



Screen Australia **Drama Report**

Production of feature films, TV
and VOD drama in Australia in 2021/22



Australian Government





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Screen Australia is grateful to all those who contributed data to the compilation of this report. The data provided has been drawn from a number of sources. While Screen Australia has undertaken all reasonable measures to ensure its accuracy, we cannot accept responsibility for inaccuracies and omissions.

Cover: *True Colours*

Inside cover: *Ginger and the Vegesaur*

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ABOUT THE REPORT

This year marks the thirty-second edition of the Drama Report. First produced by the Australian Film Commission and, since 2008, Screen Australia, it has evolved from covering feature films and TV drama to include drama made for online platforms.

The screen industry is experiencing a period of rapid change. Audience habits, content platforms, business models and production practices have continued to evolve, and in some cases, converge. After evaluating these factors, Screen Australia has revised the Drama Report to ensure that it remains as relevant as possible to governments and the sector.

The most significant change to the report this year is to the classification of Australian titles. Previously, Australian titles were sorted into four categories: feature films, general TV drama, children's TV drama, and online drama. To provide more specific insights into production for different release platforms, and production of children's drama across platforms, Australian drama is now categorised as:

- Australian theatrical features
- Australian general TV and VOD drama
 - * Australian general FTA TV and BVOD drama
 - * Australian general subscription TV and SVOD drama
 - * Australian general AVOD, TVOD and other online drama
- Australian children's TV and VOD drama.

Data across the most recent five years has been re-categorised, to enable analysis of trends.

The production of drama was affected by a range of factors in 2021/22. Notably, the COVID-19 pandemic impacted productions, increasing costs and hampering plans, while the Producer Offset provided an increased rebate to Australian content made for television and streaming services. Continuing factors from previous years included the global demand for content production and post-production crew and facilities, and altered content regulations.

The report incorporates data gathered through surveys and publicly available sources to give a comprehensive view of drama production activity in Australia. Where data is not available, including for projects that are yet to be finalised at the time of survey, some estimations have been used.

Results should therefore be considered indicative at a point in time, and should not be viewed as a precise measurement.

Data is presented for the past five years, 2017/18 to 2021/22. Foreign titles are included if they are entirely or substantially shot in Australia, or have PDV work carried out in Australia without shooting here. See page 5 for definitions of 'Australian', 'domestic', 'Co-production' and 'foreign'.

Feature films and TV dramas represent about 30% of all audiovisual production spend in Australia (excluding online productions).¹ Other areas of activity include documentaries, web-series, light entertainment, commercials, music videos, corporate videos, and sport, news and current affairs. See the statistics section of the Screen Australia website for details, screenaustralia.gov.au/fact-finders/production-trends, and the relevant archives for pre-2013/14 data.

¹Australian Bureau of Statistics (ABS), [Film, Television and Digital Games Australia](#), 2015/16. An updated version of this publication is expected in mid-2023.



KEY TERMS

For the purpose of this report, **Drama** includes:

Theatrical features: a film made for first release in cinemas that is at least 60 minutes.

Free-to-air (FTA) TV and Broadcaster Video-On-Demand (BVOD) drama:

a 'drama' program according to the *Broadcasting Services (Australian Content and Children's Television) Standards 2020* (Cth).² Includes series/serials, mini-series and telemovies. See page 18 for definitions. FTA and BVOD drama is content made for first release on Australia's free-to-air broadcaster television channels or online platforms, including ABC iview, SBS On Demand, 7plus, 9Now and 10 play. Titles must have total durations of 30 minutes or more.

Subscription TV and Subscription Video-On-Demand (SVOD) drama:

is drama made for first release on Subscription TV (incl. Foxtel) and Subscription VOD services (incl. Amazon Prime, Disney+, Netflix, Paramount+ and Stan). Titles must have total durations of 30 minutes or more.

Advertising-based Video-On-Demand (AVOD), Transactional Video-On-Demand (TVOD) and other online drama:

is content made for first release on online services not captured by the above categories, including ad-based video-on-demand services (incl. Facebook, Instagram, TikTok and YouTube) and Transactional video-on-demand services (incl. iTunes and other emerging services). Titles must have total durations of 30 minutes or more.

General drama: drama made for adult and/or family audiences. It does not include Children's drama, which is made specifically for child audiences.

Total budgets: reports on how much it actually costs to make projects. It is reported for all projects that started shooting during the financial year, with the full budget allocated to the date principal photography started; budgets are not apportioned across the duration of the project.

Total spend/expenditure: reports on how much of the total budgets were spent in Australia. This measure is particularly relevant for Co-productions and foreign

productions. Again, all expenditure is allocated to the date principal photography or PDV work in Australia began rather than to the actual date of spending. Note: this is not the same as 'qualifying Australian production expenditure' (QAPE) for the purpose of the Producer Offset. Some expenditure in Australia is not QAPE, and QAPE can include some expenditure on Australian elements outside of Australia. QAPE is not reported here.

Australian productions include:

Domestic productions are projects other than Co-productions under Australian creative control (i.e. where the key elements are predominantly Australian and the project was originated and developed by Australians). This includes projects under Australian creative control that are 100% foreign-financed.

Co-productions are Official Co-productions (i.e. projects made pursuant to an agreement between the Australian Government and the government of another country).

As Official Co-productions don't have to pass the 'Significant Australian Content' test to be eligible for the Producer Offset, and may be classified as 'Australian' for the purposes of Australian content obligations applying to broadcasters, the report mainly focuses on domestic and Co-production projects as a combined 'Australian' slate.

Foreign productions are defined as those under foreign creative control, originated and developed by non-Australians. This includes foreign projects with an Australian production company operating in a service capacity. A test of creative control and key roles is applied for projects with Australian elements.

In-house productions are projects by Australian TV networks, where no independent production company is credited as producer or co-producer.

PDV (post, digital and visual effects) refers to those activities that create audio and visual elements for film, TV or VOD drama other than by principal photography, pick-ups or physical elements such as sets and props, and includes animation. It also refers to the manipulation of those elements and includes sound and visual editing, digital effects, creation of computer-generated images (CGI), film laboratory work and duplication services. As such, it includes a variety of activities that

not only take place after the shoot but also during the earlier stages of a project's overall production.

See also **Methodology** on page 52.

²See [Broadcasting Services \(Australian Content and Children's Television\) Standards 2020 \(Cth\), s 8](#).

Overview

The annual slate of feature films, TV and online drama productions consists of Australian titles (including Official Co-productions) and foreign titles that start production or post, digital and visual effects (PDV) during a given financial year.

DRAMA EXPENDITURE IN AUSTRALIA

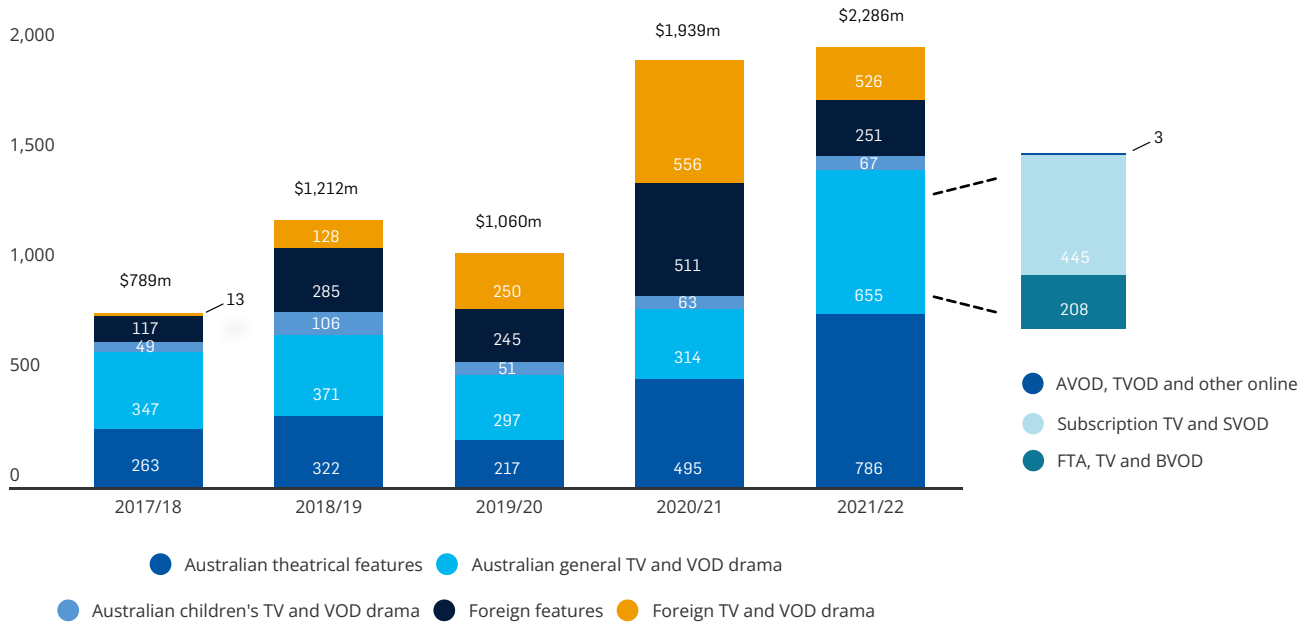
- **\$2.29 billion total expenditure in Australia** — a new record spend driven by Australian features, foreign PDV work and Australian subscription TV and SVOD titles.
- **Record expenditure by Australian titles — \$1.51 billion** 66% of total expenditure was triggered by Australian titles that started principal photography during 2021/22.
- **24 Australian theatrical features — \$786 million** a 59% increase on last year and 89% up on the 5-year average. Record spend was generated by significantly fewer titles.
- **62 Australian general TV and VOD drama titles — \$655 million**
 - 24 Australian general free-to-air TV and BVOD drama titles — \$208 million expenditure up 8% on last year, but 8% below the 5-year average. Hours decreased by 16% and were 22% below the 5-year average.
 - 29 Australian general subscription TV and SVOD drama titles — \$445 million spend, more than triple the previous year's result, and more than double the 5-year average.
 - Nine AVOD, TVOD and other online drama titles — \$3 million 13% up on last year, and 12% above the 5-year average and a 53% increase in the cost-per-hour.
- **11 Australian children's TV and VOD drama titles — \$67 million** 5% increase on last year and 1% below the 5-year average. Hours up by 12% from last year, but 32% below the 5-year average.
- **65 foreign projects — \$777 million** 27% down on last year's record spend, but 35% above the 5-year average, and comprised of:
 - Spend of \$442 million on two features, two TV dramas and four SVOD dramas that commenced shooting in Australia, 44% down on last year's spend.
 - A new record for PDV-only spend, which totalled \$335 million on 57 titles, up 22% on 2020/21.

EXPENDITURE BY STATE AND TERRITORY

- **New South Wales** accounted for 45% of the national share and, for the second year running, set a new record, with over \$1 billion in expenditure in 2021/22. This was driven by several big-budget domestic productions, including *Furiosa*.
- **Queensland** accounted for 20% of spend. After last year's all-time high of \$555 million, expenditure fell by 16% to \$465 million, but was 55% above the 5-year average.
- **Victoria** also achieved a record high, with expenditure of \$556 million, representing 24% of the national share, the majority of which was attributed to domestic features and foreign TV drama.
- **South Australia** reported 6% of the national share. Expenditure increased by 47% from last year, to \$144 million, the second-highest on record.
- **Western Australia's** share of spend fell to 1%, with expenditure of \$26 million.
- Spend in the **Australian Capital Territory, Northern Territory** and **Tasmania** also set a new record, more than tripling from last year's \$18 million to \$57 million in 2021/22, or 2% of the national total.



Total expenditure in Australia (\$m)



All drama production

Total drama expenditure in Australia in 2021/22 was \$2.29 billion. Expenditure triggered by Australian titles increased 73% to \$1.51 billion. Foreign spend fell by 27% to \$777 million.

	Australian ¹		Foreign ²		Total	
	No. titles	Spend (\$m)	No. titles	Spend (\$m)	No. titles	Spend (\$m)
Theatrical features						
2017/18	45	263	29	117	74	380
2018/19	45	322	28	285	73	607
2019/20	26	217	22	245	48	461
2020/21	46	495	20	511	66	1006
2021/22	24	786	23	251	47	1037
5-yr av	37	417	24	282	62	698
General TV and VOD drama						
2017/18	58	347	3	13	61	360
2018/19	63	371	10	123	73	494
2019/20	46	297	12	128	58	425
2020/21	43	314	29	530	72	844
2021/22	62	655	26	490	88	1145
5-yr av	54	397	16	257	70	654
Children's TV and VOD drama						
2017/18	10	49	0	0	10	49
2018/19	20	106	3	4	23	110
2019/20	14	51	10	122	24	174
2020/21	11	63	14	26	25	89
2021/22	11	67	16	37	27	104
5-yr av	13	67	9	38	22	105
Total annual drama slate³						
2017/18	113	659	32	130	145	789
2018/19	128	799	41	413	169	1212
2019/20	86	566	44	495	130	1060
2020/21	100	872	63	1067	163	1939
2021/22	97	1508	65	777	162	2286
5-yr av	105	881	49	576	154	1457

Notes

Figures may not total exactly due to rounding.

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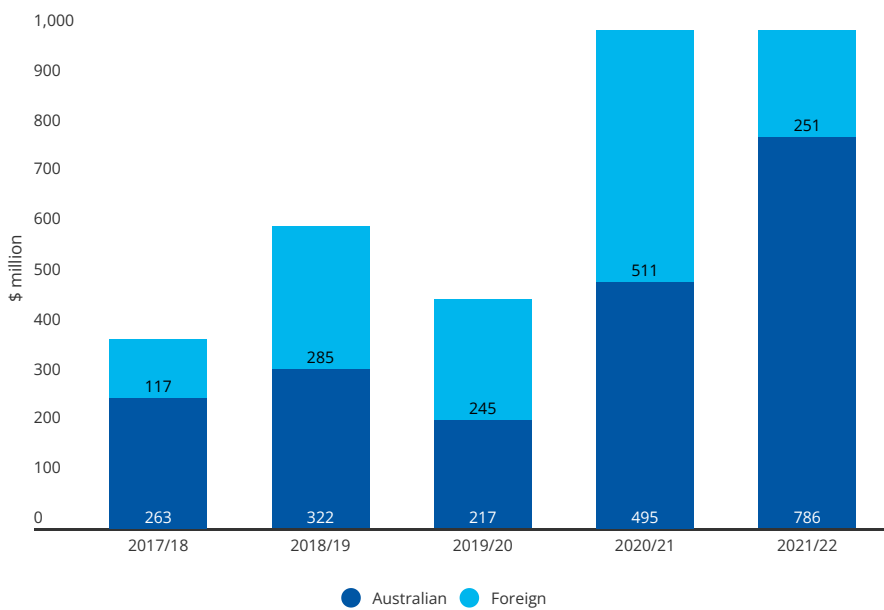
¹See page 5 for definitions.

²Includes both productions that started principal photography during the year and foreign productions undertaking only PDV work in Australia.

³Expenditure has been attributed to the year in which principal photography commenced for Australian and foreign titles shot in Australia, but based on the year PDV work commenced for foreign PDV-only titles.

PRODUCTION TRENDS

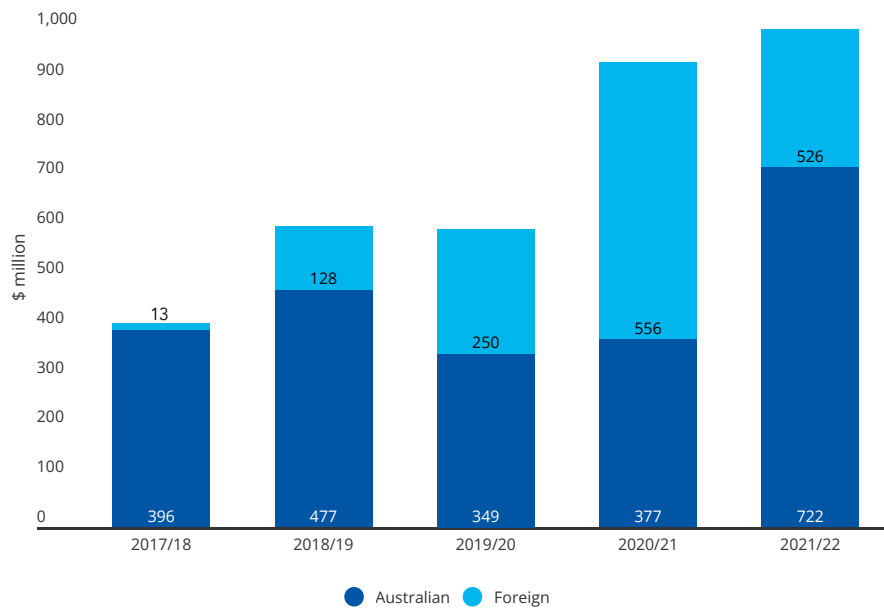
Theatrical features spend (\$m)



Visit Screen News for articles, podcasts and videos with Australian drama creators:

screenaustralia.gov.au/screen-news

TV and VOD drama spend (\$m)



Notes

Australian includes both domestic and Official Co-production titles.

Foreign productions include both productions that started principal photography during the year and productions undertaking only PDV work in Australia.

TV and online drama includes general and children's titles.

Australian theatrical feature slate

In 2021/22, total expenditure on Australian domestic and Co-production theatrical features was a record \$786 million — an increase of 59% on the previous year's spend, and 89% up on the 5-year average. Domestic expenditure was up by 64% on 2020/21. Twenty-two domestic features started principal photography in 2021/22, along with two Co-productions — *Being Betty Flood* (a children's film) and *You, Me and the Penguins*. The number of titles in 2021/22 was almost half the previous year's count and 35% below the 5-year average.

Furiosa, *Better Man* and *Foe* accounted for a significant proportion of the total Australian theatrical feature expenditure for titles commencing production in 2021/22, with some spend estimated, as work is ongoing.

