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Video-on-demand affordability: the cultural costs of unequal access to online film and television

Ramon Lobato[a], Kylie Pappalardo[b], Alexa Scarlata[c] and Nicolas Suzor[b]

[a]Digital Media, Swinburne University of Technology, Melbourne, Australia; [b]School of Law, Queensland University of Technology, Brisbane, Australia; [c]Digital Communication, RMIT University, Melbourne, Australia

ABSTRACT

This article considers how content fragmentation in online video-on-demand (VOD) markets shapes public access to, and affordability of, screen content. We offer a case study of Australia, a jurisdiction in which media and broadcast policy have traditionally prioritised some considerations of access and reach over commercial interests in exclusivity and market segmentation. To capture the affordability of screen content, we use a shopping basket approach and an automated data scraper to measure the price and availability of award-winning film and television titles across different streaming providers. We find that, while most titles are readily available across one or more free, subscription and transactional VOD services, premium titles are largely concentrated behind paywalls. Our analysis assesses the implications of this market structure for the social stratification of video consumption. We conclude that fragmentation and price increases in subscription video are contributing to a narrowing of public access to premium film and television.

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KEYWORDS
Access; affordability; availability; television; streaming

Introduction

When the first wave of mainstream subscription video-on-demand (SVOD) services, including Netflix and Prime Video, appeared in the mid-2010s, they were widely celebrated as an affordable alternative to pay television. Offering thousands of film and video titles for a low monthly subscription fee, SVODs promised to lower access barriers to film and television and to usher in a new era of 'cord cutting'. However, since the turn of the decade this rosy vision has been complicated by changes in the global SVOD market. First, Disney, Apple, Paramount and others launched major new direct-to-consumer SVOD services between 2019 and 2020, joining market leaders Netflix and Prime Video; while smaller SVODs including AMC, Britbox, and Shudder entered the market as standalone apps and add-on channels distributed through aggregators. This led to increasing competition for premium content among the leading SVODs, steep rises in production costs, rising subscription fees, and content fragmentation as streaming video titles became spread across a growing number of services. Since then, successive price-hikes, password-

CONTACT Kylie Pappalardo k.pappalardo@qut.edu.au School of Law, Queensland University of Technology, GPO Box 2434 Brisbane, Brisbane QLD 4001, Australia

sharing crackdowns and the introduction of advertising tiers have further complicated the value proposition of those SVODs.

Together, these changes mean that accessing SVODs is now a considerably more expensive activity than it was a decade ago. Some observers refer to a 're-bundling' process that is bringing streaming video services closer to the price point of traditional pay-TV (Micon et al. 2022). In Australia, the site of our study, the price of an ad-free monthly Netflix subscription has risen over the last decade from a base rate of AU$9.99 in 2015 to AU$20.99 in 2025. Other leading SVODs have also substantially raised their prices during this time, with the monthly price of Disney+ almost doubling from AU$8.99 at launch in 2019 to AU$15.99 at present. These price rises are more than double the rate of inflation (Reserve Bank of Australia 2025). Deloitte's (2025) media consumer survey found that the average Australian household spends AU$78 per month across digital entertainment subscriptions – including video, music, sport and gaming services – with an average of 2.3 SVOD services (Deloitte 2025, 4, 7). Deloitte (ibid: 4, 11) also found that 78% of Australians are concerned about the cost of multiple paid subscriptions and that splitting the bill or other workarounds is common. Other research notes high levels of online service cancellation, churn and downgrading in Australia, especially among those aged 18–44 (Social Research Centre 2024, 14).

The structure of the video market in Australia at the time of our data collected is illustrated in Table 1. As in most countries, the market is complex and consists of many different service types, with SVODs operating alongside legacy public-service (PSB) and

Table 1. Video streaming providers and pricing (AU$) in Australia at the time of data collection (June 2023).

Name	Business model	Costs/requirements
ABC iview	PSB VOD	N/A
Beamafilm	Library	Local library account
Kanopy	Library	Local library account
SBS On Demand	PSB VOD/AVOD	Exposure to advertising
7Plus	Commercial BVOD/AVOD	Exposure to advertising
9Now	Commercial BVOD/AVOD	Exposure to advertising
10Play	Commercial BVOD/AVOD	Exposure to advertising
Foxtel	Pay-TV	Subscription ($49–$140/month)
Foxtel Now	SVOD	Subscription ($25-$104/month)
Acorn TV	SVOD	Subscription ($7/month)
AMC+	SVOD	Subscription ($7/month)
Apple TV+	SVOD	Subscription ($10/month)
Binge	SVOD	Subscription ($10-$18/month)
Disney+	SVOD	Subscription ($14/month)
Docplay	SVOD	Subscription ($8/month)
Mubi	SVOD	Subscription ($13/month)
Netflix	SVOD	Subscription ($7-$23/month)
Paramount+	SVOD	Subscription ($9/month)
Prime Video	SVOD	Subscription ($10/month)
Stan	SVOD	Subscription ($10-$21/month)
Apple TV	TVOD	Rent/buy per title (movies: $5-$35; TV: $2-$3.50/episode)
Fetch TV	TVOD	Rent/buy per title (movies: $6-$30; TV: $3/episode)
Google Play	TVOD	Rent/buy per title (movies: $4-$35; TV: $3/episode)
Microsoft Store	TVOD	Rent/buy per title (movies: $6-$30; TV: $3/episode)
Amazon Video	TVOD	Rent/buy per title (movies: $3-$35; TV: N/A)
Telstra TV	TVOD	Rent/buy per title (movies: $5-$35; TV: $3/episode)
YouTube	TVOD	Rent/buy per title (movies: $4-$43; TV: N/A)

Note: Subscription costs exclude any bundling offers, annual subscription discounts and free trials. Certain niche services (e.g. those offering fewer than two titles that appear in our sample of film and video titles) have been excluded.

commercial broadcasters, which provide free or ad-supported content, and AVODs (including YouTube) that provide diverse ad-supported videos. Two questions that need to be asked of this structure, and which form the basis of the present article, are: *What is the relation between free and paid video in the current market structure of streaming video?* and *What does this mean for audiences, in terms of content affordability?*

Addressing these two questions, our paper presents findings from an empirical experiment that clarifies these issues by testing the availability and pricing of video content in the Australian VOD marketplace. We use a shopping basket approach and an automated data scraping method to measure the availability and price of a sample of award-winning film and television titles across a range of different VOD services, which allows us to establish how widely or narrowly available such content is to the consumer and at what price. This method allows us to explore the inequalities of access that may result from content fragmentation and to identify the specific kinds of content that are most affected.

Our article proceeds as follows. First, we review the existing literature on affordability of video-on-demand services. Second, we describe our approach including the automated data collection method. Third, we present findings from our experiment that show a concentration of film and video titles behind SVOD paywalls. Finally, we consider what this concentration means for debates in cultural policy studies regarding equity and participation in screen culture.

