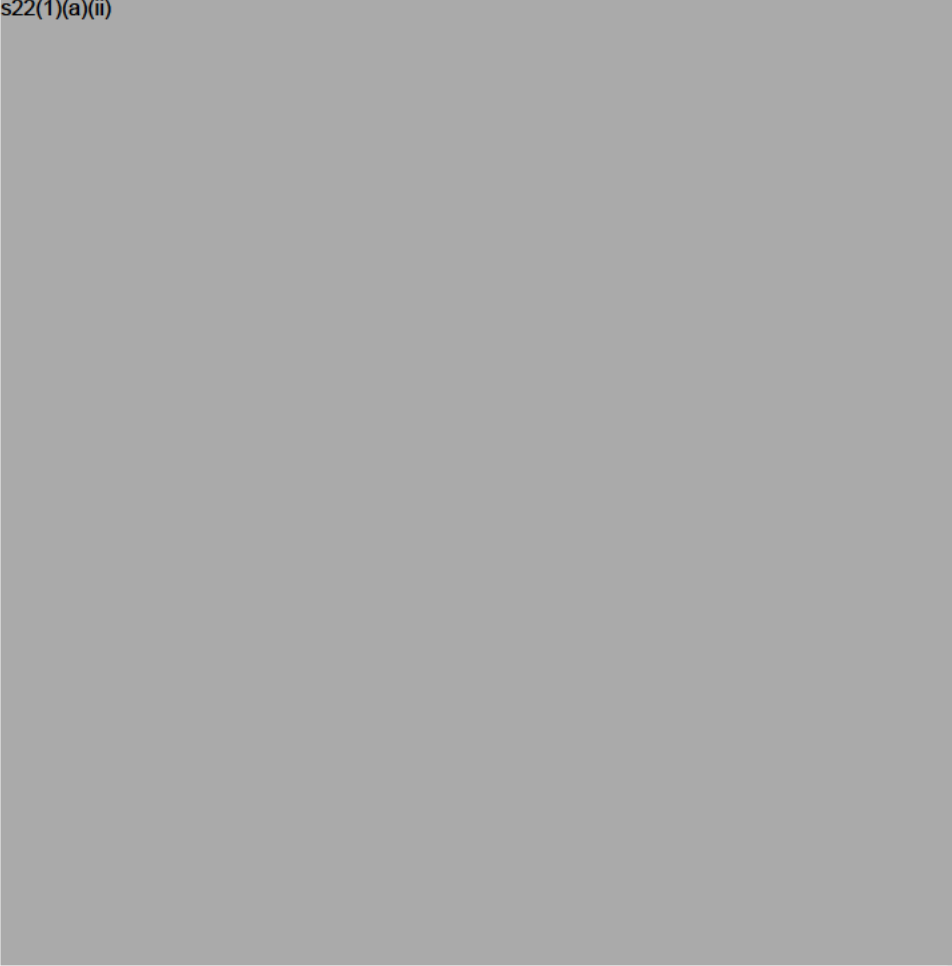
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BACKGROUND

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- The proposed local content obligation was identified by the US Government in its 2025 National Trade Estimate Report on Foreign Trade Barriers. The report states that the United States will 'continue to monitor this issue to ensure Australia's compliance with its free trade agreement obligations'.