The 24 features that started production in 2021/22 had total budgets of \$788 million. Titles were spread fairly evenly across budget ranges, except for the proportion of titles made for under \$1 million, which fell for the second year in a row. Five titles each had budgets in excess of \$20 million and accounted for 87% of total Australian theatrical feature budgets. The proportion of features made for over \$5 million was above the 5-year average, while the proportion made for under \$5 million was below.

All Australian theatrical features

	Domestic features ¹		Co-production features ¹		Total		
	No. titles	Spend (\$m)	No. titles	Spend (\$m)	No. titles	Budgets (\$m)	Spend (\$m)
2017/18	41	183	4	80	45	281	263
2018/19	41	288	4	34	45	351	322
2019/20	24	211	2	6	26	271	217
2020/21	42	469	4	26	46	520	495
2021/22	22	772	2	14	24	788	786
5-yr av	34	384	3	32	37	442	417

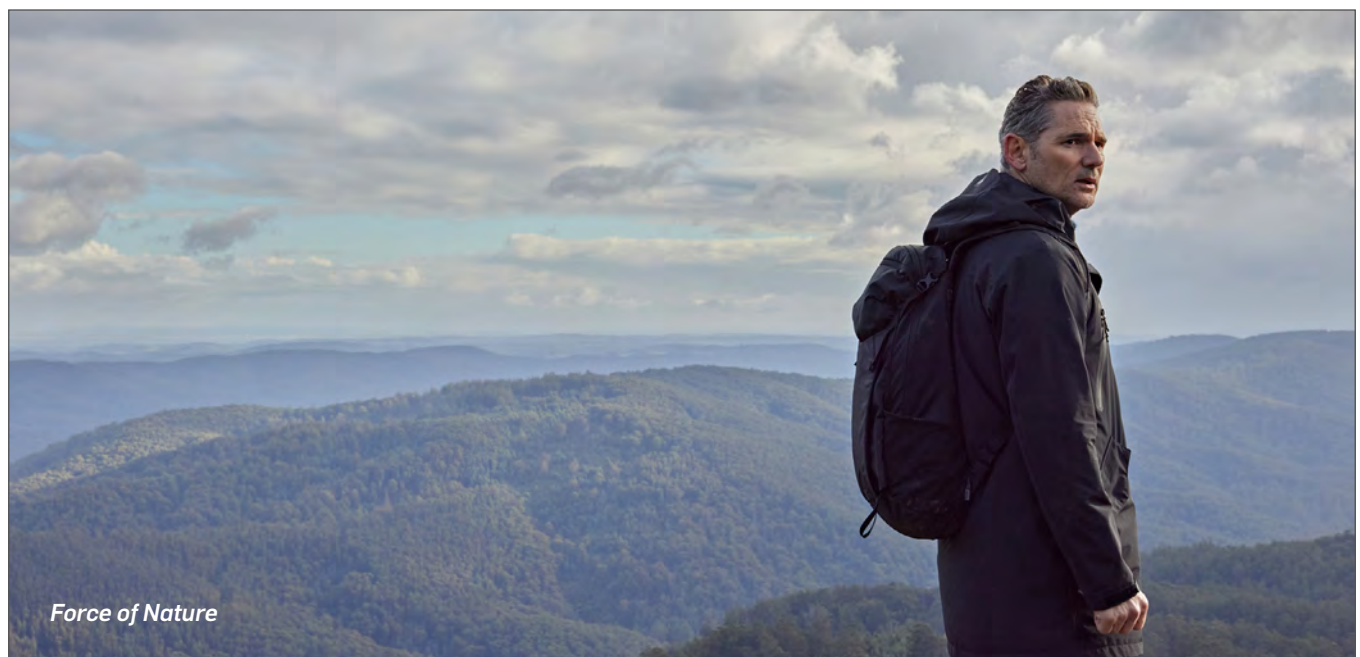
Production of larger-budget features drove a significant increase in spend.

Notes

Figures may not total exactly due to rounding. Includes only feature films first released, or with an intended first release, in Australian cinemas.

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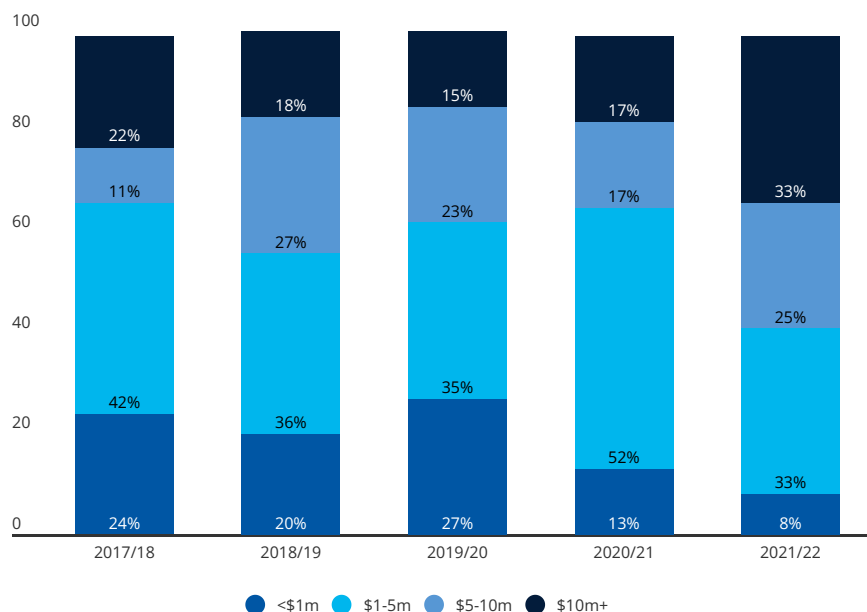
¹See page 5 for definitions.



All Australian features (domestic and Co-production) by budget ranges

	<\$1m ¹	\$1-5m	\$5-10m	\$10m+	Total	%<\$1m ¹	%\$1-5m	%\$5-10m	%\$10m+
Domestic									
2017/18	11	17	5	8	41	27%	41%	12%	20%
2018/19	9	16	11	5	41	22%	39%	27%	12%
2019/20	7	9	5	3	24	29%	38%	21%	13%
2020/21	6	22	8	6	42	14%	52%	19%	14%
2021/22	n.p.	n.p.	n.p.	n.p.	22	n.p.	n.p.	n.p.	n.p.
Co-production									
2017/18	0	2	0	2	4	0%	50%	0%	50%
2018/19	0	0	1	3	4	0%	0%	25%	75%
2019/20	0	0	1	1	2	0%	0%	50%	50%
2020/21	0	2	0	2	4	0%	50%	0%	50%
2021/22	n.p.	n.p.	n.p.	n.p.	2	n.p.	n.p.	n.p.	n.p.
Total									
2017/18	11	19	5	10	45	24%	42%	11%	22%
2018/19	9	16	12	8	45	20%	36%	27%	18%
2019/20	7	9	6	4	26	27%	35%	23%	15%
2020/21	6	24	8	8	46	13%	52%	17%	17%
2021/22	2	8	6	8	24	8%	33%	25%	33%
5-yr av	7	15	7	8	37	19%	40%	21%	21%

Budget range proportions



The number of features starting production was almost half of the previous year.

Notes

¹Features with budgets of less than \$500,000 are included in the report only if they have had a cinema release or major festival screening. Figures may therefore be revised upwards in future if releases are achieved for additional low-budget films that went into production in 2021/22. See page 52, Methodology.

SOURCES OF FINANCE FOR AUSTRALIAN FEATURES

The sources of finance for Australian features can vary significantly from one year to the next. High-budget, principally foreign-financed titles cause large fluctuations. All contributions were above the 5-year averages in 2021/22.

In total, domestic governments and government agencies provided 45% of total finance for Australian feature films in 2021/22. Over the last five years, governments and government agency funding has made up 44% of total finance. The Federal Government contributed 35% of total finance for Australian feature films in 2021/22, mainly via the Producer Offset and Screen Australia direct funding. Over the last five years, Federal Government funding has made up 36% of total finance.

Funding from **All Australian government sources** (excluding Producer Offset) increased significantly, to \$78 million (10% of total finance) more than double last year. Screen Australia contributed \$9 million to seven features with the state and territory agencies providing \$65 million to 18 titles. Other government sources, including the Federal Location Incentive, the Adelaide Film Festival and the Melbourne International Film Festival, provided funding to five features.

In addition the **Producer Offset** contributed \$274 million to projects, accounting for 35% of total finance.

Australian private investment was \$40 million (5% of total finance) in 12 titles. While significantly (71%) up on last year, investment from private sources remained proportionally stable.

The **Australian screen industry** (mainly distribution and production companies) contributed \$46 million to 19 features (6% of total finance). Contributions from this sector, as a proportion of total finance, have fallen for three consecutive years.

Foreign investors provided the largest share of finance, \$347 million to 18 titles (44% of total finance).



You, Me and the Penguins

Contributions to the annual Australian feature slate (domestic and Co-production)

	No. titles	Amount (\$m)	% of total finance
Australian direct government sources (excluding Producer Offset) ¹			
2017/18	32	45	16%
2018/19	32	47	14%
2019/20	15	12	5%
2020/21	34	37	7%
2021/22	18	78	10%
5-yr av	26	44	10%
Australian Producer Offset ²			
2017/18	n.p.	93	33%
2018/19	n.p.	112	32%
2019/20	n.p.	76	28%
2020/21	n.p.	176	34%
2021/22	n.p.	274	35%
5-yr av	35	146	32%
Australian private investors			
2017/18	26	21	7%
2018/19	25	14	4%
2019/20	15	9	3%
2020/21	23	23	4%
2021/22	12	40	5%
5-yr av	20	21	5%
Australian screen industry ³			
2017/18	40	39	14%
2018/19	40	49	14%
2019/20	20	26	10%
2020/21	41	40	8%
2021/22	19	46	6%
5-yr av	32	40	10%
Foreign investors			
2017/18	25	84	30%
2018/19	19	128	37%
2019/20	16	147	54%
2020/21	31	244	47%
2021/22	18	347	44%
5-yr av	22	190	42%

Notes

Figures may not total exactly due to rounding. Please note that finance sources reflect data available at time of data collection and are subject to possible revision.

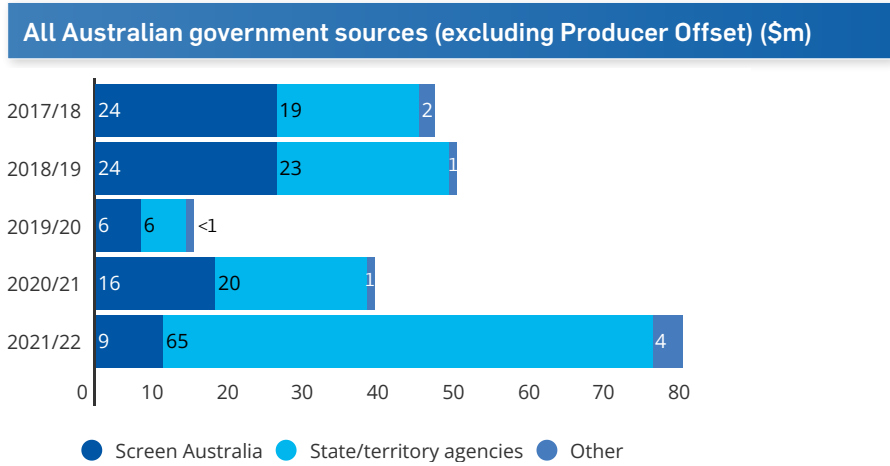
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¹Includes all forms of direct (grants and investments) and indirect (various rebates and incentives) funding from Australian federal, state and territory agencies and government departments for titles that commenced principal photography during a given financial year (see page 14). Does not include the Producer Offset, loans and underwriting.

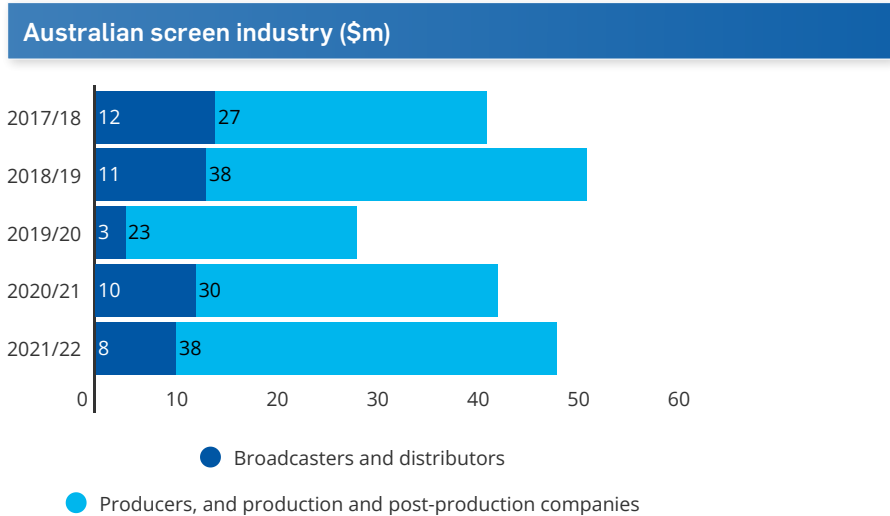
²The Producer Offset amount is taken from the finance plan of each title. For Screen Australia funded projects – the agency only requires 90% of the anticipated Offset to be included in the finance plan for drama features and television projects. A producer is entitled to retain the difference for their own purposes, but many producers still include it in the finance plan. For this reason, the Producer Offset amounts listed above may be lower than what is eventually received from the Australian Taxation Office for each project.

³Finance provided by Australian-based producers and production companies, distribution companies, free-to-air broadcasters (commercial and public), subscription TV channels and VOD platforms. The Producer Offset, cashflowed in various ways, is listed separately.

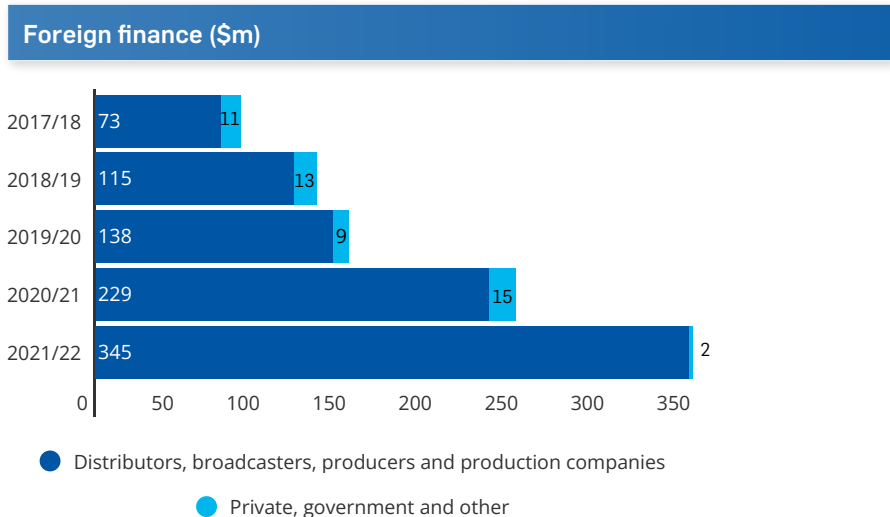
The graphs below represent contributions from various sources for films starting principal photography in each financial year.



Screen Australia funding was down on last year, and below the 5-year average. Financial backing from state and/or territory agencies was \$65 million, up from \$20 million in 2020/21 and more than double the 5-year average. Financial contributions from government agencies fluctuate year-to-year in line with the production schedules of each film as well as budget allocations of each agency, and support provided by direct funding such as grants and investments, and indirect funding such as PDV rebates. Despite the overall increase in spend, the number of titles backed by the three government agency groups dropped significantly from the previous year, and was well below the 5-year averages.



Investment by producers, production and post-production companies accounted for more than three-quarters of screen industry finance.



The presence or absence of foreign studio-backed domestic films as well as Co-production titles causes year-to-year fluctuations in foreign finance of Australian features. Foreign studios, platforms and investors have backed a number of recent Australian features including *Peter Rabbit 2* (2018/19), *The Power of the Dog* and *Mortal Kombat* (2019/20), *Elvis* and *Three Thousand Years of Longing* (2020/21) and *Furiosa and Foe* (2021/22).

Australian general TV and VOD drama slate

Audience habits, content platforms, and production practices have continued to evolve, and in some cases, converge. After evaluating these factors, Screen Australia has revised the Drama Report to ensure that it remains as relevant as possible to governments and the sector. Across general TV and VOD drama, three new sub-categories have been created to better measure important trends, and reflect the diversity of online content and its contribution to the Australian production industry:

- Australian general FTA TV and BVOD drama slate
- Australian general subscription TV and SVOD drama slate
- Australian general AVOD, TVOD and other online drama slate.

The table to the right provides examples of prominent platforms in each sub-category.

