

NETFLIX

Submission to National Cultural Policy Review Consultation May 2026

Introduction

Netflix has been, and continues to be a proud participant in Australia's flourishing screen industry, which is undergoing a period of unprecedented growth.

Screen Australia's Drama Report shows expenditure on drama production in Australia reached a record \$2.7 billion in 2024/25, a 43% increase on the previous year. The uplift points to holistic sector growth driven by high-budget features and subscription video on-demand (SVOD) production, with a \$678 million increase from an expansion of international activity.¹ Of the 174 titles that entered production in 2024/25, 71 were Australian, with \$1.1 billion spent on local stories – a 14% increase in expenditure from 2023/24.

The recent wave of content production in Australia can be attributed to a range of factors, including audience appetites for Australian content, our reputation for excellence as a place to make screen content, Government support through the location attraction and production incentives and other measures, as well as Australia's world class cast and crew. This has enabled Australia to position itself to become a leading destination for film and television production, showcasing Australian content to Australians, and to global audiences via streaming services.

Streaming services play a significant and valued role in this success.

The Australian Communications and Media Authority (ACMA) reports that five streaming services invested over \$1.1 billion in Australian and Australian-related programs in the 2024-25 financial year. Of the \$414 million spent on Australian content, 76% (\$316.6 million) was spent on new Australian commissions and co-commissions, a 40% increase in investment from financial year 2023-24.² Data published by the ACMA and Screen Australia shows that SVOD services now invest more in Australian drama, children's, documentaries and other Australian programming than subscription and commercial broadcasters combined.³ This represents a significant shift in the commissioning landscape.

Screen Australia highlighted that the Drama Report's findings reflect Australia's interconnected screen ecosystem where both domestic and international production contribute to the health of the sector, providing economic benefit, infrastructure, training and employment opportunities.⁴ As CEO Deirdre Brennan stated:

¹ Screen Australia Drama Report 2024-2025

<https://www.screenaustralia.gov.au/drama-report-2024-25-2-7-billion-spent-on-drama-production-in-australia-points-to-holistic-industry-growth/>

² ACMA, Spending by subscription video on demand providers, financial year 2024-25

<https://www.acma.gov.au/spending-subscription-video-demand-providers>

³ Streaming for Australia Media Statement, 3 December 2025,

https://cdn.prod.website-files.com/687e47974a5274b31f7c5370/692f93cec723073f50573feb_031225_Media%20Statement.pdf

⁴ Ibid

“This strong result is a testament to the hard work and creativity of our screen practitioners, who are navigating a rapidly evolving landscape. The numbers reflect a complex story of production value and content volume. While there is moderate growth in local drama expenditure, fewer TV titles entered production across free-to-air, subscription-video-on-demand and children’s content, showing ongoing shifts in commissioning behaviour. This presents an industry challenge, but also an opportunity to seek out new areas of collaboration and innovative production to ensure we continue to elevate Australian storytelling.”

The key challenge now is ensuring Australia’s screen sector can continue to grow sustainably as production demand increases. Growth is leading to ever increasing pressure on workforce capability, studio capacity, infrastructure, and long-term production sustainability. Continued investment in skills development, training pathways, and production infrastructure will be critical to supporting long-term industry resilience. A thriving screen industry depends on a skilled workforce, production capacity, authentic storytelling, strong audience pathways, and sustained investment. These are not separate policy issues. They are interconnected parts of the same production ecosystem.

Olsberg•SPI identifies seven interrelated areas of best practice for screen sector development: production incentives, workforce capacity, infrastructure, film-friendliness, diversity equity and inclusion, sustainability, and partner engagement - emphasising that successful production markets are cohesive ecosystems that must deliver across all seven.⁵

In the same way, Netflix considers the Five Pillars of the National Cultural Policy to be similarly interconnected and mutually reinforcing. Australian cultural policy should continue to support both the creation of Australian stories and the attraction of global investment, and focus on the broader conditions that enable those stories to be produced, financed, distributed, and discovered. This submission outlines Netflix’s contribution across each of the Five Pillars and highlights opportunities for all industry players to further strengthen Australia’s screen production ecosystem.

Netflix in Australia

Netflix is proud to contribute to Australia’s screen sector through commissioning and licensing Australian stories, investing in the development of local talent, and producing global productions in Australia. Since 2019, Netflix has invested more than **AUD \$1 billion** in new Australian and Australian-related Netflix films and shows, spanning local originals, kids and young adult programming, adult drama, animation and major international productions. That investment has helped support thousands of cast and crew, hundreds of locations and a wide network of local vendors and production partners.

In the more than ten years since Australians invited Netflix into their homes for the first time, Netflix has been redefining Australian storytelling with authentic representation and fresh perspectives. We commissioned our first local series, *Mako Mermaids* in 2014, and since then have been responsible for close to 90 local shows filmed across Australia, not including the international

⁵ Olsberg•SPI, *Best Practice in Screen Sector Development*, AFCI, 2024.

<https://afci.org/wp-content/uploads/2024/09/Best-Practice-in-Screen-Sector-Development-2024.pdf>