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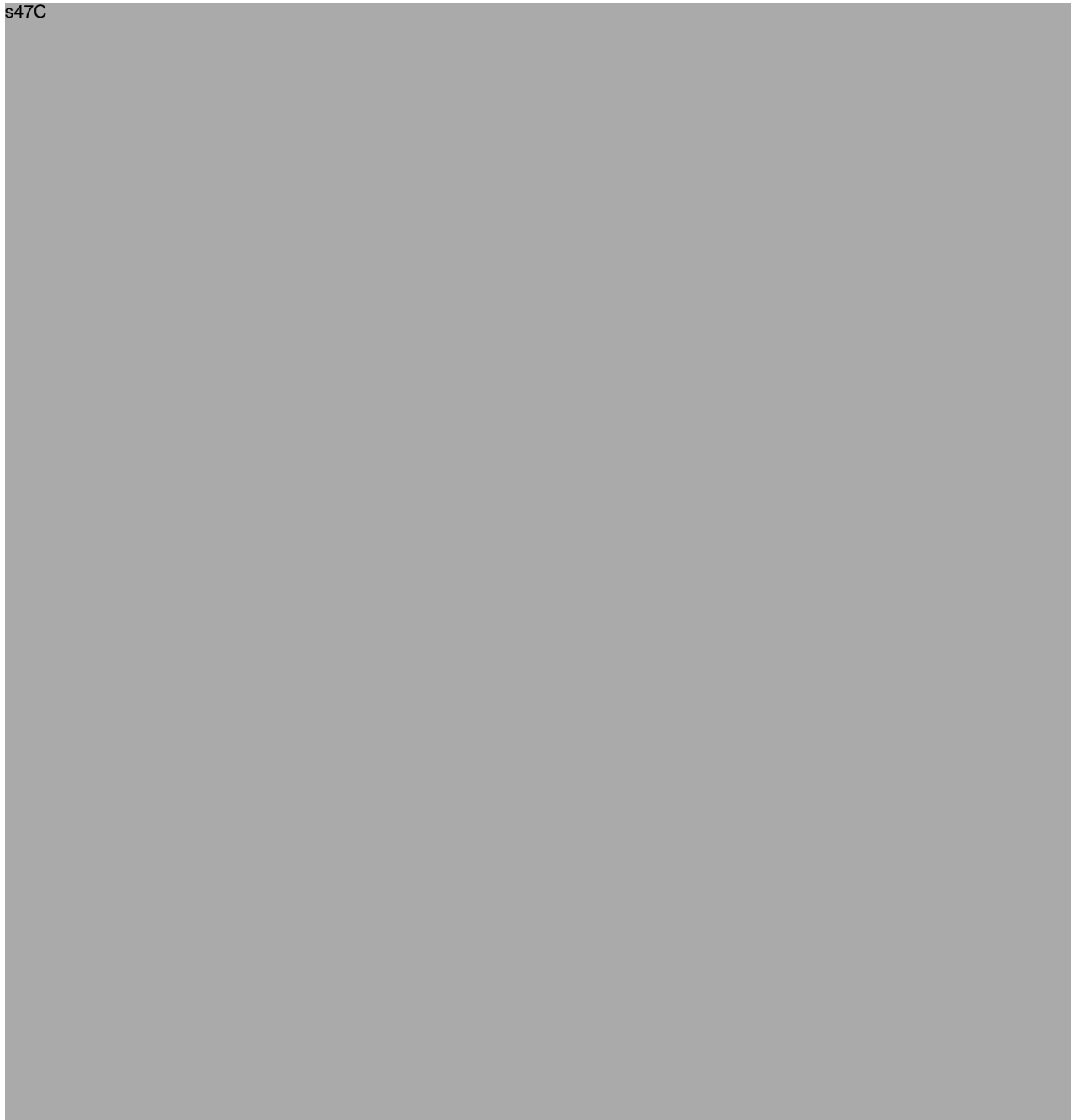
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Date QTB Created: 17 January 2024

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***What is pay-per view?***

- Pay-per-view services allow viewers to rent or buy individual films or programs. Pay-per-view services include services such as Google Play (Movies & TV), Apple TV and OzFlix.
- This is in contrast to subscription streaming services allow users to pay a fee to access a range of content over a set period of time (subscription period), such as a month or a year.
- Some services offer only pay-per-view content (such as Google Play), while others offer content that is available as part of a subscription plan, and additional pay-per-view content.

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- The surveys described in the December 2024 Australian Communications and Media Authority report *Communications and media in Australia series: How we watch and listen to content Executive summary and key findings*¹ found that in the previous 7 days:
 - 7% of Australians used pay-per-view
 - 69% of people watched subscription streaming services
 - 18% watched pay-tv or other subscription TV channels

¹ <https://www.acma.gov.au/publications/2024-12/report/communications-and-media-australia-how-we-watch-and-listen-content> ; <https://www.acma.gov.au/publications/2023-12/report/communications-and-media-australia-methodology>

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From: s22(1)(a)(ii)
To: s22(1)(a)(ii)
Cc: s22(1)(a)(ii) ; s22(1)(a)(ii) ; s22(1)(a)(ii) ; [Potkins, Jason](#)
Subject: Content section input - MB25-001030 -Australian content requirements for SVOD platforms
~~[SEC-PROTECTED, CAVEAT-SH.CABINET]~~
Date: Thursday, 3 July 2025 2:31:00 PM
Attachments: [image002.png](#)
[image003.png](#)

~~PROTECTED, SH.CABINET~~

Hi s22(1)(a)(iii)

The Content Section's branch head cleared input is below.