Policy context: access and affordability

Access and affordability have long been matters of interest to cultural policy scholars, especially those concerned with inequity in cultural participation. Scholars working in the Bourdieusian tradition have drawn attention to the socially stratified nature of consumption and the role of pricing in exacerbating inequity. These barriers to access are known to stratify cultural consumption. As Kruczkowska (2014, 200) observes, 'differential patterns of consumption of [cultural] goods serve to draw the boundaries of social groups'. Oakley and O'Brien (2016, 474), in their review of the literature on this topic, observe that 'Almost all research agrees that cultural consumption is socially differentiated and there are differences along lines of class and social status, educational level, age, gender, ethnicity and disability'. These concerns find expression in cultural policies that attempt to minimise inequity in cultural participation (e.g. European Union 2021).

An empirical literature on pricing informs this debate. Cultural economists and other experts in cultural markets – many of them writing in this journal – have studied the pricing of theatre performances (Mokre 1996), video stores (Roehl and Vairan 2001), books (Ringstad 2004), cinema tickets (Coate and Verhoeven 2015) and live music events (Behr and Cloonan 2020). Suzor et al. (2017, 4), in an early study of digital content pricing, extended this approach to streaming video markets, arguing that pricing and availability of video content shapes 'the ability of Australians to participate in global cultural conversations'. Researchers have also considered pricing in informal media markets (Karaganis 2009; Lobato 2012; Sezneva 2013).

The European Commission (2025), in its recent study of VOD consumer spending, found that higher-income consumers spend relatively higher amounts on streaming services compared to basic TV services. 'Across income groups," the report concludes, "higher earnings correlate with greater overall media spending, particularly in bundle

services, subscriptions to streaming services, and video games' (European Commission 2025, 32). This inequity of access has also been theorised in cultural policy scholarship. Colbjørnsen et al. argue that catalog differences, pricing, technological factors and skills all compound to shape consumer access to content, with access to content shaped by 'how much effort, money, expertise or technical infrastructure you bring to the table' (2021: 938). Straubhaar et al. (2019) consider streaming video pricing and consumption in Latin America, finding that SVOD adoption is reproducing social stratifications associated with earlier forms of pay-TV.

These debates about VOD affordability are directly relevant to our research site. Australia is a mid-sized country with a historically strong free broadcast and public-service television sector. It offers a revealing case study in VOD affordability, for several reasons. Unlike much of Asia, Europe and the Americas, Australia does not have a strong tradition of cable or satellite pay-TV, and consumers have until recently been largely unaccustomed to paying for pay-TV bundles (there is only one Australian pay-TV service, Foxtel, which is in less than a third of homes). Instead, free-to-air broadcast television – including three commercial broadcasters, Seven, Nine and Ten, and the public-service broadcasters ABC and SBS – has historically been at the centre of Australian public culture (Given 2003, 2016; Kenyon and Wright 2006). As Graeme Turner has noted, 'television broadcasting was introduced by governments for specific national, cultural or developmental policy objectives and addressed to the citizenry of a single nation-state, who were promised more or less universal access' (Turner 2009, 54). This is particularly true for Australia, where broadcast television was seen as a way to connect a widely dispersed population. Accordingly, free-to-air TV has been supported by government as a vehicle of social integration, public information, and emergency communications for Australia's highly geographically dispersed population (Given 2016).

To support this goal, successive Australian governments have pursued policies designed to reduce the bargaining power that large commercial providers such as Foxtel might exercise in regard to licensing of screen content. For instance, broadcast rules expressly override parts of copyright law, allowing broadcasters to retransmit signals to improve reach in rural and regional Australia (*Broadcasting Services Act 1992*). Australia also maintains anti-siphoning regulations that require the rights to broadcast major sporting events to be offered preferentially to free television broadcasters. The former Minister of Communications, Michelle Rowland, described Australia's free-to-air television system as 'the product of ongoing collaboration between government and the private sector, each working together to ensure universal availability of a mix of high-quality, locally relevant, free television services' (Rowland 2022). As the Minister's comments suggest, free provision of video content has long been prioritised within Australian media policies, reflecting the importance placed by successive governments on broadcasting as a means of distribution of information and entertainment.

Against this backdrop of a politically protected free-to-air television sector and a weak (and expensive) pay-TV sector, the rise of SVOD in Australia had a profound impact. Tanner and Given (2020, 5) observe that with the launch of Netflix and other SVODs, '[p]aying for television, a minority practice through two decades of "pay TV", became a majority practice in 2016', as millions of Australians raced to sign up to the new, low-priced SVOD services. This widespread SVOD adoption is disruptive in the sense that it challenges established policy approaches that rely on free-to-air television as a core

component of delivering equitable access to content, while also straining consumer expectations geared to the free distribution of video content. It has been clear for some time that the broadcast-era rules that promote access to screen content do not sufficiently account for digital distribution over the internet (Bosland 2007; Scarlata and Lobato 2023). Major policy reviews have sought to develop more 'technologically neutral' approaches to convergent media policy, but have never squarely addressed the challenge of promoting adequate free access to screen content in what is inevitably thought of as a digital content licensing market (Weatherall 2014).

In the latest example of industry protection, in 2024 the Australian parliament passed a law designed to ensure the prominence of air broadcasters on connected TV devices. The prominence law requires that all new smart TVs and streaming devices sold in Australia require designated free-to-air apps to be preinstalled and easily visible on the primary user interface (home screen) of the TV. Australian free-to-air networks lobbied the government intensively for this new protection on the basis that broadcast television – as a free, mass medium that has long served national policy objectives – is vulnerable to and requires protection from overseas streamers. The government accepted this view, with former Communications Minister Rowland (2023) describing the prominence law as a necessary support for 'services that are made available free to Australian audiences and users'. Another telling sign that free-to-air television remains politically important in Australia is the government's decision in 2025 to entirely waive spectrum licensing fees (Commercial Broadcasting (Tax) Amendment (Transmitter Licence Tax Rebate) Rules 2025), providing a 1-year $50 million windfall for commercial broadcasters that the sector hopes to make permanent. As these interventions suggest, television policy in Australia remains strongly influenced by an implicit norm of free-to-view access, with broadcast television retaining a central, protected place within the national media ecology.

It is worth noting that free-to-air television viewing remains an important part of daily life in Australia, notwithstanding recent competition from streamers. Viewing data collected by the Australian Communications and Media Authority (ACMA) found that 46% of Australian adults aged 18 years and older watched free-to-air television in 2024 and 69% used a paid online TV subscription in 2024 (ACMA 2024b: 5). They found that the subscription streaming numbers were driven by younger audiences, but younger audiences were still consuming long-form television programs in addition to short-form video content on platforms such as TikTok (ACMA 2024b, 5). This accords with similar studies conducted overseas. A study of teenagers (13–17 years) in Belgium found that while streaming platforms have overtaken live TV as the primary medium for long-form audiovisual programming, teenagers have not, in fact, turned away from traditional television (Evens, Henderickx, and De Marez L 2021, 187; 194). Instead, for teenagers, television viewing has become detached from a singular device. Young people use a variety of screens to view content (mobile phones, tablets, laptops), and in doing so 'integrat[e] socially networked communication with more traditional media practices' (ibid: 186–188).

