Australian Streaming Services and the Relationship Between Viewing Data and Local Television Drama Production

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Abstract

The recent introduction of video streaming services into the Australian television industry has already had a significant impact on the local broadcast and subscription ecology. Undoubtedly, the sudden influx of foreign content and choice, paired with increased content deregulation, will have considerable ramifications for the Australian production industry in the long term. While many have predicted widespread devastation, this paper suggests that access to 'big data' and increased audience 'addressivity' (Hallinan and Striphas 2014, 13) could in fact serve to protect and promote the continued production and consumption of local drama content via this 'new screen' option.

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Introduction

The introduction of video streaming services into the Australian television industry in has quickly had a significant impact on the local broadcast and subscription ecology. While this new development is transformative in that it offers audiences exclusive media content and products, new forms of access and innovative modes of interaction, it also threatens to obscure local content under a deluge of foreign programming. Media commentators have begun to express serious concerns that increased privatisation and deregulation could devastate the Australian production industry in the long term. However, this paper posits that access to 'big data' and increased audience 'addressivity' (Hallinan and Striphas 2014, 13) could actually serve to protect and promote the continued production and consumption of local television drama via this 'new screen' option.

This paper charts the introduction of streaming services into the Australian market, and utilises the example of international industry-leader Netflix throughout as an indication of what we might come to experience locally. It then assesses the current state of local television production and consumption in Australia, and questions the continued efficacy and relevance of long-standing minimum local content regulations in this era of increased digital convergence and consumer autonomy. Expanding upon the examinations by Hallinan and Striphas (2014) and Jenner (2014) of the Netflix programs House of Cards, created by Willimon, and Arrested Development (Hurwitz) respectively, this paper considers the potential impact of streaming services upon the reception and subsequent production (as opposed to production and subsequent reception) of locally made television content.

To what extent can unprecedented access to big data—the minutiae of individual viewing habits, monitored, accumulated and interpreted on a mass scale—change what and how original television content is produced? How are the audience-tracking capabilities of net-based delivery systems likely to affect production considerations like casting, structure and substance? Finally, what potential could this hold for the future of television production in Australia?

The Introduction of Video Streaming Services in Australia

The advent of video streaming services into the traditional broadcast and subscription television ecology signals a 'significant shift in a new media landscape' (Jenner 2014, 2). Digital media streaming is the real time processing, sending and viewing of packets of information sent via a content source and received by a user. Unlike other kinds of data accessing, media streaming does not require a complete file to be in the user's possession or system. Instead, the media is sent incrementally in a compressed format and is processed, revived and viewed as needed, and then deleted. Due to the nature of this service it is heavily reliant on bandwidth and processing power.

Internationally video streaming services have proven very popular. They substitute the traditional flow of appointment-viewing programming for unregulated, 'individualised viewing practices and self-scheduling' (Jenner 2014). They are 'marked by highly diversified content, atomized reception, and customizable interfaces' (Kompare 2005, 198) and are indicative of

> *...a larger conceptual shift across all media, as the aesthetic, technological, industrial and cultural boundaries between previously discrete forms (text, film, broadcasting, video, and sound recordings) are increasingly blurred, challenging established practices and paradigms (Kompare, 2005: 198).*

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It is becoming increasingly important, as these operators expand their services, to conceptualise them not just as video-on-demand services, but also consider their 'relatively new role as producer and distributor' (Jenner 2014, 2). This paper will use industry-leader Netflix as a primary case study throughout. As one of the earliest streaming services launched, and certainly as the most successful, the American operator is a pioneer in the digital television landscape. While we can certainly look to Netflix as an example of the potential of these services, it is also essential to acknowledge that much of what the company has achieved is the product of time and experience, with which new local services will struggle to compete.

Netflix now operates in more than forty countries with over sixty million subscribers. The subscription-based service is credited with almost single-handedly reducing torrenting from 31 per cent of all internet traffic in the United States to just 5.6 per cent in only six years (Glasson 2015). It now accounts for nearly one-third of internet traffic in the US, dwarfing the use of other major online video providers like Hulu and Amazon Prime. As well as offering an extensive film and television library, Netflix has also been producing award-winning, quality original content since 2011.

