

Measuring the Cultural Value of Australia's Screen Sector

A report presented to Screen
Australia by Olsberg•SPI



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1. EXECUTIVE SUMMARY

This study highlights a range of different values for Australian screen content, noted by both domestic and international audiences. These results have been generated through a variety of different techniques, including qualitative and quantitative approaches, and underline the depth, breadth, and diverse value which Australian screen content delivers around the world.

1.1. A Diverse Range of Interests

One of the strengths of Australian screen content is its diversity of style and subject matter. This is highlighted by the fact that 1,049 survey respondents, when asked to name important pieces of Australian content, identified 271 separate pieces of content or content types. Those pieces named covered a broad range of films and TV programs – from cult classics such as *Crocodile Dundee* to TV soaps such as *Home and Away* to socio-historical films such as *Rabbit-Proof Fence* to current affairs programs such as *Four Corners* to the genre of natural history documentaries.

The titles named by international survey respondents showed a broad overlap with those identified domestically, suggesting a strong, common understanding of what Australia is. This helps to achieve international cultural impacts and soft power, as the *Mad Max* and *Crocodile Dundee* franchises – two of those identified – can only impact on international understanding of Australia if they are recognised as Australian. Supporting this, over 60 per cent of respondents considered that Australian content is fairly, very or completely different from other countries' screen content.

1.2. A Preference for Local Stories

Despite the vast range of imported programs on Australian screens (large and small), and their large production and marketing budgets, Australians surveyed expressed a strong preference for local content. Only 2% said that they don't watch Australian content, while 64% said that local content accounted for up to half of their media diet, and 22% reported that most or all of their viewing was Australian.

35% of respondents said they were more likely to watch a program if it's Australian, compared to 14% who stated that they were less likely, dovetailing with previous research which identified the strong cultural distinctiveness of domestic production. This 'self-recognition' is a key part of engaging production, and is something which Australian-produced content can achieve that American programmes and films (for example) cannot.

People who were most actively engaged with online viewing were also generally high consumers of screen content. Their views on the distinctiveness of Australian content and their likelihood of engaging with it were comparable with the wider group.

1.3. Demonstrating Cultural Value

Cultural value manifests in a range of ways, many of which are not so easily quantified through surveys.

The important 1981 feature film *Gallipoli* is a strong example of this, and demonstrates how screen content has helped to shape national understanding of Australian identity. As an early example of a film that established mainstream representation of the spirit of mateship, courage, larrikinism and good humour that has now become ubiquitous, it had a major impact on the Australian population's understanding of their own history.

At the time of production, the director Peter Weir felt that understanding and awareness of ANZAC was diminishing in Australian culture, noting that he "was [part of] the last generation where the battle was taught as sacred. Today, kids [in the early '80s] think of [ANZAC] as a joke." The film is seen as having refocused the cultural conversation on the soldier's sacrifice and the importance of ANZAC in Australia's national identity, whilst simultaneously launching the international career of Weir, and boosting that of actor Mel Gibson.

The film helps to underline the three ways in which productions can generate cultural impact which we use in this report, as it:

- had direct social or economic impacts, or instrumental value. *Gallipoli* demonstrated this by helping to define the Australian self-identity, and in launching the international careers of Peter Weir and Mel Gibson.
- enabled an organisation, a government or a country to gain the trust and esteem of the public, which we consider institutional value. *Gallipoli* demonstrated this by re-establishing respect for ANZAC and Australia's contribution to the Gallipoli Campaign.
- brings value to individuals in a society by giving them a way to engage with ideas and aesthetic excellence, known intrinsic value. It's highly subjective so can be harder to evaluate. Some of the ways that *Gallipoli* showed such value were through its moving story, and its iconic imagery and music.

Many pieces of screen content similarly demonstrate various combinations the outlined cultural value categories, including *Rabbit-Proof Fence*, *First Australians*, and *The Sapphires*.

1.4. Generating Artistic and Instrumental Value

Rabbit-Proof Fence was not only well-received for artistic reasons, it is also considered an important mainstream depiction of the experience of the Stolen Generations and was the first to bring these issues to an international audience. Leading American critic Roger Ebert said in his positive review of the film that "not since the last shots of *Schindler's List* have I been so overcome with the realisation that real people in recent historical times had to undergo such inhumanity."

This production demonstrates the unique ability of Australian film to generate long-term cultural value, telling stories which are repeated, and which help to bring about change in the way Australia sees and runs itself, and the way the rest of the world sees Australia. Indeed, such films and TV series often become part of the teaching around such issues following their initial broadcast, a factor shown not only by *Rabbit-Proof Fence* but also other notable productions like *First Australians*.

More recently, films such as *The Sapphires* have also explored the treatment of Indigenous Australians, framing this within a familiar context to audiences – the Vietnam War – and generating instrumental value as a result.

1.5. Generating Social Understanding

Popular screen content frequently informs and challenges audiences, while also entertaining them. Challenging social commentary is presented in a way that engages viewers and helps to inform the audience's perception of a changing society. Australian TV has taken on an almost unique role in driving the debates about Australian history through the medium of drama and comedy. Though such a trend is also seen in other countries, the depth and

frequency with which it occurs in Australia is unusual, and underlines a deep and important role for TV in shaping the national conversation and society itself.

A Country Practice (1981 – 1994) introduced a range of tricky issues including drug addiction, HIV/AIDS, and the place of Aboriginal people in contemporary Australian society, all of which were brought into the nation's living rooms through the highly popular and accessible commercial program. This has been succeeded by productions like *Please Like Me* (2013 to present) which addresses issues such as homosexuality and mental illness, as well as *Here Come the Habibs* (2016 to present) and *Go Back to Where You Came From* (2011 to 2015), which consider inter-cultural relations through different frameworks. All of these have helped to generate discussion within Australia, creating a platform for future public discussion of these important issues.

1.6. Explaining Australia Internationally

As the survey data highlighted, Australian screen content provides a unique avenue for international 'soft' power, presenting aspects of our country and culture, and promoting an understanding of and openness to Australian values.

Australia's two long-running serials (*Home and Away* and *Neighbours*) are popular overseas – particularly in the UK – and were strongly recognised by international survey respondents. Natural history programs were also identified as a valuable program category, underlining not only the value of Australia's diverse natural landscape in the eyes of foreign audiences (and potentially associated tourism impacts), but also the value of these programs in educating and entertaining.

Centring on five women running a cattle station in rural South Australia, *McLeod's Daughters* (2001-2009) presents a positive representation of women in the Australian outback. In addition to its strong ratings and awards success over multiple seasons, it sold widely internationally and garnered a fanbase in a range of countries including the US, Canada and Ireland. It has since been made available on Netflix in the US and was cited by a number of survey respondents – particularly international ones – as being a piece of Australian content with value. Its international impact has helped to generate a positive perception of Australia and its natural landscape, and the ongoing benefit of continuing tourist visits to the show's location, now a popular destination on the back of the show's success.

Several recent quality TV dramas have also generated strong export sales and further soft power impacts, while Australian-generated formats – including *Go Back to Where You Came From* and *My Kitchen Rules* – are increasingly generating international sales.

1.7. Bringing Indigenous Stories to a Wider Australian Audience

Indigenous Screen Content plays a unique role in engaging the wider Australian audience with the stories and traditions of Australia's diverse Aboriginal and Torres Strait Islander communities. Such content runs from the recording of traditional Songlines via the *Songlines on Screen Project* to the creation of the ground-breaking *First Australians* documentary – both of which created a range of underlying content for Indigenous communities – to popular drama.

Redfern Now is a strong example of this, being a critically-acclaimed, nuanced portrayal of the inner-city Sydney suburb of Redfern, which covered a range of socially-challenging topics, but in doing so generated notable impacts on understanding. The show, furthermore, was created with an all-Indigenous cast and crew, generating career opportunities which – for one

of the directors, Catriona McKenzie – have already led to an attachment on Ridley Scott's next film.

1.8. Preserving Australia's Other Stories

Documentary content uniquely spans the history of the medium, and of the Australian Commonwealth - a film of the 1896 Melbourne Cup was made less than 12 months after the Lumiere brothers' first demonstration of cinema. Since then, documentaries have helped people understand the diversity of the country, and recorded and preserved the changing face of the Australian nation and its people. Content has ranged from the recording of Federation in 1901, Shackleton's 1914-16 expedition, Frank Hurley's records from the front lines of the First World War and the 1957 television documentary *Manslaughter*, examining the conditions for Indigenous communities living near the Maralinga nuclear test range, and fostering movements to change the laws governing Indigenous Australians.

Australian documentaries have a long tradition of social impact. In recent years, filmmakers have maximised this through initiatives including crowdsourcing and social impact funds such as Documentary Australia Foundation (DAF) and Good Pitch, which connect projects and their associated outreach campaigns with philanthropic investment and distribution opportunities. Recent examples, including *That Sugar Film*, *Gayby Baby*, and *Prison Songs*, have gone well beyond their original cinematic releases to reach wide new audiences through community, education and workplace screening programs.

1.9. Educating Australia's Children

Children's TV has a particular ability to educate its viewership about the world around them, and there is in general a strong preference for domestic productions. Our evidence demonstrates this occurring within Australia, where a range of content – from *Paper Planes* to *Little Lunch* – have performed strongly in recent years. Both of these pieces of content help to educate children about important issues, including responding to grief, understanding media, and sharing, aiding their future development as citizens.

Dance Academy has been a particular success in recent years, both in terms of its impacts as a programme, and for the way in which it has helped the development of its actors. Set in an iconic Sydney Harbour setting, the programme addresses a range of key issues such as eating disorders, bullying, and sexuality of significant importance to the target group, and has proved highly successful in domestic and international markets as a result of this and its engaging content. Partially as a consequence of this, the young Australian stars of the programme – which is now being adapted as a film – have been picked up for Hollywood productions like *The Flash* and *Point Break*, introducing a new generation of Australian actors to the wider world.

2. INTRODUCTION

2.1. Aims of this Report

In commissioning this report, Screen Australia was seeking a credible, comprehensive assessment of the cultural value of Australia's screen media sector, to sit alongside an evaluation of the sector's economic value, being separately conducted by Deloitte Access Economics ("DAE"). This document represents the final deliverable in this study, and will bring together the body of evidence Olsberg•SPI has collated and analysed for this report, explaining for the reader how this identifies, describes, and assesses the cultural value of these industries.

This report considers two key overarching sectors – film and television – which are defined in section 2.2, below. Within these, we have identified a range of cross-cutting themes worthy of separate analysis – documentary, children's content, and Indigenous content, each of which are considered separately in the chapters that follow. Multiplatform drama is an emerging area of value for content, but given the limited available data for this, we have chosen to address it within the TV chapter of the report, as this is where it most comfortably sits; in future, though, this is likely to require a separate chapter.

In undertaking this project, we have adopted a range of different techniques and approaches, each of which allows us to consider different elements of cultural and audience value. These are addressed within the context of a framework, described in section 2.3, below, which considers the instrumental, institutional, and intrinsic value of the various content types produced in Australia. Within this framework, the audience is a key participant, given that without their engagement with the content, any cultural impact is necessarily impossible.

By using a variety of techniques, we are able to undertake a broad survey of the cultural value of Australian content, and to begin to compare the impact of one piece of content with another. As an example of this, *Crocodile Dundee* will impact people very differently from *Here Come the Habibs*, but our data show that both are important in describing Australia to the Australian public.

2.2. Defining the Study Sectors

In order to address the value of the Australian screen sectors, we first need to define these; for the purposes of this report, the definition will be similar to those adopted by DAE in their economic analysis, but not identical. As noted above, the two key parts of the screen sectors to be considered are film and TV, defined respectively as:

- Film – long-form productions originally created for theatrical release, but including their downstream impacts on other formats, such as TV, home media and Video on Demand ("VoD")
- Television – productions of any length originally created for distribution on TV, also including their downstream impacts on VoD or home media; this section will also include multiplatform drama

The chapters relating to these elements will primarily address scripted fiction productions created for TV and cinematic release, respectively, but will also consider other elements of the sector – such as news – where appropriate.