Conceptualising affordability in video-on-demand

Given that free access to screen content continues to be politically and culturally important, we turn now to consider how to conceptualise concerns over affordable access in an era dominated by streaming video. While a broad policy literature on VOD and SVOD

exists – touching on national content, content diversity, and language diversity, among other topics – relatively little attention has been paid to affordability of those services. In this section, we consider the existing research relevant to this topic before offering our own conceptualisation of VOD affordability that provides the basis for the empirical analysis presented in the following section.

A useful first step is to clarify the normative basis of affordability. Here, we follow a tradition of work that uses Sen's (1999) and Nussbaum's (2011) 'capabilities approach'. Drawing on Aristotelian notions of the good life, the capabilities approach considers what capabilities a person needs to live a life of dignity and human flourishing. The capabilities approach seeks to move beyond a focus on access to resources, to consider the capabilities or 'substantive freedoms' that a person needs to thrive. In applying the capabilities approach to content, copyright scholars have emphasised the importance of access to cultural goods as central to democratic citizenship, 'from critical thinking to creativity to sharing and sociability' (Sunder 2012, 11). Media policy then has an important role to play in ensuring that copyright licensing markets are functioning well (Frischmann 2017), such that audiences are not unduly impeded from engaging in civic and cultural life (Elmahjub and Suzor 2017).

Within digital media and internet policy studies, research on affordability often takes the form of 'digital divide' research. This paradigm is focused on inequalities of access to technology, initially with reference to internet connectivity, but now increasingly more focused on soft access divides related to skills and social capital (Thomas et al. 2021; Van Dijk 2020). Affordability concerns have traditionally been narrowly defined in digital divide research to include the cost of hardware (computers, phones) or connectivity (internet access, mobile data plans), rather than services (Chao, Park, and Stager 2020). As a result, few studies have considered the additional costs of *content*, including video, music, and other cultural materials. We suggest that there is a growing need to articulate these traditions of internet and cultural affordability research with research on cultural consumption, availability, and affordability, as both share a similar concern with 'information "haves" and "havenots"' (Ragnedda and Muschert 2013, 2).

A related area of research is the existing literature on VOD *availability*, which uses catalog research methods to investigate what titles are available across different VOD services and markets (Aguiar and Waldfogel 2018; Iordache et al. 2023; Lobato and Scarlata 2017; Lotz, Eklund, and Soroka 2022; Muñoz Larroa 2023). Giblin et al. (2019) also used a similar approach to study ebook libraries. However, this availability literature has rarely considered content affordability and what it means for the consumer, although these issues do surface in some audience research (e.g. Huffer 2019; Johnson, Hills, and Dempsey 2023; Straubhaar 2007). Additionally, there is quantitative literature on VOD pricing, mostly written from an applied business studies perspective (e.g. Baek, Moonkyoung, and Seongcheol 2024), but its operational focus is distinct from the public-interest issues we explore here.

A key question, therefore, is how to connect the twin issues of availability and affordability as part of a wider conceptualisation of access in video culture. We illustrate this problem in Figure 1, which shows how streaming video consumption relies on three different kinds of 'access': devices, data, and content (services). While noting the importance of the lower strata, our study focuses on the services layer as the presently most dynamic and least-researched part of the triangle.

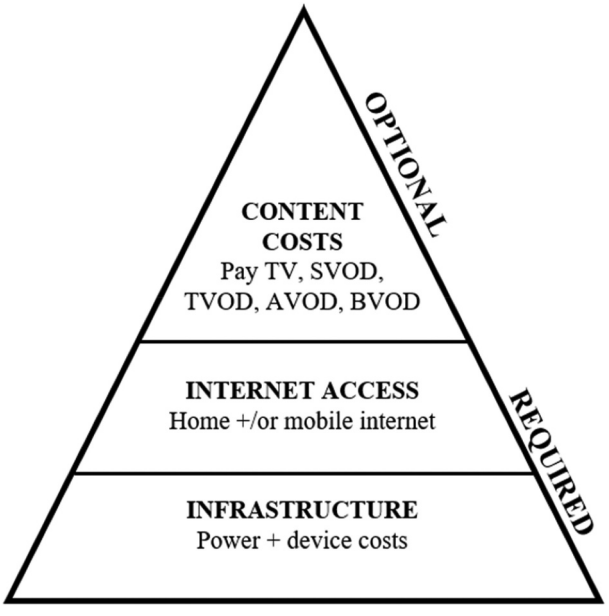

Figure 1. Access costs for streaming video in Australia.

To understand how these three costs come together, let us return to the case of video streaming in Australia. Infrastructure costs required for streaming video include purchase costs of a viewing device (typically a smart TV, modem and router, although smartphones and tablets can also be used) and the electricity needed to power those devices. Broadband internet access costs range upwards from AU$54 per month for a 250mbps home internet connection – the minimum speed needed to stream video content reliably – up to the faster fiber or 5 G connections (AU$70–$90 per month). Cheaper mobile-only connections are available (AU$20+ per month), but are prone to restricted speeds, excess data charges or caps. Existing research on internet affordability in Australia suggests access to these various access plans remains socially stratified. The Australian Digital Inclusion Index (ADII) reports that 28% of the national population in 2021 was either excluded or highly excluded from digital technologies (Thomas et al. 2021, 5). Importantly, the ADII found that 14% of all Australians would need to pay more than 10% of their household income for a reliable internet connection and that for Australians in the lowest income quintile, 67% would need to pay more than 10% of their household income for internet connectivity (6). The situation is especially challenging for mobile-only internet users who 'are less likely to enjoy video streaming services, not only because of the screen size but because of the high data costs that will prohibit them from subscribing to streaming services' (Flew and Park 2022, 29).

Alongside these internet access costs we must consider content costs. While public-service broadcasters and local public libraries offer free-to-view VODs, most video consumption in Australia is paid for in one of two ways. The first option is to pay with time and attention, by watching advertisements; the second option is direct payment, either via transactional purchase or subscription. Direct payment costs can range from a few dollars for a TVOD title or up to AU$140 per month for the most expensive pay-TV service,

Foxtel (known for its exclusive sport and entertainment packages). SVOD services represent a mid-tier option of between AU$8–$26 per month, with ad-supported subscription packages priced at the lower end of this bracket and packages with Ultra-HD resolution and simultaneous viewing on multiple devices at the upper end. Annual plans, subscription bundles, and free trial periods often make this more economical. Users can mitigate some content costs by strategically cycling through different streaming services one at a time (paying for a month of Netflix, followed by a month of Stan, then Disney+, and so on) to watch all the content that interests them on each service before moving onto the next one, thus maximizing the value of each subscription payment. However, this requires time, patience, digital skills and disposable income not available to all Australians. For many viewers, this 'juggling' (Johnson, Hills, and Dempsey 2023, 14) of services is often combined with waiting, foregoing content, and seeking out titles through informal routes.