The international success and reputation of Netflix and its mythical never-ending library of content had many television audiences in Australia lamenting its absence. By the end of 2014 an estimated 200,000 Australians were using fake postcodes and software workarounds to circumvent geoblocks and sign up for the US service (Lobato and Ewing 2014). Australia has been repeatedly dubbed the 'pirate capital of the world' (Mullins, 2014) and many Australians unashamedly attributed their illegal behaviour to the 'tyranny of digital distance' (Leaver 2008) that often left them waiting months for popular international programming (like that offered by Netflix) if it was to be made available at all.

Amidst rumours of the impending arrival of Netflix, Australian television broadcasters and subscription operators joined forces to launch a pre-emptive spate of local net-based delivery services that surpassed previous online catch-up offerings. Joining the 'granddaddy' (Healey 2015) of Australian streaming services, Quickflix, the Foxtel and Seven joint venture Presto launched a television spin-off in January 2015, followed soon after by Nine and Fairfax unveiling Stan on Australia Day (January 26). Not long thereafter (March 24) Netflix expanded its service to Australia and New Zealand. The sudden introduction of an abundance of online television services has sparked a 'streaming war' (Christensen 2015) and fundamentally disrupted a local industry long monopolised by only a small number of traditional providers.

If experiences in other countries are replicated in Australia, this development in distribution will disrupt both the existing advertising models and programming practices of the established broadcast and subscription industries, in part because of the ways in which streaming services will alter the televisual habits and experiences of viewers. The introduction of streaming will also have a significant impact on the continued production of local television drama content, which has traditionally been regulated, subsidised and protected by government intervention, under the supposition that the continued consumption of Australian screen stories by Australian audiences is integral to the maintenance of a national sense of identity and community (Screen Australia 2013). At this point it is important to acknowledge that local broadcasters have been responding to and experimenting with the increasing digitisation of television distribution for some time now. All commercial and public service outlets have an established online presence via catch-up services. More recently, ABC iview has begun to experiment with digital production methodologies (Hutchinson 2015), with audience input shaping program content (#7DaysLater 2013) and distribution tactics (Glitch 2015). This paper focuses on how the spate of new streaming players arriving into the Australian television ecology 'all at once' (Given, Brealey and Gray 2015, 6) will sustain and stimulate local drama production.

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The Romanticism and Realities of Australian-Made Drama

In 2013 Screen Australia released a qualitative study, Hearts and Minds. This report explored 'how and why Australians engage with local screen stories on both television and film' (Screen Australia 2013, 1). The result of a series of focus groups in Sydney, Melbourne and Orange, NSW, it questions the role of home-grown content in the screen diets of participants in a bid to determine the cultural value of local screen stories, the role they play in the formulation of national identity, and how they build towards a sense of belonging and participation (Screen Australia 2013, 1). Hearts and Minds is largely optimistic about the importance of Australian screen industries to the national audience. 'Local content, it was clear, was well and truly on their minds as well as in their hearts' (Screen Australia 2013, 21). It was submitted that, overall, Australian content played an 'important role in the interior lives of participants and their sense of cultural identity', and was overwhelmingly considered a valuable platform for the telling of 'our own stories' (Screen Australia 2013, 21).

The findings of the Hearts and Minds report (Screen Australia 2013) are ostensibly very comforting. They infer that there is an ongoing demand for Australian television content, a market for familiar and relatable stories and characters that capture our 'way of life and the complexity of our contemporary, multicultural and urban culture' (Screen Australia 2013, 21). There is, however, a significant discrepancy between what Australians say they want and the variety of screen stories they actually consume. The participants in this study may be 'enthusiastic nationalists when they're interviewed by researchers', but their collective 'platitudes, euphemisms, and wishful thinking... [do] not fit with the way Australian audiences actually behave' (Dale 2013). The methodology utilised by Screen Australia in the Hearts and Minds report (that is, the collation of cursory, contestable claims, as opposed to the in-depth analysis of audience behaviour) does not produce an accurate picture of the market (or lack thereof) for local content in Australia, and it is certainly not of much practical use to future screen producers.

Since the introduction of television in Australia in 1956 the local industry has relied on a steady diet of imported content. From the perspective of the early television networks and moguls, it was much cheaper to simply purchase the rights to air international programming than to produce local material in a fledging market. What's more, British and American content was also quite well established at this point, and so represented the pinnacle of quality and creativity. As such, and as Moran has skilfully examined, a 'mighty programme format industry' (Moran 2013, 225) emerged, with reputable, tried and tested foreign formulas being very successfully (and inexpensively) reproduced in the local context.