Cutting across these areas, there are three themes which require separate analysis, based on their separate value for the Australian production sector, or their distinct cultural value and goals; these are:

- Documentary – covering both film and TV productions which are aimed at documenting one or more aspects of reality, primarily for the purpose of informing, preserving, or educating
- Children's content – film and TV productions aimed at a younger audience, reflecting the particular needs and educational opportunities for this demographic
- Aboriginal and Torres Strait Islander content – film or TV productions made under the creative control of Australians of Aboriginal or Torres Strait Islander descent, whether fiction or documentary

Our analysis of these elements will primarily be focussed within their own chapters of the report, but we will not exclude case studies or commentary from the broader sectoral chapters because they fit into one of these three categories.

2.3. Analysing Cultural and Audience Contributions

In this report, there are no commonly agreed frameworks considered for the aggregation of a single, all-encompassing perspective on the cultural and audience values of the products. Nonetheless, we consider the use of certain existing models to be valuable in helping to organise the evidence we have gathered and created during this project.

Foremost among these is the model proposed by John Holden at the independent think tank Demos, which describes the three kinds of value culture has as instrumental, institutional, and intrinsic. Within these:

- Instrumental describes the social and economic uses of cultural value, for example how culture can be used in tackling social exclusion;
- Institutional highlights how organisations can gain the trust and esteem of the public by user engagement; and,
- Intrinsic represents the unique value of culture as a sector, and is by its nature hard to define – O'Brien describes this as being "associated with ideas of aesthetic excellence and individual enjoyment. Intrinsic value is therefore highly subjective and is hard to fit into the language of outputs and outcomes associated with Holden's other two types of value."¹

While this is, on its own, by no means a perfect model – indeed, it has been criticised by other researchers – we have found that this is still a useful approach to take in analysing the various contributions that we note. Specifically, it is accurate to say that people do not, in general, access media for the purposes of secondary impacts: typically, they do it to be entertained or, in some cases, educated. Nevertheless, it is clear from research conducted by Screen Australia (among others) that such media plays an important role in shaping perceptions of Australia around the world.

In this regard, the role of Australian screen culture in building interest and trust in Australia abroad – so-called 'soft power' – can be seen as an institutional value derived from these products. Meanwhile, the role of the screen sectors in shaping the "reflective individual and the engaged citizen" described by Crossick and Kaszynska can be seen as an instrumental outcome.² The particular element of this described by Crossick and Kaszynska can, for example, be seen clearly in the role of children's television – analysed in detail below – in shaping future generations.

¹ O'Brien, D., *Measuring the value of culture: a report to the Department for Culture Media and Sport* (2010) p. 18

² Crossick, G., and Kaszynska, P., 'Under construction: Towards a framework for cultural value', in *Cultural Trends*, vol. 23, no. 2 (2014) p. 125

Intrinsic value is, as O'Brien notes, an altogether slipperier concept, but nonetheless one where we have attempted to build an evidence base. Primarily, such evidence has come through the construction of case studies, via desk research and consultations. In addition, it may be perceived that the various consumer surplus analyses contained within this report also highlight elements of intrinsic value, by revealing consumer preferences not directly demonstrated through market pricing.

3. SURVEY RESULTS

3.1. Overview of Survey

As part of the research for the Economic Impact report which is a companion to this piece, DAE conducted a survey into which SPI placed some questions, to help identify the response of the Australian audience to Australian content.

These questions considered:

- Where and how Australians engage with screen content;
- For what amount of time per week;
- What preferences they had in terms of genre;
- How distinct they find Australian content to be;
- What percentage of their content viewing time was spent on Australian content; and,
- Whether they were more or less likely to view content they knew to be Australian.³

In addition to this, both this Australian sample and a number of non-Australian respondents – from the UK, USA, Canada and New Zealand – were asked to identify the three most culturally impactful pieces of Australian content that they were aware of.

Such data demonstrates how different groups engage with content, and how much of the content they engage with is Australian. By doing so, it allows us to identify where domestic – and international – audiences draw the most value from Australian screen productions, as well as the pieces of content that they consider to be most impactful.

In total, 928 Australians and 121 international participants responded to the survey. The Australian respondents were sampled from a wide range of demographic, geographical, and age backgrounds, and therefore present a representative sample of the Australian population.

3.2. Domestic Response

In order to analyse the data generated by this survey, we have broken down the data by question, cross-referencing this against the age range of the respondent. This approach allows us to identify the different ways in which the evolving Australian audience engages with the content available in the Australian market.

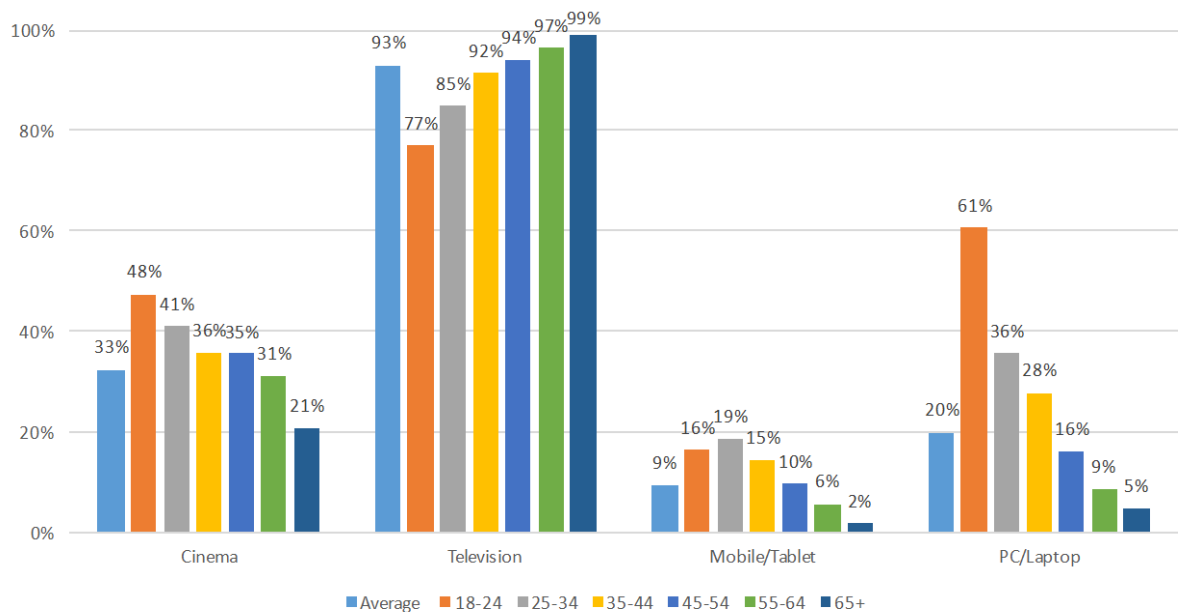
These data are presented and analysed below, with the exception of the time of engagement question, which will be addressed in the film and TV chapters which follow

3.2.1. Location of Engagement

The first key datapoint from the survey considered whether Australian respondents had engaged with screen content in the cinema, on television, on a mobile phone or tablet, and on a PC or laptop over the past week (Figure 1, below).

³ A question relating to the production value of Australian content was also asked, but the spread of answers showed this was not understood; as a result, our analysis of this is not presented in this report

Figure 1 - How Australians Engage with Screen Content



The graph above shows what percentage of each demographic group have engaged with each form of content in the week before they took the survey, and highlights the differing form of content engagement used by each age group.

Unsurprisingly, television is the most frequently used platform for content for each age group, with 93% of all respondents – and 99% of those over the age of 65 – having watched TV in the week prior to the survey. This aligns with previous conclusions on the subject.

However, the differences between the age groups are significant. 77% of 18-24 year olds had watched TV in the week prior to the survey, the smallest part of any demographic band, and only marginally more than the percentage of the group who had used a PC or laptop to view content in the previous week.

This underlines the changing face of content viewership in Australia, with the 18-24 age group – and to a lesser degree those aged 25-34 – using digital forms much more than their older compatriots.

The cinema is the exception to this. Overall, 33% of respondents stated that they had been to the cinema in the past week, a number which correlates with prior studies of the issue. However, the most likely group to visit the cinema were those in the 18-24 age group, with propensity to go to a cinema decreasing with older age groups.

Such trends are observed in other parts of the world, reflecting the social quality of a cinema visit, but were deemed unexpected by Australian consultees. By contrast, the low percentage of over-65s going to the cinema is unusual – in many English-speaking countries, the cinema offer increasingly targets this age group, given their increasing disposable incomes and free time.

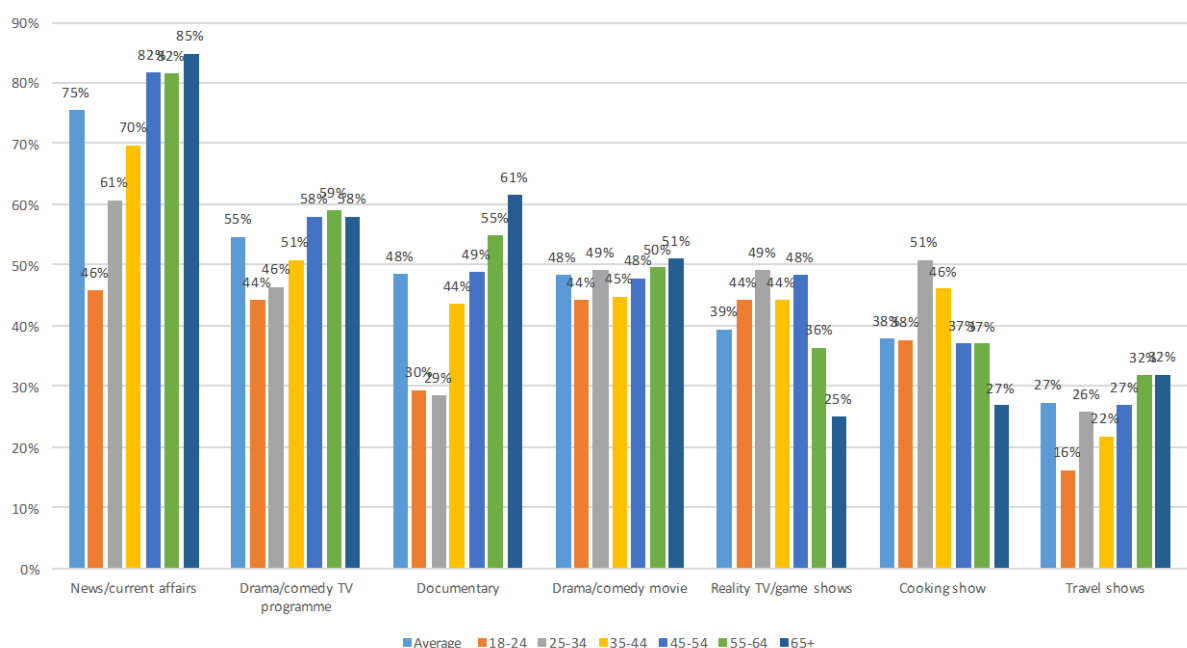
Taken as a whole, these data underline the fact that television is the medium through which Australians engage the most with screen content, followed by cinema and emerging digital models. Such headline data however mask a wide variety of media use in different demographic bands, with the youngest of the age groups both more likely to go to the

cinema, and far more likely to access content through an over-the-top model (for example, Netflix). Such choices will colour the way in which cultural value is generated – while the greatest value will be found in the TV market, different media will deliver cultural value to different parts of the demographic spectrum.

3.2.2. Preferred Genres

The survey participants were asked about their preferences in terms of the genre of programmes they preferred to watch (Figure 2). This also highlighted a significant demographic split in preferences, with a strong preference from the older respondents to news, current affairs and documentary, while the younger generations favoured reality TV, game shows, and cooking programmes.

Figure 2 - Genre Preferences of Survey Respondents



News and current affairs represented the largest single response, with three quarters of those taking the survey stating it as a genre preference. This masked a major demographic split within the data, though, as only 46% of 18-24 year olds stated it as a preference, compared to 85% of over-65s.

A similar split was identified within the documentary genre, which ranked third among survey respondents. Again, the older generations were much more interested in the genre than younger respondents. Comparable patterns are seen in the travel show segment, though the overall number of people noting a preference here is far lower.

In comparison to this, reality TV, game shows, and cooking shows show a far greater percentage engagement among younger demographics, particularly those in the 25-34 and 35-44 age groups. This correlates with other data on this issue, including viewing figures, within which such content ranks strongly in the younger age groups.