In summary, our approach to VOD affordability seeks to reframe that specific issue as part of a wider conceptualisation of access which includes content pricing and availability. Drawing on Sunder (2012), we take video seriously not just as a site of consumption but also as a space in which cultural capabilities are formed. Of course, we are mindful of the complex markets that enable as well as structure access, and which are fundamental to the production of video content. Some level of exclusivity and market segmentation is unavoidable in screen industries that rely on varied licensing deals to recoup sizable investments in production. Nonetheless, we believe that it is helpful for policy purposes to have an empirical account of what kinds of content are available on a free or paid basis, and how the current market structure may advantage or disadvantage particular kinds of access and particular kinds of users.

Method

To investigate these issues, our article uses a catalog analysis method based on data scraping of a major video aggregator website, JustWatch. JustWatch is a service that allows users to search the catalogs of multiple VODs to find out where specific titles (movies, TV series, documentaries, and so on) are hosted, and at what cost (in AU$). JustWatch is widely used in catalog research as a proxy for VOD services which are not themselves easily scrapable (Grece 2022; Suzor et al. 2017). By scraping JustWatch over a 2-week period in June 2023, we were able to search for a discrete set of titles across all major SVOD, TVOD, AVOD and BVOD services in Australia. Our results provide a snapshot of availability and price (free, ad-supported, subscription) for titles over a short window, enabling us to then use qualitative methods to examine the affordability of video content in the Australian market.

A key consideration in this type of consumer-centred study is how to define the sample of titles. There were many ways that we could have approached this task. Following Sunder's (2012) understanding of culture as community, which emphasises the ability of citizens to engage in shared conversation about culture, we set out to identify a set of high-profile film and television titles that generate public discussion and are integral to cultural participation and citizenship (Simons 2015). Accordingly, we used major Australian and US screen industry awards as a proxy, focusing on titles selected for the following four film and television industry awards over the recent decade: *TV Week* Logie Awards (Australian television – 81 titles), Australian Academy of Cinema and Television

Arts (AACTA) Awards (Australian cinema – 26 titles), the Emmy Awards (US television – 23 titles), and the Academy Awards (US cinema – 46 titles). This method produced an overall sample of 176 titles. The full lists of titles and award categories are available in the Appendix.

Any list of titles intended to correlate to the viewing preferences and habits of the Australian public at large is bound to be somewhat arbitrary. Our titles, taken from industry award categories, risk reflecting a taste culture that might be associated with higher socio-economic viewers. Afterall, 'quality television' – the kind of television that one might expect to win awards – has been criticised for 'cultural elitism' in targeting 'college educated middle-class to elite-class audience[s]' (Nicholson 2016). While mindful of this risk, we would also point to the diversity of titles captured by the award categories. The Australian titles span family content (e.g. *Red Dog, Bluey, Dance Academy, Lego Masters*), comedy (e.g. *Rosehaven, Fisk, Please Like Me*), horror (e.g. *The Babadook, The Dressmaker*), action (e.g. *Mad Max: Fury Road, Jack Irish*), romance (e.g. *The Wrong Girl, A Place to Call Home)*, and even reality television (e.g. *Gogglebox, Australian Survivor, X Factor, Masterchef)*. The variety of genres cuts across social stratifications. The Australian awards also cover a broad selection of titles featuring Indigenous stories and talent, including *Bran Nue Day, The Drover's Wife, The Sapphires, First Contact, Little J & Big Cuz*, and *Mystery Road*. The US Emmy Awards also have some genre diversity and our list features titles that have been popular with mainstream audiences, including *Schitt's Creek, Modern Family* and *Game of Thrones*. The US film titles are more likely to be considered 'culturally elite', though the ability to view these titles at home may make them more accessible to broader audiences. As Barrett (2022, 163–4) has argued, 'Art and culture are not anathema to working class people . . . but rather have been appropriated away from them', often because culture is presented, performed and screened in elite spaces.

As Australia is a small English-language video market that has long imported most of its video from the United States (O'Regan 1993), we felt it was important to consider film and television from both the US and Australia, and not to limit the scope to one or the other, as would be the case if we used only one national award system. Similarly, we chose to include both film and television titles on the basis that streaming services offer both these formats, and both are important within watercooler conversations. While we acknowledge that content from other countries and in other languages will be important for many Australians (and increasingly so, as Australia's migrant population continues to grow), we wanted to test the availability and affordability of cultural dominant television and film in the Australian streaming ecosystem, which continue to be primarily Australian and US productions. There is both scope and need for future research to examine the accessibility of culturally diverse screen content for Australian audiences.

To assess the availability of 176 titles in our sample across streaming services available in Australia, we customised existing automated data collection infrastructure previously developed by two of the authors (Suzor et al. 2017). Starting from 2017, this infrastructure has used public APIs and scraping techniques to continually collect observations about the availability and pricing of screen and music titles across different online services. This observatory, originally funded by the Australian Communications Consumer Action Network, has been extended and supported by contributions from the Australian Research Council and the ARDC Nectar Research Cloud. The observatory was initially seeded with an extensive list of commercial film, television, and album titles and

configured to ingest new release titles scraped weekly from web sources including IMDB (television titles) and Box Office Mojo (film titles). The observatory would then continuously cycle through random subsets of titles and use web-scraping and API access to check the availability of each across services offered in the United States and Australia. Where possible, the data collection uses public data made available by providers directly. There are, however, a large number of streaming video providers and many are reluctant to make catalog information easily available; we accordingly rely heavily on JustWatch, a prominent aggregator of digital screen providers, which we accessed initially through its own API and later through an API hosted by The Movie Database (TMDB).

There are significant limitations to this type of scraping study that we had to work around. First, and most significantly, availability for any list of titles can only be reliably constructed for future collection; while the infrastructure collects availability information on thousands of titles each week, we found the list of titles that were historically collected to be too limited for our use. For this study, we modified the scraper to search for each title in our lists several times over a 2-week period, and we were unable to make longitudinal observations. Second, the observatory relies on matching plain text title and year information to identify individual films and television series, which introduces a risk of false matches for similarly named titles and for misses where titles are named differently in different jurisdictions or where different providers use different naming conventions. We mitigate this with a fuzzy-text search algorithm which then requires careful human review to ensure accuracy. This gives us sufficiently reliable results at a cost of limiting our ability to conduct larger scale quantitative analysis. We validated the data manually, correcting for mistaken matches between similar titles and for errors in the identification of providers. While availability of titles across services can change relatively quickly, this methodology provides a degree of confidence in a snapshot of availability for each of our 176 titles in a short period in mid-2023. We then combined this data with the costs of accessing the services identified to determine what Australian audiences can access for free.