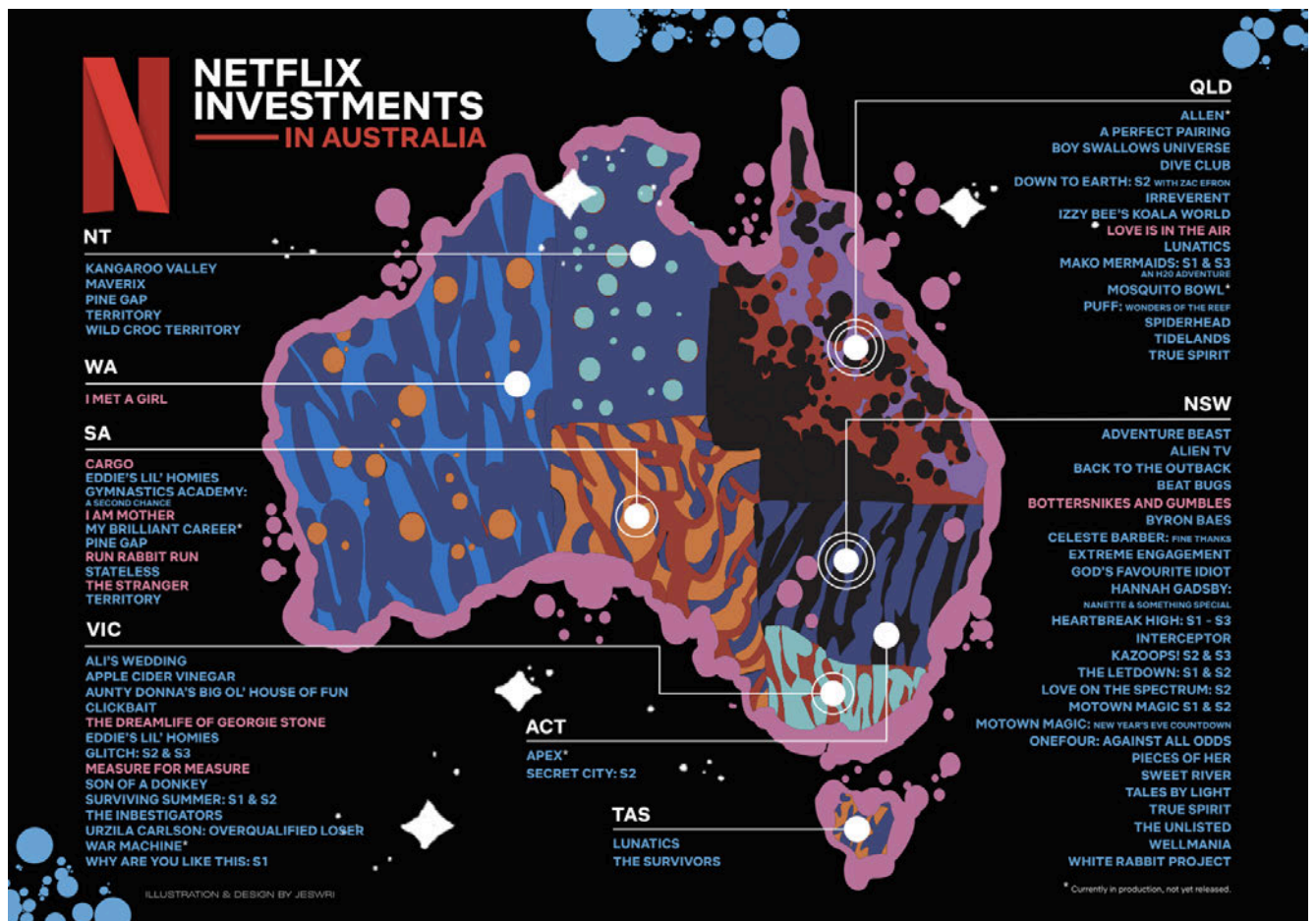
productions which have filmed in Australia and/or post produced by world leading Australian vendors.

As Netflix Co-CEO Greg Peters said at the opening of Netflix’s new Sydney office in 2024:

*"We want amazing Australian storytellers to know that they can tell their incredible stories right here in Australia. They don't need to go to Hollywood, they don't need to go somewhere else, but they can tell hugely ambitious stories, authentic stories at significant scale right here, and we will help them find an amazing audience in Australia, in New Zealand, and around the world."*⁶

Netflix Australia Production Map

Netflix has now filmed original productions in every Australian State and Territory.



⁶ <https://about.netflix.com/en/news/netflix-celebrates-decade-aussie-storytelling-sydney-office>

Pillar 1 - First Nations First

First Nations Australians are the custodians of the world's oldest continuing storytelling tradition. First Nations stories hold a significant place in the cultural fabric of Australia. The inclusion of First Nations Australians in the film and television industry is crucial for fostering diversity, authenticity, and representation. It is important not only to support First Nations stories on screen, but also to support the participation of First Nations Australians throughout the production process.

Inclusion across creative, technical, and below-the-line roles helps strengthen authenticity, cultural accuracy, and representation, while also creating meaningful career and skills development opportunities across the screen sector. First Nations Australians bring a unique perspective and cultural knowledge that enriches the storytelling process by promoting greater cultural accuracy and respect in on-screen portrayals.

Netflix is deeply committed to supporting First Nations leadership, participation, and career development across the screen sector, both on-screen and throughout the broader production ecosystem. We have worked with local partners and productions to help embed First Nations participation across different stages of development and production. For example, in the upcoming Netflix drama series, *My Brilliant Career*,⁷ we worked with independent experts and First Nations creatives to ensure First Nations considerations were woven through every layer of the production process – from script to set design.⁸

Supporting First Nations storytelling

Netflix continues to invest in and showcase Australian and First Nations stories across a diverse range of genres, formats, and audiences.

Netflix co-commissioned *Eddie's 'Lil Homies*, an Australian animated children's series, that premiered exclusively on Netflix and National Indigenous Television (NITV). It was nominated for a Logie Award in 2024 for Best Children's Program. Based on Eddie Betts' children's books of the same name it tells the story of an eight-year-old boy named Eddie and his two best friends, Lottie and Tal, navigating playground life.

When announcing the show, Eddie Betts said:

"Having a series on NITV is a great opportunity to show Indigenous kids just how far they can go. And having it on Netflix at the same time might help shape the way non-Indigenous kids see the world, too.