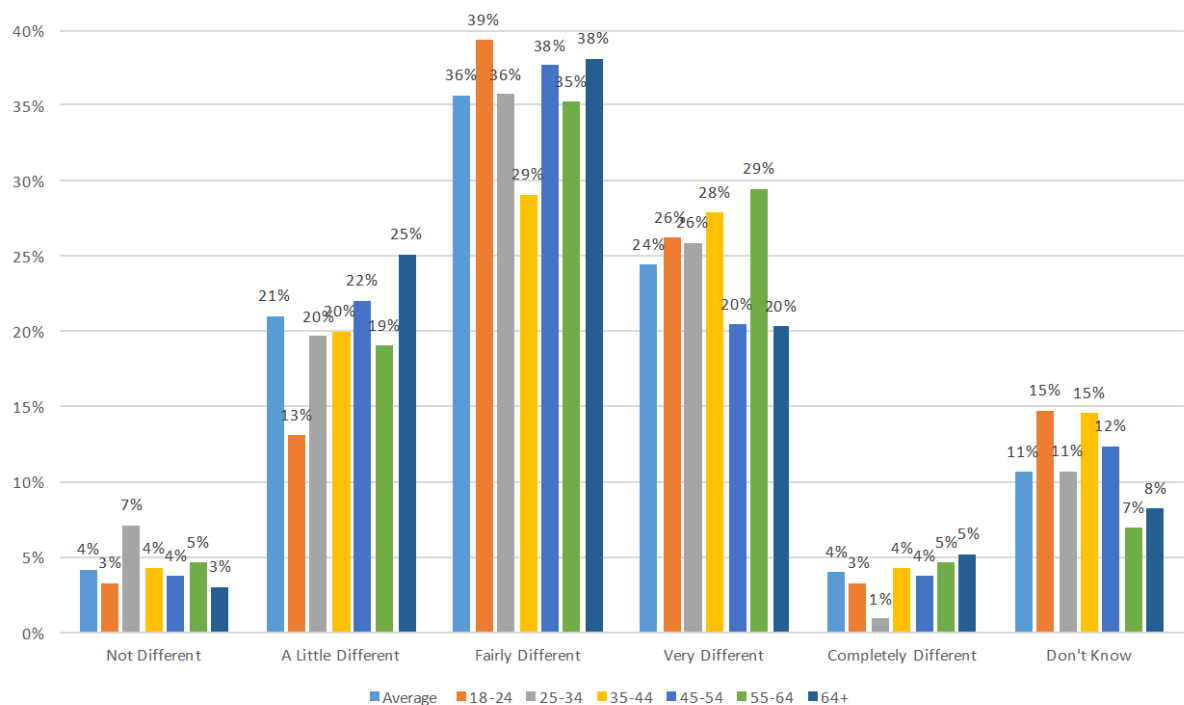
Drama and comedy – both for TV programmes and movies – are the genres in which the demographic split between age groups is narrowest. From the perspective of cultural impact,

this is a positive as such programmes tend to be the most culturally distinct, and this is a conclusion which is drawn out through other data collected in the survey.

3.2.3. Distinctiveness of Australian Content

Respondents were asked how distinct they considered Australian content to be in relation to other international programmes and movies available (Figure 3).

Figure 3 - Distinctiveness of Australian Content



There was little differentiation between the age groups within this question, with a broad majority (60%) of all demographics considering that Australian content is fairly or very different.

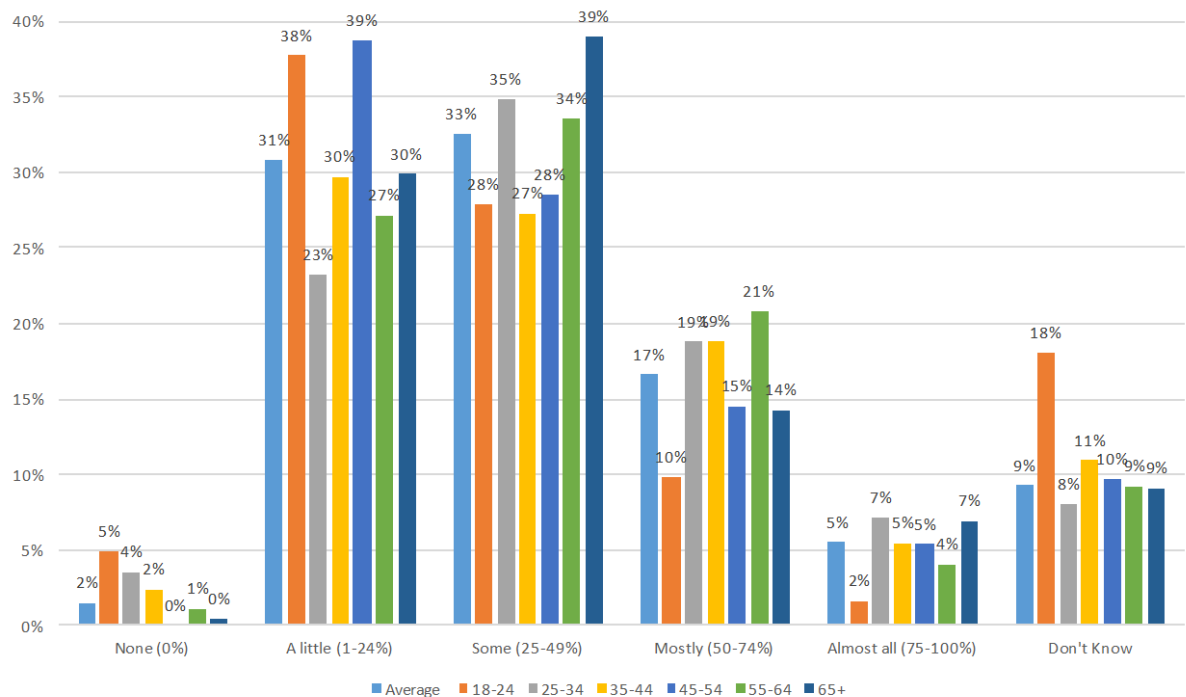
This ability to differentiate is crucial to achieve cultural impact. Whereas cultural impact can occur even if content is not recognisable of a location or origin, without the ability to distinguish the genesis of content, such value cannot generate impacts for the country of origin. As an example of this, the soft power impacts for Australia of a franchise like *Mad Max* or *Crocodile Dundee* would be significantly limited if such content was not recognised as distinctively Australian.

3.2.4. Engagement with Australian Content

In order to build upon this, Australian survey respondents were asked about their viewing choices for Australian screen content. This considered two questions:

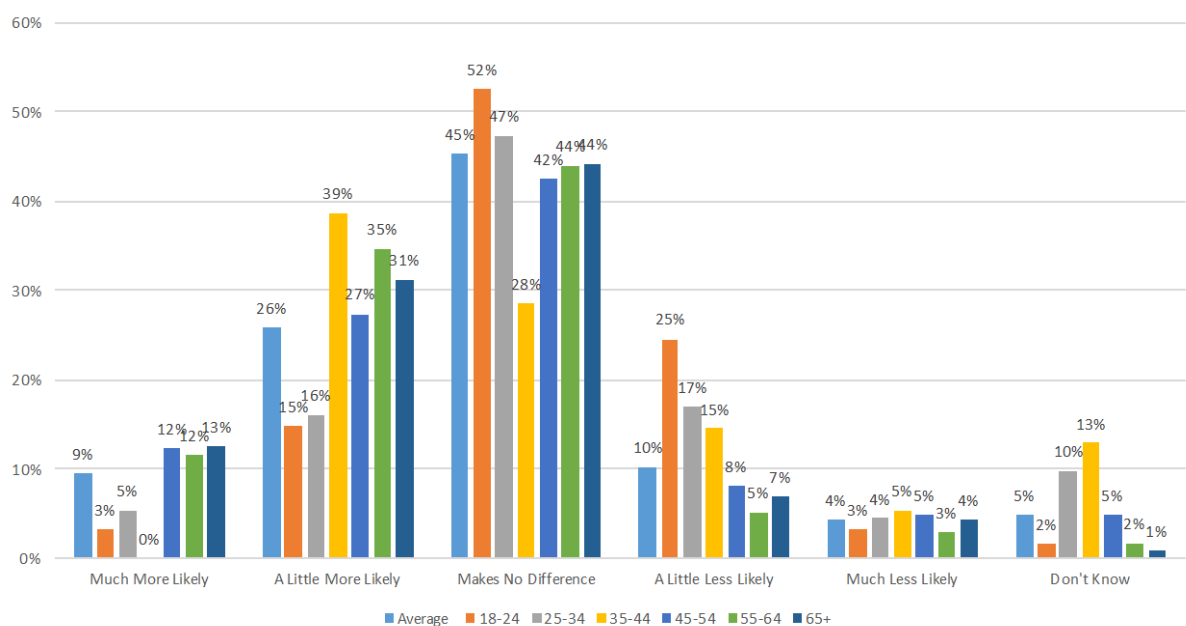
- What percentage of their total content consumption was Australian in origin (Figure 4); and,
- Whether the fact that a piece of content was Australian made them more or less likely to watch it (Figure 5)

Figure 4 - Amount of Australian Content Watched



Overall, 50% of respondents reported watching some (25-49% of viewing time) or mostly (50-74%) Australian content, with a minor bias toward older generations watching more domestic screen content than younger generations. Around a third of respondents reported watching a little Australian content (1-24%), with few people taking a position at either extreme.

Figure 5 - Impact of Australian Content in Viewing Decisions



When asked whether the fact a piece of content was Australian made them more or less likely to watch it, more than a third of respondents (35%) stated that it was a little or much more likely that they would watch. These data were slightly more biased towards older age groups,

with 28% of 18-24 year olds stating that they would be a little or much less likely to watch Australian content.

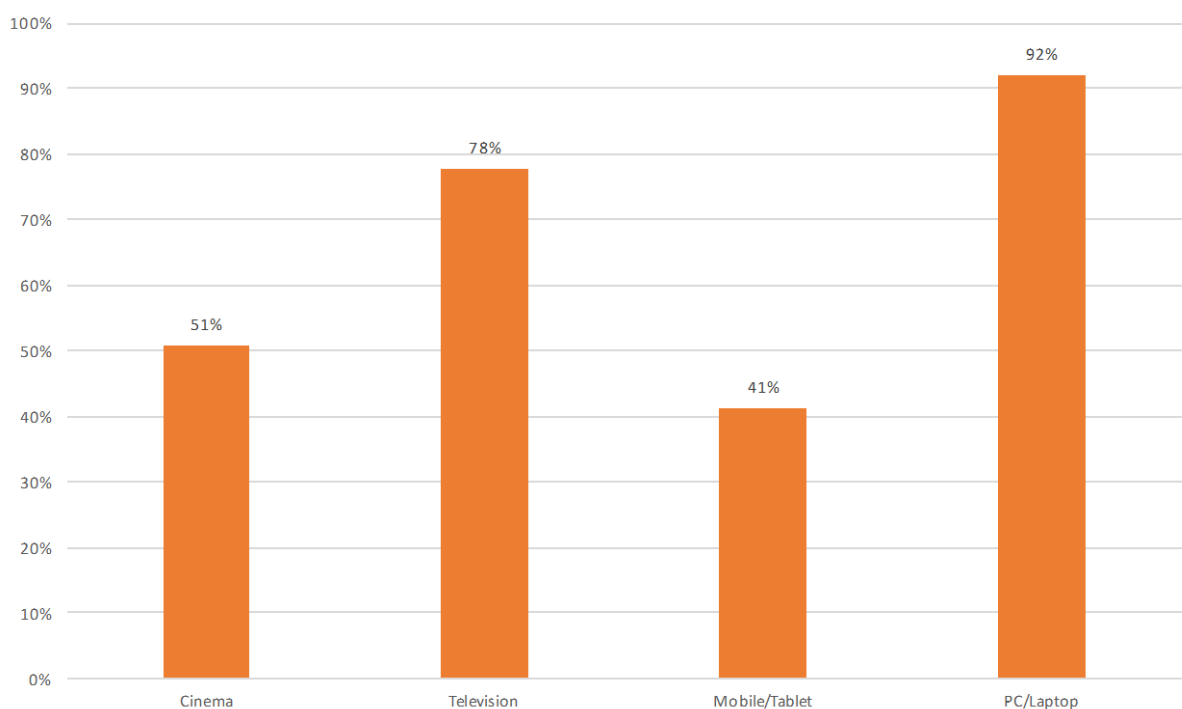
This said, the overall figures for less or much less likely were low – at 14% – indicating that there is an inherent preference for watching domestic content. Such a conclusion agrees with previous literature reviews, which highlight the importance of self-recognition on screen in order for cultural impacts to be generated.