Media commentator David Dale describes the 'cultural cringe' (Phillips 1950) that has permeated our industry since its inception as an inherent 'Australian value': the belief 'that any work done by Australians [will] inevitably be inferior to the work of British and American people, and that we [need] them to teach us how to be 'world class'' (Dale 2010, 28). Now, he suggests, 'Australia's secret identity talks with an American accent' (Dale 2013). This is commonly attributed to the persistent disparity in cost between producing Australian content and purchasing the licence fees for foreign programming. 'Australian content is more expensive. Or more accurately, foreign content remains very cheap' (Eltham 2011). While US production budgets can be almost unfathomable; for instance a one hour episode of Game of Thrones (episode 9, season 2) reportedly cost HBO (AUD)$8 million (Clench, 2014). The cost to local US broadcasters is significantly lower, at between $100,000-$400,000 an hour.

In comparison, the average production cost per hour of Australian drama runs well over $500,000 (Australian Bureau of Statistics (ABS) 2013) to as much as $1.8 million (Screen Australia 2011, 6). While Australian TV dramas can, says Han, be worth the price tag, with 'valuable longevity and long-term monetisation potential' (Janda 2013) for merchandise, re-runs, DVD and overseas sales, they are nevertheless a 'riskier proposition, involving significant upfront costs that may or may not be fully met if the content is not successful' (Screen Australia 2011, 5).

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A 2013 ABS study of film, television and digital games found that, at approximately $14,000 per half an hour, news programming is considered an economical way to meet local content quotas, and as such accounts for almost half of all locally-made television content in Australia (ABS 2013). At only $70,000 for the average variety program it is clear why free-to-air (FTA) broadcasters have resorted to filling their schedules with hours of 'endlessly elongated' reality shows. Quality drama is 'increasingly rare, and hard to justify' (Kidman, 2015). This expenditure disparity has many questioning the viability of commercial networks to deliver and invest in locally produced screen stories.

Some argue that our television networks 'only screen Australian content because they have to' (Eltham, 2011). At present the Australian television industry is regulated by the Australian Communications and Media Authority (ACMA) which seeks to 'promote the role of broadcasting in developing and reflecting a sense of Australian identity, character and cultural diversity' (ACMA 2015). The mandatory Australian Content Standard requires all commercial FTA television licensees to broadcast an annual minimum transmission quota of 55 per cent Australian programming between 6 am and midnight. There are also specific minimum annual sub-quotas for Australian drama, documentary and programming for children. Subscription services are bound by their own set of regulations, which mandate a comparatively weak 10 per cent Australian drama expenditure requirement, rather than a transmission quota. Even then this only applies to those pay-TV channels that broadcast drama, as classified by the ACMA.

Content regulations are becoming increasingly pointless as technological developments pioneer 'new forms of access, new modes of interaction and new media products' to meet a seemingly insatiable demand for content (Turner and Tay 2009, 7). In the last decade all the Australian FTA broadcasters have introduced new digital multi-channels and, more recently, online catch-up services that are not subject to local content requirements. While you might be able to require a broadcaster to promote local programming, to compel an online service to do the same would be futile when consumers are in control of what (of the available content) is viewed, when.

Unsurprisingly, between 2008 and 2011 foreign content hours rose by 154 per cent, while Australian programming increased by only 59 per cent over the same period (Screen Australia 2011, 8). According to Screen Australia, in Convergence 2011: Australian Content State of Play, Australian material is dwindling, with a 'watering down of local content across FTA programming and a fall in share of viewers' (Screen Australia 2011, 8). If the impact on the local production industry of this first spate of digital distribution is any indication, what are we to make of the recent introduction of unregulated digital streaming services into the Australian media milieu?

Streaming Services: The Beginning of the End for Local Content?

Many media commentators have already speculated that the introduction of streaming services will act as the 'final nail in the coffin' for Australian-produced screen stories. While the arrival of Netflix and its local competitors is 'good news for people dissatisfied with our lacklustre local TV networks... it's potentially very bad news for the production of dramas showing Australians, not Americans, on screen' (Kidman 2014).