*"If I can't educate the older generation, I want to start with the younger ones, I want to educate them," he says. "That's how we gradually make change."*⁹

Netflix's *Heartbreak High* (Seasons 1-3) has been celebrated for its authentic representation of Australian teenagers including characters that are from First Nations communities. Kamilaroi man

⁷ <https://about.netflix.com/en/news/my-brilliant-career-series-adaptation-now-in-production-in-south-australia>

⁸ <https://about.netflix.com/en/news/naidoc-week-2025>

⁹ <https://www.smh.com.au/culture/tv-and-radio/eddie-betts-turns-his-wildly-popular-books-into-new-series-for-netflix-20230201-p5ch5h.html>

Thomas Weatherall, who won a Logie Award for Most Outstanding Supporting Actor for his portrayal of Malakai in the show, highlights the approach Netflix takes to inclusivity, including First Nations representation:

"The thing that I loved the most about Malakai and was drawn to the most is that he's an Indigenous man, he's proud of his culture, but it's not the most important thing about him or his character breakdown or what he goes through in this show,"

"So often, you see scripts or shows that are made and they get reduced to their cultural identity ... I'm a proud First Nations person, but that's not all I am. And when I was 16, that wasn't the only important thing in my life .. "That was really important to me because I think it's so easy and common to kind of reduce a character to just that plotline. But suddenly, here's this young Indigenous man in one of the main romance arcs of the show and he's a love interest, and he has a really intense emotional and dramatic storyline as well."

"There's a lot of nuance there ... They're not just focused on ticking the box."¹⁰

Promoting First Nations talent

Growing and maintaining talented and experienced crew is essential to the success of our local screen industry. Netflix has worked with local partners on several initiatives to promote First Nations talent:

- Netflix partnered with Screen Producers Australia to launch *Broad Horizons*, an initiative designed to increase access and opportunities for First Nations screen professionals.¹¹ Netflix then supported the cohort to promote its talent globally, as *Across Horizons*.
- Netflix's partnership with AFTRS to deliver the 'Indigenous Scholarship Fund'¹² previously supported three individuals to complete a Masters of Arts (Screen), covering the full cost of course fees and a contribution towards travel, accommodation and living expenses. In 2027, the program will also support two additional First Nations Australians to study full time at AFTRS' Sydney campus as part of its On Country program.¹³
- Netflix partnered with NIDA, to first develop then provide a scholarship for NIDA's Diploma of Screen Media¹⁴ (Specialist Make-Up Services) for First Nations and people of colour, because we were alerted by onscreen talent to the need for greater representation in hair and makeup roles.
- Netflix partnered with Campfire X to develop a First Nations Production Protocols Playbook.¹⁵

¹⁰ *Heartbreak High's* Thomas Weatherall & Kartanya Maynard On What It Takes To Get First Nations Representation Right, Refinery 29, <https://www.nowtolove.com.au/entertainment/tv/heartbreak-high-thomas-weatherall-logie-2023-78399/>

¹¹ <https://tvblackbox.com.au/page/2024/03/13/screen-producers-australia-and-netflix-unveil-broad-horizons-participants/>

¹² <https://www.aftrs.edu.au/news/2023/aftrs-announces-first-three-recipients-of-netflix-indigenous-scholarship-fund/>

¹³ <https://www.aftrs.edu.au/news/2026/aftrs-and-netflix-announce-first-nations-scholarship-program/>

¹⁴ <https://www.nida.edu.au/news/nida-and-netflix-announce-specialist-make-up-scholarship/>

¹⁵ <https://campaignbrief.com/campfire-x-teams-up-with-netflix-to-strengthen-cultural-pathways-for-first-nations-storytelling/>

- In all its training and production attachment programs Netflix works with its partners (AFTRS, NIDA, Screen Works, Bus Stop Films) and vendors such as Screen Careers to highlight opportunities for First Nations participants, for those with a disability, and for those from regional areas; providing production readiness training such as the First Nations Production Ready Bootcamp¹⁶ which was a three-day Darwin-based workshop that supported 10 First Nations participants by providing a comprehensive overview of the ins and outs of screen production, while also preparing them for trainee and attachment positions.

Pillar 2 - A Place for Every Story

Filming across Australia

The impact that Netflix has goes far beyond entertainment - we contribute to economies, support communities and create a ripple effect through culture. As shown in Figure 1, Netflix has already filmed at over 250 locations across all States and Territories in Australia.¹⁷

This includes telling stories about Aussie drill rap in *ONEFOUR: Against All Odds*, showcasing comedians like Hannah Gadsby through standup specials like *Nanette* and *Douglas* and exploring everyday relationships seen on Emmy® Award winning *Love on the Spectrum*. We provide a home for stories about Australians like *True Spirit*, stories that showcase Australia like *A Perfect Pairing*, and stories that let our Australian creatives shine, like *War Machine*. All of which have a place in bringing the best of Australian storytelling to our members in Australia and around the world.

Netflix productions contribute to economic activity, workforce participation, and creative development across metropolitan, regional, and remote communities throughout Australia. Many of our shows and movies are made outside major cities, supporting communities, telling a wider range of stories and allowing us to tap into a deeper pool of talent.

Netflix members around the world have also embraced Australian stories on Netflix. Netflix series and films also drive tourism, spike book and music sales, shape fashion trends, inspire travel and language learning, and spark viral social moments. After seeing a new place on screen, people are 2.4x more likely to say that country is their new top travel destination.¹⁸ Season 1 of *Heartbreak High* sparked international curiosity around Australian slang and culture (with Americans searching for what an “eshay” was), and *Boy Swallows Universe* inspired a “Discover Brisbane” tour of the locations of the show.¹⁹

Here are just some examples of the extent of the places that Netflix has filmed across Australia, and the impact of those productions:

- **New South Wales**

Heartbreak High (s. 1-3) is iconically Australian. The original series about teenagers growing up in Sydney was first broadcast in 1994. The new and rebooted *Heartbreak High* premiered globally on Netflix in September 2022. It instantly resonated with audiences both in Australia and around the world, and has been celebrated for its authentic representation

¹⁶ <https://about.netflix.com/en/news/netflix-introduces-first-nations-production-ready-bootcamp-in-darwin>

¹⁷ <https://about.netflix.com/en/news/netflix-celebrates-decade-aussie-storytelling-sydney-office>

¹⁸ <https://www.e-unwto.org/doi/book/10.18111/9789284422838>

¹⁹ <https://www.mediaweek.com.au/netflixs-australian-content-push-pays-off-with-a45m-boy-swallows-universe-boost/>

of Australian teenagers. *Heartbreak High* spent three weeks in the global top 10 English TV shows (number 6, 5, 8) and had more than 42 million viewing hours in the three weeks following its release. *Heartbreak High* won three Australian Academy Cinema Television Arts Awards (AACTA Awards) and the International Emmy® for Best Kids: Live-Action in 2023.