3.2.5. Audiences Engaging Online

During our consultation process, a contention was raised that those of a younger generation were far more likely to watch content online, and therefore far less likely to view Australian content than international. The data on viewing media, on page 12, above, do not accord with the first part of this assertion, but we wished to test the second part by reference to the survey results.

In order to achieve this, a sample of data was taken looking at those who rated their viewership on tablet or mobile, or PC or laptop, as being the highest – at 15 hours or more per week. This is taken as a proxy for high use of online video, as the survey questions did not distinguish between the use of online-only content with viewership of TV or film content online. Sixty-three of the 928 Australian respondents fit into this category.

Figure 6 - How Digital Media Users Engage with Screen Content



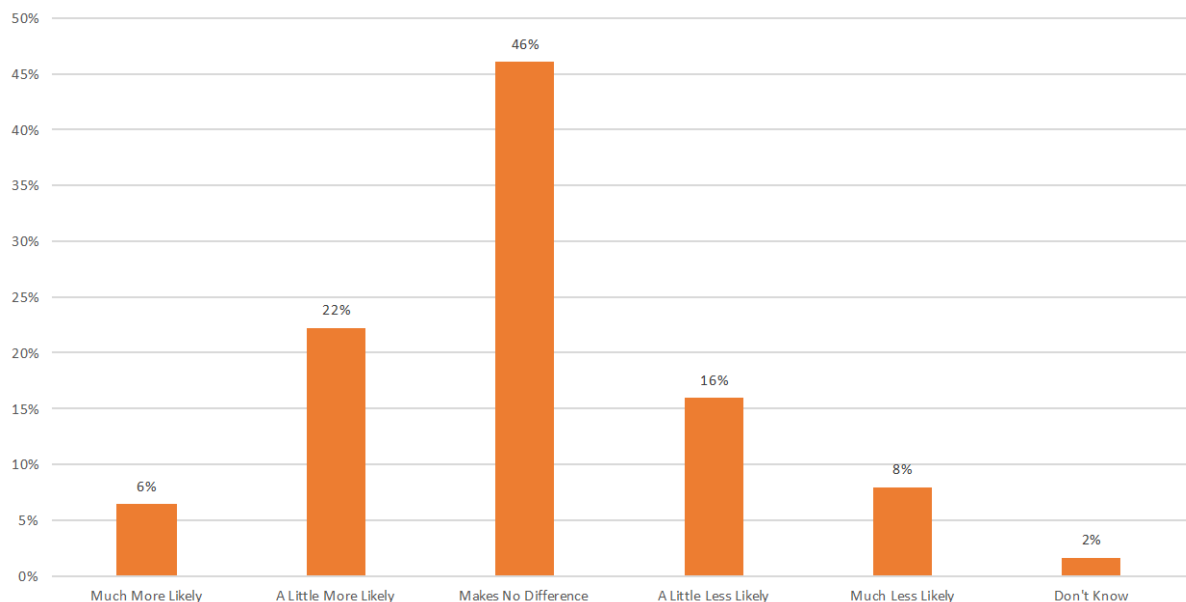
The data for this sub-set (Figure 6) show that they are, in general, very high users of screen content. While their TV viewership is lower than the wider average, a greater percentage of these respondents noted that they attended the cinema in the last week than the overall average, even for the most engaged demographic (Figure 7).

Figure 7 - Time of Engagement of Digital Users

	Less than 2 hours	2-5 hours	6-10 hours	11-15 hours	16+ hours
Cinema	21%	16%	6%	0%	8%
Television	6%	8%	14%	13%	37%
Mobile/Tablet	3%	6%	13%	2%	17%
PC/Laptop	0%	0%	0%	38%	54%

This perspective is reinforced by the stated viewing times of the sixty-three sampled respondents, with the majority noting high media use across a range of media. The stated preferences for genre, and the views on the distinctiveness of Australian content and their likelihood of engaging with it, were also comparable from this sub-group to those expressed in the wider survey (Figure 8).

Figure 8 - Impact of Australian Content for Digital Users' Viewing Decisions



The result of this is an impression that those in the survey sample who engage most heavily with media using online platforms are, simply, heavy users of all media. This correlates with the demographic data presented on page 9, which show that the age groups who use digital media most heavily are also those most likely to visit the cinema.

This is not to say that changing patterns of media consumption are not occurring – clearly, the availability of online media opens up a range of new possibilities. Rather, it is to highlight the continuity which occurs under the surface. Whereas historically the limited number of channels meant that people watched the same content – allowing for the maintenance of a common cultural reading of society – even given the wider choice available, there is still a strong preference for domestic, culturally relevant films and programmes.

3.3. Noted Pieces of Content

In order to understand which pieces of content were viewed as most distinctively Australian, and to begin to analyse the impact that this has on survey respondents, those completing the survey were asked to note three pieces of content that they considered to be culturally

valuable. Such data will help us to understand which kinds of Australian content tend to travel, and what factors might lead an Australian piece of content to have influence domestically and internationally. They will also be used to inform the case studies, presented in the chapters which follow.

Not all of the survey respondents identified a specific piece of content, and a number identified content (such as *The Simpsons* and *Downton Abbey*) which was not Australian in origin. However, these were in the minority, and overall 271 separate pieces of content or content genres were identified by respondents to both parts of the survey.

3.3.1. Domestic Response

Figure 9 - Top 10 Pieces of Content Noted by All Australian Respondents

Title	Number of Respondents
<i>Crocodile Dundee</i>	92
<i>Home and Away</i>	75
<i>Neighbours</i>	67
<i>The Castle</i>	60
<i>Mad Max</i>	51
<i>Priscilla, Queen of the Desert</i>	39
<i>Four Corners</i>	33
<i>Australia</i>	32
<i>Gallipoli</i>	31
<i>Q&A</i>	25
<i>Rabbit-Proof Fence</i>	25

Across all Australian respondents, *Crocodile Dundee* was noted as being the most culturally impactful piece of content (Figure 9) – a trend that is continued in the demographically-split lists, below. This is unsurprising, given the degree to which the film has entered the worldwide cultural vernacular as a way of referring to Australia.

The soap operas, *Home and Away* and *Neighbours* fill the second two slots; both of these also have a long tail of cultural impact for how Australia sees itself, and how it is seen in the rest of the world, and again their presence is not a surprise as a result.

Following this, we find a range of eight separate pieces of content (resulting from a tie for tenth position), predominantly reflecting narrative film, but also including two long-running factual series, *Four Corners* and *Q&A*.

The films noted by the survey respondents are diverse, ranging from a comedy in *The Castle*, to a number of critically-acclaimed and impactful productions in *Rabbit-Proof Fence* and *Gallipoli*. All, however, share a number of traits, being distinctively Australian in content, popular domestically and internationally and (with the exception of *Australia*) being more than 10 years old. That such a range of content continues to be seen by the Australian audience as emblematic of what Australia stands for is indicative of the staying power of film.

Figure 10 - Mentions for Content by Demographic Bands

	18-24	25-34	35-44	45-54	55-64	65+
1	<i>Home and Away</i>	<i>Home and Away</i>	<i>Home and Away</i>	<i>Mad Max</i>	<i>Crocodile Dundee</i>	<i>Crocodile Dundee</i>
2	<i>Neighbours</i>	<i>The Castle</i>	<i>Neighbours</i>	<i>Crocodile Dundee</i>	<i>Neighbours</i>	<i>Gallipoli</i>
3	<i>MasterChef Australia</i>	<i>Neighbours</i>	<i>Crocodile Dundee</i>	<i>The Castle</i>	<i>Mad Max</i>	<i>Home and Away</i>
4	<i>Australia</i>	<i>MasterChef Australia</i>	<i>Priscilla, Queen of the Desert</i>	<i>Neighbours</i>	<i>Rabbit-Proof Fence</i>	<i>The Castle</i>
5	<i>The Castle</i>	<i>Australia</i>	<i>The Castle</i>	<i>Home and Away</i>	<i>The Castle</i>	<i>Four Corners</i>
6	<i>Rabbit-Proof Fence</i>	<i>Crocodile Dundee</i>	<i>Mad Max</i>	<i>Priscilla, Queen of the Desert</i>	<i>Four Corners</i>	<i>Australia</i>
7	<i>My Kitchen Rules</i>	<i>Priscilla, Queen of the Desert</i>	<i>Underbelly</i>	6 tied: <i>Australia</i> , <i>60 Minutes</i> , <i>Q&A</i> , <i>Muriel's Wedding</i> , <i>Four Corners</i> , and <i>The Sullivans</i>	<i>Priscilla, Queen of the Desert</i>	<i>Q&A</i>
8	<i>Here Come the Habibs</i>	<i>Mad Max</i>	<i>My Kitchen Rules</i>		<i>Home and Away</i>	<i>Landline</i>
9	<i>Tomorrow when the War Began</i>	<i>60 Minutes</i>	<i>Muriel's Wedding</i>		<i>Gallipoli</i>	4 tied: <i>Neighbours</i> , <i>Priscilla, Queen of the Desert</i> , <i>Rabbit-Proof Fence</i> , and <i>Australian Story</i>
10	30 Pieces of Content	<i>ABC Channels</i>	<i>Australia</i>		<i>60 Minutes</i> and <i>Number 96</i>	

Breaking down the content identified by demographic bands (Figure 10) demonstrates that there are a range of trends beneath the surface, with different pieces of content taking on particular value for specific age groups.

Common trends do emerge from this – the 18-24 age group, for example, notes predominantly programming that has been released (or continued) during the time when they grew up, with the exception of *Rabbit-Proof Fence*, which is used in education. Some of these programmes, such as *MasterChef* are noted by older age groups, but these samples also start to draw in older films, including *Crocodile Dundee* and *Priscilla, Queen of the Desert* (Case Study 1).

Case Study 1 – *Priscilla, Queen of the Desert*

Year of Production 1994

Box Office	A\$ 16.5 million (Australia)
Audience Response	93% on Rotten Tomatoes 7.5/10 on IMDb 68% on Metacritic
Notable Awards	2 AFI Awards from 8 Nominations (Best Production Design and Best Costume Design) Academy Award for Best Costume Design BAFTA for Best Makeup and Hair
Critical Reaction	"Stamp... lends Bernadette genuine dignity and somehow, through his performance, the ridiculous look coalesces into a person you accept, gradually come to like and then respect." Mark LaSalle, <i>San Francisco Chronicle</i>
Background	<i>Priscilla, Queen of the Desert</i> is the story of three friends – two drag artists, Anthony (aka Mitzi Del Bra) and Adam (aka Felicia Jollygoodfellow), played by Hugo Weaving and Guy Pearce, and a transgender woman, Bernadette, played by Terence Stamp – who take a road trip through the Australian Outback on a bus named Priscilla.
Impacts	Through the road trip and the protagonists' comedic, heart-warming and sometimes dramatic adventures, the film addressed and highlighted many complex themes. At the forefront was the question of identity and acceptance which can be placed in the context both of the individual and the national. The film was well received and a commercial success – as of May 2016 it is the 14 th highest grossing Australian film of all time in Australia ⁴ . In particular, it was credited for helping to introduce LGBT themes to mainstream audiences and for its positive portrayal of members of the LGBT community. The story also sparked an interesting conversation about

⁴ Top 100 Australian Feature Films of All Time, Screen Australia (2016)

	<p>representation in film with some commentators praising it for going beyond stereotypes with interesting and complex leads while others pointing to certain supporting characters and scenes to criticise what they considered old-fashioned clichés.</p> <p>To this day the film is remembered and beloved by many and is undoubtedly one of the Australian films with the most staying power. This is evidenced in particular with the seemingly never ending runs of stage musicals based on the film around the world. The show's seasons in the West End and Broadway earned numerous accolades including Olivier and Tony Awards, such staying power acting to exemplify the production's social impact.</p>
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The overall trend we can see from these data is that particular series or films resonate strongly with specific demographic bands, but that within this there are an undertone of timeless Australian pieces of content which are considered valuable by a range of respondents. These are the pieces of content which reflect the strongest cultural value, either through their instrumental value in defining what it is to be distinctively Australian (e.g., *Gallipoli*), their institutional value in helping to shape Australia (*Four Corners*) or their inherent Australian value (*Mad Max*, *Crocodile Dundee*).