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A. Distribution of Existing Australian Content

Upon their arrival into the local television ecology, each of the new streaming services announced, or at least eluded to, their intention to distribute Australian screen stories. Operators very purposefully stated that their online catalogue would include an 'array' of Australian programming. Netflix emphasised that their distribution deal with Beyond International would give them access to a number of specials by big-name Australian comedians and a number of local childrens' series (Beyond International 2015, Sadauskas 2015). A month into its service, Netflix had made 34 local films (mostly comedic) available in a specific 'Australian Movies' category (out of the 1,047 films available), as well as a sub-genre of more than 30 'Australian TV Shows' (out of the 317 television programs available). Australian satirists have mocked these fractional national representations:

> In a press release today, Netflix CEO Reed Hastings expressed excitement at the launch. "We can't wait to bring Netflix to Australian customers, allowing them the thrill of watching The Castle and Muriel's Wedding over and over again," he wrote. "After months of intensive market research, we determined that these are the only films Australians are interested in watching – and we can't blame them."...

> Speaking to the Backburner, Hastings made clear that Australia is an important market for the company, and that he expects tremendous growth. "Australian consumers are hungry for content, and we're looking forward to bringing you the films you love to watch again and again."...

> "In December... we'll be adding Red Dog" (Backburner 2015).

Hastings, in an attempt to ease local industry concern, affirmed that it is the provider's track record in every market it has entered to distribute national content 'not only for the local market but also for the global market' (ABC News, March 23 2015). This presents a very interesting opportunity for local content-makers: not only has there been a multiplication of national distributors with this influx of new television operators, but international services like Netflix could 'breath[e] new life into Australian content by making it available to more than 60 million subscribers in more than 40 countries' (Goldsmith 2015). The series Wentworth, for example, when it debuted on US Netflix late in 2014, was compared by New York's Vulture site to Breaking Bad and Deadwood (Lyons 2014) and proved popular with subscribers. Screen Australia chief executive Graeme Mason has described Australia as unique, with the possible exception of the UK, 'of being able to really create amazing content which travels internationally' (Dow 2015).

From the outset, Stan online streaming service positioned itself as distinctly Australian. By using Australian actress Rebel Wilson's familiar twang in its pre-launch advertising campaign, it presented itself as a purveyor of local content for local audiences, even though at present the operator only offers a collection of Australian cooking specials, children's programming and the odd completed television series, such as Underbelly and Gallipoli.

Presto offers quite a lot of Australian-made content in comparison, with a focus on old television serials like All Saints and reality programming such as Border Security. This is not surprising given Foxtel's ownership of Presto which gives it access to exclusives from the subscription service's stable. However, at the time of writing, only 16 of the service's 937 movies are Australian.

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B. Production of new Australian content

Upon entry into the Australian market, the online streaming operators' focus soon turned from the distribution of existing local content to the prospect of them supporting original production. Given the international success of the Netflix 'swathe of self-produced content' (Jager 2015), many questioned whether streaming services would have a similarly productive effect here. Netflix chief content officer Ted Sarandos told the triple j 'Hack' program that Netflix is 'open to producing original content in Australia as soon as we can find a great story and a great storyteller' (Lauder, 2015). In an interview with ABC News, Reed Hastings hinted that his organisation would, in the future, look at investing in local content production, as it has done with the BBC in the United Kingdom (ABC News March 23 2015).

According to The Guardian, Netflix has, privately, contacted Screen Australia about the two-year Blue Sky Drama Initiative originated and co-funded by FremantleMedia Australia. Blue Sky aims to use high-calibre overseas mentors to guide Australian drama writers to create four 'international' Australian drama series for 'platforms outside the traditional marketplace', with half the $800,000 cost borne by Australian taxpayers (Dow 2015). Netflix cannot apply for a grant in its own right: under Screen Australia's terms of trade, applicants must be incorporated and centrally managed in Australia. According to FremantleMedia Australia head of drama, Jo Porter, more than 500 Blue Sky script idea applications were received for the first year's program, (Dow 2015). It would be 'massively naïve' however (Kidman 2014), to assume that Netflix would commission anything near the number or size of original drama that it does in the US, given the dramatic discrepancy in the cost, as previously mentioned.

So far, Stan has been the only streaming service to commission a local production, a comedy series, No Activity, from the creators of A Moody Christmas. The operator also announced the ongoing development of two Australian programs that Stan would offer exclusively: Wolf Creek, a six-part spin-off of the internationally successful horror movie and its sequel, and Enemies of the State, a political drama based on the life of High Court judge Lionel Murphy (Jager 2015). Presto is yet to commit to the creation of content exclusive to the streaming provider, but will certainly benefit from Foxtel's 'beefing up' of the amount of Australian drama it produces (Sinclair 2014).