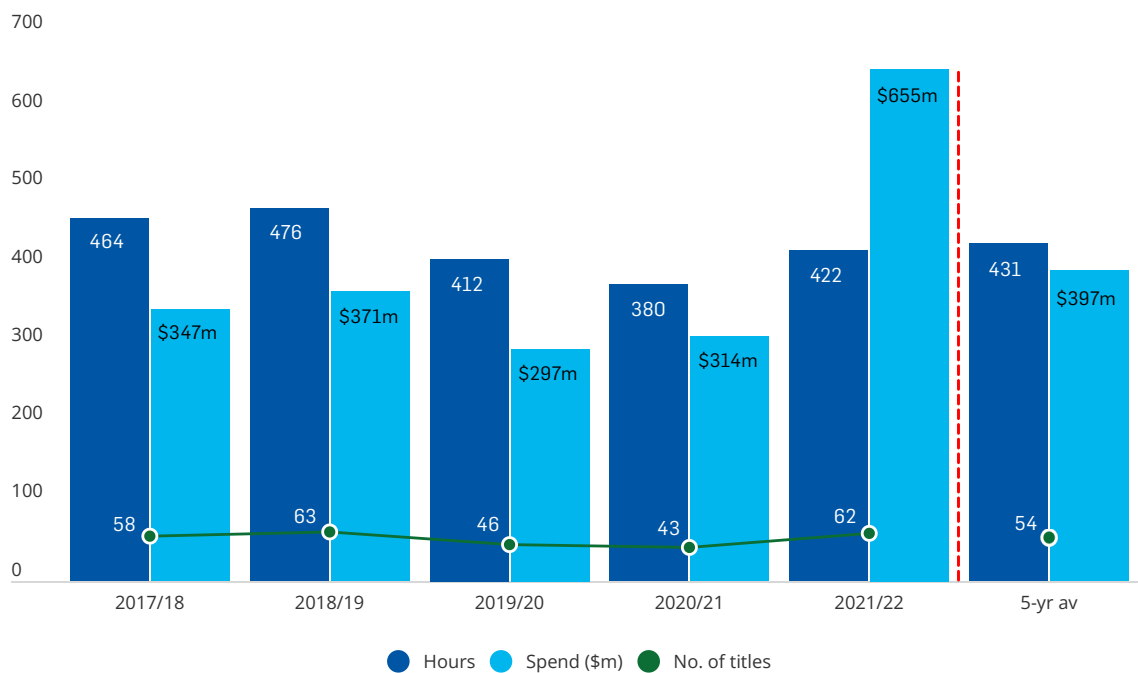
Australian children’s drama content (excluding theatrical features) will continue to be reported separately, and the new category — Australian children’s TV and VOD drama slate — will now incorporate all online releases.

Australian general FTA TV and BVOD	Australian general subscription TV and SVOD	Australian general AVOD, TVOD and other online
		

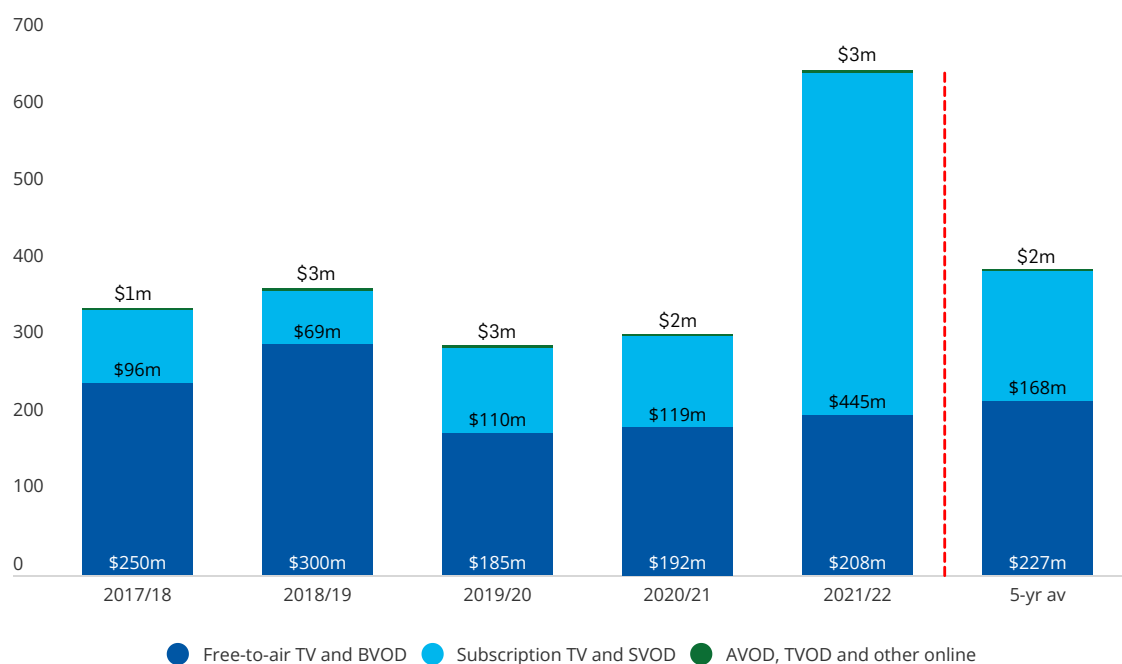


Darby and Joan

Australian general TV & VOD drama production activity



Australian general TV & VOD drama production spend (\$m)



Australian general FTA TV and BVOD drama slate

General FTA TV and BVOD drama is drama made for family and adult audiences first released on either FTA television — ABC, NITV, SBS, Seven, Nine and 10 — or those broadcasters' online platforms — ABC iView, SBS On Demand, 7plus, 9Now and 10 play. It does not include children's drama, which is reported separately.

Expenditure on Australian general FTA TV and BVOD drama was up 8% on 2020/21's spend. 24 titles commenced production, generating 278 hours of content and spending \$208 million in Australia. These titles had total budgets of \$208 million. Notwithstanding yearly fluctuations and amendments to the categorisation of the Drama Report, the number of hours produced for release by FTA broadcasters has been in steady decline since 2000/01, when 715 hours of general drama was produced for free-to-air television.

There were no Co-productions in this category between 2017/18 and 2021/22.

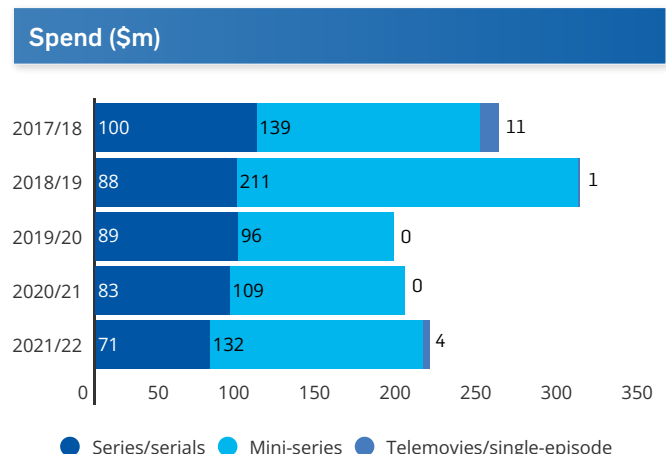
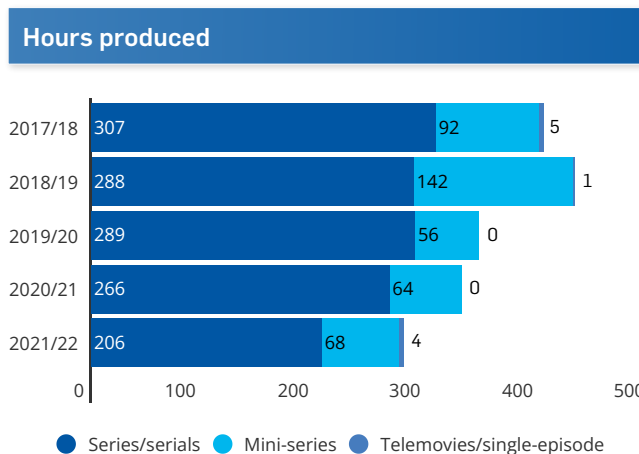
See page 47 for full list.

Australian general FTA TV and BVOD drama slate¹

	No. titles	Hours ²	Spend (\$m) ³	Av cost/hr (\$m) ⁴
2017/18	40	404	250	0.6
2018/19	42	432	300	0.7
2019/20	23	345	185	0.5
2020/21	24	330	192	0.6
2021/22	24	278	208	0.7
5-yr av	31	358	227	0.6

Notes

Figures may not total exactly due to rounding.
¹The annual slate is defined as productions starting principal photography during the year.
²See Methodology (pg 52) for definition.
³Amount of total budgets spent in Australia.
⁴Total budgets divided by total hours.



BY FORMAT

Format definitions according to this report:

- **Series/serials** – unlimited number of episodes (more than 13 in total) as well as multi-part programs with episode durations less than one commercial broadcast hour.
- **Mini-series** – a limited series of drama normally 13 hours or less in length and each episode is usually a commercial hour in duration.
- **Telemovies and single-episodes** – telemovies are single episode drama made for TV that is a commercial hour or more in length. Series of or related telemovies are counted as individual titles, as set out in a broadcaster's licence agreement. Single-episodes are drama made for VOD platforms and can be of any length and are measured by actual running time.

Nine **series/serials** entered production in 2021/22. Hours were down by 22%, while budgets and spend were down by 14% and 13% respectively. The average cost-per-hour increased by 11%. The number of series/serials produced has more than halved in the last five years. Serials, *Home and Away* (Seven) and *Neighbours* (10), continued to provide the bulk of series and serials hours, and of all general FTA TV and BVOD drama.

Other returning titles included *Aftertaste* and *Fisk* (ABC) and *Housos: The Thong Warrior* (Seven). New series in production included *Soundtrack to Our Teenage Zombie Apocalypse* and *Summer Love* (ABC), and *Latecomers* (SBS).

Eleven **mini-series** entered production, the same number of titles as last year. Expenditure increased by 21%, budgets rose by 19%, and hours increased by 6% — however each metric was below the 5-year average. Cost-per-hour was up on last year, by 12%, and was the only metric recorded above the 5-year average. Titles included *Barons*, *Bay of Fires*, *The Messenger*, *Mystery Road: Origin* and *Troppo* (ABC), *Underbelly: Vanishing Act* and *After the Verdict* (Nine) and *Safe Home* and *True Colours* (SBS).

Four **single-episode** titles were made for SBS On Demand — *Appetite*, *A Beginners Guide to Grief*, *Night Bloomers* and *Time to Buy*.

No **telemovies** for general audiences commenced production in 2021/22.

Farewell, *Neighbours*



After 37 years, with a total of 8,903 episodes, the final episode of Australia's longest-running serial, *Neighbours*, went to air on 28 July 2022.

The serial first aired on 18 March 1985 on the Seven Network before moving to Network 10 the following year. The show was hugely popular in the UK, where it first aired on the BBC in 1986 before moving to Channel 5 in 2008. In Australia, the final episode attracted a total audience of 1,473,000 viewers across 28 days on the 10 Network.* In the UK, consolidated audience figures on Channel 5 have now exceeded 4 million viewers.[^]

Between 120 and 130 broadcast hours of *Neighbours* were typically produced each year. The majority of *Neighbours* production took place in Melbourne and the show provided consistent employment and a valuable training ground for a wide range of screen professionals from writers and producers to set designers and video editors. It is also heralded as a launching pad for some of Australia's most well-known actors and performers such as Kylie Minogue, Guy Pearce, Jason Donovan, Delta Goodrem and Margot Robbie.

Over 37 years *Neighbours* played its part in projecting Australia's culture, values and people to international audiences, and contributed to tourism expenditure by making Australia an attractive destination for fans of the show.

Notes

*OzTAM and RegionalTAM, 5-city-metro, combined markets, total people, average audience, consolidated 28. Metro viewers: 10 = 988,000; 10 Peach = 1,435 VPM source: OzTAM Video Player Measurement — consolidated 28 day

[^]Fremantle Australia

First release platform

	No. titles	Hours
ABC/ABC iView	11	67
Nine/9Now	2	8
SBS/ NITV ¹ /SBS On Demand	8	15
Seven/7plus	2	119
10/10 play	1	70

Third year in a row that production of series/serials dropped.

Notes

Indicates intended release platform. Services may not have commissioned titles, even though they obtain first release rights. Hours may not match other tables due to rounding.

Australian general FTA TV and BVOD drama slate

	No. titles	Hours ¹	Budgets (\$m) ²	Total spend (\$m) ³	Av cost/hr (\$m) ⁴
Series/serials					
2017/18	22	307	101	100	0.3
2018/19	22	288	88	88	0.3
2019/20	14	289	89	89	0.3
2020/21	13	266	83	83	0.3
2021/22	9	206	71	71	0.3
5-yr av	16	271	86	86	0.3
Mini-series					
2017/18	15	92	145	139	1.6
2018/19	19	142	211	211	1.5
2019/20	9	56	96	96	1.7
2020/21	11	64	111	109	1.7
2021/22	11	68	132	132	1.9
5-yr av	13	84	139	137	1.7
Telemovies/single-episode					
2017/18	3	5	11	11	2.3
2018/19	1	1	1	1	1.0
2019/20	0	0	0	0	0.0
2020/21	0	0	0	0	0.0
2021/22	4	4	4	4	0.0
5-yr av	2	2	3	3	0.7
Total					
2017/18	40	404	256	250	0.6
2018/19	42	432	301	300	0.7
2019/20	23	345	185	185	0.5
2020/21	24	330	194	192	0.6
2021/22	24	278	208	208	0.7
5-yr av	31	358	229	227	0.6

Notes

Figures may not total exactly due to rounding.
¹See Methodology (pg 52) for definition.
²Total cost of productions.
³Amount of total budgets spent in Australia.
⁴Total budgets divided by total hours.

The Drama Report categorises TV dramas following categories used in Australian content quotas and regulation. Previous drama content obligations for commercial FTA broadcasters were based on different drama formats (explored in the tables above) attracting different points. Current content obligations for commercial FTA broadcasters predominately reference a drama program's production budget, with more points allocated for higher-cost drama.³ The table below sorts titles into the budget categories used for 2021 under the current obligations. It provides a broad analysis of the entire slate of Australian General FTA TV and BVOD drama, and includes general drama titles created for release on all public and commercial FTA broadcasters, and their BVOD platforms. See page 53 for more information on differences between the Drama Report and ACMA reporting.

³See [Broadcasting Services \(Australian Content and Children's Television\) Standards 2020 \(Cth\), s 8 and s 1](#).

Visit Fact Finders for further data on Australian screen production, including historical data from prior to 2016/17: screenaustralia.gov.au/fact-finders

Notes

Figures may not total exactly due to rounding.

¹See Methodology (pg 52) for definition.

²Total cost of productions.

³Amount of total budgets spent in Australia.

⁴Total budgets divided by total hours.

Budget ranges by cost-per-hour

	No. titles	Hours ¹	Budgets (\$m) ²	Total spend (\$m) ³	Av cost/hr (\$m) ⁴
<\$450,000					
2017/18	8	253	51	51	0.2
2018/19	8	250	53	53	0.2
2019/20	6	254	58	58	0.2
2020/21	4	243	57	57	0.2
2021/22	4	192	51	51	0.3
5-yr av	6	238	54	54	0.2
\$450,000 - \$700,000					
2017/18	2	3	2	2	0.5
2018/19	4	6	3	3	0.6
2019/20	3	12	6	6	0.5
2020/21	2	5	3	3	0.5
2021/22	2	4	2	2	0.6
5-yr av	3	6	3	3	0.5
\$700,000 - \$1,000,000					
2017/18	6	30	24	23	0.8
2018/19	5	14	11	11	0.8
2019/20	4	22	19	19	0.8
2020/21	1	1	1	1	0.9
2021/22	2	2	2	2	0.9
5-yr av	4	14	11	11	0.8
\$1,000,000 - \$1,400,000					
2017/18	13	66	80	80	1.2
2018/19	14	90	107	107	1.2
2019/20	4	17	21	21	1.3
2020/21	8	34	40	40	1.2
2021/22	4	13	16	16	1.2
5-yr av	9	44	53	53	1.2
> \$1,400,000					
2017/18	11	51	99	94	2.0
2018/19	11	71	126	125	1.8
2019/20	6	40	81	81	2.0
2020/21	9	47	93	91	2.0
2021/22	12	67	135	135	2.0
5-yr av	10	55	107	105	1.9

Australian general subscription TV and SVOD drama slate

General subscription TV and SVOD drama is drama made for family and adult audiences first released on either subscription TV and related platforms — Foxtel, Foxtel Now, Foxtel Go and other Foxtel services — or subscription VOD platforms such as Amazon Prime, Binge, Disney+, Netflix, Paramount+ and Stan. It does not include children's drama, which is reported separately.

A range of SVOD services have launched in Australia offering drama. Stan, now fully-owned by Nine Entertainment, opened in 2015 and Netflix launched in Australia later that year, followed by Amazon Prime in 2016. Disney+ and Apple TV+ launched in Australia in 2019 and Foxtel launched its SVOD service, Binge, in 2020. Paramount+ launched in 2021: it replaced the former 10 All Access service and is operated by Paramount Global, owners of the 10 Network. While production in previous years remained relatively stable, the 2021/22 slate marks increased production for most of these platforms. Notably, this production was supported by changes to the Producer Offset rebate: titles that began production after 1 July 2021 now access a 30% rebate, higher than the previous 20% rebate.

In 2021/22, 29 titles entered production, up from just nine in the previous year. Spend in Australia on general subscription TV and SVOD drama increased significantly, from \$119 million in 2020/21 to \$445 million in 2021/22. Titles, hours, budgets and spend all increased by more than three times the level of the previous year. At \$3.3 million, cost-per-hour was on par with 2020/21. Cost-per-hour of titles in this category greatly exceeded the cost of general and children's drama reported elsewhere in this report.

Eight titles, each with budgets over \$20 million, accounted for 55% of total budgets, all of which was spent in Australia.

There was increased production across most services, including Stan, which has expanded its slate over time and had seven titles in this year's slate, including the 9/Stan co-commission *Bali 2002*. Three titles were produced for Foxtel, one title for Binge, and four titles were produced for first release on Paramount+, including new series of *Five Bedrooms* and *The Secrets She Keeps* which originally debuted on 10 and 10 play. Both Amazon Prime and Netflix also saw increased production activity, with four titles each slated for first-release. Other titles were created for Acorn TV, The Cartoon Network, Disney+, and foreign subscription VOD service AMC+.

There were no Co-productions in this category between 2017/18 and 2021/22.

See page 48 for full list.