Many of these were also identified through consultations, and are developed as case studies for cultural impact in the following chapters. One of the leading producers in Australia – responsible for a number of important films, including those noted by survey respondents – has been Jan Chapman, who is profiled below (Case Study 2).

Case Study 2 – Jan Chapman

Years of Work 1977-present

Key Productions	<i>The Piano</i> , <i>The Last Days of Chez Nous</i> , <i>Bright Star</i> , <i>Lantana</i> , <i>Love Serenade</i> , <i>Holy Smoke</i>
Notable Awards	<p>Nominated for Academy and Bafta Awards in 1994 for <i>The Piano</i></p> <p>Won five AFI Awards from nine nominations</p> <p>PGA award for Most Promising Producer for <i>The Piano</i>, also nominated for Outstanding Producer</p>
Impacts	<p>One of Australia's leading producers, Jan Chapman is a multi-award winning filmmaker, who was a key part of the 'third way' movement Verhoeven describes. Known for her strong female characters, many of the films that she has produced relate to the question of human relationships, including in <i>The Piano</i>, which follows a headstrong woman discovering her sexuality at a time when this was a major challenge.</p> <p>In conversation for this report, Jan outlined the feeling that Australian films have a unique voice compared to the other English language producers. This includes a strong visual sense, building on Australia's diverse range of landscapes, as well as unconventional and unique characters. Such production values help Australian films stand out against their backdrop, representing Australia to the world, and as a result generating cultural value and soft power.</p>

3.3.2. International Response

Along with the survey of domestic respondents, a survey was undertaken of international respondents from four countries – the UK, New Zealand, the USA, and Canada. They were asked a number of questions, including their views on the most culturally impactful pieces of Australian content (Figure 11).

Figure 11 - Titles Mentioned by International Survey Respondents

Title	Number of Respondents
<i>Crocodile Dundee</i>	17
<i>Home and Away</i>	14
<i>Neighbours</i>	12
Natural History Programmes	12
<i>Australia</i>	7
<i>Mad Max</i>	4
<i>Rabbit-Proof Fence</i>	3
<i>A Place to Call Home</i>	3
<i>H2O Just Add Water</i>	3
4 shows – <i>Underbelly</i> , <i>Steve Irwin's Australia Zoo</i> , <i>McLeod's Daughters</i> , and <i>The Thorn Birds</i>	2

Many of these pieces of content – such as *Crocodile Dundee*, *Neighbours*, and *Home and Away* – align with those identified by the Australian respondents, but others come higher up the list.

The emergence of natural history programmes, mostly suggested as a group by respondents, is a particular point of differentiation with the domestic list. These productions, exemplified by *Steve Irwin's Australia Zoo* in joint-tenth place, provide an insight into how non-Australians see the country, and the value of its diverse natural landscape in this perception. Such programmes provide a key instrumental cultural impact, teaching people about Australian natural history, generating interest as well as entertainment.

The correlation between the international and the Australian list also suggests a broadly similar understanding of the country from both the domestic and foreign audience. While this does not imply that the foreign respondents will see Australia in exactly the same way as locals, it does suggest that there will be an underlying basis of understanding, demonstrating the instrumental aspect of creative media through soft power.

3.4. Conclusions

The data from the survey show that television continued to be the major portal through which the Australian public engages with screen content. As such, TV is the media through which cultural value will predominantly be generated, though as we note in the chapters below, films will often be screened on TV. Cinema also has a significant attraction, particularly to the younger generations, who are also more inclined to engage with content through digital forms, particularly a PC or laptop.

This generational split is also highlighted through the genre preferences. Whereas over-65s stated a distinct preference for news, current affairs, and documentary, younger generations liked reality TV, game shows, and cooking programmes as much. Comedy and drama productions, both in film and TV formats, were enjoyed by all demographic segments, a factor that the stated impactful titles underlined.

The majority of Australian respondents consider Australian content to be fairly or very different from its international competitors, and a majority tended to spend 25-74% of their viewing time watching Australian content. There was also a minor bias towards favouring Australian content when making viewing decisions. This will help to maximise the cultural value of such productions, and highlights the importance of self-recognition on screen, which previous researchers have noted.

Finally, the titles list from domestic and international audiences tends to show a strong, common understanding of what Australia is, generated through its screen media. Productions like *Crocodile Dundee*, *Home and Away*, and *Mad Max* are identified by almost all demographic groups, as well as by foreign respondents. While there are noted preferences within or between similar groups – cooking shows for the two youngest Australian demographic groups, for example, and natural history for foreign respondents.

Such a common understanding is an important component of how a country recognises and defines itself, and screen content provides a major instrumental role in building this understanding. Being able to demonstrate this through the survey results therefore helps us to underline this particular value of the Australian screen sector.

4. THE FILM SECTOR

4.1. Introduction

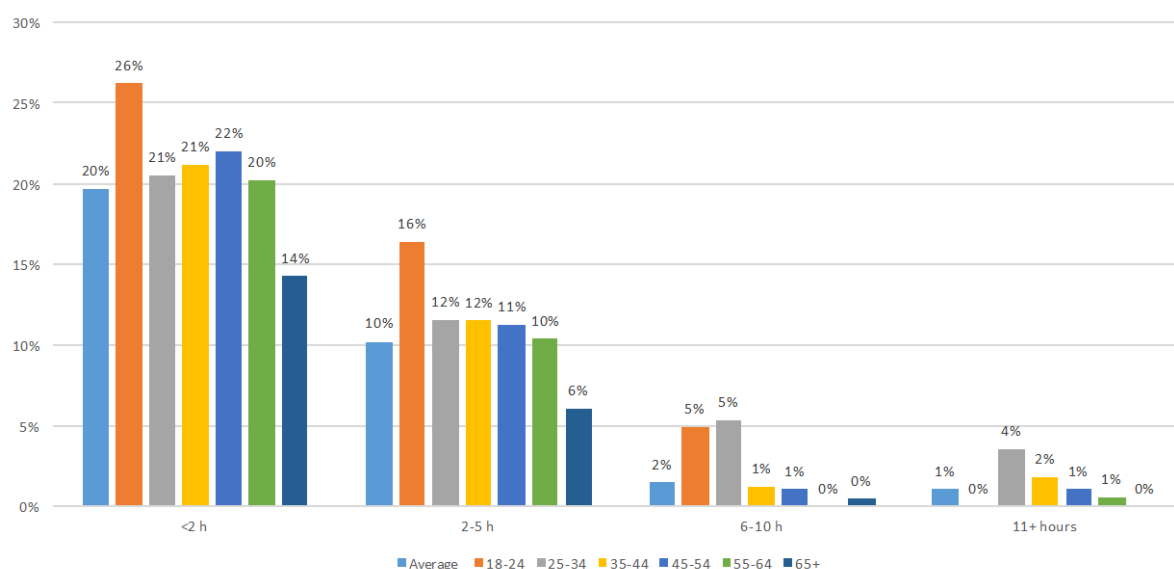
This section considers the impact of the Australian film sector, both domestically and internationally. It will consider only fiction films originally created for theatrical release, and will include their impacts on subsequent formats, such as TV and non-linear platforms. Documentary productions are considered in Chapter 6, and fiction films with Aboriginal and Torres Strait Islander creative control will be considered primarily in Chapter 8, but both will also be also addressed in this chapter where relevant.

In order to address the question of the cultural and audience value of Australian film, we consider new data constructed through our survey results and audience response analysis, also isolating positive externalities and social impacts.

4.2. Time of Engagement

As we noted in the introduction to this chapter, engagement with Australian film does not occur solely at the cinema; indeed, the existence of the long tail requires that other forms of engagement – particularly TV – occur. Nonetheless, cinema remains the primary platform for engagement with feature film, and as a result it is helpful to consider how Australian consumers' cinema attendance breaks down (Figure 12).

Figure 12 - Cinema Attendance by Demographic Band



During the survey, respondents were asked to identify the amount of time they spent at the cinema on a weekly basis. Over a third of respondents claimed to attend the cinema weekly (aligning with prior research), with 20% stating that they attended for less than two hours a week – this would be sufficient time to watch a single film. Ten percent of respondents stated they attended 2-5 hours a week – enough for two films of average length – with three percent attending for more than this.

As we noted in the survey chapter, above, the 18-24 age group is the demographic band that engages most with cinema, and based on research conducted in other countries, it is fair to assume that is reflective of the social value of cinema attendance amongst younger people. More than a quarter of respondents in the 18-24 age group stated that they saw one cinema film a week, with 16% seeing two.

The 25-34 age group is the second most likely to attend, with respondents being marginally less likely than the younger group to attend, but with a greater percentage attending more films in a week. From this point, we see a steady decline in attendance as the respondents get older, with the 65+ demographic attending fewest screenings.

This presents an interesting contrast with other developed global markets, which have seen an uptick in cinema attendance among the oldest age groups in recent years, reflecting the social value of going to a film, together with the spending power of retiring baby boomers. It may be that Australia has not yet reached this stage, as the country has a proportionally younger population than European nations (for example), but it nonetheless reflects an interesting market trend to be observed.

For the purposes of this report, the data demonstrate that it is most likely that a film will have a cultural impact within the first years of its release on the younger generations in Australia. This helps to validate our audience response methodology, which leverages elements of specialised social media that are most likely to be used by this generation.

It also helps to underline the continuing social importance of film – a third of the Australian population watch at least one film a week in the cinema, with a significant minority of these attending more than one. While TV will therefore continue to be a major forum for the cultural impact of Australian films – because of its lower cost and broader reach, particularly in such a large country – this social aspect provides a particular inherent value of cinema given the shared nature of the experience, particularly to the younger generations who our survey data show are more likely to attend.

4.3. Audience Response

4.3.1. Methodology

Audience response is a key component of our analysis of the impact of Australian content, as it allows us to consider how a range of content is received, by looking at a sample determined solely by year of release. This minimises the likelihood of selection bias, as it precludes a focus solely on those considered culturally valuable by selectors – or memorable by survey respondents – and instead considers a diverse range of content on an equal footing. Such an approach will, as a result, provide an insight into how the audience responded to a variety of different content, and how this has changed over the life of the content, whilst allowing comparability between different kinds.

For Australia, we have considered content which was released in its original format – in this case theatrical cinema – during the fiscal years 2011-12 and 2012-13. On average, approximately 30 domestic films a year are released in Australia, so two years' releases have been used to provide a sufficient range. Several of these pieces of content were operatic productions streamed into theatres as alternative content; these were removed from our analysis.

In each of the remaining cases, the piece of content has been researched, and data identified from a range of sources; these are:

- The number of territories the production was released theatrically in;
- Gross Box Office within Australia;
- Gross Box Office worldwide (including Australia);
- Video sales after the production was released for home media;
- Major domestic and international awards and festival nominations;
- Professional rating (using a weighted average from Rotten Tomatoes and Metacritic);

- Audience rating (a weighted average from IMDb, Rotten Tomatoes, and Metacritic)

These datapoints were built into a balanced scorecard, allowing productions that did not have data in each category to be compared to major productions that did. The model was further developed to allow each of these separate datapoints to be weighted, allowing comparisons to be focused on specific elements, for example box-office success or critical acclaim and awards.

4.3.2. Breakdown of Productions

The sample of productions for 2011-13 contained 71 separate films, of which 66 were analysed (the five opera productions were removed). The majority of these were drama or comedy films, with a small number of thriller, romance, and action/adventure titles. Only five of the titles were children's or family features (Figure 13).

Figure 13 - Genre Breakdown of Film Sample

Genre	Number
Drama	20
Comedy	17
Thriller	8
Romance	5
Action/Adventure	4
Family	4
Animation	3
Mystery	2
Musical	2
Children	1

Not all of the productions in the sample had a feature type attached, but of those that did the vast majority were live-action feature films (40). Twelve feature documentaries were released over the period, and three feature animations.