Kind regards

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Australian content requirements for SVOD platforms

Key Points

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If asked:

Consistency of the proposed models with international free trade agreements


- The Government is aware of concerns that Australian content requirements for streaming services may not be consistent with Australia's obligations under the Australia – United States Free Trade Agreement.
- The Government is conscious of its international trade obligations.
- The Government is committed to an evidence-based and consultative approach to get the new obligation right.

Impact of the Trump administration's proposed tariffs on foreign-produced films


- Until the scope, nature and timing of any tariff is known, the impact on the Australian screen production sector is impossible to predict and would be purely speculative.
- The Government is in regular contact with representatives of the US studios

and streaming platforms. The Government will continue to monitor the situation.

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s22(1)(a)(ii)



s22(1)(a)(ii)

Senior Policy Officer • Content Section • Screen and Arts Workforce Development Branch

s22(1)(a)(ii) [@infrastructure.gov.au](mailto:s22(1)(a)(ii)@infrastructure.gov.au)

P +61 2 6136 s22(1)(a)(ii)

GPO Box 594 Canberra, ACT 2601

Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts

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*I acknowledge the traditional custodians of this land on which we meet, work and live.
I recognise and respect their continuing connection to the land, waters and communities.
I pay my respects to Elders past and present and to all Aboriginal and Torres Strait Islander people*

From: 's22(1)(a)(ii)' <s22(1)(a)(ii)@COMMUNICATIONS.gov.au>
Date: Wednesday, 2 July 2025 at 12:36:21 pm
To: 's22(1)(a)(ii)' <s22(1)(a)(ii)@INFRASTRUCTURE.gov.au>, "Verdon, Andrew" <Andrew.Verdon@INFRASTRUCTURE.gov.au>, 's22(1)(a)(ii)' <s22(1)(a)(ii)@INFRASTRUCTURE.gov.au>, 's22(1)(a)(ii)' <s22(1)(a)(ii)@arts.gov.au>, 's22(1)(a)(ii)' <s22(1)(a)(ii)@health.gov.au>, 's22(1)(a)(ii)' <s22(1)(a)(ii)2@INFRASTRUCTURE.gov.au>
Cc: 's22(1)(a)(ii)' <s22(1)(a)(ii)@COMMUNICATIONS.gov.au>, 's22(1)(a)(ii)' <s22(1)(a)(ii)@infrastructure.gov.au>
Subject: Request for input by COB Monday, 7 July 2025 | MB25-001030 [SEC=OFFICIAL]

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Good afternoon all

We've received a request from the Minister's Office for a meeting brief by 15 July 2025. s22(1)(a)(ii)
 s22(1)(a)(ii). I am coordinating the briefing for this meeting.

s22(1)(a)(ii)

s22(1)(a)(ii)

I welcome any input on:

- s22(1)(a)(ii)
- s22(1)(a)(ii)
- Australian content requirements on subscription video on demand platforms
- s22(1)(a)(ii)
- s22(1)(a)(ii)

Could you please provide any relevant key points, sensitivities and background, to include in the meeting brief? I have attached the brief template for your reference, but I'm happy to receive input directly via email.

I would be grateful for **cleared input** by **COB Monday, 7 July 2025** to accommodate for clearance timeframes.

Happy to discuss further,

s22(1)
(a)(iii)

s22(1)(a)(ii)

Senior Policy Officer • Broadcast & Technology Policy

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I acknowledge the traditional custodians of this land on which we meet, work and live.

I recognise and respect their continuing connection to the land, waters and communities.

I pay my respects to Elders past and present and to all Aboriginal and Torres Strait Islander people.

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~~PROTECTED, SH.CABINET~~

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Streaming Measures in USTR Foreign Trade Barriers Report