Findings

Our results clarify two distinct but inter-related aspects of video-on-demand access in Australia: availability and affordability.

First, we find that the overall *availability* of titles in our sample in Australia is high. Figure 2 shows the full title list that constitutes our sample and availability results for each title across free, subscription, and transactional providers in Australia. Our data analysis found that the availability of titles is generally very good across all content categories, in the sense that most titles are available for digital viewing on one or more platform, with 100% availability for cinema titles and 93–96% availability for television titles. Indeed, only one of the 18 US TV titles and six of the 81 Australia TV titles were unavailable (see Figure 2). This suggests that, across our sample, almost all recent releases are being made available somewhere in the digital marketplace. This is a good indicator that business-to-business digital screen markets are at least functional, in that titles in our sample are overwhelmingly available in some form from at least one major platform. This is not always the case; scholars have raised serious concerns about related digital markets – including major discrepancies between international markets and market failures arising

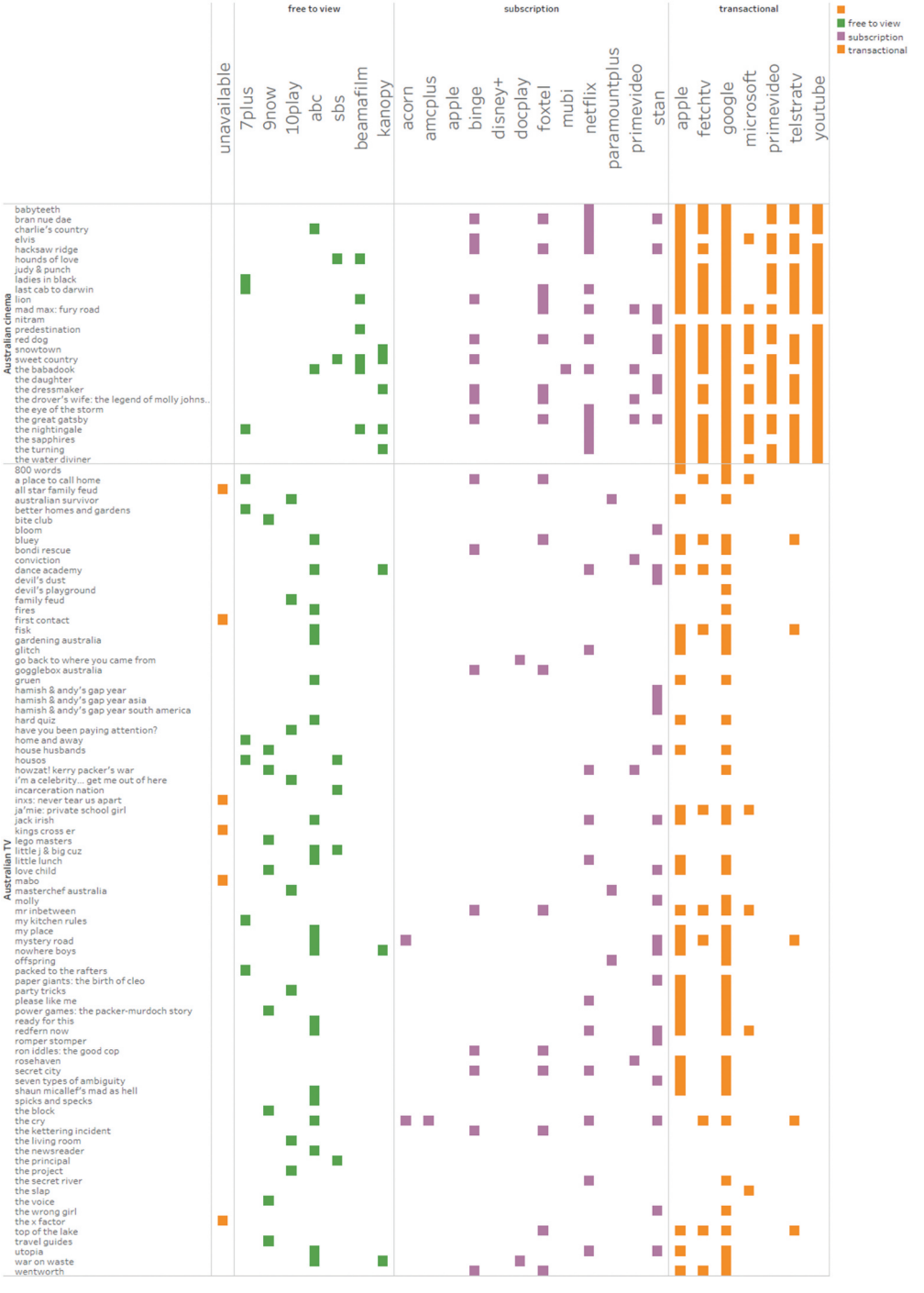

Figure 2. Availability of 176 titles across Australian free, subscription, and transactional service (June 2023).