Five of the productions contained Aboriginal or Torres Strait Islanders in key creative positions. Six productions were period pieces. Twelve were adaptations of existing pieces of work, with two of these being spinoffs of successful TV series (*Kath and Kimderella* and *Housos vs Authority*). One (*Happy Feet 2*) was a sequel.

4.3.3. Results

Weighting each of the factors equally, unsurprisingly, focuses the results primarily on productions that perform well at the box office, and follow this up with strong home entertainment releases (Figure 14). Such productions range from *Red Dog* – a family film that was released in a relatively small number of territories, but which performed well in those where it was released, and had a good critical response – to *The Great Gatsby*, whose strong box office and awards performance outweighed mixed professional reviews.

Figure 14 - Top Ranking Films (Equal Weighting)

Position	Title
1	<i>Red Dog</i>
2	<i>The Sapphires</i>
3	<i>The Great Gatsby</i>
4	<i>The Hunter</i>
5	<i>Eye of the Storm</i>
6	<i>Happy Feet 2</i>
7	<i>Wish You Were Here</i>
8	<i>Mental</i>
T-9	<i>Santa's Apprentice</i>
T-9	<i>Storm Surfers 3D: The Movie</i>

A number of the films that performed well on this composite measure were particularly Australian in content. The aforementioned *Red Dog* is an example of this, being based on a novel about Western Australia, as are *The Sapphires* and *The Hunter*. While other films – such as *The Great Gatsby* and *Happy Feet 2* – are respectively US-set and location neutral, both were identified by survey respondents as Australian, showing that their value to Australia is recognised.

Overall, the list provides a broad mix of Australian productions, which generate value in different ways. Many act purely as avenues for entertainment, but *The Sapphires* is a film which stands out from the sample – it explores an issue of great significance to Australian history in a framing that is familiar to many in the international audience, the Vietnam War. In doing so, it demonstrates strong instrumental impacts, which we explore below.

Figure 15 - Top Rating Films by Widest Release and Sales

Position	Title	Territories	Total GBO	Video Unit Sales
1	<i>The Great Gatsby</i>	45	\$343,030,786	175,673
2	<i>Happy Feet 2</i>	43	\$151,816,204	1,528,522
3	<i>Killer Elite</i>	39	\$61,880,320	37,472
4	<i>The Sapphires</i>	12	\$20,183,427	285,319
5	<i>Red Dog</i>	4	\$21,871,407	611,741
6	<i>Bait</i>	14	\$31,560,506	30,137
7	<i>A Few Best Men</i>	22	\$15,661,115	30,454
8	<i>Iron Sky</i>	18	\$10,452,294	20,325
9	<i>Mental</i>	5	\$4,530,530	41,284
10	<i>The Hunter</i>	9	\$1,870,157	10,817

Considering the films with the widest global release (Figure 15), and the best performance at the box office and for home media, it is notable that the top two are both films that have a wide audience. *The Great Gatsby* and *Happy Feet 2* would both have been expected to perform well at the cinema because of their profile and P&A spend, and followed this with good home media sales, particularly for the animation. As noted above, both were also recognised by survey respondents as Australian, and as such can be expected to have generated good instrumental and institutional value, demonstrating the success of Australian production to the wider world.

Of the sample, *The Sapphires* and *Red Dog* show the longest tails – both have home media performances that are notably better than their box-office performance, by comparison to others. If we contrast this with a production like *Killer Elite* – an action film targeting the 18-30 male demographic – we can see the difference in performance. Whereas the latter had strong box-office performance and a wide release, its performance in the home media segment was weaker – for the other two films, the converse is true.

This underlines the comments seen through the literature review that films with cultural value tend to perform better in the long term, whereas a film like *Killer Elite* performs well with its initial target audience in cinemas, but has little long-term impact.

Overall, this sample tends to suggest that those films that are most commercial often have the broadest impact, but the presence of productions like *The Sapphires* shows also that films with strong cultural value can achieve popular success. That those commercial films are, themselves, recognised as Australian further demonstrates the cultural impact of Australian films domestically and internationally.

Figure 16 - Top Rated Films by Review Scores, Festival Entries, and Awards⁵

Position	Title	Average Pro Score	Average Audience Score	Awards and Festival Entries
1	<i>Red Dog</i>	8.10	7.75	8
2	<i>Face to Face</i>	9.10	7.75	3
3	<i>The Sapphires</i>	7.90	7.40	21
4	<i>The Tall Man</i>	8.30	7.00	5
5	<i>Autoluminescent</i>	7.90	10.00	1
6	<i>Lore</i>	8.50	7.53	2
7	<i>The Great Gatsby</i>	5.15	7.07	15
8	<i>The Hunter</i>	6.60	6.63	5
9	<i>Storm Surfers 3D: The Movie</i>	7.65	6.75	2
10	<i>Not Suitable for Children</i>	8.80	5.60	3

Our final analysis of this dataset (Figure 16) considers those films that have received high audience review scores and professional review scores, together with award nominations and festival entries. This element of the work allows us to look at a sub-section of films that fly under the radar, achieving a narrow impact, but providing those who are interested in them with deep cultural value.

For the most part, the films receiving the highest acclaim in this category – such as *Red Dog* and *The Sapphires* are also those which have achieved good impacts in other elements of the analysis. This helps to underline the cultural value which these films have brought to the table.

All three of the highest ranking films in figure 16 that have not previously been noted – *Face to Face*, *The Tall Man*, and *Autoluminescent* – fit this criteria, having had a narrow but deep

⁵ For the purpose of this report, festival entries refers to the appearance of the production at a major domestic or international film festival; awards refers to the receipt of a major domestic or international award, or an award from one of these festivals

impact. *Face to Face* was an independent film – focusing on an interpersonal relationship – which achieved critical and festival success. *The Tall Man* and *Autoluminescent*, meanwhile, were both feature documentaries, the first focusing on the 2004 death of Cameron Doomadgee in police custody, and the second on the life of the musician Roland S. Howard.

Neither of these were ever likely to achieve significant commercial success, but they help to underline a key part of instrumental cultural impact, in drawing our attention to the way in which smaller films can speak to a specific section of the audience. This 'narrow but deep' impact often contrasts with the 'broad but shallow' value of mainstream films, with productions like *The Sapphires* sitting in the middle (Case Study 3). It is also a reminder of the value of a diverse film sector, which can cater to a variety of different tastes and interest groups.

Case Study 3 – *The Sapphires*

Year of Production 2012

Box Office	A\$ 20.2 million (Global)
Audience Response	91% on Rotten Tomatoes 7.1/10 on IMDb 67% on Metacritic
Notable Awards	11 AACTA Awards from 12 Nominations, including Best Film, Best Direction, and Best Lead Actor and Actress
Critical Reaction	"An energetic, amusing and resolutely feel-good-film-with-a-message", Mark Adams, <i>Screen International</i>
Background	Set in 1968, <i>The Sapphires</i> tells the story of four Aboriginal Australian women who form a music group and, after being discovered by a talent scout, travel to Vietnam during the war to perform for the troops. The musical comedy-drama was adapted from a stage play of the same name which was loosely inspired by a true story.
Impacts	<p>The film gives insight into issues and struggles Aboriginal and Torres Strait Islanders may have faced at the time while also touching on universal themes of identity, love and relationships. The character of Kay, one of the leads, was taken from her family at a young age by government officials because of her light skin and struggles to deal with the effects of colonisation.</p> <p>Playwright Tony Briggs – who wrote the source material and co-wrote the film – said of the story that it was not about the racist persecution of the 1960s but "a celebration". He explained: "I will never forget the achievements of the '60s and the advances that were made, but this play is not about the racism of those times, it's for everybody, no matter what their colour."⁶</p> <p>The film was immediately embraced by Australian audiences and</p>

⁶ Sparkle, in any colour, *The Age* (2004)

	<p>critics. It was given a wide release and scored the biggest opening-weekend gross (A\$2.32 million) for an Australian film in two years.⁷ Underlining this impact, two weeks after its debut, <i>The Sapphires</i> original soundtrack hit number one on the ARIA music charts.</p> <p>While it is perhaps too early to assess the full impact of the film, it is already apparent that the film has established itself as a key modern Australian film. The <i>Hearts and Minds</i> surveys (see Appendix 9.1) showed on a number of occasions that many respondents had seen the film and had fond memories of the “feel-good” story.⁸</p> <p>It has also raised the profile of the original Sapphires themselves who, in February 2015, made a public appeal for recordings of their songs or images of their performances.⁹ The film is another example of screen content exposing audiences to obscure and forgotten stories, particularly about Aboriginal and Torres Strait Islanders.</p>
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4.3.4. Conclusions

The dataset studied for this section of the report considered a quasi-representative sample of Australian film production, and this highlighted some interesting factors. Drama and comedy were by far the largest genres, with few in other categories such as children's and family. This is reflective of tough conditions in the children's media production market, which we discuss below.

Our analysis underlined that a diverse range of Australian productions impact upon the Australian population, and that a good number of these are recognised as Australian by the public. A number of these demonstrate strong cultural impacts, particularly in the instrumental space, with *The Sapphires* exemplifying this in its treatment of the stolen generations. *Red Dog*, meanwhile, tells a particularly Australian story in an Australian setting, receiving a strong audience response as a result.

The institutional value of the biggest Australian productions is facilitated by their recognition in the survey as being Australian. This allows the soft power aspects of productions to be generated, as at least part of the audience can be seen to recognise the creative talent of Australian cast, crew, and key creatives working on these productions. We can also exemplify through the dataset the 'deep but narrow' impact of productions like *The Tall Man*, which given its subject matter will also have had an institutional impact, as it reflected on relations between the Australian government and the Indigenous community.

This dataset, as a result, provides us with an insight into a range of different impacts which Australian films can generate. Each of these forms of production – large-scale, mid-range, and niche interest – has an audience and a cultural value, underlining the overall importance of maintaining a diverse production sector, to address all elements of the Australian public.

4.4. Australian Film and Australian History

Aside from modern culture and the changing face of the country, Australian domestic film has an almost unique ability to reflect the history of the nation, and shape the public's

⁷ Sapphires proves an Aussie box office gem, The Sydney Morning Herald (2012)

⁸ *Hearts and Minds*, Screen Australia (2013) p.4, p.13, p. 23-24

⁹ Original Sapphires search for recordings of musical past, ABC News (2015)

interpretation of what it means to be Australian, and how their country engages with the rest of the world. Such an ability is reflected in a range of fiction films, but can also be captured through the archival materials contained in Australia, which cover the entire modern history of the country, and which are discussed in the Documentary chapter.

A variety of major issues in Australian history have been understood through the medium of film, which can play a key instrumental role in interpreting the nature of events for a wider audience. Issues where film has helped to shape national comprehension have included the First World War and the Stolen Generations, with film taking a key role in shaping a single understanding both domestically and for a wider international audience.

Gallipoli (Case Study 4) is an example of this, being a production which took a key role in structuring the nation's understanding of a seminal moment in their own history.