The Big Fix, currently shooting in Sydney, is a major international production starring Mark Wahlberg and Natalie Dormer. *The Big Fix* is set to create 500 local jobs and contribute an estimated \$55 million to the state's screen industry and broader economy.

Interceptor, filmed in Artarmon, Sydney, was the number 1 most watched film on Netflix in the week of its release, with over 89 million viewing hours.

- **Queensland**

Filming has wrapped on the upcoming Netflix feature film *Allen* from Emmy® and BAFTA award winning Ludo Studio (*Bluey, Thou Shalt Not Steal*) with principal photography taking place in Queensland's Brisbane and Gold Coast. *Allen* is a heartwarming tale of friendship and adventure, set against the backdrop of a Queensland coastal town. As Ludo Studio's Daley Pearson said:

"Getting the opportunity to make this story in this part of the world - in the town where I grew up in, inspired by the friends and family I grew up with - is a dream. We're creating Allen for families to watch together."

Boy Swallows Universe – The production took place across 67 locations in South East Queensland, hired more than 1,000 extras and added \$45 million to the Australian economy. See the case study on pages 9-10 for more information about the impact of this production.

True Spirit, a feature film about teenage Australian sailor, Jessica Watson, spent three weeks in the global top 10 English films (number 8, 5, 2) with over 37 million viewing hours in the first three weeks. It was a top 10 film on Netflix in 88 countries including US, Canada, Italy, UK, Colombia and South Korea.

A Perfect Pairing, an original romantic comedy made and set in Queensland, became a top 10 film in 93 countries, reaching number 1 on Netflix worldwide.

Dive Club, a 12-episode teen drama (co-produced with Network 10) filmed in Queensland featured in Netflix's ten most popular series list in over 30 countries.

Puff! Wonders of the Reef, documentary filmed on the Great Barrier Reef, won an Emmy® Award.

- **Tasmania**

The Survivors – Commissioned by Netflix, the show attracted 28 million viewers globally in 2025. The fictional town of Evelyn Bay was created using various iconic Tasmanian locations, including the towering sea cliffs of the Tasman Peninsula. *The Survivors* was the most watched Australian series on Netflix in H2 2025.

- **South Australia**

My Brilliant Career – filmed in South Australia and yet to be launched, it is the highest spend of any TV series made in the state. As announced, it will also provide significant employment for South Australians, creating 450 South Australian jobs across key creatives, crew and extras talent and engaging 260 South Australian small businesses.²⁰

- **Western Australia**

Breakers – The series is currently being shot and set in Western Australia, with filming taking place in the Shire of Gingin's rural countryside and the coastal areas of Lancelin Sand Dunes. The filming is estimated to create 100 local jobs and inject \$19 million into the economy.²¹

- **Victoria**

Apple Cider Vinegar, inspired by a true story that was based on a lie, tells the story of Belle Gibson, an Australian wellness influencer who claims to have cured her terminal brain cancer through health and wellness. Shot in Melbourne, the limited series spent three weeks in Netflix's Global Top 10, reached the top 10 in 57 countries, and was the number one most watched series in five countries, including Australia and New Zealand.

Thrash, filmed at Docklands Studios Melbourne, was the number one film on Netflix for the two weeks after its release. The production pushed technical and creative boundaries to depict a town at multiple stages of flooding. As Antony Tullock, Docklands Studio Melbourne CEO said: "The result on screen speaks for itself. It's a credit to the capability of the Melbourne crews and the depth of craft in this city"²²

Surviving Summer, a teen drama filmed and set in Victoria, became a top 10 title in 42 countries, was the number 4 most watched title in the United States, and had over 20 million viewing hours globally in its first week. [This video](#) about the making of *Surviving Summer* highlights some of the cultural and economic benefits of making quality Australian stories in Australia. It's also packed with music from new and emerging Australian artists.

Clickbait was co-created by Australian producer Tony Ayres and Australian author Christian White, and produced by Melbourne-based Matchbox Pictures and Tony Ayres Productions, together with UK production company Heyday Television. The production resulted in more than USD\$36 million of new investment, engaged around 540 cast, crew and extras, and used the services of around 290 local businesses.²³ *Clickbait* became the number 1 most watched title on Netflix in over 20 countries in the week of its release.²⁴

- **Australian Capital Territory**

Apex – Charlize Theron and Taron Egerton feature in this survival thriller, set in the Australian wilderness. Production took place all over NSW, with some key scenes filmed in

²⁰ <https://www.safilm.com.au/latest-news/netflix-chooses-brilliant-sa-for-my-brilliant-career/>

²¹ <https://www.abc.net.au/news/2026-04-23/netflix-start-filming-breakers-wa-wheatbelt-gingin/106584962>

²² <https://www.dsmelbourne.com/showcase/case-study-thrash/>

²³ <https://www.film.vic.gov.au/news/netflix-partners-with-victorian-creators-to-bring-clickbait-to-m%20elbourne>

²⁴ <https://www.smh.com.au/culture/tv-and-radio/australian-show-clickbait-tops-netflix-charts-around-the-world-20211005-p58xe2.html>