Country	Measure Description	OFTA commentary
Australia	Australia is considering imposing Australian screen content requirements on streaming video services as part of its National Cultural Policy. The Policy, published in January 2023, recommends that the Australian Government introduce “requirements for Australian screen content on streaming platforms to ensure continued access to local stories.” The Australian Government has consulted on potential models and intends to introduce legislation codifying the selected model ahead of the federal election, which must be held by May 2025. The United States will continue to monitor this issue to ensure Australia’s compliance with its FTA obligations.	
Canada	The Canadian Government passed the Online Streaming Act on April 27, 2023, amending the Broadcasting Act to give the CRTC authority to impose conditions on the operation of online streaming platforms. The Canadian Government instructed the CRTC to create a methodology for financial contributions and obligations on streaming platforms to support and promote Canadian programming, and to prioritize a review of how it defines Canadian programs given the foundational nature of these definitions to the regulatory framework. On June 4, 2024, before beginning a review of the definitions, the CRTC announced that streaming services would be required to contribute five percent of their Canadian revenues to support the Canadian broadcasting system, beginning in the broadcast year 2024 to 2025. The rules include criteria that, based on available information, may effectively exclude Canadian streaming services from the new obligations, and under current definitions, would prevent U.S. suppliers from accessing the funding mechanisms that they will pay into. The United States will closely monitor the implementation of the Act and any USCMA implications.	
China	China’s restrictions on services associated with television and radio greatly limit participation by foreign suppliers. For example, China prohibits retransmission of foreign TV channels, foreign investment in TV production, and foreign investment in TV stations and channels. China also imposes quotas on the amount of foreign programming that can be shown on a Chinese TV channel each day. In addition, in September 2018, the National Radio and Television Administration (NRTA) issued a problematic draft measure that would impose new restrictions in China’s already highly restricted market for foreign creative content. It would require that spending on foreign content account for no more than 30 percent of available total programs in	s33(a)(iii)

Streaming Measures in USTR Foreign Trade Barriers Report

		each of several categories, including foreign movies, TV shows, cartoons, documentaries, and other foreign TV programs, made available for display via broadcasting institutions and online audio-visual content platforms. It also would prohibit foreign TV shows in prime time. Although this measure has not yet been issued in final form, it continues to raise serious concerns, as it appears that, as a matter of practice, it has been implemented in China since 2021, including by online audio-visual content platforms.	s33(a)(iii)
European Union	EU AVMSD	<p>In 2018, amendments to the 2007 Audiovisual Media Services Directive (AVMSD) were adopted to reflect developments in the audiovisual and video-on-demand markets. Member States were given 21 months to transpose the amendments into national legislation.</p> <p>The original AVMSD established minimum content quotas for broadcasting that had to be enforced by all Member States. Member State requirements were permitted to exceed this minimum quota for EU content, and several have done so. However, the original AVMSD did not set any strict content quotas for ondemand services, although it still required Member States to ensure that on-demand services encourage production of, and access to, “EU works.”</p>	
	Belgium	In the Wallonia-Brussels Federation, video-on-demand services must invest a percentage of revenue into regional audiovisual works or pay a levy to the region’s Cinema and Audiovisual Centre. In 2024, a new law entered into force that increased the mandatory contribution for the largest service suppliers to 9.5 percent of revenue. Additionally in 2024, the Flemish Parliament adopted a law increasing the investment obligation on VOD services from 2 percent to up to 4 percent, accompanied by additional restrictions relating to IP ownership limitations	
	Denmark	The Danish Government passed legislation in 2024 that includes a five to seven percent tax on streaming services’ revenue in Denmark. The legislation would require a two percent basic contribution of revenue, and the choice between either investing at least five percent in Danish content, or an additional three percent contribution of revenue in Denmark from audiovisual content.	
	France	For VOD services, France requires an investment obligation of at least 15 percent (for television VOD services) and up to 25 percent (for streaming VOD services) of their net annual French revenues. France also imposes significant sub-quotas (up to 75 percent) for commissioned independent productions and works of original French expression. The legislative framework does not provide an exemption for thematic or niche AV services.	