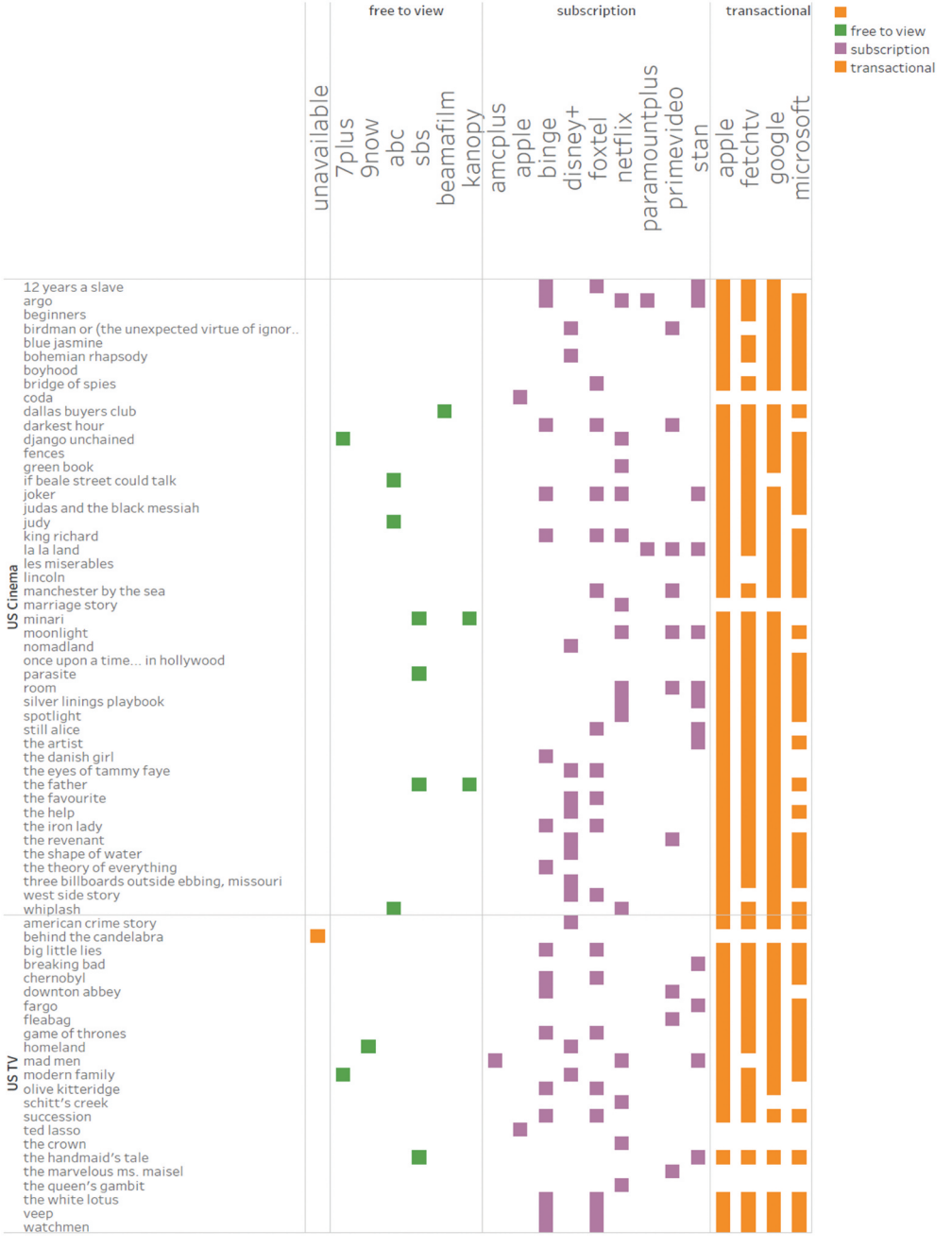

Figure 2. (Continued).

from holdouts, high search and transaction costs in tracking down rightsholders and negotiating licences, and prohibitive costs of digitising older releases (Dootson and Suzor 2015; Lobato 2009; Sengupta 2006). It is important to note that we sampled *recent* and *popular* film and television titles; our method does not account for the availability of older and/or more niche content.

Given our focus on affordability, a more meaningful question is whether the film and television titles in our shopping basket are provided to the consumer at a reasonable *price*. On this count, our findings suggest some clear differences across free-to-view, transactional and subscription models. Titles are much more readily available through more expensive transactional (TVOD) options where consumers have the option to 'buy' or rent individual titles. This highlights significant variation in practical availability when taking into account structural differences in the willingness and ability of consumers to buy individual titles as TVOD downloads. TVOD downloads are often priced high (new releases cost above AU$20) and lock users into using a particular content store. As a result, use of TVOD in Australia is extremely low: in the 6 months to June 2023, only 2–4% of adults used the major TVOD platforms (ACMA, 2024a). In other words, most titles in our basket may be *technically* available via TVOD, but in practical terms, these TVOD transactions are often an unattractive or even prohibitive option for most consumers.

It is also clear from our initial findings that TVOD availability does not directly address concerns about consumer choice and the experience of consumers in managing multiple subscriptions and locating titles. As Figure 2 shows, some titles are available on only one service (exclusively licensed), whereas others are available on multiple services (non-exclusively licensed). For example, the Australian TV drama *Bloom* is available in only one place – as an exclusive original on local SVOD Stan. In comparison, the Australian horror film, *The Babadook* is available in 11 places, licensed non-exclusively across BVODs, free library services, SVODs and TVODs. Clearly, non-exclusive licensing means more choice and convenience for consumers. Figure 3 shows that 46% of US cinema titles, 59% of US TV titles and 61% of Australian cinema titles in our basket were non-exclusive, suggesting a reasonably good level of cross-service availability. Australian premium cinema was particularly widely available, with most local films being available in more than seven places. Almost two-thirds (58%) of the Australian TV titles in our sample were licensed to just one streaming service, which makes sense given that these were broadcaster-commissioned shows; accordingly, more than half of these titles (29) were exclusively available for free on an Australian BVOD.

The next step in our analysis was to compare the content available for free with that which is only accessible behind a paywall, clarifying the variable affordability of different content types.

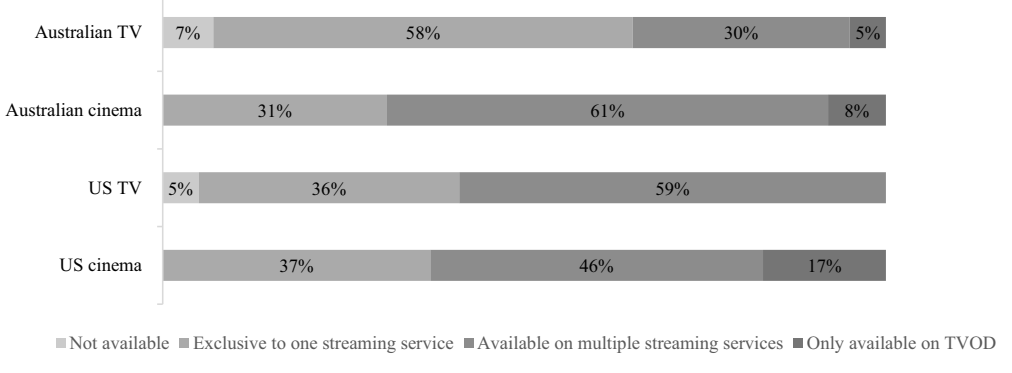

Figure 3. Proportion of titles available (exclusive vs. non-exclusive).

What content can Australian audiences access for free?

Overall, our findings suggest that viewers can access only about a third (32%) of our basket of content for free, with the rest locked behind one or more paywalls. As shown in Figure 4, Australian content is more commonly available for free than US content: 57% of the Australian TV titles in our dataset were free to stream on BVODs. This mirrors the availability dynamics of terrestrial broadcasting: shows that are aired free on broadcast are also usually free to stream on BVODs. In contrast, award-winning US titles are less affordable, with only 13% of the award-winning TV shows and 17% of the award-winning movies in our sample accessible via a free option.

This finding highlights the ongoing importance of Australia's national public broadcaster, the ABC, and public library memberships, such as Kanopy and Beamafilm, in making content available to price-sensitive consumers who may not be able to afford SVODs. For example, we found that ABC's streaming service iview hosts more Australian television titles in our sample (21) than any other BVOD. The lesser-known Kanopy and Beamafilm services, which are accessible through public library memberships, also offered many titles in our sample. Together, these resources serve as a kind of public infrastructure for access to local TV content, making up for some of the shortcomings of the market.