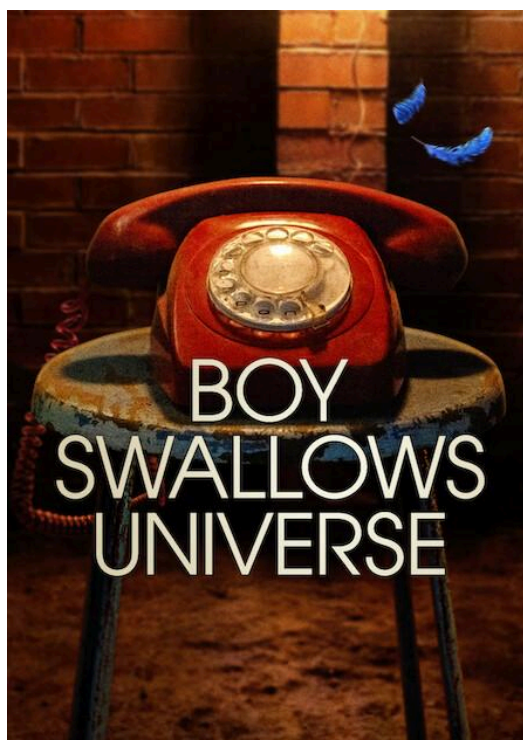
the ACT, including Ginninderra Falls.²⁵

- **Northern Territory**

Territory – The series showcases stunning views of the Northern Territory’s Top End, known for its diverse landscapes including breathtaking waterfalls, rugged outback wilderness, vibrant sunsets and the territory’s largest cattle station.

Maverix, produced by Northern Territory’s Brindle Films, with investments from Netflix and the Northern Territory Government, is a high-octane Australian children’s drama series that was filmed in Alice Springs. Set against the spectacular backdrop of Central Australia, the live-action series showcases this unique and visually stunning part of Australia to Netflix subscribers in 190 countries across the globe.

Case Study - Boy Swallows Universe



25

<https://www.abc.net.au/news/2025-02-08/canberra-welcomes-unprecedented-level-of-screen-production/104908158>

Netflix's adaptation of Trent Dalton's award winning Australian novel, *Boy Swallows Universe*, became an instant hit on Netflix, enjoyed both locally and globally. It spent three weeks in the Netflix Global Top 10, eight weeks in the Netflix Australia Top 10, and reached the Netflix Top 10 in over 50 countries. It won five Logie Awards, including Best Miniseries or Telemovie.²⁶

Netflix partnered with some of Australia's leading creators and crew to bring *Boy Swallows Universe* to life, including Troy Lum and Andrew Mason from Brouhaha Entertainment, Kerry Kohansky-Roberts, Joel Edgerton and Toby Bentley from Anonymous Content, Sophie Gardiner from Chapter One, and author Trent Dalton. It also stars some of Australia's finest talent, including Travis Fimmel, Simon Baker, Phoebe Tonkin, Bryan Brown, Anthony LaPaglia and Sophie Wilde. The series also introduced rising stars Felix Cameron and Lee Tiger Halley.

"It's as Brisbane as I've ever seen anything in my life, and I would only have dreamed of seeing a show like this when I was 12". Trent Dalton, Author



The series employed more than 175 cast, more than 225 crew, and used over 800 Australian vendors to generate more than \$45 million in Gross Value Added, the added value of goods and services produced across the Australian Economy.²⁷

Book sales for *Boy Swallows Universe*, originally published in 2018, soared in the Australian charts after the series was released, reaching No 1 on Amazon, No 2 on Kindle and No 1 on Apple Books.

²⁶<https://www.abc.net.au/news/2024-08-19/logies-2024-boy-swallows-universe-streaming-free-to-air-emdur/104241962>

²⁷ Netflix *Boy Swallows Universe* Economic Impact Study

A place for all types of stories

Netflix will continue to invest in quality Australian content, not because of any applicable regulatory obligations, but because our business benefits from ensuring our members are provided quality Australian content.

It is also important to recognise that a flourishing Australian screen sector is not created by local content investments alone. Second run licensing and global productions are also a critical part of the stories told in Australia's creative ecosystem.

Licensing Australian content

The majority of films and series on Netflix are licensed from studios, broadcasters and independent producers around the world. Globally, Netflix has licensed content from more than 3,000 companies over the past decade, and today around three out of four titles on the service are licensed.

These acquisitions are an important part of the Australian screen ecosystem. They create additional revenue streams for producers, expand audience reach, and support the long-term commercial sustainability of Australian storytelling. Streaming services have also opened up new global markets for Australian content. ACMA reports that SVOD providers reported making Australian programs available to international audiences in nearly 50 countries throughout the world. The largest number of Australian program titles and hours are available in North and South American countries.²⁸

Netflix acquisitions have supported Australian content at multiple stages of its lifecycle. "First run" acquisitions of films such as *The Stranger*, *Cargo* and *I Am Mother* helped support theatrical release pathways in Australia alongside local and global distribution on Netflix.

"Second run" or catalogue acquisitions can also extend the life and reach of Australian productions. *Love on the Spectrum* first premiered on ABC in 2019 before being licensed by Netflix in 2020, introducing the series to a global audience. The success of the first season led to Netflix and SBS co-producing a second season, which won an Emmy®, followed by a US spin-off commissioned by Netflix.

Catalogue acquisitions also ensure iconic Australian titles remain accessible to new generations of audiences. Titles such as *Muriel's Wedding*, *Gallipoli*, *The Secret Life of Us*, *Heartbreak High* (original series), *Rake*, *Sea Change* and *Secret City* continue to find audiences through streaming services, including in Netflix's 190 country global footprint.

The economic significance of these acquisitions is substantial. ACMA reports that streaming services invested \$97.5 million in acquiring (licensing) Australian content in the financial year 2024-25.²⁹ This is a significant source of new industry revenue created since the launch of streaming services in the Australian market.

Netflix curates a slate that blends licence favourites and local originals - and we're seeing strong success across both, with library titles thriving with new audiences:

²⁸<https://www.acma.gov.au/spending-subscription-video-demand-providers#austrian-programs-available-outside-australia>

²⁹<https://www.acma.gov.au/spending-subscription-video-demand-providers#expenditure-on-australian-programs>

- The ABC's *Fisk* reached Netflix's global top 10 and made the top 10 in 11 countries post its premiere on Netflix. Netflix members spent 13.5 million hours viewing *Fisk* in 2025.
- Australian kids shows have found large global audiences. *Little Lunch* was first premiered on the ABC in 2016, but still has huge viewing on Netflix. It was in the top 10 most viewed Australian shows on Netflix in 2025, with over 23 million view hours. *The InBestigators* reached 82.5 million view hours in 2025.
- *Muster Dogs* received glowing international reviews, including from The New York Times.³⁰

Global productions in Australia

Large-scale global productions filmed in Australia play an important role in strengthening workforce capability, infrastructure utilisation, and the long-term sustainability of the screen sector. While Australian stories remain central to Australia's cultural policy objectives, a sustainable domestic industry also depends on consistent production activity that supports the broader production ecosystem over time.