Streaming Measures in USTR Foreign Trade Barriers Report

	Italy	Domestic video-on-demand services must ensure that 30 percent of their catalogues are for European works produced within the past five years. Fifteen percent of a subscription video-on demand service's catalogue must be dedicated to Italian works produced by independent producers within the past five years. Non-linear video-on-demand providers subject to Italian jurisdiction must also give prominence to EU works. Foreign and domestic video-on-demand providers must devote 16 percent of their annual net revenues generated in Italy to the production of European independent works. Seventy percent of the investment obligation must be reserved for Italian works produced by independent Italian producers.	
	The Netherlands	A law mandating VOD service providers invest 5 percent of national revenues either into Dutch works or into the Dutch film fund entered into force in 2024. This law applies to VOD services with an annual turnover of at least €10 million (approximately \$10.4 million) within the Netherlands, and includes a 60 percent sub-quota for independent productions. The Netherlands also imposes a 30 percent European works catalogue quota for VOD services.	
	Poland	On-demand services must promote content of EU origin, especially content originally produced in Polish, and dedicate at least 30 percent of their catalogue to EU content.	
	Spain	The catalogue of on-demand services must include at least thirty percent EU content, of which at least half must be in an official language of Spain. In addition, broadcasters and on-demand services with revenues exceeding €50 million (approximately \$52 million) must invest five percent of their revenues in the production of EU and Spanish works, and 40 percent of this allocation must be reserved for works of independent producers in any of Spain's official languages.	
Malaysia		Malaysia requires that broadcast stations, through broadcast licensing agreements, devote 80 percent of terrestrial airtime to local Malaysian programming. Broadcast stations are also banned from broadcasting foreign programming during prime time.	
Pakistan		Pakistan drafted an Electronic Commerce Policy Framework in August 2019, with the aim of increasing exports and strengthening the digital economy. The framework, adopted in January 2022, contains some restrictive requirements. For example, the policy contains licensing, registration, and local presence requirements, as well as broad restrictions on cross-border data flows.	

Streaming Measures in USTR Foreign Trade Barriers Report

The Philippines	The Philippine Constitution prohibits foreign ownership in mass media, including cable television and broadcasting, as well as film distribution and pay-television. Additionally, foreign ownership in private radio communications networks is limited to 40 percent under 2022 changes to the Foreign Investment Negative List (FINL).	
Russia	In January 2022, the Russian Government announced that it would require any streaming service with over 100,000 daily users to register as a Russian company and to add 20 Russian television channels to its service, including Russian news stations, thereby forcing U.S. suppliers to become platforms for Russian state propaganda. However, affected U.S. companies suspended operations in Russia before the measure went into effect.	
Switzerland	A “unique distributor clause” in Switzerland’s Film Act requires a single distributor to have exclusive control over all language versions of a film for all forms of distribution, including theatrical release, DVDs, and video-on-demand. On January 1, 2024, legislation entered into force that requires video-on-demand services to pay 4 percent of their revenues sourced from Switzerland into a fund to support Swiss film production and requires a 30 percent quota of European produced content in their video-on-demand offerings.	
Thailand	The 2008 Motion Picture and Video Act authorizes Thailand’s Film Board to establish ratios and quotas limiting the importation of foreign films. However, the Film Board had not exercised this authority as of December 31, 2024, and the act was under review for amendment as of that date. In addition, under the Broadcasting Business Act and Telecommunications Services Act and related laws, a broadcasting licensee, including a services licensee, network licensee, and infrastructure licensee, must be a Thai national, and foreign investment in terrestrial broadcast networks is limited to 25 percent of registered capital and voting rights.	
Türkiye	Türkiye’s 2019 Regulation on the Transmission of Radio, Television, and On-Demand Services on the Internet requires providers of Internet streaming services to establish a commercial presence in Türkiye and obtain a broadcasting license. The law also imposes substantial requirements for providers of streaming services to censor content and provide the government with data about their subscribers on request.	
Vietnam	Decree 71/2022 (Decree 71), which amends Decree 06/2016 on the Management, Provision, and Use of Radio and Television Services, took effect on October 1, 2022, and requires either a local presence or a joint venture for online, over-the-top (OTT) radio and television services. The measure encompasses films and non-scripted “non-film” programs like game shows, reality shows, stand-up comedy, documentaries, and docuseries. The Law on Cinema and its implementing decree allow foreign OTT providers to offer films without obtaining a license or	