The role of commercial broadcasters in providing a baseline level of access to free local television is also worth noting – a function now also performed and extended by their BVOD services, 7Plus, 9Now and 10Play. More than a quarter of Australian titles in our sample (28%) are available on the commercial BVODs. Seven and Ten also offer a rotating suite of free ad-supported streaming TV (FAST) channels, some of which play titles in our basket, like *Better Homes & Gardens* (Seven) and *MasterChef* (Ten), on a loop. However, we identified some limitations associated with this type of free access. First, commercial BVODs (as well as public-commercial hybrid SBS On Demand) do come with a cost: an abundance of unskippable and often repetitive advertising. Another caveat is that some of the TV titles available on commercial BVODs cannot be streamed in full, with older seasons unavailable to stream and, in some cases, seasons split across a BVOD and its partner-SVOD services. In comparison, paid services regularly provide a (largely) ad-free experience and frequently complete catalogues.

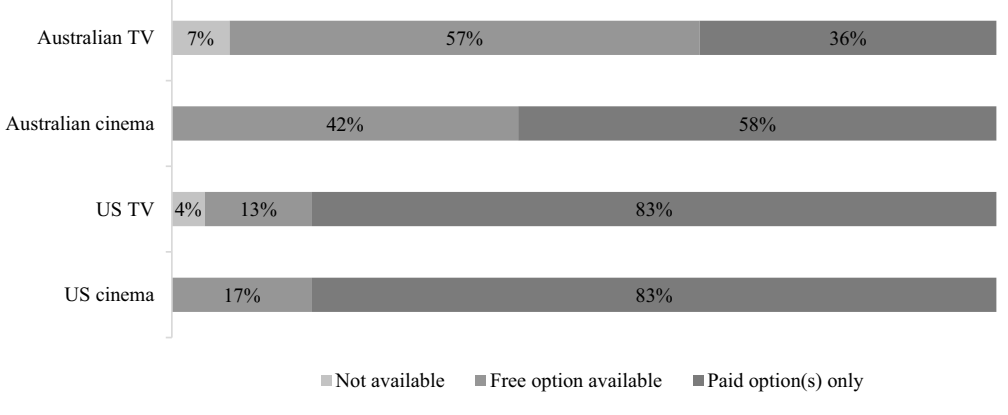

Figure 4. Proportion of titles available (free vs. paid streaming services).

Australian cinema was relatively less available on free VOD services than Australian television series, with more than half (58%) of Australian films in our sample behind a paywall. This difference in affordability between cinema and television reflects historical norms in both markets. As above, Beamafilm and Kanopy are playing an important role here, providing free access to a third (34%) of Australian films in our basket. Among the paid services, Netflix offers the best value for lovers of local cinema willing and able to pay for it: around half of the award-winning titles in the sample were available on Netflix. Netflix is also the most active exclusive SVOD licensor of award-winning Australian movies overall, offering six exclusives including *The Sapphires*, *Babyteeth* and *The Turning*.

In contrast, US titles are less commonly available for free streaming. Among the high-profile, award-winning US TV shows in our sample, Australians can stream only three titles: *Modern Family* is available on 7Plus, *Homeland* is on 9Now and *The Handmaid's Tale* is on SBS On Demand. Yet while all eight seasons of *Homeland* are available to stream on 9Now, SBS On Demand has only the most recent season (Season 5) of *The Handmaid's Tale* and 7Plus only has five episodes of season 8 of *Modern Family*. This suggests that Australian commercial broadcasters, which once played a key role in providing access to hit US movies and TV shows, are reducing their commitment to securing award-winning titles, likely as a result of constrained licensing budgets, and appear to have ceded much of this territory to the SVOD market. For example, award-winning US TV series like *Ted Lasso* (Apple TV+), *The Crown* (Netflix) and *The Marvelous Mrs Maisel* (Prime Video) are available exclusively on those SVOD services.

We also observed poor availability of US movies on free streaming services. Only eight titles from our sample of 46 US movies are available for free: three each on ABC iview and SBS On Demand, one on 7Plus, and three on library services Kanopy and Beamafilm (with overlapping availability of two titles with SBS). A positive difference between US cinema and television is that many more cinema titles are available on multiple streaming services at a time than was the case for television; that is, US cinema is licensed less exclusively. Of the 46 titles available to stream, 21 titles – nearly half – were available on more than one streaming service. Several were available on more than two services at once. For example, *Argo* was available on Stan, Binge, Netflix, and Paramount+. However, accessing more than half the US premium films in our basket would require multiple SVOD subscriptions, or for the consumer to move between SVODs by suspending one subscription and starting another within the same film licensing period.

It is clear, then, that while Australian television is broadly available on free-to-view streaming services, Australian cinema and US television and cinema are less widely available. This means that consumers who cannot afford SVOD subscriptions are limited to a small slice of the overall premium entertainment content available in Australia's video marketplace. The heavy market fragmentation, the high spread of content across providers, and the strong exclusivity of (US) television content mean that consumers must pay for subscriptions – multiple subscriptions – if they want reasonable access to current, award-winning video content. While this market structure is logical given the dynamics of SVOD, it nonetheless represents a significant departure from historical norms of access within Australian television culture.

Discussion

Our experiment has shown that while the availability of award-winning screen titles in Australia is good, access to these titles is likely to require multiple SVOD subscriptions (and thus sufficient disposable income). In other words, the rise of streaming in Australia appears to have increased the availability of video but decreased its affordability. Unlike music streaming, where consumers benefit from strong competition between platforms that all provide largely identical and comparatively extensive catalogues, video streaming entails a more complex and unequal distribution model.

To conclude, we would like to offer some reflections on how this finding relates to ongoing debates about access and affordability. Our first observation is that understanding the historical and political context of national policies is crucial. As we have shown, Australian governments have historically relied on broadcasters to enable broad, easy and free access to video. Free-to-air broadcasters have played an integral role in Australian communities (Griffen-Foley 2020), and questions of copyright licensing, exclusivity, and public access have consistently featured prominently in public policy debates (Armstrong 1980). Their operation has long been a matter of public interest. This is most pronounced in radio, one of the few areas where the private content licensing market has been effectively replaced by collecting societies, essentially removing the power of publishers to negotiate for higher prices on exclusive terms. Both television and radio broadcasters benefit from retransmission licences and have been subject to some form of local content quotas, and anti-siphoning rules prioritise public access to the most culturally significant sporting events. The public interest in free access to cultural goods has been a major part of the bargain involved in allocating public spectrum, but digital delivery on demand has radically changed the market and consumer expectations. Our results highlight the extensive gap in public access that is left behind as broadcasters become more precarious and less able to provide free access to popular content, and as audiences, especially younger audiences, transition to digital streaming.

This brings us to our second observation, which concerns equity as a cultural policy goal. The shift to SVODs draws a sharper line between the haves (those with multiple SVOD subscriptions) and have-nots (those who rely on free-to-view television). This is a difficult challenge for policymakers. There is no desire from any quarter to return to the old broadcast days of limited channels and limited choice. At the same time, the fragmentation and stratification associated with streaming is an undesirable outcome for participation, social cohesion, and other common goals of cultural policy. A question then arises of how to maximise participation and minimise barriers to access.