As recent Screen Australia analysis has identified³¹, the industry is facing growing pressure on studio capacity, technical capability, workforce availability, and long-term production sustainability. Ongoing production activity helps maintain demand for studios, crews, visual effects capability, production services, and technical infrastructure, making it commercially viable to invest in new facilities, skills development, and industry capability over the long term.

These productions also generate broader economic activity beyond the screen sector itself, supporting accommodation providers, hospitality businesses, transport operators, construction services, logistics providers, and local suppliers. For example, the Netflix title, *Gundam*, a live-action adaptation of the science fiction franchise, which is being shot in Queensland, is expected to inject approximately AU\$110 million into the State's economy, employ more than 350 local cast and crew, and support a wide supply chain of Australian businesses.³²

This continuity of production activity matters. It helps retain skilled workers between Australian productions, supports local businesses, and strengthens the underlying production base that Australian storytelling relies upon. In this sense, global and local productions should not be viewed as competing priorities. A strong pipeline of international production activity helps sustain the infrastructure, workforce capability, and commercial ecosystem that enables Australian stories and culture to be developed, produced, and shared with audiences both domestically and internationally.

Australia's screen sector also operates within an increasingly competitive global production environment, with governments around the world investing heavily in incentives, infrastructure, and workforce capability to attract screen production activity. Recent Olsberg SPI research tracking more than 124 film and television production incentive systems globally notes that:

³⁰ <https://www.nytimes.com/2023/06/08/arts/television/the-architect-muster-dogs.html>

³¹ Screen Australia Drama Report 2024-25, *ibid*.

³² <https://screenqueensland.com.au/sq-news/media-centre/legendary-strikes-again-with-gundam/>

“In a competitive global market, incentives are increasingly recognised by governments as powerful strategic tools to attract high-value inward investment, strengthen local production sectors and build skills, employment and infrastructure in a future-facing global industry.”³³

Maintaining a globally competitive production environment is therefore not separate from supporting Australian storytelling. It is part of sustaining the broader ecosystem on which Australian production capability depends.

Pillar 3 - Centrality of the Artist

Australia is home to world-class talent, and it's crucial that we build a strong pipeline of talent – both on and off screen – so Australia’s screen industry remains strong and sustainable.

This is particularly important in Australia, as record levels of production have resulted in skills shortages, capacity constraints and rising production costs. As ABC Director Screen Jennifer Collins recently said:

“There’s no doubt that the cost of production has gone up substantially. We’re looking at an industry now with multiple global streamers in the market and international shows coming into the market to be made. Rates have gone up and the cost of production has increased. So, we are committed to spending our budget in the same way that we have, year on year. We’re not reducing any of our genres, but the cost of production has most definitely come up, and our focus is on high-impact shows that really can cut through a very crowded market”³⁴.

That’s why Netflix invests in the screen industry of tomorrow and since 2021, we’ve **invested over \$10 million AUD in building the capacity of the Australian screen industry through skills, training and on the job training programs**. That means our average annual spend on capacity initiatives is approximately twice what Screen Australia can spend each year on its Skills Development Fund.

Working with local partners, we offer fully paid placements on productions and support training and skills development programs so early and mid-career screen practitioners can take the next step in their own careers.

Netflix provides opportunities for Australian actors, writers, directors, producers, vendors and crew not just to work in Australia, but to reach and be recognized by a global audience. When someone works with Netflix, they don’t just reach new audiences, they often receive more recognition and attention - which can open doors that may not have existed before.

Supporting Australian creatives

Between 2020 and 2023 alone, Netflix productions engaged more than 6,000 cast and crew in Australia. Alongside local production activity, Netflix has also invested in skills development,

³³

<https://static1.squarespace.com/static/5f7708077cf66e15c7de89ee/t/6a0347604010590b44dc7096/1778599776495/Global+Incentives+Index+2026-05-12.pdf>

³⁴ <https://tvtonight.com.au/2026/05/costs-are-up-but-abc-still-a-driving-force-to-creative-sector.html>

training pathways, and industry capability-building to support the long-term growth of Australia's screen sector.

Working with Australian industry partners, Netflix supports paid placements, attachment opportunities, and targeted training programs designed to help early and mid-career practitioners progress into sustainable screen careers.

For example, since 2022, Netflix has partnered with Screenworks to support the Regional Crew Pathways Program, which has:

- **Trained 295 early-career below-the-line** crew through the workshops Assistant Directing Fundamentals (2022), Production Accounting Essentials (2022), Who's Who in Crew: Forging a Career in the Regional Crew Industry (2022), Hair and Makeup for Film and TV (2023), Inside the Production Office (2023), and numerous Onset Onboarding Courses (2022-2026).
- **Paid the wages and enabled 17 early regional practitioners to secure screen credits** as they stepped into their first below-the-line crew roles across a range of Australian productions, including feature films, television and post-production environments.
- **Provided more than 36 productions** across the country, including in regional areas, with skilled early-career crew and their wages covered.

Netflix has also supported targeted capability-building initiatives to address workforce shortages and strengthen creative development pathways, including:

- the *Writers Journey Lab*, a five-day intensive workshop delivered with Australians in Film and Screen Australia to support Australian scripted series writers;
- a two-week *Production Accounting Workshop* delivered in partnership with Entertainment Partners to help address skills shortages in production accounting; and
- attachment programs across physical and post-production roles on productions including *Heartbreak High* and *Boy Swallows Universe*, with participants subsequently progressing to roles on other Australian productions, including non-Netflix projects.