Streaming Measures in USTR Foreign Trade Barriers Report

	<p>establishing a local entity, although platforms must adhere to two separate sets of regulations for content censorship, categorization, and ratings: Circular 05/2023/TT-BVHTTDL from the Ministry of Culture, Sports, and Tourism for films, and Circular 06/2023/TT-BTTTT from the Ministry of Information and Communications for “non-film” programs. Vietnam’s implementation of Decree 71 has led U.S. stakeholders to withdraw from the Vietnamese market.</p> <p><i>Internet-Based Content Services</i></p> <p>Vietnam restricts access to the Internet through a limited number of state-controlled Internet service providers. The government blocks or restricts websites deemed politically or culturally inappropriate. Decree 72/2013/ND-CP (Decree 72) on the management, provision, and use of Internet services and online information prohibits using Internet services to oppose the government. Decree 27/2018/ND-CP (Decree 376 FOREIGN TRADE BARRIERS 27), issued in March 2018, amends Decree 72 by consolidating requirements for content, server localization, and data retention for social networks and information websites. Since 2022, the Authority of Broadcasting and Electronic Information under the MIC has released draft measures to replace Decree 720 (and Decree 27), imposing new regulations on a wide range of Internet services and content providers. The draft Decree proposed content censorship measures and data localization requirements that may overlap or duplicate requirements in other laws. The scope of regulation would expand to include data centers and cloud services. In June, in response to industry advocacy, the MIC identified “ongoing issues” with the draft and committed to addressing concerns. Vietnam subsequently issued Decree 147/2024/ND-CP on the management, provision, and use of Internet services and cyber information on November 9, 2024. Effective December 25, 2024, Decree 147 annulled Decree 72 and Decree 27.</p>	
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Environment and Communications

Lead/Support contact: Stephen Arnott/s22(1)(a)(ii)

SB24-000408

SUBJECT: Australian Content on Streaming Services**Talking Points**

- Through our National Cultural Policy *Revive*, the Australian Government committed to introducing Australian screen content requirements on streaming platforms to ensure continued access to local stories and content.
- Streaming services are one of the most popular ways Australians consume screen content. However, unlike free-to-air commercial television and subscription television broadcasting services, these streaming services are not subject to Australian content requirements.
- An Australian content obligation will level the playing field across media platforms and help ensure Australian content is available no matter which platform Australians use. It will also give streaming services the regulatory certainty they have long called for.
- The government is undertaking a genuine consultation process and is taking the time to consider views to support ongoing investment in, and production of, Australian stories.
- Consultation is taking longer than we would like – the government is taking the time to get the new obligation right.
- The requirements will be implemented as part of the government's broader media reform program and are the joint responsibility of the Minister for Communications and the Minister for the Arts. (See SB24-000368 for details of the Media Reform program).

Key IssuesNational Cultural Policy

- On 30 January 2023, the government launched the National Cultural Policy, *Revive: a place for every story, a story for every place*.
- In the policy, the government committed to, among other things:
 - Introduce requirements for Australian screen content on streaming platforms to ensure continued access to local stories and content in the third quarter of 2023 and to commence no later than 1 July 2024, with the Minister for the Arts and the Minister for Communications to undertake further consultation with industry in the first half of 2023 on the details of actions to be taken and implementation as part of the Commonwealth's broader reforms to media legislation.

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SB24-000408

Stakeholder consultation

- Following targeted consultation with key stakeholders on Australian content requirements for streaming services in the first half of 2023, the government refined its view on high-level models.
- On 6 November 2023, the government released 2 refined models for further targeted consultation – an expenditure-based model and a revenue-based model.
- The government is working through the final details of the Australian content obligation and will introduce legislation as soon as practicable.

Australia's trade obligations

- The government is well aware of our obligations under relevant trade agreements.
- The government has adopted an evidence-based and consultative approach to get the new obligation right.
- Any questions about the implications of models for the Australia-United States Free Trade Agreement should be directed to the Department of Foreign Affairs and Trade at their request as the agency with oversight of all Free Trade Agreements.

Australian Government's position

- A 20% revenue-based model is an industry position. It is not government policy.
- Any reporting about the specific parameters of the obligation the government will impose is incorrect: no model has yet been agreed.
- The government is committed to a genuine consultation process and is taking the time we need to ensure we get this right.
- Other answers to possible questions are at **Attachment A**.

BackgroundVoluntary SVOD reporting

- 5 large subscription video-on-demand (SVOD) services voluntarily report to the Australian Communications and Media Authority (ACMA) on the availability of and investment in Australian programming on or by their respective services.
- Amazon Prime Video, Disney+, Netflix and Stan have voluntarily reported to ACMA each financial year since 2019-20.
- As a newer entrant to the market, Paramount+ joined the voluntary reporting for the 2021-22 financial year.

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- The information collected from SVOD providers relates to expenditure on commissioned and acquired Australian and Australian-related programs/titles.
- The ACMA also receives information about the total hours of Australian content on Australian services and rest-of-the-world services.
- The ACMA and the Department of Infrastructure, Transport, Regional Development, Communications and the Arts have each agreed strict confidentiality and disclosure terms with the 5 services that have provided data.
- In December 2024, the ACMA released aggregated Australian content expenditure data for subscription video on demand services for the 2023–24 financial year.
- The 5 reporting subscription providers spent \$341.5 million in 2023–24 on 1,527 commissioned, co-commissioned or acquired 'Australian programs'.
 - Total expenditure on Australian programs increased by \$17 million, compared to the 2022–23 financial year (\$324 million).
 - \$225.2 million was spent on commissioned or co-commissioned Australian programs.
 - \$116.3 million was spent on Australian program acquisitions.