The Twelve

Australian general subscription TV and SVOD drama slate

	No. titles	Hours ¹	Budgets (\$m) ²	Total spend (\$m) ³	Av cost/hr (\$m) ⁴
2017/18	11	52	96	96	1.8
2018/19	7	32	69	69	2.2
2019/20	10	49	112	110	2.3
2020/21	9	38	124	119	3.3
2021/22	29	135	446	445	3.3
5-yr av	13	61	169	168	2.6

Notes

Figures may not total exactly due to rounding.

¹See Methodology (pg 52) for definition.

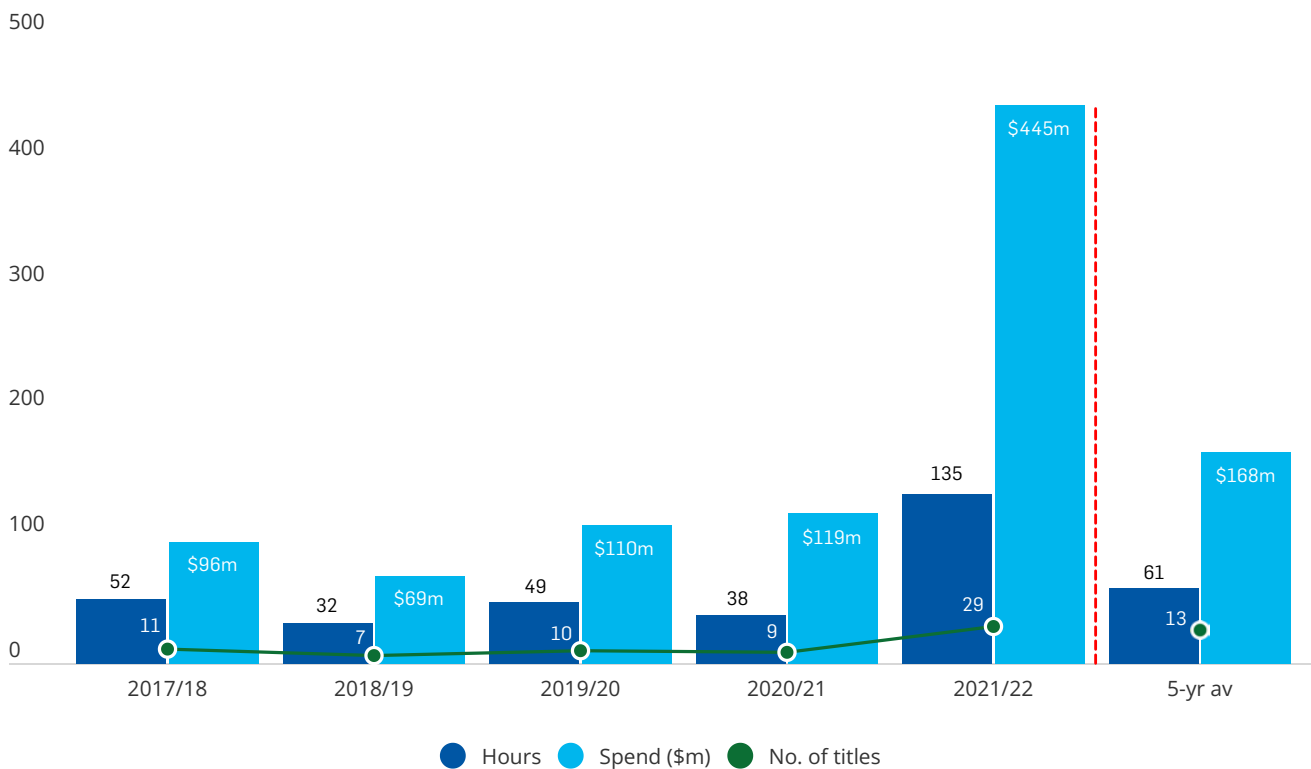
²Total cost of productions.

³Amount of total budgets spent in Australia.

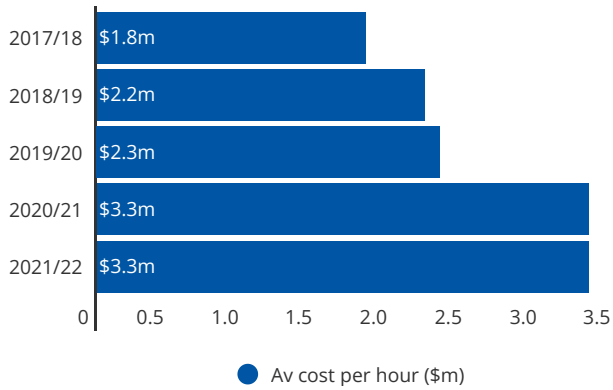
⁴Total budgets divided by total hours.

Production activity in terms of spend, hours and number of titles is more than triple that of previous year.

Australian general subscription TV and SVOD drama production activity



Cost per hour (\$m)



First release platform

	No. titles	Hours
Acorn TV	1	6
Amazon Prime	4	21
AMC+	1	8
Binge	1	4
The Cartoon Network	1	2
Disney+	2	6
Foxtel	3	18
Netflix	4	22
Paramount+	4	23
Stan	7	25

Notes

Indicates intended release platform. Services may not have commissioned titles, even though they obtain first release rights. Hours may not match other tables due to rounding.



Heartbreak High



Five Bedrooms series 3

Australian general AVOD, TVOD and other online drama slate

General AVOD, TVOD and other online drama is drama made for family and adult audiences first released on a variety of free services including AVOD (Facebook, Instagram, TikTok and YouTube), TVOD (iTunes) or other emerging online services. It does not include children’s drama, which is reported separately.

In 2021/22, nine Australian general AVOD, TVOD and other online drama titles generated \$3 million in expenditure and eight hours of content. Titles and hours dropped 10% and 29% on last year, respectively, but the cost-per-hour rose by 53%. There were no single-episode titles in 2021/22, and only one in the last five years.

All nine titles that entered production in 2021/22 were supported by Screen Australia, and the agency provided the majority of the total budgets of these titles. Eight titles will have their first release on YouTube and one will release on TikTok.

See page 49 for full list.

Content under 30 minutes



While not included in this report, a range of projects are produced that are under 30 minutes total duration, across platforms such as Facebook, TikTok and YouTube. In particular a large number of Australian scripted projects have reached millions of viewers on social media platforms, such as *The Monster with Me* (over 21 million views on TikTok) and *#Matched* (over 1.5 million views on TikTok). Shorter-form content provides an important pathway for a new wave of Australian talent to find global audiences for scripted drama and comedy.

Source: TikTok views are reported by TikTok. Compiled by Screen Australia as at 14 October 2022.

Australian AVOD, TVOD and other drama slate

	No. titles	Hours ¹	Budgets (\$m) ²	Total spend (\$m) ³	Av cost/hr (\$m) ⁴
2017/18	7	9	1	1	0.1
2018/19	14	12	3	3	0.2
2019/20	13	18	3	3	0.2
2020/21	10	12	2	2	0.2
2021/22	9	8	3	3	0.3
5-yr av	11	12	2	2	0.2

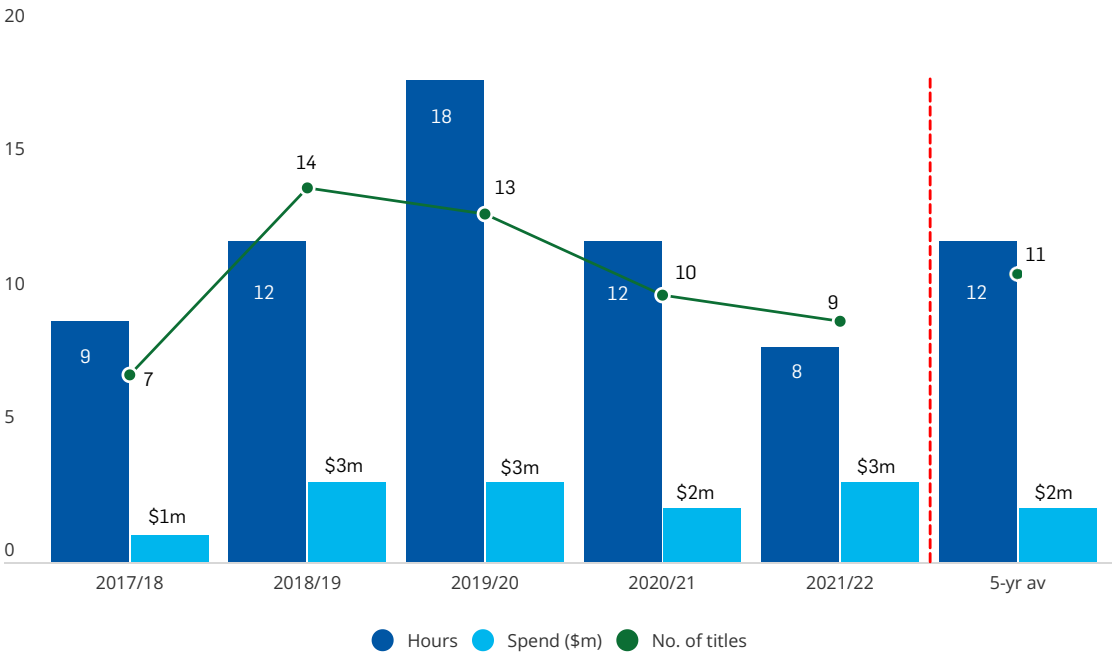
Increased cost-per-hour may indicate a shift to higher production values.

Notes

Figures may not total exactly due to rounding.
¹See Methodology (pg 52) for definition.
²Total cost of productions.
³Amount of total budgets spent in Australia.
⁴Total budgets divided by total hours.



Australian general AVOD, TVOD and other online drama production activity



Australian children's TV and VOD drama slate

Children's drama is drama made for child audiences. In previous Drama Reports, the **Children's TV drama** category was limited to content first released on FTA or subscription (cable and satellite) TV. Children's drama titles first released online, including SVOD and BVOD titles, were included in the Australian online drama section. In this report, all Australian children's drama created for TV and online release that meets criteria for inclusion is reported in this new **Australian children's TV and VOD drama** category, providing a more holistic view of children's drama production.

There was little year-on-year change across all metrics in the production of Australian children's TV and VOD drama in 2021/22. Eleven titles entered production, as in 2020/21. Hours, budgets and spend were all slightly up on the previous year — 12%, 4% and 5%, respectively. Cost-per-hour was down by 7%, but was the only metric above the 5-year average, by 26%. All but one of the titles in the 2021/22 slate was directly funded by Screen Australia. The ACTF funded five titles.

The 5-year dataset shows a decline in production from a peak year in 2018/19. Data on earlier years is available on Screen Australia's website. The production of children's content has been affected by a number of factors, including:

- the COVID-19 pandemic
- increased funding for the Australian Children's Television Foundation and Screen Australia
- an increased Producer Offset rebate for all non-theatrical titles
- changed content regulations: since January 2021, commercial free-to-air broadcasters have been able to commission children's drama to acquit their content obligations, but are not specifically required to.

The number of animated titles remained the same as the previous year, while budgets and spend were up 10% and 15% respectively. However, with the exception of cost-per-hour, each metric for animated titles in 2021/22 was below the 5-year average.

Similarly, the number of live-action titles was the same as 2020/21. Hours were up by 17% and both budgets and spend increased by 2%. Cost-per-hour was down by 12%. Budgets, spend and cost-per-hour exceeded the 5-year average, while hours were down against the average by 10%.

No children's Co-productions started production in 2021/22. An average of one Co-production has been produced per year over the last five years.

Of the 11 titles, the ABC financed eight, including animations *100% Wolf: The Book of Hath*, *First Responders*, *Ginger and the Vegesaur* and *Kangaroo Beach* series 2, and live-action titles *Beep and Mart*, *Crazy Fun Park*, *First Day* series 2 and *The PM's Daughter*. NITV financed the live-action series *Barrumbi Kids*.

One title that entered production in 2021/22 was financed by the commercial free-to-air broadcasters: *Rock Island Mysteries* (10). *Gymnastics Academy: A Second Chance!* was financed by Netflix.

See page 49-50 for full list.

In the 2021/22 slate, only one children's title, *Rock Island Mysteries*, was financed by the commercial FTA broadcasters.

Notes

Figures may not total exactly due to rounding.
n.p. Not for publication due to confidentiality reasons.

¹See Methodology (pg 52) for definition.

²Total cost of productions.

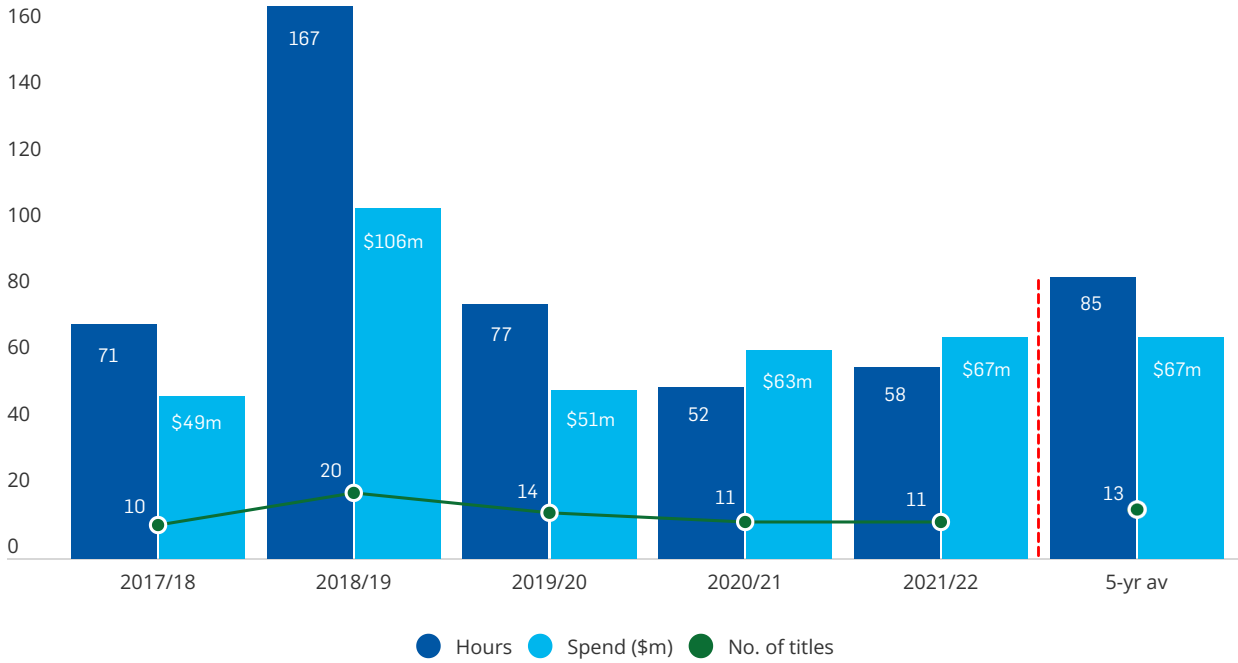
³Amount of total budgets spent in Australia.

⁴Total budgets divided by total hours.

Australian children's TV and VOD drama

	No. titles	Hours ¹	Budgets (\$m) ²	Spend (\$m) ³	Av cost/hr (\$m) ⁴
Domestic					
2017/18	9	65	n.p.	n.p.	n.p.
2018/19	18	141	104	85	0.7
2019/20	14	77	63	51	0.8
2020/21	10	45	n.p.	n.p.	n.p.
2021/22	11	58	71	67	1.2
5-yr av	12	77	69	62	1.0
Co-production					
2017/18	1	7	n.p.	n.p.	n.p.
2018/19	2	26	24	21	1.0
2019/20	0	0	0	0	0.0
2020/21	1	7	n.p.	n.p.	n.p.
2021/22	0	0	0	0	0.0
5-yr av	1	8	7	5	0.6
Total					
2017/18	10	71	54	49	0.8
2018/19	20	167	129	106	0.8
2019/20	14	77	63	51	0.8
2020/21	11	52	68	63	1.3
2021/22	11	58	71	67	1.2
5-yr av	13	85	77	67	1.0

Australian children's TV and VOD drama production activity



Australian children's live-action vs animation

	No. titles	Hours ¹	Budgets (\$m) ²	Spend (\$m) ³	Av cost/hr (\$m) ⁴
Live-action					
2017/18	4	24	23	23	1.0
2018/19	10	84	64	49	0.8
2019/20	6	26	24	24	0.9
2020/21	7	31	47	47	1.5
2021/22	7	36	48	48	1.3
5-yr av	7	40	41	38	1.1
Animation					
2017/18	6	48	31	26	0.6
2018/19 ⁵	10	83	65	57	0.8
2019/20 ⁵	8	50	38	27	0.8
2020/21 ⁵	4	21	20	16	1.0
2021/22	4	21	22	19	1.0
5-yr av	6	45	35	29	0.8
Total					
2017/18	10	71	54	49	0.8
2018/19	20	167	129	106	0.8
2019/20	14	77	63	51	0.8
2020/21	11	52	68	63	1.3
2021/22	11	58	71	67	1.2
5-yr av	13	85	77	67	1.0

2021/22 results were largely consistent with the previous year, following significant fluctuation in previous years.

Notes

Figures may not total exactly due to rounding.
 n.p. Not for publication due to confidentiality reasons.
¹See Methodology (pg 52) for definition. .
²Total cost of productions.
³Amount of total budgets spent in Australia.
⁴Total budgets divided by total hours.
⁵Includes one hybrid animation/live-action title.



First release platform

	No. titles	Hours
ABC	8	38
Netflix	1	4
NITV	1	5
10	1	10

Notes

Indicates intended release platform. Services may not have commissioned titles, even though they obtain first release rights. Hours may not match other tables due to rounding.