Pillar 4 - Strong Cultural Infrastructure

Netflix contributes to the strength and sustainability of Australia's screen production ecosystem through investment, commissioning, acquisition, and international distribution. We are also investing in cultural infrastructure and technological advances to enhance our contribution to employment, sustainable production, and efficient content delivery.

Netflix Australia opened a permanent office in 2024. As Minister Burke stated at the office opening:

*"Simply to have a permanent office in itself is really important. It sends a message to me, it sends a message to everybody who works here that this is a permanent home of creativity in Australia for one of the biggest platforms on the planet, and that's something to celebrate."*³⁵

³⁵ <https://about.netflix.com/en/news/netflix-celebrates-decade-aussie-storytelling-sydney-office>

Netflix Animation Studios in Sydney

Netflix Animation Studios is paving the way for a bold future by building a community of cutting-edge talent dedicated to industry innovation and expanding the expectations of what is possible in feature animated storytelling.

Netflix Animation Studios is a full pipeline animation studio, done differently. We proudly operate across three vibrant locations - Burbank, Vancouver, and Sydney - fostering global collaboration to form one innovative studio. Our Sydney location builds on over three decades of award-winning design, visual effects, and animation experience from former Animal Logic Studios. This team brings expertise in CG shot based departments such as: Technology, Animation, Modeling, Surfacing, Rigging, Effects, Character Effects, Crowds, Layout, Lighting, Compositing and more.

Our Sydney studio champions top Australian and international talent and provides opportunities to contribute to ground-breaking animated content that pushes the boundaries of visual storytelling and helps shape a new wave of feature animation. Located at Moore Park, within the largest integrated entertainment facility in the southern hemisphere, NAS Sydney is a fixture of Australia's creative community.

Netflix animations are just a part of Australia's world class animation sector. With *Stranger Things: Tales From '85*, Netflix and Sydney-founded Flying Bark Productions are showing how Australian animation talent is helping expand one of the world's most recognisable entertainment universes.

The animated series, from showrunner Eric Robles and executive producers the Duffer Brothers, returns audiences to Hawkins in the winter of 1985, with a new mystery set within the *Stranger Things* universe. The scale of the work tells its own story: 499 props, more than 1 million total frames of animation, nearly 18.8 million rendered frames, and more than 664,000 render hours — equivalent to roughly 76 years.

For Flying Bark, the project is a major marker of growth. Since partnering with Netflix in 2021, the studio has grown from a small Sydney team into a global player with nearly 700 employees across Sydney, Los Angeles and Madrid. Netflix and Flying Bark are also partnering on animated adaptations for *Minecraft* and *Clash of Clans*.

As Barbara Stephen, CEO of Flying Bark Productions, says:

“Projects like Stranger Things: Tales From '85 are proof that world-class animation is being made right here in Australia. Partnering with Netflix and working on globally recognised IP has helped us expand our international footprint and this global success is facilitating opportunities for the studio to produce premium local content as well.”

Flying Bark's crew are gaining international credits, working within sophisticated pipelines and tackling more ambitious storytelling - experience that helps Australian artists compete and lead on the global stage.

Investing in sustainable production

Netflix is contributing to a sustainable future for the film industry, by modernising the ways our films and series are powered by trading fossil fuels for clean technology like mobile batteries, hydrogen power units and solar.

Since 2023, every scripted Netflix-managed production has integrated some form of clean mobile power or electric vehicles. From hydrogen power units on [Bridgerton](#) and electric vehicles on [Virgin River](#), to solar battery systems on [Stranger Things](#) and renewable energy microgrids on [Ransom Canyon](#), we're bringing exciting innovations to our productions, and the industry, while working to reach our [climate targets](#).

Apex, a survivalist thriller starring Charlize Theron and Taron Edgerton, is the first production in Australia to use a hydrogen power unit. The tech powered the entire unit basecamp and helped production reduce its diesel generator fuel usage by over 50%. *Apex* is another example of the popularity of Australian made content on Netflix, with over 105 million global views in less than a month on Netflix.

Investing in technical infrastructure

Netflix continues to invest in digital delivery infrastructure that supports reliable access to screen content across Australia. As audiences increasingly engage with screen content through streaming and connected devices, digital infrastructure plays an important role in ensuring audiences can discover and enjoy stories seamlessly across different locations and viewing environments.

Netflix's Open Connect Content Delivery Network (CDN) is designed to move content closer to audiences through a distributed network of local servers located at the edge of, or within, internet service provider (ISP) networks. Open Connect now operates across more than 140 countries and partners with more than 1,000 ISPs globally to help localise traffic and improve streaming efficiency. By storing content closer to viewers, Open Connect helps improve streaming reliability and reduce network congestion, while also lowering delivery and transit costs for ISP partners.

Netflix also continues investing in encoding and video compression technologies to deliver high-quality viewing experiences while using bandwidth more efficiently. As a result of these investments, the number of hours a Netflix member can stream per gigabyte of data has increased by more than 200% over the past five years.³⁶

Pillar 5 - Engaging the Audience

Audiences are engaging with screen content in new ways across streaming and on-demand platforms. We believe audience engagement is strengthened when viewers can easily discover relevant content relevant to their interests, access safe and age-appropriate viewing experiences, and participate in inclusive and accessible storytelling environments.

³⁶ <https://openconnect.netflix.com/Open-Connect-Briefing-Paper.pdf>

Discovering something new

Netflix's recommendations allow local content to find its ideal audience both in its home market and around the world, extending the cultural and economic impact of Australian productions.

Netflix uses AI-powered recommendation systems to help audiences discover content they are likely to enjoy, including Australian stories. Recommendations are personalised based on a member's interests and viewing preferences, meaning Australian content can be surfaced both through dedicated Australian content collections and alongside globally popular genres such as comedy, drama, documentary, or family programming. This helps place Australian stories in front of audiences most likely to engage with them, both in Australia and internationally.