Case Study 4 – *Gallipoli*

Year of Production 1981

Box Office	A\$ 11.7 million (Australia)
Audience Response	88% on Rotten Tomatoes 7.5/10 on IMDb
Notable Awards	Nominated for 12 AFI awards, winning nine including Best Film, Best Achievement in Directing, Best Screenplay, and Best Actor in a Leading Role for Mel Gibson Featured in US's National Board of Review's top 10 list for the year (alongside <i>Breaker Morant</i> , another Australian war film) Nominated for Best Foreign Film at the Golden Globes
Critical Reaction	"One of the most elegiac anti-war films ever made", Martin Chilton, <i>Daily Telegraph (UK)</i>
Background	<i>Gallipoli</i> tells the story of two young men from rural Western Australia, who enlist in the army during the first World War and are sent to the peninsula of Gallipoli. At the time of release it was felt that the understanding and awareness of the significance of ANZAC was diminishing in Australian culture. After the film was released director Peter Weir said "I was the last generation where the battle was taught as sacred. Today, kids [in the early '80s] think of [ANZAC] as a joke". ¹⁰
Impacts	Throughout the film, the protagonists slowly lose their innocence and preconceptions about the purpose of the war. The coming of age of the characters arguably represented the continued coming of age of Australia as a nation. Shot primarily in Australia, the film was noted for its faithful portrayal of life in the 1910s as well as an important representation of the conditions many Australians endured on the battlefield. The filmmakers did however use their artistic license modifying events for dramatic purposes and the film

¹⁰ Retrospective: *Gallipoli*, Peter Galvin (2012)

	<p>contains some significant historical inaccuracies.</p> <p><i>Gallipoli</i> was an important representation of Australian identity with underlying themes of friendship, courage, larrikinism and good humour. Together, many of these qualities were clustered and identified by some as the ANZAC spirit, referring to possible shared characteristics of the Australian and New Zealand soldiers who fought in World War I.</p> <p>An immediate commercial and critical success, the film became a key part of the Australian New Wave of the 1970s and 80s. Released in 1981, the film was the highest-grossing film of that year in Australia.</p> <p>The film is seen as having refocused the cultural conversation on the soldier's sacrifice and the importance of ANZAC in Australia's national identity. Its success also cemented Peter Weir's position as an A-list director who went on to helm several high profile and acclaimed Hollywood productions such as <i>Dead Poets Society</i>, <i>The Truman Show</i>, and <i>Master and Commander: The Far Side of the World</i>.</p> <p><i>Gallipoli</i> also helped to further launch Mel Gibson's career, following his breakthrough with <i>Mad Max</i> two years earlier.</p>
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4.5. Overall Impacts

Australian film has a unique ability to generate long-term cultural value, telling stories which are repeated, and which help to bring about a change in the way Australia sees and runs itself, and the way the rest of the world sees Australia. This has been exemplified through a range of content over the years – from *Crocodile Dundee* and *Mad Max*, to *The Piano* and *The Sapphires*. *Rabbit-Proof Fence* (Case Study 5) is a good example of this:

Case Study 5 – Rabbit-Proof Fence

Year of Production 2002

Box Office	US\$16.2 million (Worldwide)
Audience Response	88% on Rotten Tomatoes 7.5/10 on IMDb
Notable Awards	3 AFI Awards: Best Film, Best Original Score, and Best Sound Golden Globe nomination for Best Original Score Audience Awards at film festivals in Edinburgh, Leeds, Aspen, Durban, and São Paulo
Critical Reaction	"A bold and timely film about the stolen generations", David Stratton, <i>SBS</i> "Not since the last shots of <i>Schindler's List</i> have I been so overcome with the realization that real people, in recent historical times, had to undergo such inhumanity", Roger Ebert, <i>Chicago Sun-Times</i>
Background	A historical drama based on a true story, <i>Rabbit-Proof Fence</i> follows

	<p>three young aboriginal girls – two sisters and their cousin – who are forcibly taken from their family in the 1930s as part of an official Australian government policy in place at the time. The story reflects their escape back to their families, based on the 1996 book, <i>Follow the Rabbit-Proof Fence</i> by one of the girls, Doris Pilkington Garimara.</p> <p>It is a personal account of her family's experience as part of the Stolen Generations, whose story it helped bring to global attention.</p>
Impacts	<p>The film was a critical and commercial success, winning numerous awards, and travelled well through the international festival circuit and a targeted foreign theatrical release, thanks in part to Noyce's profile as an A list director and Hollywood veteran. His return to Australian "arthouse" was well received by audiences, particularly in the UK and the US, exemplified by the strong critical reviews received, and the US\$6.2 million US box office.</p> <p>In addition to being well received for artistic reasons, the film was also considered an important mainstream depiction of the experience of the Stolen Generations. It was also praised by many, and reviled by some, for revealing an important part of Australia's history to the rest of the world. Pat Dudgeon, head of Indigenous Studies at Curtin University, also highlighted the film as the first to bring the issues surrounding the Stolen Generations to an "international arena".¹¹</p> <p>The film came at a critical time in contemporary Australian history, when the country was undergoing a cultural transformation during which previously 'invisible' histories of Australia's Aboriginal and Torres Strait Islanders communities emerged in the mainstream. Perhaps slightly ahead of its time, the film was met with some controversy with a small number of commentators criticising the portrayal of the white antagonists and claiming that the film distorted and exaggerated the experience of Aboriginal children at the time.</p> <p>More than ten years after its release, a survey in the Screen Australia study <i>Hearts and Minds</i> (see Appendix 9.1) revealed that the film remains an important tool to raise consciousness of Australia's sometimes difficult past and that the educational aspect of the story is highly valued. In line with this, the film is often used as a teaching resource and a vehicle for children and teens to study Australian history and, in this case, its impact on Aboriginal Australian communities.</p>

Our evidence has built on the basis provided by reports like *Hearts and Minds* (see Appendix 9.1) to underline the diversity of Australian film – in this report, consultees noted the value of this diversity, and the data show that this still exists. Such diversity underpins the cultural value of Australian film, by allowing a range of different audiences to engage, both domestically and internationally.

The survey data we gathered reinforces the conclusions of previous work, to show that 30% of Australians visit the cinema regularly; unusually, though, the younger generation is far

¹¹ Which Rabbit-Proof Fence? Empathy, Assimilation, Hollywood, Tony Hughes D'aeth (2002)

more inclined to do this than the older. This notwithstanding, most of the cultural impact of film occurs on television, though the data suggest that the unique social value of cinema continues to a younger generation.

Looking at a range of productions using our Audience Response tool, we can demonstrate the variety of production generated in Australia in the recent past. These have included dramas like *The Sapphires*, with a significant social message and emerging impact; major international productions like *The Great Gatsby* and *Happy Feet*, which demonstrate the technical aptitude of Australian filmmakers to the world; and family-friendly domestic productions like *Red Dog*, which have the value of place and self-reflection.

This range of outcomes demonstrates the variety of cultural impacts of Australian film, which continues to teach people about the country's history, reinforce notions of place and purpose, and generate soft power for the nation. They also demonstrate that *Crocodile Dundee* – both for awareness and box office – continues to be the most successful Australian film of all time.

5. THE TV SECTOR

5.1. Introduction

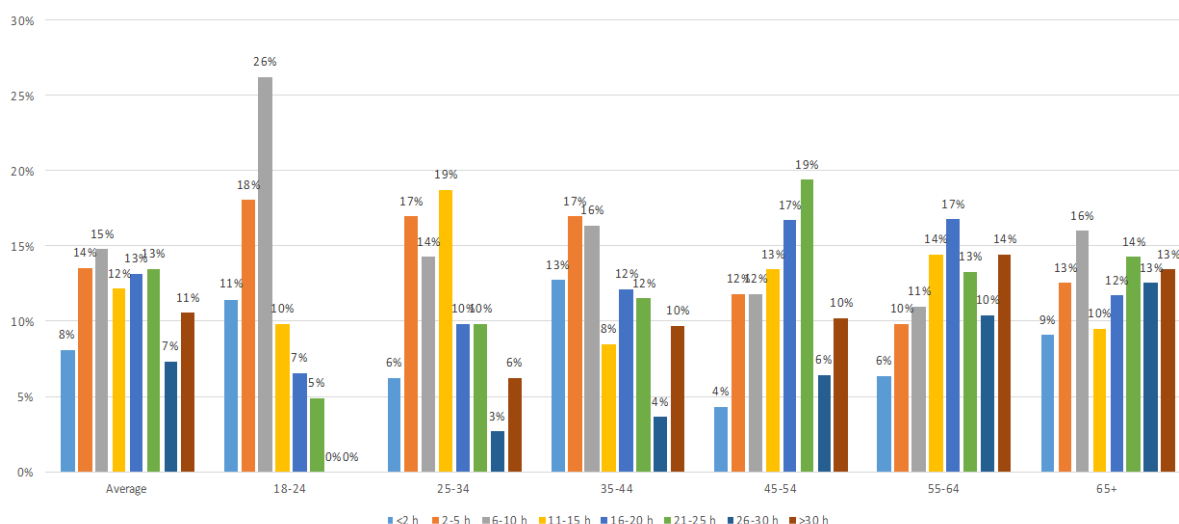
This section of the report considers the impact of the Australian television sector, both domestically and internationally. It will consider productions of any length originally created for distribution on TV, also including their downstream impacts on VoD or home media. Documentary productions are considered separately, in Chapter 6, below, while television content with Aboriginal and Torres Strait Islander creative control will be considered primarily in Chapter 8.

A similar range of techniques as that used for the film sector are employed, while this chapter will also consider the impact of multiplatform drama

5.1.1. Time of Engagement

There is a strong correlation between the time people engage with television as a medium and the viewership of the content which is described in this chapter. Whereas other forms of content – particularly film – are frequently viewed on network television, overnight viewing figures (the most relevant given the timing of the sample) demonstrate the general primacy of first-run TV content, whether drama or news/current affairs.

Figure 17 – Television Viewing Time by Demographic Band



The data collected through our survey (Figure 17) tend to show that the amount of television watched increases as the population gets older. This reflects both the availability of free time to engage with television, as well as the engagement of younger demographics in the survey with other media, in this case online platforms and cinema.

As a result of this, the average engagement time increases by age group, peaking with the 55-64 demographic, whose average response was 17.5 hours per week. By contrast, the 18-24 age group averaged 8.4 hours per week, with 25-34 and 35-44 averaging 13.1 and 13.3 hours, respectively.

Whereas this could indicate that the cultural impact of television will be greatest for the older generations, it is worth noting the named content that was highlighted by each age group in the survey. Of the nine titles most highlighted by the youngest age group (a large number tied for tenth place), five were TV series, and one was both a TV series and a film. This

suggests that this generation's engagement with TV content is narrower, but that impacts still exist.

As this report has noted previously, TV is the medium through which the largest percentage of Australians engage with screen content, and as such it has the broadest scope for cultural impacts. These impacts, however, cover a wide range of different content, which we will explore through our audience response analysis.

5.2. Audience Response

5.2.1. Methodology

The basic methodology for our audience response analysis for TV was the same as that for film, using two years' worth of content that was released in its original format – broadcast television – during the fiscal years 2011-12 and 2012-13. As with film, two years' releases have been used to provide a sufficient range, as a one-year sample would be too small.

For each of the productions, a range of data similar to that used for film was analysed; these data-points were:

- Audience Share, 5 City Metro and Regional;
- Target Audience Rating Point (TARP), the average audience for a demographic addressed as a percentage of the relevant Universe Estimate;¹²
- Video sales after the production was released for home media;
- Major domestic and international awards and festival nominations;¹³
- Professional rating (using a weighted average from Rotten Tomatoes and Metacritic);
- Audience rating (a weighted average from IMDb, Rotten Tomatoes, and Metacritic)

These were built into a balanced scorecard, allowing productions that did not have data in each category to be compared to major productions that did. As we did for the film sector, a range of different kinds of analyses were conducted, to assess different elements of cultural value within the sample.

5.2.2. Breakdown of Productions

The sample consisted of a total of 87 productions, spread across a variety of genres. As with film, the majority of these programmes were drama or comedy based, with a smaller number of crime, mystery, and thriller elements (Figure 18).

¹² TARP and Audience Ratings are not used in the same analysis tables, given the similarity in their underlying data

¹³ These represent a similar sample to film, above, though the festivals and awards in the TV sector are slightly different

Figure 18 - Genre Breakdown of TV Sample¹⁴

Genre	Number
Drama	36
Comedy	29
Children	18
Crime	13
Family	6
Animation	6
Mystery	4
Thriller	3
Romance	3
Biographical	2

Twenty-four of these productions were targeted at children or the family, while the six animation productions can reasonably be expected to be children's productions as well.

Figure 19 - Original Broadcast Networks of TV Sample

Network	Number
ABC	33
Nine	13
TEN	13
Seven	11
Eleven	4
SBS	3
Disney	2
UK TV	2
Cartoon Network, Family Movie Channel, Fox, Showcase, SoHo, TV1, and W (each)	1

The programmes in the sample were originally broadcast across a variety of different networks (Figure 19), with ABC being the most frequent, but the other major networks also contributing strong numbers of productions.

Many of these programmes were series (38), with 32 mini-series, 13 telemovies, and four serials in the sample. Twenty-one of the productions were period series, 14 were based on historical events, and a further 14 were based on underlying material, such as books.

Six of the productions had Indigenous cast and crew in key creative positions.