Contributions to the annual Australian TV and VOD slate (domestic and Co-production)

	No. titles	Amount (\$m)	% of total finance
Australian direct government sources (excluding Producer Offset) ¹			
2017/18	60	47	12%
2018/19	74	65	13%
2019/20	43	45	13%
2020/21	50	66	17%
2021/22	65	98	13%
5-yr av	58	64	14%
Australian Producer Offset²			
2017/18	n.p.	53	13%
2018/19	n.p.	65	13%
2019/20	n.p.	34	9%
2020/21	n.p.	46	12%
2021/22	n.p.	163	22%
5-yr av	42	72	14%
Australian Location/PDV Offset			
2017/18	4	5	1%
2018/19	8	8	1%
2019/20	9	11	3%
2020/21	3	6	2%
2021/22	3	6	1%
5-yr av	5	7	2%
Australian private investors			
2017/18	11	1	<1%
2018/19	5	<1	<1%
2019/20	8	1	<1%
2020/21	4	<1	<1%
2021/22	7	1	<1%
5-yr av	7	1	<1%
Australian screen industry³			
2017/18	63	188	46%
2018/19	76	205	41%
2019/20	52	146	40%
2020/21	48	136	35%
2021/22	57	174	24%
5-yr av	59	170	37%
Foreign investors			
2017/18	37	112	28%
2018/19	39	159	32%
2019/20	27	125	34%
2020/21	28	133	34%
2021/22	46	284	39%
5-yr av	35	163	33%

SOURCES OF FINANCE FOR AUSTRALIAN TV AND VOD DRAMA

This section reports on the financing of all titles produced for Australian free-to-air broadcasters, subscription television providers and video-on-demand platforms: from short-form, low-budget titles to high-end, big-budget series.

In total, domestic governments, government agencies and the public broadcasters provided 44% of total finance for Australian TV and VOD drama in 2021/22. Over the last five years, these sources made up 42% of total finance. With the public broadcasters again included, Federal Government sources contributed 37% of total finance for Australian TV and online drama in 2021/22. The Producer Offset, ABC, and Screen Australia provided the vast majority of Federal Government funding.

All Australian government sources (excluding the Producer, Location and PDV Offsets) provided a record-high of \$98 million for 65 titles, or 13% of total finance. Screen Australia provided \$44 million to 51 TV and VOD drama titles that commenced principal photography during the year (70% of all titles in the Australian TV and VOD drama slate).

The state and territory agencies contributed \$44 million for 58 titles. Screen NSW and VicScreen provided 64% of this funding.

Nearly \$10 million of direct government funding was provided by the ACTF, the Federal Location Incentive, local councils, the Melbourne Film Festival and the Adelaide Film Festival and other government agencies.

The **Producer Offset** provided \$163 million, more than double the 5-year average, and made up 22% of total finance. 30% of titles had budgets between \$10 and \$20 million and 13% had budgets over \$20 million. Of the titles with budgets over \$10 million, 65% were made for subscription TV or SVOD platforms and 35% for free-to-air TV or BVOD platforms. This result was influenced by a change to the Offset that stimulated production of TV and VOD drama: from 1 July 2021, the Producer Offset provided a 30% rebate to dramas that are not feature films, up from 20%.

The federal **Location and PDV Offsets** have been combined to ensure data confidentiality. Three titles accessed either the Location or PDV Offset, and these Offsets contributed a combined \$6 million in finance.

Australian private investment was \$1 million — the lowest contributor to overall finance.

The **Australian screen industry** provided 24% of the finance to this year's Australian TV and VOD drama titles, accounting for \$174 million to 57 titles. This was a significant year-on-year increase, though the local industry's proportion of total finance continued to decline.

Foreign investment in Australian TV and online drama doubled, to \$284 million, making up 39% of total finance. Investment in ten of the 46 titles accounted for 62% of total foreign contributions.

Notes from previous page

Please note that finance sources reflect data available at the time of production and may change as titles near completion.

¹Includes all forms of direct (grants and investments) and indirect (various rebates and incentives) funding from Australian federal, state and territory agencies, funding bodies and government departments for titles that commenced principal photography during a given financial year (see page 30). Does not include the Producer Offset, Location Offset, PDV Offset, loans and underwriting.

²The Producer Offset amount is taken from the finance plan of each title. For Screen Australia funded projects — the agency only requires 90% of the anticipated Offset to be included in the finance plan for features and TV/VOD dramas. A producer is entitled to retain the difference for their own purposes, but many producers still include it in the finance plan. For this reason, the Producer Offset amounts listed above may be lower than what is eventually received from the Australian Taxation Office for each project.

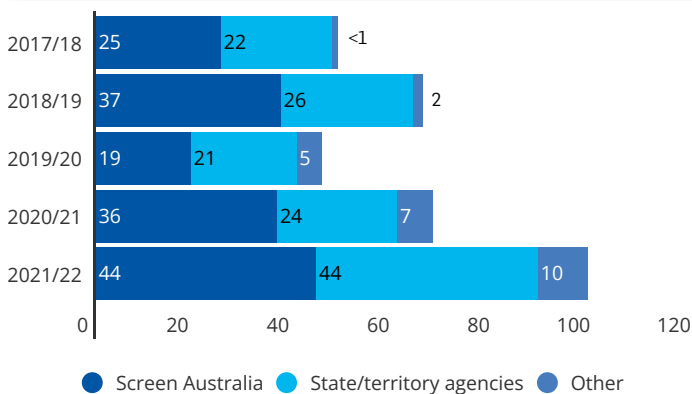
³Finance provided by Australian-based producers and production companies, distribution companies, free-to-air broadcasters (commercial and public), subscription TV channels and VOD platforms. The Producer Offset, cashflowed in various ways, is listed separately.



Mystery Road: Origin

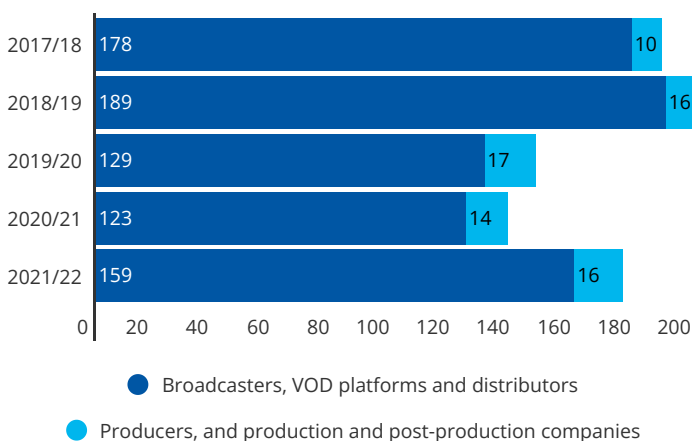
The graphs below represent contributions from various sources for TV and VOD titles starting principal photography in each financial year.

All Australian government sources (excluding Producer Offset) (\$m)



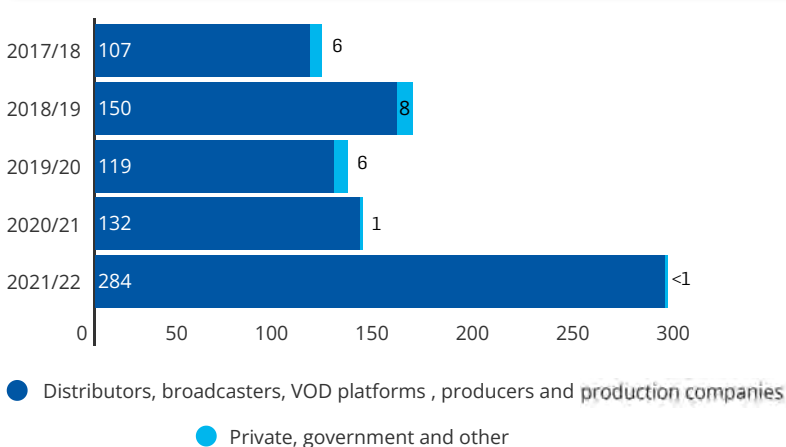
The number of titles backed by the three government agency groups increased by 30%. Investment was up by 47% and was 52% above the 5-year average. The proportion of total investment fell from last year, and was below the 5-year average. Financial contributions from government agencies fluctuate year-to-year in line with production schedules as well as budget allocations of each agency, and support provided by direct funding such as grants and investments, and indirect funding such as PDV rebates.

Australian screen industry (\$m)



Investment from the Australian screen industry rose from \$136 million in 2020/21 to \$174 million in 2021/22, representing a 28% increase. However, as a proportion of total finance, screen industry investment has been in steady decline over the last decade, with this year being the lowest on record. Broadcasters and VOD platform finance accounts for the largest proportion of all screen industry finance, an average of 89% over the last five years. This year, it was slightly below the average with 87% of screen industry finance.

Foreign finance (\$m)



The proportion of foreign investment in Australian drama has steadily increased over the last decade, accounting for 39% this year. In dollar terms, 2021/22 was the highest on record, with \$284 million invested in 46 titles. Foreign broadcasters, VOD platforms and distributors made up the majority of investment, with 69% and 30%, respectively, in 2021/22.

Australian TV and VOD drama finance by first release platform

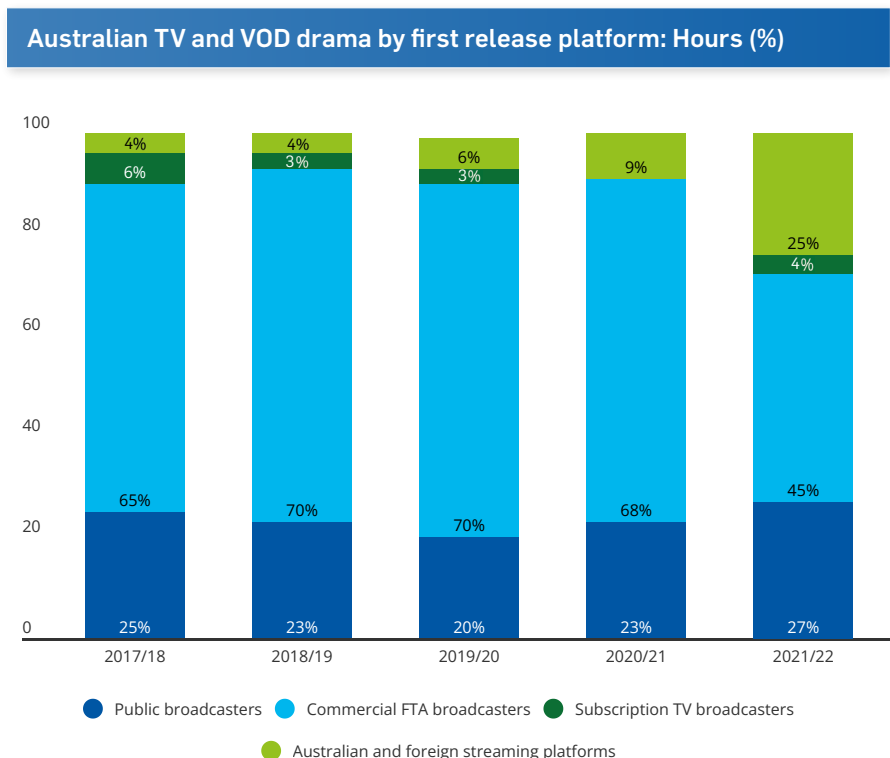
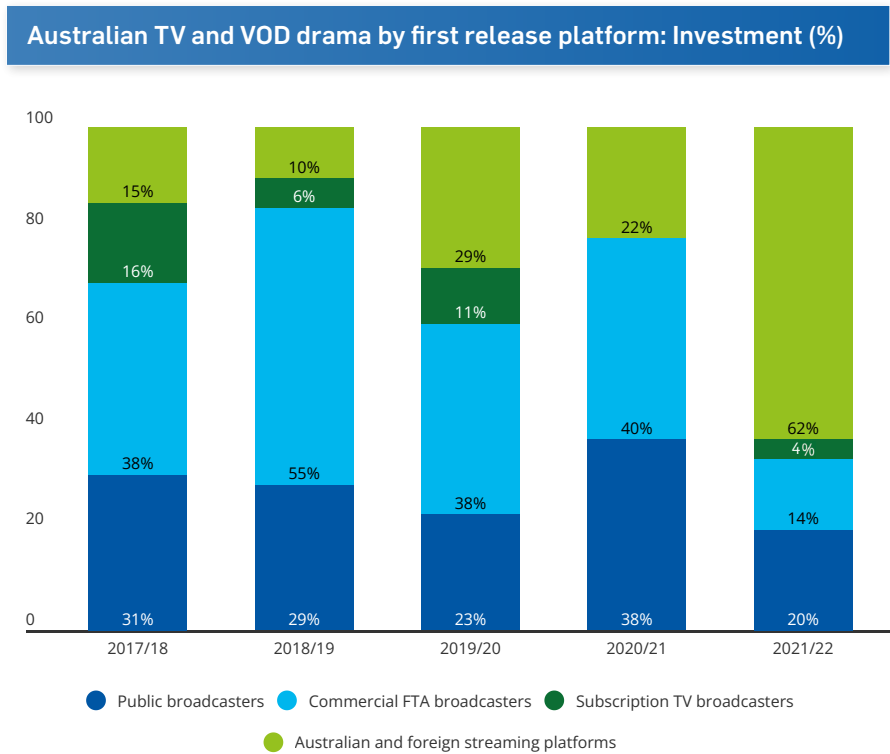
This section of the report shows Australian drama production activity by first release platform in Australia, i.e. first release broadcaster or online streaming service. Financial contributions provided outside finance plans, or for subsequent release rights, are not accounted for here. Some businesses share ownership with entities across various platforms, including Nine and Stan, 10 and Paramount+, and Foxtel and Binge. Each business is grouped by the categories in the table below (page 34), rather than ownership. Over the last five years, the commercial free-to-air broadcasters have provided the largest collective contribution to the TV and VOD slate — on average 37% — while the public broadcasters provided an average of 28%. Subscription TV broadcasters have averaged 7% over the last five years. Australian and foreign streamers have averaged 28%, although this was significantly influenced by this year's record contribution. The last two years have seen dramatic shifts in the proportion of finance provided, when titles are grouped by first release platform.

In 2021/22, the public broadcasters contributed a combined \$58 million. The ABC invested \$50 million, up 12% on last year, in 19 titles. Financial contributions from SBS also increased. One title for first release on NITV entered production in 2021/22. Titles, investment, hours and total budgets increased year-on-year for the combined public broadcasters and were above the 5-year averages.

The commercial free-to-air broadcasters continued to produce the larger share of total hours (45%), largely due to *Home and Away* and *Neighbours* for the Seven and 10 networks respectively. Number of titles, investment, hours and total budgets were all down on last year and below the 5-year averages.

The subscription TV broadcasters financed three titles for first release that entered production in 2021/22. Titles first released on Binge are included in the Australian and foreign online streaming services category.

Australian and foreign online streaming services contributed a record \$186 million to 24 titles, representing a more than five-fold increase in finance from this collective. Stan contributed to six titles, Netflix to five, and Paramount+ and Amazon Prime to four each. Acorn TV, AMC, Binge and Disney+ contributed to one title each. The number of titles, hours and total budgets increased to new highs.



	No. titles	Investment (\$m)*	Hours	Budgets (\$m)
ABC (includes iview)				
2017/18	23	53	112	144
2018/19	28	52	128	159
2019/20	16	36	89	111
2020/21	18	45	84	124
2021/22	19	50	105	164
5-yr av	21	47	103	140
SBS/NITV (includes SBS On Demand)				
2017/18	6	8	20	21
2018/19	4	5	12	16
2019/20	2	2	5	7
2020/21	4	6	10	17
2021/22	8	8	18	29
5-yr av	5	6	13	18
Public broadcasters (ABC and SBS/NITV)				
2017/18	29	61	132	165
2018/19	32	58	140	175
2019/20	18	37	94	119
2020/21	22	51	94	140
2021/22	27	58	123	193
5-yr av	26	53	117	158
Commercial free-to-air broadcasters (includes BVOD platforms)				
2017/18	17	73	336	142
2018/19	24	107	433	210
2019/20	17	60	321	126
2020/21	10	54	281	108
2021/22	6	41	207	79
5-yr av	15	67	315	133
Subscription TV broadcasters				
2017/18	5	31	29	50
2018/19	3	12	19	33
2019/20	2	17	16	24
2020/21	0	0	0	0
2021/22	3	13	18	41
5-yr av	3	15	16	29
Australian and foreign online streaming services**				
2017/18	5	29	22	46
2018/19	10	19	27	49
2019/20	6	46	30	84
2020/21	9	30	37	121
2021/22	24	186	115	371
5-yr av	11	62	46	134

*Investment includes contributions to the initial finance plan, including licence fees, presales, equity investments etc. Financial contributions provided by a broadcaster or online streaming service for subsequent release rights are not accounted for here.

**Combined due to confidentiality reasons.

Notes

Figures may not total exactly due to rounding. Titles not included if investment cannot be established. n.p. Not for publication due to confidentiality reasons.

Subscription TV broadcasters include Disney Junior, Fox Networks, Foxtel.

Australian and foreign online streaming services include Acorn TV, Adult Swim, Amazon Prime, AMC, Binge, Blackpills, The Cartoon Network (USA), Disney+, Netflix, Paramount+, Stan.

Titles with a first-release on a platform that is not directly available in Australia are excluded from this analysis.

Foreign production

Total spend on foreign shoot and PDV-only titles came to \$777 million in 2021/22, down by 27% on last year's expenditure, but 35% above the 5-year average. Spend on foreign titles that shot in Australia reached \$442 million, making up 57% of total foreign spend. This was 44% below last year's record spend, but 19% above the 5-year average. In contrast, spend on foreign PDV-only titles rose to a new record of \$335 million, an increase of 22% from last year and 65% above the 5-year average.

Despite worldwide easing of COVID restrictions, a range of high profile US and UK theatrical, SVOD and TV titles were attracted to Australia in 2021/22. The Australian dollar typically traded at around USD \$0.73 and Australia's federal, state and territory government programs continued to attract foreign work and offer support. The Australian Government's Location Incentive grant program is scheduled to run until 2026/27, and supported six foreign dramas that entered production in 2021/22. Productions were also assisted by the Australian Government's Location Offset, and state and territory government funding and incentives. Increased PDV-only activity was supported by the Australian Government's 30% PDV Offset, which can be combined with state and territory PDV incentives and grants worth up to an additional 15%.