Here, it is instructive to return to prior cultural policy research on pricing and the practical policy measures that have been tried before. In the GLAM sector inequity effects of pricing are often softened by targeted subsidies, as when museums and galleries offer discounted or free admission to particular cohorts (the young, the elderly, First Nations people) either permanently or occasionally (e.g. first Friday of every month). Here, 'the onus falls on various agents of policy to firstly identify the impediments [to attendance at cultural venues] and then, as far as they can, remove them' (Barrett 2022, 162). To what extent could such interventions be considered for SVOD? The video market is of course different from the GLAM sector: the state is not involved in setting prices and the levers

available to pull are fewer and far between. Nonetheless, it is worth asking what kinds of policy interventions might reduce the social stratification of VOD use.

We are mindful here of the risks of paternalistic attempts to 'include' vulnerable groups in elite cultural forms. As Barrett (2022, 165) argues, the 'problem' of cultural attendance is in fact 'a problem created by valorised culture that has systematically and purposefully excluded working class people and other marginalised groups'. However, the situation is different with VODs because the content they offer is generally very broad and appeals to many different classes, social groups, and taste communities. In this sense, the choice is not so much between an 'elite' video culture and a 'working-class' video culture but between an ever-expanding and increasingly diverse universe of content available on VODs and the much more limited, diminished baseline product of free-to-air TV. Cultural policy intervention under these circumstances is defensible and worth considering.

To minimise these inequities in VOD access, our research suggests a few possible options for policymakers. There are no easy solutions here, and all of the options below entail significant challenges and risks. The first and most obvious option would be to sustain or increase existing support for broadcasters, particularly public-service broadcasters. This may ensure a minimum threshold of free video provision, mitigating the unaffordability barriers described above. However, the long-term viability of broadcasters everywhere is in question, and many countries are considering a switch-off of broadcast spectrum (Ofcom 2024). So the rationale for supporting incumbents is by no means uncontroversial.

A second option is centralizing subscription costs in institutions. We have shown in our study that specialist subscription services including Kanopy and Beamafilm play an important role in smoothing inequities of VOD access, as they provide large numbers of national TV titles. In Australia, these services are offered through public libraries, which are funded by local governments, and universities, which are funded by the federal government. Increased public funding for such libraries may help to fill gaps in the digital marketplace.

Third, there are supply-side measures to consider. Australia presently offers generous tax rebates and direct funding for local screen production with the aim of increasing industry capacity and 'telling Australian stories'. While this funding typically requires a distribution agreement, there are no rules as to whether the end-product should be shown on a free-to-view or subscription platform. Incentivising producers to make nationally funded titles available on free-to-view platforms may increase audience engagement with national content and reduce affordability barriers. However, such a change would profoundly disrupt the existing market arrangements for screen production, and so again, can only be considered as a long-term aspiration. Another consideration is the degraded experience of free-to-view ad-supported video platforms, as well as the questionable audience surveillance practiced by those platforms which may have privacy implications for audiences. How to reconcile access and affordability while limiting exposure to intrusive or harmful advertising is a major challenge for policy.

Our study is limited by a number of factors including the sampling and data collection method. We could not capture all possible VODs and video services in our study; for example, FAST (free ad-supported streaming TV) channels on smart TVs were excluded as these are not easily indexed and are little viewed in Australia at present. Our sample also had inherent limitations as noted in Method. Nonetheless, we hope that our approach is

sufficient to capture the general dynamics of an evolving video market and its implications for access and affordability.

Our study is specific to Australia but may have relevance to other countries with broadcast-centric policies and market structures. Readers from countries with more liberalised video markets may find the phenomenon of a user-pays system to be unremarkable or uncontroversial and may wonder why we have gone to the effort of specifying in such detail the absence of free-to-view content. We would respond that cultural policy analysis of video markets always has an unavoidable national dimension, as television 'is still largely national in its institutional and industrial location' (Turner 2016, 94) even as transnational services are reshaping those markets. For this reason, the national remains the key regulatory space for video culture, and thus a primary and unavoidable site of analysis for cultural policy studies.

In Australia, the rising costs of SVOD services and the migration of culturally significant film and television content behind a paywall are highly disruptive to existing cultural policy. This emerging user-pays norm, while a logical extension of current global trends in video, is a disruptive development for national audiences given the country's long-established broadcast policies and associated audience expectations about free-to-view television. There are many questions that flow from this, such as how and whether to support and maintain a degree of access equity among audiences (and whether this is a desirable outcome), and how a diversity of content supply can be encouraged alongside reasonable public access to such content. These are complex issues that will need to be considered in future research. What is clear, however, is that such problems will become increasingly urgent for cultural policy research in the years ahead, as national television ecosystems are further reconfigured by digital platforms.

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Notes on contributors

Ramon Lobato is a Professor of Digital Media at Swinburne University of Technology. A media industries scholar, Professor Lobato has a special interest in television and video distribution - its histories, markets, and audiences. He has held three Australian Research Council Fellowships since 2010, including a Future Fellowship (Australian Television in the Smart TV Ecology, 2020-2025). His work uses a range of empirical and critical methods to study the industrial transformation of video in the streaming age and its implications for audiences, broadcasters, and policymakers. He is the author of Netflix Nations: The Geography of Digital Distribution (NYU Press 2019) and Shadow Economies of Cinema (British Film Institute, 2012), among other books.

Kylie Pappalardo is an Associate Professor in the School of Law at the Queensland University of Technology. She is a leading researcher in intellectual property law, especially the intersections between copyright, culture and creativity. She studies how automation, digital distribution, and intellectual property laws shape the reach and diversity of our culture. Her work seeks to develop and inform law, public policy and industry norms that prioritise marginalised voices and diverse perspectives in the production and distribution of content. A/Professor Pappalardo has been an Australian Research Council (ARC) Discovery Early Career Research (DECRA) Fellow (2021-2024).

Alexa Scarlata is a Lecturer in Digital Communication in the School of Media and Communication at RMIT University. She is a scholar of media and cultural industries, with a special interest in internet distributed television, content production and national screen policy. Her PhD thesis (University of Melbourne, 2022) found that while online TV has provided rather limited support for the development of original Australian television drama, it has proven advantageous for the distribution of existing local drama and the likely future production of content with an increasingly global focus. Dr Scarlata has worked on several ARC funded projects, including one that explored how government, local industry and consumers responded to SVOD services, and which impacted the subsequent development of SVOD policy in Australia.

Nicolas Suzor is a Professor in the Law School at the Queensland University of Technology. His research examines the governance of the internet and social networks, the regulation of automated systems, digital copyright, and knowledge commons. He is the author of Lawless: the secret rules that govern our digital lives (Cambridge, 2019).

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