Netflix makes local content available in a number of ways on its service:

- **Local Content Collections:** Collections of local movies and TV shows are easily accessible from links in the "Movies" and "TV shows" menus by choosing TV Shows or Movies and then selecting the category "Australian".
- **Search:** Netflix members are able to find collections of local content by searching for movies and TV series of a national origin. Search is becoming an increasingly popular source of discovery as members use more voice activated devices.
- **Genre Categories:** Netflix organises content into thousands of genres and micro genres to make highly personal recommendations. This tagging allows for members to be precise in what they are searching for. For example, our members in Australia can use the granular nature of these micro genres to search for content such as *Australian TV Shows*, *AACTA Award Winners*, *Australian Movies*, *Australian Kids & Family Movies*, *Australian Documentaries*, *Australian TV Comedies*. Micro genres combined with Netflix recommendations help ensure that consumers who enjoy content from a specific country are presented with more.
- **Recommendations:** Netflix recommendations ensure members are presented with content they are likely to enjoy. This means members who may be interested in Australian content will be recommended an Australian content row. It also means that members who are interested in other categories of content, like comedies, for example, will be recommended a row of comedies. Australian content that is of the comedy genre may then be placed in that row alongside comedies from all over the world. This places Australian content in its best position to be enjoyed by Netflix members.

Netflix recommendations are designed to only reflect what we think a member might enjoy watching. Recommendations ensure that Netflix members are presented with content, including local content, that they are likely to enjoy. Netflix's recommendations allow local content to find its ideal audience both in its home market and around the world.

- **Mobile phone friendly features**, including 'Clips' a new vertical video feed designed to be mobile friendly in nature - quick, visual, and easy to tap into. This feature highlights short

clips from series, films and specials tailored to the audiences' tastes, with an easy way to go deeper when something grabs their attention.

Audience research suggests these discovery systems are working effectively. The 2022 Department of Communications Media Consumption Survey³⁷ found that 83% of respondents did not report any problems finding Australian content on subscription streaming services.

Netflix cautions against any consideration of formal discoverability rules as part of national cultural policy. Discoverability rules can harm both viewers and producers. Displaying content to members that they are not interested in makes for a worse consumer experience, and consumers down rating or only partially watching a title may harm the reputation of that content.

For example, a Netflix member in Germany or Norway who enjoys horror films may be recommended the Australian zombie film *Cargo*, allowing Australian content to find its ideal audience around the world. However, recommending *Cargo* for an Australian Netflix member who only likes romantic comedies simply because it is Australian, may generate a negative reaction and a disappointing viewing experience for that member.

If recommendation technologies are weighted to artificially recommend Australian content that a member is unlikely to watch or may rate negatively - that viewer feedback may diminish the likelihood of that title being recommended to other members.

Ensuring age-appropriate experiences

We believe families should have confidence that children can explore content in safe, engaging, and age-appropriate ways, while giving parents and carers added confidence and peace of mind. Netflix supports families and younger audiences through age-appropriate viewing experiences, parental controls, and dedicated children's programming environments.

Our parental control tools help families make informed viewing choices tailored to different age groups and household preferences.³⁸

Parental tools available include:

- Individual kids profiles with age-appropriate content;
- Customizable maturity settings;
- Title-level blocking for shows or films parents prefer to filter out;
- Profile lock PINs so grown-up profiles stay for grown-ups;
- Viewing history and activity tools so parents can stay informed.

Children's viewing environments on Netflix are curated specifically for younger audiences, helping children discover content at their own pace while supporting a safe and trusted viewing experience.

³⁷

<https://www.infrastructure.gov.au/sites/default/files/documents/Media%20Content%20Consumption%20Survey%202022%20-%20Final%20Report.pdf>

³⁸ <https://about.netflix.com/en/news/netflix-kids-and-families-how-netflix-keeps-parents-in-control>

To support safe and age-appropriate engagement for the youngest audiences, we have recently launched Netflix Playground.³⁹ Designed for children ages 8 and under, Netflix Playground is included with all memberships and has no ads, in-app purchases or extra fees. Kids can play and explore with their favorite characters — from Peppa Pig to their friends on Sesame Street.

Providing accessible audience services

Great stories should be accessible to as many people as possible. We support accessible audience engagement through features such as captioning, subtitling, audio description, and inclusive viewing tools that help members experience content in ways that work for them.

Netflix provides extensive captioning and subtitling capabilities across 33 languages, helping broaden access to screen content for Deaf and hard-of-hearing audiences, multilingual audiences, and viewers watching across different environments. We have also continued to invest in high-quality audio description services, which provide narrated descriptions of visual elements to support blind and low-vision audiences. In 2025, we added more than 13,000 hours of Audio Description across 34 languages, up over 30% year-over-year. This year, we rolled out ‘Search by Language,’ a new search update that lets members find TV shows and movies by language and accessibility features directly from the search bar, on any device.

Accessibility features are integrated directly into the Netflix viewing experience so members can more easily discover and engage with content. As audiences increasingly consume content across different devices, languages, and accessibility needs, these services play an important role in supporting inclusive participation in screen culture. In recognition of this work, Netflix received the [Dr. Jacob Bolotin Award](#) by the [National Federation of the Blind \(NFB\)](#) for work providing quality audio transcription in multiple languages.

As this submission demonstrates, Netflix is committed to playing a significant ongoing role as a key participant in Australia’s flourishing screen industry. We recognise that all five pillars of cultural policy are intertwined, as are the various elements of the content production ecosystem. It is important that policy decisions made as part of this review of the National Cultural Policy also adopt an ecosystem-level approach, recognising the benefits of investments across all areas of Australian screen production and its contribution to Australia’s cultural framework.

Thank you for the opportunity to present these remarks. We would be happy to provide any further information or clarification on this submission.



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APAC Policy, Studio & Production | Global Affairs | ANZ

25 May 2026

³⁹ <https://about.netflix.com/en/news/netflix-expands-kids-entertainment-lineup-with-playground-app-for-games>