2022/23 will see more major foreign productions made in Australia, including the 8 episode series *Metropolis*, reportedly one of the most technically ambitious projects ever to film in Australia. Other titles planned for production include a sequel to *Godzilla vs Kong* (Queensland), *The Fall Guy* (New South Wales), *Kingdom of the Planet of the Apes* (New South Wales), and *Land of Bad* (Queensland). The Victorian and Australian governments have funded new virtual production infrastructure at the recently-expanded Docklands studio, which will be used for *Metropolis*. Screenwest and the Western Australian Government have opened a \$20 million production attraction incentive to entice foreign productions to the state, and the 2022/23 Screen Territory Funding Program is also offering a Production Attraction Incentive Program, which is open to all Australian and international producers, production companies and studios.

Notes: Figures may not total exactly due to rounding.
¹Amount of total budgets spent in Australia.
²Combined due to confidentiality reasons.

FEATURES

Two foreign features commenced shooting in Australia in 2021/22, bringing \$57 million in expenditure. This result was 82% down on 2020/21 and 64% below the 5-year-average of \$159 million. The 2021/22 foreign feature shoot slate consisted of the US titles *Ticket to Paradise* and *Woody Woodpecker 2*.

PDV-only feature expenditure totalled \$194 million in 2021/22, 1% above last year's spend and 83% above the 5-year average. 21 features contributed to the result including *Ant-Man and the Wasp: Quantumania*, *Borderlands*, *The Flash* and *The Gray Man*.

Spend on foreign features accounted for 32% of total foreign expenditure in 2021/22.

See pages 46/47 for full list.

TV AND ONLINE DRAMA

In 2021/22, six foreign TV and VOD titles that commenced shooting in Australia spent \$385 million, down by 19% on last year but 80% above the 5-year average. Titles included *Joe vs. Carole*, *La Brea* series 2, *Nautilus*, *Ten Pound Poms* (a co-commission with Stan), *The Woman Who Ate Photographs* and *Young Rock* series 2.

Expenditure from 36 foreign PDV-only TV and VOD titles that commenced work in Australia in 2021/22 reached \$141 million, an increase of 72% on last year and 76% above the 5-year average. PDV-only titles including US titles *Hazbin Hotel*, *Leave The World Behind*, *Rise* and *Ted*. Some titles that commenced work in 2021/22 forecast significant spend in future years.

Spend on foreign TV and VOD dramas accounted for 68% of total foreign expenditure in 2021/22.

See page 50 for full list.

Foreign production – foreign shoot and PDV-only

	Shoot		PDV-only		Total Foreign	
	No. titles	Spend (\$m) ¹	No. titles	Spend (\$m) ¹	No. titles	Spend (\$m) ²
Theatrical features						
2017/18	5	10	24	107	29	117
2018/19	7	185	21	100	28	285
2019/20	8	221	14	23	22	245
2020/21	3	319	17	192	20	511
2021/22	2	57	21	194	23	251
5-yr av	5	159	19	106	24	282
TV and VOD drama²						
2017/18	2	4	1	9	3	13
2018/19	4	112	9	16	13	128
2019/20	3	97	19	153	22	250
2020/21	7	474	36	82	43	556
2021/22	6	385	36	141	42	526
5-yr av	4	214	16	65	25	295
Total						
2017/18	7	13	25	116	32	130
2018/19	11	297	30	116	41	413
2019/20	11	318	33	177	44	495
2020/21	10	793	53	274	63	1067
2021/22	8	442	57	335	65	777
5-yr av	9	373	40	204	49	576

Drama production by location

Drama production expenditure (\$m) by location

	NSW			QLD			VIC		
	Shoot	PDV	Total	Shoot	PDV	Total	Shoot	PDV	Total
\$m									
2017/18	173	108	281	103	19	122	185	68	252
2018/19	238	148	386	269	31	300	233	119	352
2019/20	301	195	497	47	10	57	237	82	319
2020/21	645	290	935	484	71	555	206	99	305
2021/22	724	313	1038	407	59	465	331	225	556
5-yr av	417	211	627	262	38	300	238	119	357
%									
2017/18	32%	45%	36%	19%	8%	15%	34%	28%	32%
2018/19	28%	40%	32%	32%	8%	25%	28%	32%	29%
2019/20	42%	56%	47%	7%	3%	5%	33%	24%	30%
2020/21	45%	58%	48%	34%	14%	29%	14%	20%	16%
2021/22	45%	45%	45%	25%	9%	20%	21%	33%	24%
5-yr av	39%	49%	42%	23%	8%	19%	26%	27%	26%

	SA			WA			ACT/NT/Tas		
	Shoot	PDV	Total	Shoot	PDV	Total	Shoot	PDV	Total
\$m									
2017/18	41	44	85	33	4	37	11	<1	11
2018/19	44	66	110	33	3	36	26	1	28
2019/20	90	58	148	32	2	34	5	1	6
2020/21	59	39	98	24	5	29	18	<1	18
2021/22	54	90	144	24	2	26	56	1	57
5-yr av	58	59	117	29	3	32	23	1	24
%									
2017/18	8%	18%	11%	6%	2%	5%	2%	<1%	1%
2018/19	5%	18%	9%	4%	1%	3%	3%	<1%	2%
2019/20	13%	17%	14%	4%	1%	3%	1%	<1%	1%
2020/21	4%	8%	5%	2%	1%	1%	1%	<1%	1%
2021/22	3%	13%	6%	2%	<1%	1%	4%	<1%	2%
5-yr av	7%	15%	9%	4%	1%	3%	2%	<1%	2%

In 2021/22, spend reached new records in New South Wales, Victoria, and the collated results for the Australian Capital Territory, the Northern Territory and Tasmania. Spend in Queensland fell, but to the second-highest result in the past five years, and spend in South Australia also reached the second-highest level in the same period. Spend in Western Australia continued to decline.

New South Wales \$1.038b 45%: set a new record for the second year in a row, and also accounted for the largest share of total spend in Australia. Australian features *Furiosa* and *Mercy Road* were shot in New South Wales. Subscription TV and SVOD dramas included *Last King of the Cross*, *The Lost Flowers of Alice Hart*, *Poker Face*, *Class of '07* and *The Twelve*, and UK drama *Ten Pound Poms*. FTA TV and BVOD dramas included *Barons*, *The Messenger* and the returning *Home and Away*. Foreign feature titles that undertook PDV-only work included *The Gray Man*, and *The Marvels*, while foreign PDV-only TV and VOD dramas included *Monkie Kid* series 3 and *Obi-Wan Kenobi*.

Queensland \$465m 20%: spend fell after last year's all-time high. Australian titles included features *True Spirit* and *Wizards!*, SVOD dramas *Irreverent*, *Black Snow* and *A Perfect Pairing*, and FTA dramas *Rock Island Mysteries* and *Troppa*. Foreign titles that started production included *Nautilus*, *Joe vs. Carole*, *Ticket to Paradise* and *Young Rock* series 2.

Victoria \$556m 24%: spend reached an all-time high in 2021/22. Australian features included *Better Man*, *Foe* and *Force of Nature* and US feature *Woody Woodpecker 2* also commenced production. FTA TV and BVOD dramas included new titles *Savage River*, *Safe Home* and *Crazy Fun Park*, as well as returning seasons of *Fisk* and *Neighbours*, and the foreign title *La Brea* series 2. Subscription TV and SVOD dramas included *Bad Behaviour*, animated series *Koala Man*, *Love Me* and *Spreadsheet*. Foreign PDV-only titles included *Lyle*, *Lyle*, *Crocodile*, *Ted* and *Borderlands*.

South Australia \$144m 6%: spend reached the second-highest result on record for South Australia. Australian features that started production in 2021/22 included *Run Rabbit Run* and *Foe*. Australian subscription TV and SVOD titles included *Firebite* and *Gymnastics Academy: A Second Chance!*. FTA TV and BVOD titles included *Aftertaste* series 2 and *Beep and Mort*, while foreign PDV-only work included *Ant-Man and the Wasp: Quantumania*, *Strays* and *Rise*.

Note

Figures may not total exactly due to rounding. Spend has been attributed to the year in which principal photography commenced for Australian and foreign titles shot in Australia, but based on the year PDV work commenced for foreign PDV-only titles.

Western Australia \$26m 1%: spend fell for the fifth consecutive year and was below the 5-year average. Australian feature film *Kid Snow*, local TV and VOD dramas *100% Wolf: The Book of Hath*, *Koala Man* and *Mystery Road: Origin*, undertook production activities in the state. PDV-only work included *The Glassworker*, *Titina*, *Animaniacs* and *Beavis and Butt-Head*. Western Australia's border re-opened in March 2022.

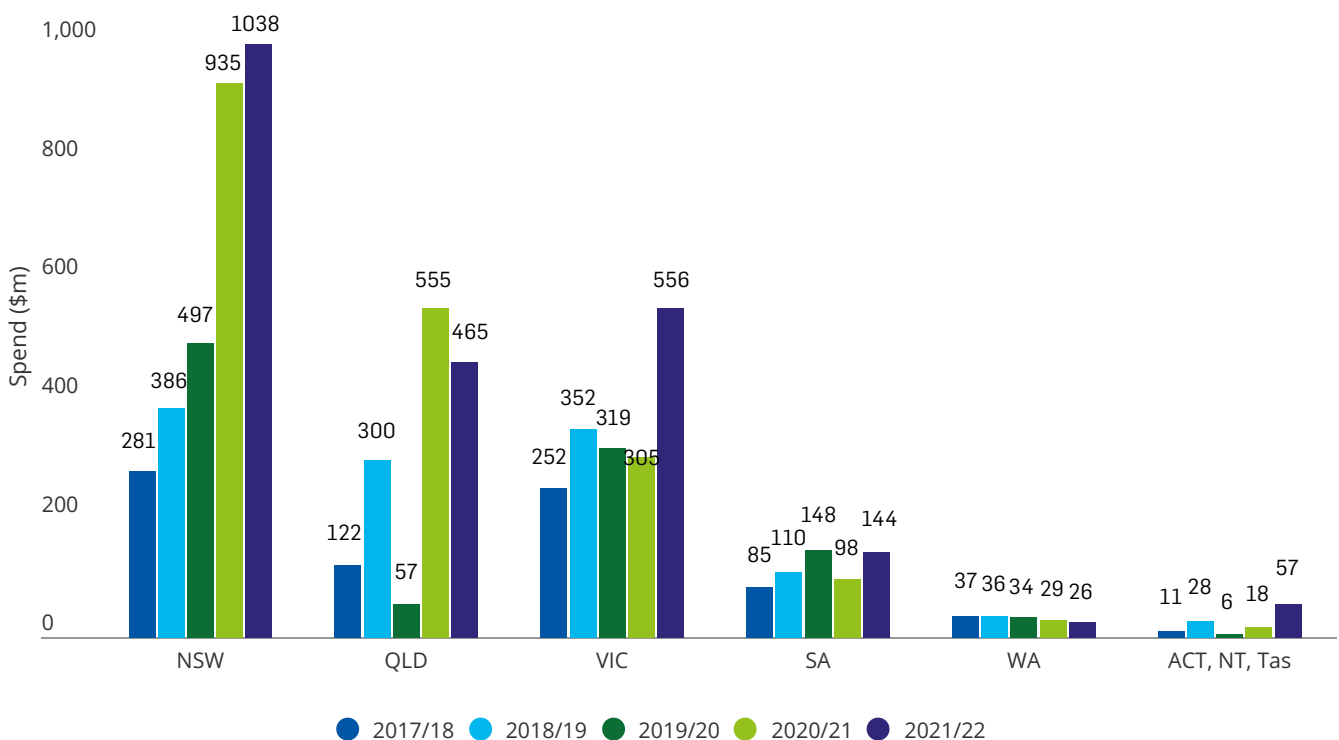
ACT/NT/Tasmania \$57m 2%: more than three times the previous year's spend and an all-time high for the combined territories and state. Australian titles included feature film *The Survival of Kindness*, the FTA TV and BVOD dramas *Barrumbi Kids*, *Bay of Fires* and *True Colours*, and subscription TV and SVOD dramas *Deadloch* and *The Last Flowers of Alice Hart*.

Data for the Australian Capital Territory, Northern Territory and Tasmania is combined in the previous table to preserve the confidentiality of data for titles produced in those locations. The new table to the right provides data for these locations, combining years to preserve data confidentiality. Spend in each location has risen in recent years, with particularly significant recent activity occurring in the Northern Territory and Tasmania.

Average annual spend (\$m)

	ACT	NT	Tas
2020/21 - 2021/22 (2 years)	3	14	21
2017/18 - 2021/22 (5 years)	2	8	14
2012/13 - 2021/22 (10 years)	2	5	12

Expenditure by state (\$m)



The impact of COVID-19

The COVID-19 pandemic continued to impact production throughout the 2021/22 financial year. Producers reported a range of factors that constrained production, however, most productions were able to adapt to the challenging circumstances.

Around half of all respondents provided anecdotal evidence to describe how the COVID-19 pandemic impacted individual projects as well as, more broadly, production businesses. Overall, the impacts were a continuation of last year.

The most common impacts included:

- budget pressure, disrupted finances and difficulty in obtaining necessary insurances
- rescheduling to accommodate loss of locations and changing dates
- delays while actors and crew quarantined
- revisions to scripts and schedules to accommodate casting and location changes, and to ensure adherence to strict COVID-19 protocols
- increased workload for producers so that they could keep productions fluid and able to respond to ever-changing circumstances
- heightened anxiety and stress among casts and crews due to the ever-present threat of sudden and unexpected changes
- needing to provide adequate equipment and ensure appropriate conditions for remote working
- greater competition for Australian crew, and facilities such as studios, increasing some costs.

It is expected that these impacts will flow through to the 22/23 production year.

THE PDV INDUSTRY

Despite the strong year, COVID-19 impacts were also felt by the PDV industry in 2021/22. Sixteen companies provided COVID-specific insights for this report.

Several companies observed that the last two years have resulted in a “feast or famine” experience for the PDV sector with extremely busy periods that have been a challenge to resource counterbalanced by extended periods of little or no work. Overall, the most common COVID-19 impacts noted in 2021/22 were:

- significant skills and labour shortages (with a reduced freelance pool, a lack of locally-based skilled staff and practitioners leaving the industry)

- increased competition for skilled staff which substantially drove up wage costs and reduced profitability and growth for businesses
- loss of job opportunities due to project delays, cancellations and travel and border restrictions
- challenges in working from home including slow internet, difficulties in training, increased equipment costs and overall lower efficiency and productivity.

While the bulk of respondents highlighted the negative impacts of COVID-19, some also noted positive effects of the pandemic including:

- increased US production in Australia resulting in productive new business relationships and opportunities
- increased workplace flexibility.



PDV services for feature, TV drama and VOD production

This section looks at Australian expenditure from post, digital and visual effects (PDV) services for domestic, foreign shoot and foreign PDV-only feature film, TV drama and VOD titles.

To provide a sense of the ongoing business activity of PDV companies in a given financial year, a project's total PDV spend has been spread across each year in which it occurred rather than the whole amount attributed to the year in which work commenced. The results for each year will therefore include expenditure from projects that began work in previous financial years and only relevant spend for projects that continue work into future financial years. As a result, this data cannot be compared to that presented in previous sections of the Drama Report.

PDV EXPENDITURE IN AUSTRALIA

- **\$553 million in total PDV expenditure**
Up 71% on last year, and 56% above the 5-year average.
- **\$289 million in PDV expenditure on 89 foreign PDV-only projects**
More than double the previous year and 93% above the 5-year average.
- **\$179 million in PDV expenditure on 57 foreign PDV-only TV and online dramas**
Up 132% on 2020/21 and 178% above the 5-year average.
- **\$111 million in PDV expenditure on 32 foreign PDV-only features**
Up 81% on 2020/21, and 29% above the 5-year average.
- **\$196 million in PDV expenditure on Australian productions**
Up 51% on 2020/21, and 17% above the 5-year average.



TOTAL PDV EXPENDITURE

PDV expenditure on Australian and foreign drama titles in 2021/22 totalled a record \$553 million, up 71% on 2020/21, and 56% above the 5-year average (\$354 million). Driving the result was PDV spend of \$289 million on foreign PDV-only titles, more than double the previous year, and 93% above the 5-year average. PDV expenditure by Australian titles was \$196 million — the highest since 2009/10 — up 51% on 2020/21 and 17% above the 5-year average. PDV expenditure on foreign shoot titles for 2021/22 totalled a record \$69 million, up 21% on 2020/21 and 86% above the 5-year-average.

Services to Australian productions averaged 47% of all PDV spend over the last 5 years. Australian titles generating PDV expenditure in 2021/22 included *Furiosa* and *Better Man*.

PDV EXPENDITURE BY STATE

New South Wales accounted for 48% of PDV expenditure in the five years from 2017/18 to 2021/22, representing an average of \$171 million annually. Across the five years, businesses in the state provided PDV services to local films including *Furiosa*, *I Am Woman*, *Interceptor*, *Ladies in Black*, *Nekrotronic*, *Penguin Bloom*, *Peter Rabbit 2* and *Three Thousand Years of Longing*, as well as international titles such as *DC Super Pets*, *The Magician's Elephant*, *The Shrinking of Treehorn*, *Space Jam: A New Legacy* and *Thor: Love and Thunder*.

Victorian businesses accounted for 25% of total PDV expenditure over the last five years, representing an average of \$89 million annually. PDV projects undertaken in the state in the last five years include Australian projects *Better Man*, *Clickbait*, *Elvis*, *Foe*, *Scarygirl*, *Three Thousand Years of Longing*, *The True History of the Kelly Gang* and *The Whistleblower*. International titles included *Christopher Robin*, *FengShen Trilogy*, *Lyle, Lyle, Crocodile*, *Men in Black: International*, *Spider-Man: No Way Home* and *The Tomorrow War*.