The reality is that although streaming services certainly offer a new set of distribution opportunities, there is a good chance that Australian content will continue to get lost in the deluge of foreign content available and preferred by seemingly nationalistic audiences. The repeated prioritisation of foreign content over local will, over time, algorithmically personalise a streaming service interface to suggest the former and obscure the latter. Netflix may make 'soothing noises about how it may produce an Australian Original or two' but by offering a 'huge smorgasbord of choice at a time when TV networks are attracting smaller audiences than ever', streaming services are more likely to contribute to the 'existing trend of less Australian content being watched by Australians' (Kidman 2015) than reverse it. How then can the Australian screen industry sustain itself, let alone compete? How can local producers create programming that local audiences not just claim to want, but actually consume? One avenue we must now consider is offered by the new capabilities and methods by which streaming services have come to interpret and respond to the behaviour of audiences.

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The Symbiotic Relationship between Big Data and Local Television Production

If we examine the immense and innovative capabilities of online streaming services to interpret 'big data', we can see that this new distribution model is replete with possibilities for Australian content producers. Hallinan and Striphas have explored the 'conceptual and semantic work required to render algorithmic information processing systems legible as forms of cultural decision making' (2014, 1). Jenner has examined how the Netflix emphasis on viewer autonomy has revolutionised, with much success, the way its original programming is structured, cast and scheduled (2014). If we apply their conclusions to a local context there is a persuasive argument to be made that streaming services may actually serve to protect and promote the continued production and consumption of Australian-made programming.

For too long the international television industry has been forced to rely on the often inaccurate and unreliable feedback of test audiences, viewer diaries, eye tracking and, of course, ratings to assess how well programming (and corresponding advertising) have been received. Now, streaming services offer unprecedented access to 'big data'. According to its former principle data scientist, Mohammad Sabah, Netflix is able to meticulously track the behaviour of viewers:

> *when they start, stop, rewind, fast forward, and pause videos, in addition to logging the time of day of viewing, the user's location, the device on which the streaming occurred, whether the user watched a program from beginning to end, what if anything he or she watched next, and more (Hallinan and Striphas 2014, 12).*

Instead of simply relying on explicit ratings systems to learn what customers like and make recommendations accordingly, large-scale predictive mining algorithms are able to monitor and interpret the unique behaviour of multiple individuals—their 'implicit' signals (Sabah 2012)—to determine what they don't like. Data scientists and engineers can track factors such as the 'velocity' of how fast a user made it through a program or whether they stopped watching after five minutes (Fiegerman 2013). This information is just as valuable, if not more so, than knowing that a subscriber watched a particular program in its entirety. It is even possible to determine, for example, 'whether a user is more likely to view an edgier sitcom… late at night or watch comedies on a particular day of the week to better dole out recommendations' (Fiegerman 2013).

Netflix has relied upon this abundance of insight into audience behaviour to adopt what Hallinan and Striphas call a 'factor-based approach' to pursuing content (2014, 12). House of Cards was one of the service's first forays into original content. At an enormous investment of $100 million for only two seasons, the critically acclaimed series established the streaming service as a 'legitimate rival to premium cable outlets HBO and Showtime' (Rose 2013). In the quarter that it premiered, the Netflix subscriber base jumped more than two million, to 29.2 million domestic streamers. Its success has been attributed to how viewing data was used to appeal to a multitude of specific audiences. As Sarandos says:

> *'…it's the overlaps that really matter. With House of Cards, it was identifying not just somebody who saw The Social Network or liked David Fincher but trying to figure out what everybody who liked Benjamin Button, Seven, Fight Club and Social Network have in common. It's that they love David Fincher's style of storytelling… You look at Kevin Spacey fans, and then you say, "How about people who love political thrillers?" We went back and pulled all the political thrillers people have watched and rated highly. So you've got all these populations, and right where they overlap in the middle is the low-hanging fruit. If we can get the show in front of these people, they will watch it and love it.' (Rose 2013; author's emphasis).*

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Netflix essentially uses algorithms to 'decompose the property to determine whether an audience might exist' for this combination of genre, cast, style, etc. (Hallinan and Striphas 2014, 12). In so doing Netflix was able to target House of Cards not at a mass market, but to a significant number of particular niche audiences.