Australian children's content

- According to SVOD Australian program expenditure data released by ACMA in December 2024:
 - Expenditure on children's drama and children's non-drama decreased in 2023–24, compared to 2022–23 and the 5-year average.
 - Expenditure on children's drama decreased by 73%, from \$12.1 million to \$3.3 million.
 - Expenditure on children's non-drama decreased 45%, from \$0.09 million to \$0.05 million.
 - SVOD provider commissioning of Australian children's content has on average declined over the 5 reporting periods.
- The National Cultural Policy has committed to reviewing policy settings to support the production of certain sub-genres, including children's content, as part of the streaming services obligation.

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SVOD expenditure on Australian programs by genre

Financial year Genre	2019-20 \$	2020-21 \$	2021-22 \$	2022-23 \$	2023-24 \$
Adult drama	\$73,737,426	\$94,786,604	\$212,534,305	\$195,344,464	\$201,602,170
Children's drama	\$33,109,299	\$22,471,101	\$7,215,129	\$12,138,529	\$3,291,998
Children's non-drama	\$7,361,419	\$466,237	\$122,706	\$91,393	\$50,377
Documentary	\$18,022,366	\$17,192,845	\$38,522,951	\$25,444,342	\$11,901,521
Light entertainment	\$21,160,011	\$11,805,346	\$21,453,395	\$20,146,507	\$21,343,068
Sport			\$55,253,871	\$70,984,563	103,333,920
Sport and other		\$32,143,049			
Total	\$153,390,521	\$178,865,182	\$335,102,356	\$324,149,798	\$341,523,054

Source: Australian Communications and Media Authority, <https://www.acma.gov.au/spending-subscription-video-demand-providers>

Australian programs made available on services in Australia by genre

Australian children's programs and hours of programming on SVODs										
	Number of programs					Hours				
Financial year	2019-20 titles	2020-21 titles	2021-22 titles	2022-23 titles	2023-24 titles	2019-20 hours	2020-21 hours	2021-22 hours	2022-23 hours	2023-24 hours
Children's drama	44	56	58	63	56	293	339	354	399	309
Children's non-drama	30	44	34	46	51	77	118	54	84	112
Total	74	100	92	109	107	370	457	408	483	421

Source: Australian Communications and Media Authority, <https://www.acma.gov.au/spending-subscription-video-demand-providers>

2023 Television and Media Survey

- For the past 4 years, the department has commissioned the Social Research Centre to conduct surveys that collect information on the screen and media content viewing practices, habits and expectations of Australian adults and children.

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- The Television and Media Survey 2023 combines questions from research previously commissioned by the department through the Media Content Consumption Survey since 2020 and the Television Consumer Survey in 2022.
- The 2023 Television and Media Survey findings note that:
 - Subscription video-on-demand platforms are the most popular means of accessing content used by 65% of Australians in the previous 7 days, a slight decrease of 1% since 2022, but an increase of 5% since 2020.
 - Over the same period, there was a 10% decrease in Australians viewing commercial free-to-air television, to 51%.
- Netflix remains the most popular streaming service (65% in 2023), down slightly from 68% in 2022. The viewership for Disney+ and Amazon Prime Video have increased to 35% and 32% respectively.
 - In 2023, more people (42%) cancelled or downgraded their subscriptions to streaming services compared to those who added or upgraded (18%).
 - Of those who reported having no online subscription services, 21% reporting having a service in the previous 6 months, meaning 1 in 5 people unsubscribed from a service.
 - Just over half of respondents indicated that online subscription streaming services have enough Australian content (52%).
 - 16% of respondents said Australian content is either difficult or very difficult to find, compared to 27% who found it easy or very easy.
 - For children aged 0-7 years old, parents reported that free video streaming services and online subscription services were the most popular for their children at 52% respectively.
 - 72% of parents identified Australian children's educational programs, followed by Australian children's animation (49%) as the most important type of Australian children's content for their children.

Attachments

- A: SVOD obligation - Potential Questions

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