The remainder of PDV work over the period was spread across South Australia (16%; \$56 million), Queensland (9%; \$33 million) and the remaining states and territories (1%; \$4 million). Titles undertaking PDV in South Australia since 2017/18 included Australian titles *Elvis*, *Firebite*, *Mortal Kombat*, *Pine Gap*, *Stateless*, *Storm Boy* and *YOLO: Silver Destiny* series 2, and international titles *Cats*, *Finch*, *Love and Monsters*, *Strays* and *Thirteen Lives*. Queensland projects included the Australian titles *Bluey* series 1, 2 and 3, *Elvis*, *Harrow*

Australian PDV expenditure on features, TV and VOD drama (\$m)

	Australian			Foreign		Total
	Domestic	Co-production	Total Australian	Shot in Australia	PDV-only	
Features						
2017/18	106	7	113	6	93	213
2018/19	75	7	83	12	90	184
2019/20	114	5	118	35	74	227
2020/21	72	5	77	51	61	190
2021/22	112	2	113	19	111	243
5-yr av	96	5	101	25	86	211
TV and VOD drama						
2017/18	59	2	61	<1	11	72
2018/19	71	2	73	4	7	84
2019/20	64	<1	64	1	48	114
2020/21	51	1	52	6	77	135
2021/22	81	1	82	49	179	310
5-yr av	65	1	66	12	64	143
Total						
2017/18	165	9	174	6	104	285
2018/19	146	9	155	16	96	268
2019/20	178	5	183	36	122	340
2020/21	123	6	129	57	138	324
2021/22	192	3	196	69	289	553
5-yr av	161	7	167	37	150	354
% share	45%	2%	47%	10%	42%	100%

Notes: Figures may not total exactly due to rounding.

Expenditure from Australian PDV work on features, TV and online drama by state or territory (\$m)

	NSW	VIC	QLD	SA	ACT, NT, Tas, WA	Total
2017/18	159	70	19	35	2	285
2018/19	109	96	18	40	6	268
2019/20	140	95	24	76	5	340
2020/21	170	78	32	41	3	324
2021/22	279	108	73	89	4	553
5-yr av	171	89	33	56	4	354
% share	48%	25%	9%	16%	1%	100%

series 3, *Irreverent*, *Occupation: Rainfall* and *Wizards!*, and the US titles *Heavens: The Boy and His Robot*, *Joe vs. Carole*, *Mermaze* *Mermaids* series 1, *Nautilus*, *Rainbow High* series 1, 2 and 3 and *Ticket to Paradise*.

FOCUS ON FOREIGN PDV-ONLY EXPENDITURE

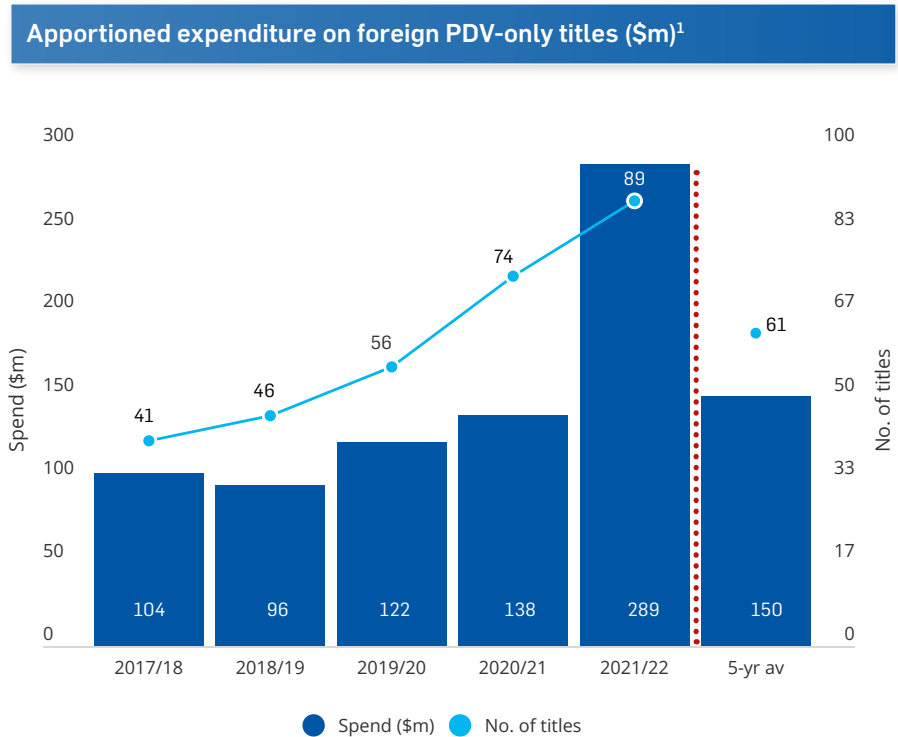
Expenditure on foreign titles undertaking PDV without shooting here totalled \$289 million in 2021/22, more than double the previous year (\$138 million) and 93% above the 5-year average. A total of 89 titles contributed to this result, including 53 online dramas with spend of \$172 million.

Amongst the titles undertaking PDV-only work in 2021/22, Australian PDV companies contributed to *Borderlands*, *Strays*, *Ted*, and *Lyle, Lyle, Crocodile*. Work also continued or was completed on projects commencing in previous years such as *The Book of Boba Fett*, *Doctor Strange in the Multiverse of Madness* and *M3GAN*.

The disruptive effects of the COVID-19 pandemic continued through 2021/22, and are discussed on page 38. The Australian dollar typically traded at around USD \$0.73 through 2021/22, helping companies to bid for work. PDV activity was supported by the Australian Government's 30% PDV Offset, rebates in New South Wales, Queensland, South Australia and Western Australia, and grants offered in Victoria.

State screen agencies continued to respond to the need to develop the local PDV and VFX workforce. In October 2021, Screen NSW announced a new round of its Animation and VFX Traineeship Program. Designed to develop career pipelines, in 2022 the paid traineeships are in partnership with studios Animal Logic, Cutting Edge and Plastic Wax. In February 2022, Screen Queensland also announced its PDV Professional Development Placement Program. Designed for early and mid-career professionals, the program will support up to five year-long, full-time, paid traineeships across the full spectrum of PDV disciplines. In 2021/22, the local PDV landscape continued to evolve. Technicolor Creative Studios announced the integration of its

Adelaide based studio MR. X under the brand Moving Picture Company (MPC), alongside its VFX brands MPC Film and MPC Episodic, and Melbourne-based Method Studios formally shifted to working under the Framestore banner. Adelaide-based Rising Sun Pictures opened a small visual effects production studio in Brisbane in mid-2021 to help the studio keep pace with its growing workload and serve productions based in Queensland. Sydney-based Flying Bark Productions also expanded its footprint, launching a new production arm, After Bark, which will focus on content for older audiences, including mature animation projects and both scripted and unscripted live-action. Flying Bark also received funding from the New South Wales Government to expand full-time staff.



¹Expenditure has been apportioned across the year or years in which it was spent.

FOREIGN PDV-ONLY TITLES BY REGION, 2012/13–2021/22

US productions represent the largest proportion of international PDV work undertaken by Australian businesses on feature, TV and online drama projects, accounting for 78% of titles and 88% of expenditure since 2012/13. PDV services to Asian productions represent 9% of titles but only around 3% of total spend.

PDV SERVICES: ABOUT THE PDV DATA

Companies identified by Screen Australia as providing PDV services to feature film, TV and online drama projects report income earned on individual projects to Screen Australia through an online survey, with data aggregated for publication.

Total PDV expenditure is determined by adding foreign PDV-only income to PDV expenditure for domestic and foreign shoot titles. To allow for easier referencing in this report, income from PDV-only projects has been referred to as expenditure.

PDV is defined as a set of activities rather than a stage in the production process (see 'Key terms' on page 5).

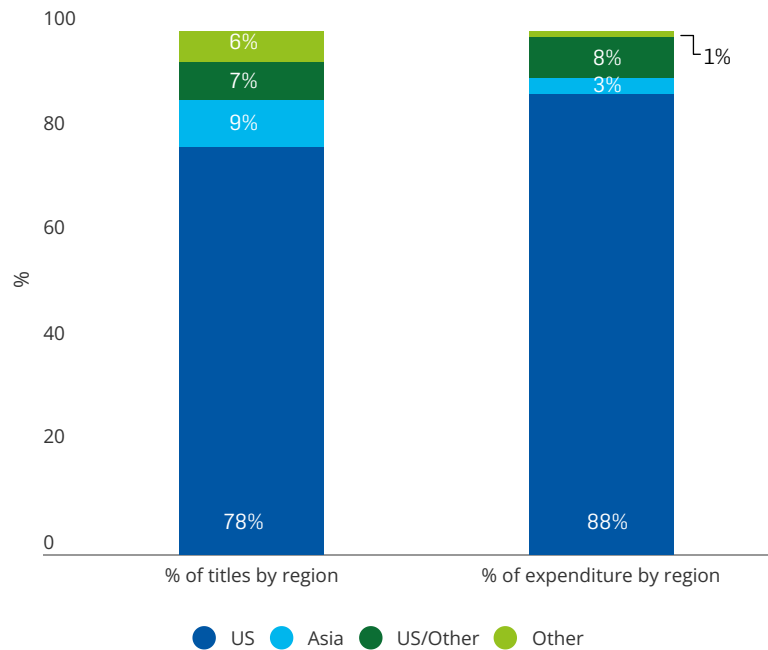
To provide a sense of the ongoing business activity of PDV companies in a given financial year (rather than according to an annual slate of productions or titles), expenditure has been assigned to the year it was spent rather than allocated to the start of the shoot or PDV work in Australia. As a result, the figures in this section may include projects that commenced shooting or PDV work in previous financial years and cannot be compared with figures in previous sections of the report, which are based on principal photography or PDV start date.

PDV expenditure figures include predicted spend on titles still undertaking work and are therefore subject to revision in subsequent years as final figures are made available.

This data relates only to feature film, TV and online drama titles, and therefore does not cover all PDV activity in Australia. The most recent data from the Australian Bureau of Statistics indicates that Australian companies received income of \$428.4 million in 2015/16 from the provision of PDV services across all audiovisual production, with 58% accounted for by feature films and TV drama. Other areas of PDV activity include commercials and other TV productions. This data will be updated in 2023.

Spend by region (\$m)

	No. titles	% of titles	% of expenditure ¹
US	280	78%	88%
Asia	33	9%	3%
US/Other	25	7%	8%
Other	20	6%	1%
Total	358	100%	100%



Notes

¹Expenditure has been apportioned across the year or years in which it was spent.

Showcase

The Book of Boba Fett



Boba Fett (Temuera Morrison) in Lucasfilm's *The Book of Boba Fett*. © 2022 Lucasfilm Ltd. & ™. All Rights Reserved.

INDUSTRIAL LIGHT & MAGIC

Founded in 1975 by George Lucas, and having expanded to Sydney in July of 2019, Industrial Light & Magic (ILM) remains one of the world's leading visual effects studios. Some of the most iconic moments in modern cinema have been created by ILM's skilled artists, technicians, and production teams.

One of the company's most recent successes is the hit Lucasfilm series *The Book of Boba Fett*, a spin-off set within the timeline of *The Mandalorian* that reintroduces Boba Fett to the Star Wars galaxy. In September 2022, ILM's VFX team members were honoured with an Emmy® Award for Outstanding Special Visual Effects in a Season or a Movie for their contribution to the series. *The Book of Boba Fett* employed both traditional filmmaking techniques that stay true to the Star Wars aesthetic and innovative new technologies such as VR, artificial intelligence, machine learning, and ILM's award-winning StageCraft LED technology, which in itself was recognised with an Engineering Emmy® Award this year.

To bring Boba Fett's Rancor to life, a full-size, rideable creature head was sculpted and mounted to a programmable motion-base. The team incorporated animation controls into the creature's rig so that it could mimic all the subtleties of the hand-operated puppet from *Return of the Jedi*. In parallel, the artists at ILM set to work creating a full CG version of the Rancor and the two would be seamlessly blended together to create the final shots.

Combined with Mark Hamill's on-set performance and that of his double, modern techniques such as ILM's FaceSwap technology and a photoreal, full 3D digital head were used to create the performance of the young Luke Skywalker in the series. The team captured over 80 shots of the actor and ran the FaceSwap over a CG head to produce the final result. This involved intricate matching of every movement of Luke's original face combined with the CG head, essentially replacing the original face while maintaining high resolution outputs.

Showcase

Hawkeye



© 2021 MARVEL

RISING SUN PICTURES

Rising Sun Pictures (RSP), established in Adelaide, South Australia, has been producing exceptional visual effects for over 27 years. In 2021 RSP teamed up with Marvel to work on *Hawkeye*, a 6-part series released on Disney+ that combines detective work, charm and full-blown Marvel universe action.

Hawkeye is set in New York City, so the RSP team were tasked with reproducing a seamless and realistic NYC cityscape to fit into the windows of Aunty Moira's apartment. The digital environment comprised of both 2D and 3D elements, including buildings and landmarks familiar to local New Yorkers, moving cars, lights and people as well as environmental changes such as daytime and nighttime, snow flurries, water droplets and condensation on the window. The biggest challenge was ensuring the background looked photographic, consistent and coherent requiring strong attention to detail, focus and finesse.

The RSP team also worked on the beloved golden retriever character, Lucky who required one eye to look as though it was sewn shut. There were many intricacies and micro-movements to consider when producing the digital eye area so that it looked as natural as possible.

A final contribution was from RSP's Computer Graphics (CG) department who worked on the scene where Clint teaches Kate a novel trick of flipping a gold coin to turn on a television. The scene switches to slow-motion and so the CG team worked on matching the background plate and could essentially control the animation and editorial curve, bringing the scene back to real time.

All in all RSP produced almost 200 visual effect shots for the *Hawkeye* series.

Showcase

Spider-Man: No Way Home



LUMA PICTURES

Luma Pictures has been on the global VFX scene for the past two decades, starting in LA in 2002 and expanding to Melbourne, Australia in 2013. Having previously worked on *Spider-Man: Homecoming* and *Spider-Man: Far From Home*, Luma Pictures was invited back to work on two incredibly action-packed scenes for *Spider-Man: No Way Home*. The Powerline Corridor scene is a big moment in which audiences are first introduced to Spider-Man's sleek black and gold suit, as well as two characters, Electro and Sandman. Brendan Seals, VFX Supervisor and AACTA Award winner for Best Visual Effects on *Spider-Man: Far From Home*, said "We were so honoured to take the creative lead of designing Spider-Man's black and gold suit. It was a rewarding process to collaborate with the Marvel team."

The Luma Art Department worked closely with the Marvel team to conceptualise and design the black and gold suit, with Luma creating a library of hand-painted circuit patterns to match the original suit as a base. Other references such as wetsuits and LED clothing were used

to model exposed details which helped create the suits unique inside-out look.

The Luma team also brought a full CG Sandman to life by treating him like an extension of the complex environment within the scene. Electro received a brand-new look, based on muscle fibres and skeletal directionality of the actor's exterior.

For the film's opening scene, where Spider-Man and MJ are swinging through the streets of NYC after his identity is revealed, the team populated the scene with hundreds of assets such as cars and crowds. Luma built a hybrid Computer Generated (CG) Digital Matte Painting (DMP) environment of Madison Square, as well as a 360-degree CG Times Square.

Luma's notable contributions to *Spider-Man: No Way Home* helped the project earn a 2022 Oscar® nomination for Best Achievement in Visual Effects.

Titles in the 2021/22 slate

AUSTRALIAN THEATRICAL FEATURES - DOMESTIC

Title	Production company	Premiered as of Oct 2022	SA Funded ¹
Arranged Love	Jeevanthi Films		N
Better Man	Better Man Productions		N
Christmess	Albert Street Films Pty Ltd		N
The Curious Case of Dolphin Bay	The Steve Jaggi Company	Y	Y
Foe	I Am That Pty Ltd, Anonymous Content		N
Force of Nature	Made Up Stories Pty Ltd		Y
Furiosa	Kennedy Miller Mitchell		N
Girl at the Window	Windows Film Productions Pty Ltd	Y	Y
In Vitro	We Are Arcadia Pty Ltd, Fictious Pty Ltd		Y
Kid Snow	Unicorn Films Pty Ltd		Y
Late Night with the Devil	Future Pictures Pty Ltd		N
Mercy Road	Arclight Films International Pty Ltd		N
Mistletoe Ranch	The Steve Jaggi Company		N
Monolith	Black Cat White Rabbit Productions		N
Of an Age	Of An Age Films Pty Ltd		Y
Run Rabbit Run	Carver Films Pty Ltd		Y
Scarygirl	Passion Pictures Australia Pty Ltd, Like A Photon Creative Pty Ltd		N
Sons of Summer	Intertropic Films Pty Ltd		N
The Survival of Kindness	Vertigo Productions Pty Ltd		Y
Talk To Me	Talk To Me Holdings Pty Ltd		Y
True Spirit	Sunstar Entertainment Pty Ltd		N
Wizards!	Plan B, See-Saw Films Pty Ltd		N

¹Titles marked Y received Screen Australia production funding.

AUSTRALIAN THEATRICAL FEATURES - OFFICIAL CO-PRODUCTIONS

Title	Production company	Premiered as of Oct 2022	SA Funded ¹
Being Betty Flood (Australia/Ireland)	POP Family Entertainment Pty Ltd, Telegael		N
You, Me and the Penguins (Australia/Canada)	The Steve Jaggi Company		N

¹Titles marked Y received Screen Australia production funding.