Jenner has also identified how viewing data can be used to cater the narrative structure and release schedule of programming to respond to viewer behaviour (2014). Her case study of season 4 of Arrested Development (which had previously been cancelled by Fox) revealed that the program had been enlivened by Netflix because of its cult status and the associated viewing practices that its success on DVD implied. As the Arrested Development audience had a tendency to binge-watch, all fifteen episodes of the season were released simultaneously. Additionally, a different, complex narrative structure, with 'incremental characterisations, backstory rationing, enigma webbing' (Jenner 2014, 10), was adopted in response to their 'attentive viewing or reviewing tendencies' (Jenner 2014, 7). This trend towards 'complex TV' assumes that 'viewers can pay close attention because the technology allows them to easily do so' (Mittel 2015).

Just as we've seen with Amazon's 'write-to-order' market, clearly 'data collection and interpretation [now] permeate many aspects of corporate decision making, from the vetting of potential acquisitions to the shaping of the context of acquired properties' (Hallinan and Striphas 2014, 12). Successfully recommending content is at the heart of the Netflix business model: in 2011, of the two billion hours streamed, 75 per cent came from recommendations (Sabah 2012). With the ability to measure retention, engagement and acquisition it is now possible to move away from an 'undifferentiated mass toward an aggregation of highly differentiated micro-audiences' (Hallinan and Striphas 2014, 12). Although it still employs user profiles of biographical and geographical details, Netflix 'couldn't care less' about these outdated marketing factors (Fiegerman 2013). According to Todd Yellin, vice president of product innovation, 'it really doesn't matter if you are a 60-year-old woman or a 20-year-old man because a 20-year-old man can watch Say Yes To The Dress and a 60-year-old woman could watch Hellboy' (Fiegerman 2013). Yellin goes on to say:

> '"You want to take people at face value. When someone tells you they are always watching foreign films and documentaries, you want to show them that," Yellin said, noting that's how traditional retailers function. "The truth of it is that some people are posing. Some people are really showing you their aspirational self because some people just want to watch Christmas Vacation with Chevy Chase for the 15th time, and that's what they really want out of their night because it's been a long day" (Fiegerman 2013).*

There is an obvious parallel here with the nationalistic and aspirational approach of Australian viewers to Australian-made content. Netflix has the technological capacity to know its users better than they know themselves, or at least, will care to admit (Fiegerman 2013). With this technology, and that developed over time by local offerings, the Australian production industry could actually identify the true practices and preferences of local audiences. With this information it could produce content that serves both a national and commercial function; popular programming that is worth the higher cost of doing business in Australia.

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Conclusion: a Collaborative Future

When Netflix launched, the chief executive of Screen Producers Australia, Matthew Deaner, tentatively welcomed the operator:

> *'We are pleased to see a new player like Netflix enter our expanding market and we trust that this will not just provide an avenue for imported content and local catalogue titles, but also will result in a valuable contribution to Australian screens through original local production After all, while everyone is invited to the party, polite guests offer to bring a plate!' (Screen Producers Australia 2015).*

Just as the integration of streaming services into the local market is sure to be a 'long process' (Hastings in ABC News March 23 2015), content producers cannot expect the immediate formation of cooperative partnerships. However, awareness of streaming service capabilities and potential can offer some hope to a local industry currently cowering in the huge shadow of cheap and prolific foreign content players. While the notoriously tight-lipped Netflix may not be willing to liaise with Australian producers, it would be in the best interests of Australian-owned streaming services to do so, especially when analysts are already predicting that only two operators are likely to succeed in the increasingly crowded local market (Healey 2015). With Netflix already leading the race, the success of Stan and Presto will rely on their ability to differentiate themselves from the American juggernaut's business model (Lynch 2015), specifically by creating and supplying local content that Australians actually want to watch. If we are to expect 'more vertical integration and consolidation', as Given, Brealey and Gray suggest (2015, 32), offering access to original programming may provide collaborative services with the competitive edge upon which their continued existence relies. This prospect presents exciting new opportunities for our local television production community.

This speculative paper maps the potential limitations and possibilities for the continued production of Australian television drama, generated by the introduction of streaming services. It also raises numerous questions for future research, as this technology is further adopted and industries adapt. What quantity and quality of locally produced television content will be made available by streaming services in the Australian market? How will this fare with subscribers in the short-term, without the aid of government and industry regulation? Finally, what effect do streaming services, as a new avenue of distribution, have on the types of television content that will be produced?

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