FOREIGN FEATURES

Title	Production company
Ticket to Paradise	Smokehouse Pictures, Working Title and Red Om Films
Woody Woodpecker 2	Universal 1440 Entertainment

FOREIGN FEATURES: PDV-ONLY*

Title	Production company
Ant-Man and the Wasp: Quantumania	Marvel Studios, Truenorth Productions, Walt Disney Pictures
Borderlands	Lionsgate
Cocaine Bear	Brownstone Productions, Lord Miller, Universal Pictures
Cottontail	Brouhaha Entertainment, MBK Productions, Magnolia Mae Films, Written Rock Films
Harold and the Purple Crayon	Davis Entertainment, Sony Pictures Animation, Sony Pictures Entertainment
Lyle, Lyle, Crocodile	Sony Pictures Entertainment
Nope	Universal Pictures, Dentsu, Monkeypaw Productions
Strays	Lord Miller, Picturestart, Universal Animation Studios
The Flash	DC Comics, DC Entertainment, Warner Bros.
The Glassworker	Mano Animation Studios
The Gray Man	AGBO, Netflix, Roth Films, Stillking Films
The Marvels	Marvel Studios
Titina	Mikrofilm, Vivi Film

*Five titles are not for publication due to confidentiality reasons.

AUSTRALIAN GENERAL FTA TV AND BVOD DRAMA

Title	Production company	First release broadcaster	Premiered as of Oct 2022	SA Funded ¹
After The Verdict	Subtext Pictures Pty Ltd	Nine	Y	Y
Aftertaste series 2	Closer Productions Pty Ltd	ABC	Y	N
Appetite	Appetite Show Pty Ltd, Fell Swoop Pictures Pty Ltd, Photoplay Films Pty Ltd	SBS		Y
Barons	Switchfoot Productions Pty Ltd	ABC	Y	Y
Bay of Fires	Archipelago Productions Pty Ltd, Fremantle Australia	ABC		Y
A Beginner's Guide to Grief	Kojo Studios Pty Ltd	SBS	Y	Y
Fisk series 2	Origma Productions Pty Ltd	ABC	Y	N
Home and Away series 35	Seven Network Operations Limited	Seven	Y	N
Housos: The Thong Warrior	Antichocko Productions Pty Ltd	Seven	Y	Y
It's Fine, I'm Fine	Photoplay Films Pty Ltd	SBS	Y	Y
Latecomers	Emma Myers, Lazy Susan Films Pty Ltd	SBS		Y
The Messenger	Lingo Pictures Pty Ltd	ABC		Y
Mystery Road: Origin	Bunya Productions Pty Ltd	ABC	Y	Y
Neighbours 2022 series	Fremantlemedia Australia Pty Ltd	10	Y	N
Night Bloomers	Turn About Entertainment	SBS		Y
Safe Home	Kindling Pictures	SBS		Y
Savage River	Aquarius Films Pty Ltd	ABC	Y	Y

Significant Others	Fremantlemedia Australia Pty Ltd	ABC	Y	Y
Soundtrack to Our Teenage Zombie Apocalypse	Australian Broadcasting Corporation	ABC	Y	N
Summer Love	Gristmill Pty Ltd	ABC	Y	Y
Time to Buy: A Musical	The Feed (SBS)	SBS	Y	N
Tropo	EQ Media Production Pty Ltd, Troppo Productions Pty Ltd, Beyond Entertainment Pty Ltd	ABC	Y	Y
True Colours	Bunya Productions Pty Ltd	SBS	Y	Y
Underbelly: Vanishing Act	Screentime Pty Ltd	Nine	Y	N

¹Titles marked Y received Screen Australia production funding.

AUSTRALIAN GENERAL SUBSCRIPTION TV AND SVOD DRAMA

Title	Production Company	First release broadcaster	Premiered as of Oct 2022	SA Funded ¹
Bad Behaviour	Matchbox Pictures Pty Ltd	Stan		Y
Bali 2002	Screentime Pty Ltd, Endemol Shine Australia Pty Ltd, Esa Productions 5 Pty Ltd	Stan	Y	Y
Black Snow	Goalpost Television Pty Ltd	Stan		Y
Bump series 2	Roadshow Rough Diamond	Stan	Y	Y
Bump series 3	Roadshow Productions Pty Ltd	Stan		Y
Christmas on the Farm	Hoodlum Entertainment	Stan	Y	N
Class of '07	Matchbox Pictures Pty Ltd	Amazon Prime		N
Colin from Accounts	Easy Tiger Productions Pty Ltd	Binge		Y
Darby & Joan	Cordell Jigsaw Productions Pty Ltd	Acorn TV	Y	Y
Deadloch	Guesswork Television Pty. Ltd., Amazon Studios, Ok Great Productions	Amazon Prime		N
Faraway Downs	Bazmark Film Pty Ltd	Disney+		N
Firebite	See-Saw Films Pty Ltd	AMC+	Y	N
Five Bedrooms series 3	Hoodlum Active Pty Ltd	Paramount+	Y	N
Five Blind Dates	Goalpost Pictures Australia Pty Ltd, Amazon Studios	Amazon Prime		N
Heartbreak High	Fremantlemedia Australia Pty Ltd, NewBe	Netflix	Y	N
Irreverent	Matchbox Productions Pty Ltd	Netflix		N
Koala Man	Princess Bento Studios, Bento Box Entertainment	Disney+		N
Last King of the Cross	Helium Pictures Pty Ltd	Paramount+		N
The Lost Flowers of Alice Hart	Made Up Stories Pty Ltd, Amazon Studios, Endeavor Content	Amazon Prime		N
Love Me series 1	Warner Bros. International Television Production Australia Pty Ltd	Foxtel	Y	Y

Perfect Pairing, A	Hoodlum Entertainment and Hoodlum Active Pty Ltd	Netflix	Y	N
Poker Face	Arclight Films International Pty Ltd	Stan		N
A Royal in Paradise	The Steve Jaggi Company	TBA		N
The Secrets She Keeps series 2	Lingo Pictures Pty Ltd	Paramount+	Y	Y
Spreadsheet series 1	Northern Pictures Productions Pty Ltd	Paramount+	Y	Y
The Twelve	The Twelve Films Pty Ltd, Warner Bros. International Television Production Australia Pty Ltd, Easy Tiger Productions Pty Ltd	Foxtel	Y	Y
Upright series 2	Lingo Pictures Pty Ltd	Foxtel		Y
Wellmania	Fremantle Australia	Netflix		N
YOLO: Silver Destiny series 2	Princess Pictures Pty Ltd, Club World Pty Ltd, Koala Man Pty Ltd	The Cartoon Network (USA)		N

¹Titles marked Y received Screen Australia production funding.

AUSTRALIAN GENERAL AVOD, TVOD AND OTHER DRAMA

Title	Production company	First release broadcaster	Premiered as of Oct 2022	SA funded ¹
1 For All series 4 & 5	Deerstalker Pictures Pty Ltd	YouTube	Y	Y
2 Street 2 Racer	One Stone Pictures Pty Ltd	YouTube	Y	Y
The Emu War	Hot Dad Productions Pty Ltd	YouTube		Y
Flats	Princess Pictures Holdings Pty Ltd	YouTube		Y
Hot Department: Dark Web	Haven't You Done Well Productions Pty Ltd	YouTube	Y	Y
Krystal Clairvoyant	Example Content Pty Ltd	TikTok		Y
Meta Runner - The Final Season	Glitch Productions Pty Ltd	YouTube	Y	Y
No Ordinary Love	No Ordinary Love Productions Pty Ltd	YouTube	Y	Y
Sonia & Cherry series 2	Cloudberry Films Pty Ltd	YouTube/ Facebook	Y	Y

¹Titles marked Y received Screen Australia production funding.

AUSTRALIAN CHILDREN'S TV AND VOD DRAMA — DOMESTIC

Title	Production company	Online streaming service	Premiered as of Oct 2022	SA funded ¹
100% Wolf: The Book of Hath	Flying Bark Productions Pty Ltd	ABC		Y
Barrumbi Kids	Ambience Entertainment Pty Ltd, Tamarind Tree Pictures Pty Ltd	NITV		Y
Beep and Mort	Windmill Pictures Pty Ltd	ABC	Y	Y
Crazy Fun Park	Werner Film Productions Pty Ltd	ABC		Y
First Day series 2	Epic Films Pty Ltd	ABC	Y	Y
First Responders	Back To Back Pictures Pty Ltd	ABC	Y	Y

Ginger and the Vegesaur series 1	Cheeky Little Media Pty Ltd	ABC	Y	Y
Gymnastics Academy: A Second Chance!	Glenpictures Pty Ltd, Maximum Effort Productions Pty Ltd	Netflix	Y	N
Kangaroo Beach series 2	Cheeky Little Media Pty Ltd	ABC		Y
The PM's Daughter series 1	Fremantlemedia Australia Pty Ltd	ABC	Y	Y
Rock Island Mysteries series 1	Fremantlemedia Australia Pty Ltd	10	Y	Y

¹Titles marked Y received Screen Australia production funding.

FOREIGN TV AND VOD DRAMA

Title	Production company	Type
Joe vs. Carole	Universal Studios International	VOD
La Brea series 2	LAB Productions, Matchbox Pictures Pty Ltd, NBCUniversal	TV
Nautilus	Moonriver TV, Seven Stories	VOD
Ten Pound Poms	Stan, Curio Pictures Pty Ltd, Eleven	VOD
The Woman Who Ate Photographs	Made Up Stories Pty Ltd	VOD
Young Rock series 2	Universal Studios International	TV

FOREIGN TV & ONLINE DRAMA: PDV ONLY*

Title	Production company
Andor	Lucasfilm
Animaniacs	Ink Animation Pty Ltd
Baby Alive! series 2	eOne, Hasbro
Beavis and Butt-Head	Titmouse, MTV Entertainment Studios, Judgmental Films, 3 Arts Entertainment
Being the Ricardos	Amazon Studios, Escape Artists, Big Indie Pictures
Boo!	Ugly Baby Productions
Chupa	26th Street Pictures
Echo	20th Television, Disney+, Marvel Studios, Walt Disney Pictures
Go Buster! Christmas Special	Moonbug Entertainment
Hazbin Hotel	A24, SpindleHorse Toons
Hocus Pocus 2	David Kirschner Productions, Walt Disney Pictures
Ivy + Bean	Kindle Entertainment
Leave The World Behind	Netflix Studios
LOL House of Surprises series 1	MGA Entertainment
Lost Ollie	21 Laps Entertainment, Flight School Studio, Industrial Light & Magic (ILM), Netflix
Matilda	Working Title Films, Netflix, TriStar Pictures
Mermaze Mermaids series 1	MGA Entertainment
Mia and Me series 4	M4e, Hahn Film AG, Lucky Punch, March Entertainment, Zweites Deutsches Fernsehen
Monkie Kid series 3	Flying Bark Productions, LEGO, Salami Studios
Moon Girl and Devil Dinosaur	Cinema Gypsy Productions, Disney Television Animation, Flixzilla Aura, Marvel Animation, Marvel Entertainment, Marvel Family Entertainment

Obi-Wan Kenobi	Lucasfilm, Walt Disney Pictures
Rainbow High series 3	MGA Entertainment
Rise	Faliro House Productions, Walt Disney Pictures, Walt Disney Studios
Rise of the Teenage Mutant Ninja Turtles: The Movie	Paramount Pictures, Nickelodeon Animation Studios, Skyline Entertainment, Zilam Animation
See series 3	Chernin Entertainment, Endeavour Content
Star Wars: Visions	Lucasfilm
Ted	Fuzzy Door Productions, MRC Television, Media Rights Capital (MRC), Universal Content Productions (UCP)
The Greatest Beer Run Ever	Apple TV
The Nevers series 2	Mutant Enemy Productions, Home Box Office (HBO)
The Parenting	Good Fear Content, New Line Productions
Uglies	Anonymous Content, Davis Entertainment, Industry Entertainment, Wonderland Pictures
Under the Banner of Heaven	Aggregate Films, FX Productions, Imagine Entertainment, Imagine Television
We Will Be Monsters	Universal Pictures
What If...? series 2	Marvel Studios, Flying Bark Productions

*One title is not for publication due to confidentiality reasons

Methodology

Faster internet access, advanced screen options and international competition are changing audience behaviour and content production and distribution. Over time, the following methodology changes have been made to the Drama Report to ensure it remains relevant to the sector. It is advised that these be taken into consideration when undertaking any analysis of time-series data sets:

Log of changes to Screen Australia's Drama Report

Years affected	Revision	Detail
2015/16 and prior	Duration	Eligibility for inclusion was 60 minutes or longer
	Online drama	Titles made for either a subscription VOD platform or ABC iview were counted as TV drama. Projects were excluded if they were: <ul style="list-style-type: none"> • exclusively released on dedicated websites • exclusively released on online platforms such as YouTube or Vimeo • only available via transactional services such as iTunes.
2016/17 to current	Duration	Eligibility for inclusion for TV and online titles revised to 30 minutes or longer to accommodate a growing number of short-form drama series, particularly comedy.
2016/17 to 2020/21	Online drama	Online drama category introduced, encompassing single episode or series programs with total durations of 30 minutes or more that have premiered in Australia online via: <ul style="list-style-type: none"> • SVOD (e.g. Stan) • BVOD (e.g. ABC iview) • AVOD (e.g. YouTube) • TVOD (e.g. iTunes). Titles with a simultaneous TV broadcast and online release were accounted for as TV drama.
2021/22	Australian broadcaster and online drama	Reclassification of Australian drama titles. New categories introduced for TV and VOD titles (see page 15 for further detail): <ul style="list-style-type: none"> • Australian general FTA TV and BVOD • Australian general Subscription TV and SVOD • Australian general AVOD, TVOD and other online services • Children's TV and VOD drama. Additionally, the 'Australian feature' category was retitled 'Australian theatrical features', clarifying it includes films made for first release in cinemas.

- Compiled by Screen Australia using production data gathered by the Strategic Policy and Industry Insights Unit through contact with production companies and from publicly available sources. PDV data is gathered through surveying PDV companies.
- Decisions to classify titles into various datasets in this report are made by Screen Australia's Strategic Policy and Industry Insights Unit, and should not be interpreted as reflecting any decision from Screen Australia's Producer Offset unit.
- The following federal, state and territory government funding agencies have provided data on titles they have funded and, in the case of state and territory agencies, titles shot and/or post-produced in their state: Screen Australia (including the former Film Finance Corporation Australia and the Australian Film Commission), Screen NSW, VicScreen, South Australian Film Corporation, Screen Queensland, Screenwest, Screen Tasmania, Screen Canberra and Screen Territory.
- In some cases, estimates have been made where data was not available. This includes projects where work is yet to be finalised at the time the report is drafted. Total budgets, amount spent in Australia and finance sources reflect data available at the time of production and may change as titles near completion.
- Data is updated on an ongoing basis when possible, with the result that some discrepancies with previously published reports may appear. The discrepancies reflect new information or adjustments to methodology. For example, some titles in the 2020/21 dataset were yet to finalise production and post-production at the time of the compilation of the 2020/21 report, and revisions have been made where possible in this report.
- Foreign projects are included in the report when a substantial amount is shot in Australia or when PDV work is undertaken in Australia. Foreign shoot figures exclude those titles that spend less than 10% of their total budgets in Australia.
- Features with budgets under \$500,000 are only included if they have had a cinema release or screening at a major festival. These titles are often added to the relevant production year data within future Drama Reports.
- Spend in Australia may include some expenditure on foreign production elements — for example, fees for non-Australian actors or other individuals while working in Australia. Likewise, spend in a particular state or territory may include fees for elements from outside the state or territory, such as foreign or interstate cast or crew.
- When analysing sources of finance, the ABC and SBS are categorised as screen industry, rather than as government sources. This reflects industry perception of the public broadcasters as part of the broadcast sector rather than government screen agencies. In addition to the federal, state and territory screen agencies, government sources may include direct finance from other government agencies and departments, including the ACTF, and the Adelaide and Melbourne Film Festival Funds.
- Funding figures from government agencies may not correlate with the figures in this report because this report includes projects according to the start date of principal photography, rather than contract dates.
- Data in this report regarding contributions to drama by content platforms may not correlate with expenditure reported by the ACMA in the Program Expenditure Information (PEI), Broadcasting Financial Results (BFR) or Spending by Subscription Video-On-Demand Providers reports. This report analyses finance sources in place at the start of production. The PEI reports expenditure by the commercial free-to-air broadcasters on screened programs during the year, and includes amortisation costs for programs purchased in previous years and programs purchased after completion. For subscription TV, the ACMA reports annual expenditure by drama channels on 'eligible Australian drama', including licence fees, production expenses and limited pre-production costs. Expenditure on features may be apportioned across financial years. Data on spend by SVOD providers reports expenditure in a given year, including on acquisitions of older content, and also includes spend on non-drama programs such as documentaries, light entertainment and reality television. The Drama Report also differs from the ACMA's reports on commercial television compliance with Australian content requirements, which classify titles based on their broadcast date on commercial networks – as opposed to the Drama Report, which classifies titles on the date they commenced production. Readers should also note the ACMA's treatment of indexation, and note that ACMA data can include expenditure on New Zealand programs. Public broadcasters are not required to report Australian content information to the ACMA.
- Sketch comedy programs are included in line with ACMA's definition of TV drama under the Australian Content and Children's Television Standards.
- In categorising titles as either mini-series or series, Screen Australia has followed the definitions set out in Division 10BA of the Income Tax Assessment Act 1936 (Cth).
- Series of, or related, telemovies are counted as individual titles, as set out in a broadcaster's licence agreement.
- Durations for individual free-to-air and BVOD programs have been rounded to the nearest commercial broadcast hour (15, 30 or 60 minutes as appropriate) including commercial breaks. Subscription TV, SVOD, TVOD, AVOD and other online programs report actual running time, or as provided by survey respondents.
- In 2021/22, the cost-per-hour for TV and VOD programs was rounded to one decimal place rather than three, as in previous years, to reflect the role of estimations and approximations within datasets.
- Figures may not total exactly due to rounding.
- Release strategies for titles reflect information available to Screen Australia at the time of publication.
- The listing of Screen Australia funded titles reflects information as at November 2022.



Australian Government