5.2.3. Results

As with the film sector, the first data cut of the audience response sample considered an equally weighted set of the data. In this instance, audience share was used instead of TARP, to provide a view of the gross impact of the particular series or programme being considered. Duplicate series were also skipped over, impacting *Underbelly* and *Offspring*, both of which appeared twice high in the sample.

¹⁴ Any factual programmes, including news and current affairs, will be captured in our documentary sample, in the following chapter

Figure 20 - Top Ranking TV Series (Equal Weighting)

Position	Title
1	<i>Underbelly: Badness series 5</i>
2	<i>Howzat - Kerry Packer's War</i>
3	<i>A Place to Call Home series 1</i>
4	<i>Offspring series 4</i>
5	<i>Puberty Blues series 1</i>
6	<i>Miss Fisher's Murder Mysteries series 1</i>
7	<i>Rake series 2</i>
8	<i>The Slap</i>
9	<i>Redfern Now series 1</i>
10	<i>A Moody Christmas</i>

As with the film sample, this dataset reveals a range of different productions having achieved an impact on the Australian TV-watching public (Figure 20). These range from the crime drama *Underbelly* – which was noted by the 35-44 year age group in the survey – to the mini-series *Howzat* and the critically acclaimed drama series *Redfern Now* (studied in more detail in the Indigenous Content chapter).

What is notable in the sample is that each of these productions is deeply Australian in character. Whether a comedy/drama series like *Offspring*, a coming-of-age story such as *Puberty Blues*, or a courtroom comedy like *Rake*, each project of this list is recognisably domestic in character. This is reflective of the concept we note in the literature review, of the population preferring self-recognition in TV shows, and also tends to be reflected by successful shows in the ratings.

Our next sample (Figure 21) looks at this same dataset, but with a focus on TARP and home entertainment sales, as a way of engaging with the question of reception and long-term value in the target audience demographic. As with the previous table, duplicate entries are removed from the sample, to present the widest possible dataset; in this instance, *Underbelly* and *Packed to the Rafters* both appear twice in the original analysis.

Figure 21 - Top Ranking TV Series - TARP and Video Sales

Position	Title
1	<i>Howzat - Kerry Packer's War</i>
2	<i>Underbelly: Razor series 4</i>
3	<i>A Place to Call Home series 1</i>
4	<i>Bikie Wars: Brothers in Arms</i>
5	<i>House Husbands series 1</i>
6	<i>Miss Fisher's Murder Mysteries series 1</i>
7	<i>Packed to the Rafters series 5</i>
8	<i>Offspring series 3</i>
9	<i>Winners & Losers series 2</i>
10	<i>Beaconsfield</i>

As with the film equivalent of this table, broadly the same range of TV productions appear in this cut of data to the overall top-10 list, though with other productions – such as *Bikie Wars*, *House Husbands*, and *Packed to the Rafters* – appearing in the sample.

Two of these productions – *Beaconsfield* and *Bikie Wars* – were respectively a telemovie and a miniseries based on events in recent Australian history: a 2006 mine collapse, and a 2004 biker shoot out. Both of these were of interest to particular target audiences, and both also demonstrate cultural value in the instrumental space – by informing about particular events, in conjunction with their entertainment value. Arguably, both will also have had an institutional value, given the role government agencies had in bringing both incidents to a successful conclusion, though the evidence for this is harder to quantify.

Overall, this sample shows a few more comedy series than those in the wider sample, and this is reflective of the broader Australian comedy tradition that we have noted. During our consultation process, a number of industry stakeholders noted the value of comedy for the health of the broader Australian industry, reflecting that leading actors such as Eric Bana started in this genre.

Figure 22 - Top Rating TV Series by Review Scores, Festival Entries, and Awards

Position	Title
1	<i>Please Like Me series 1</i>
2	<i>Danger 5 series 1</i>
3	<i>Offspring series 4</i>
4	<i>Top of the Lake series 1</i>
5	<i>Devil's Dust</i>
6	<i>Dance Academy series 2</i>
7	<i>Puberty Blues series 1</i>
T-8	<i>Rake series 2</i>
T-8	<i>Underbelly: Badness series 5</i>
10	<i>Redfern Now series 1</i>

Considering the best rated shows through the lens of audience and professional reviews, festival scores, and awards received (Figure 22), a slightly different perspective arises. The top rated programme, *Please Like Me* (Case Study 6), is particularly interesting as a critically acclaimed production with a smaller, but heavily engaged, audience, that falls somewhat into the 'narrow-but-deep' category of cultural impact.

Case Study 6 – Please Like Me

Years of Broadcast 2013-present

Audience	235,000 (average, 5 City Metro and Regional, season 1)
Ratings	100% on Rotten Tomatoes 9.2/10 on TV.com 8.3/10 on IMDb
Notable Awards	3 AACTA Awards from 7 Nominations, including Best TV Comedy Series 3 GLAAD and one Rose D'Or Nomination International Emmy nomination for Best Comedy Series in 2014
Critical Reaction	" <i>Please Like Me...</i> is fuelled, quite effectively, by the diffident charisma of Josh Thomas... boyish and wry, a member of that reserved breed of gay men who rarely appear on TV but are everywhere in the offices

	where I've worked" Emily Nussbaum, <i>The New Yorker</i>
Background	<p><i>Please Like Me</i> is a critically-acclaimed comedy-drama production, which focuses on the life of a twenty-something whose life turns upside-down, swapping his girlfriend for a boyfriend, and moving back in with his mother after she overdoses.</p> <p>In doing so, it addresses a range of issues within Australia, including the treatment of gay people, mental illness, and the challenge of social life for the millennial generation.</p>
Impacts	<p>The programme only achieved modest impact on its initial TV run, but has had strong catch-up performances on ABC's iview, and has also achieved a US release on the cable channel Pivot, and via the Hulu platform.</p> <p>Its range of award nominations, in particular those for the GLAAD (the US Gay and Lesbian Alliance Against Defamation) awards, have underlined its role in the normalisation of gay people. This was highlighted in a Guardian article, which stated that "the show is also different, not just from <i>Girls</i> but most other shows, in that it depicts a friendship between a straight person and a gay one without making a big deal of it."¹⁵</p> <p><i>Please Like Me</i> performed a similar instrumental role in the area of mental health, launching a campaign to get people to talk about their experience of the issues. This was a particular focus for the US release, where Pivot focused its commentary in relation to the series around the mental health question, generating social media coverage as a result.¹⁶</p>

Top of the Lake was also a critically acclaimed series, and particularly successful in the UK and US. However, reflecting its setting in rural New Zealand, it appears that any cultural impact of the show – particularly a soft power cultural impact on its overseas audience – would likely benefit that country rather than Australia.

5.2.4. Conclusions

As with film, the dataset studied for this element of the report gives us a quasi-representative sample of Australian TV production, once again highlighting the dominance of drama and comedy as genres. Series or mini-series were the predominant form of this, with telemovies also relatively prominent, compared to other, comparable countries.

Overall, the data tended to underline that self-recognition on TV was an important factor in the success of the show. This element came in a variety of formats – while all of the highest-ranking shows were recognisably Australian in character, their format ranged from crime drama to comedy and coming-of-age stories. In doing so, they demonstrate the variety of content available to the Australian public, catering to different tastes and interests.

¹⁵ 'Please Like Me: this millennial comedy is more than just the Australian Girls' by Moylan, B. in *The Guardian*, 16th October, 2015

¹⁶ <http://www.takepart.com/pivot/please-like-me/take-action#postitforward> [accessed 6th August, 2016]

Cultural value was delivered through this sample through a variety of means. The factor of self-recognition or self-reflection, as we have noted, ties into the institutional value of a production – by demonstrating a recognisable Australia, people are more open to the messages of social change contained within. Similarly, a number of the productions, such as *Beaconsfield* dealt with real life events, in doing so twinning entertainment with instrumental and, potentially, institutional impacts.

A more recent piece of content which deals with this self-reflection is the controversial, but popular, *Here Come the Habibs* (Case Study 7).

Case Study 7 – Here Come the Habibs

Years of Broadcast 2016-present

Viewers	1.05 million (consolidated, average for series)
Ratings	5.7/10 on IMDb
Critical Reaction	"The family at the heart of the series, whose lottery win catapults them from western Sydney into its east, is warmly drawn, pretty funny – if exaggerated – and written to be the good guys." Michael Safi, <i>The Guardian</i>
Background	<i>Here Come the Habibs</i> is a comedy show, focusing on a Lebanese-Australian family who win the lottery and move to an affluent suburb of Eastern Sydney as a result. It represented a rare occasion such a family was depicted on Australian television, despite the large Lebanese population in Sydney, and was also the first time in more than a decade that a commercial network in Australia picked up a domestically-produced comedy.
Impacts	<p>The <i>Habibs</i> generated a significant degree of comment even in advance of its launch – a small but vocal community considered the production to be racist on the basis of its trailer, leading to an unsuccessful petition to cancel the show. This controversy undoubtedly helped with the audience figures, and following the show's release, the production generated strong instrumental impacts.</p> <p>As one Lebanese-Australian journalist highlighted, by taking "stereotypes and exaggerations of people in the community and expos[ing] their flaws and qualities," the Turkish-Lebanese creators used such tropes "to expose wider societal issues."¹⁷</p> <p>This exploration has generated the instrumental cultural impact noted above – by presenting stereotypical depictions of both the Lebanese family and the white Australian response to their success, it has forced a debate, making society consider its own prejudice</p>

¹⁷ 'Journalist Rashell Habib reviews "Here Come the Habibs"', Habib, R., accessed at <http://www.news.com.au/entertainment/tv/tv-shows/journalist-rashell-habib-reviews-here-come-the-habibs/news-story/8faa8addfocde660e4336731d2df4efc> [accessed 9th July, 2016]

	<p>around the issues raised.</p> <p>From a historical perspective, such programmes are a continuation of an Australian tradition, which ranges from serious programmes like <i>Brides of Christ</i> and <i>The Leaving of Liverpool</i>, to the comedies above. In this way, Australian TV has taken on an almost unique role in driving the debates about Australian history through the medium of drama and comedy.</p> <p>Whereas such a trend is seen in other countries, the depth and frequency with which it occurs in Australia is unusual, and underlines a deep and important instrumental role for TV in shaping the national conversation and society itself.</p>
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5.3. Multiplatform Drama¹⁸

5.3.1. Introduction

Screen Australia has, in recent years, devoted funding for multiplatform drama – an emerging area of production, which presents the opportunities for lower-budget projects on non-traditional platforms. This market allows for new forms of audience engagement, but is one for which data are hard to come by, and as such a smaller evaluation is possible at this moment in time.

As such, we present a baseline in this document, leveraging such data as are available to understand the scale and shape of this market, but this will need further evaluation as the sector develops in the near future.

5.3.2. Existing Data

Swinburne University undertook an analysis in 2012 of the online video sector in Australia, which highlighted the scale and scope of the Australian public's engagement with online audiovisual stories. This considered a broader range of subjects than just multiplatform drama – including platforms like Netflix and iTunes – but nonetheless forms a solid basis for our analysis here.

Swinburne's analysis underlined that the amount of internet video which Australians were watching was steadily increasing over the late-2000s and early-2010s, with estimates for 2010 ranging up to 60% on a monthly basis, across the entire population. The heaviest users were, as expected, in the youngest part of the population.¹⁹ Despite this large amount of usage, Nielsen data presented by Swinburne showed Australia to be in the bottom third for worldwide engagement with online video content.

The report cites 2009 research conducted by YouTube, which showed that user-generated content and TV shows – the two most relevant sectors for the multiplatform drama segment – were watched by 27% and 26% of Australian viewers respectively.²⁰ While this is a respectable result, it is much lower than the two most accessed segments of the market – music videos and movie trailers – with 51% and 31% of site users respectively. Swinburne's

¹⁸ Multiplatform Drama is defined by Screen Australia as content which takes risk and pushes the envelope of fiction storytelling on traditional and non-traditional platforms, including web series, tablet, mobile, and PC-based distribution as well as traditional television

¹⁹ *Online Video in Australia*, Given, J., et al (2012) p. 15

²⁰ *ibid*, p. 20

data also showed that YouTube was by far the most popular of all video sharing websites in Australia, with 7.7 million unique users in June 2011; Vimeo, the next most popular, had 843,000.²¹

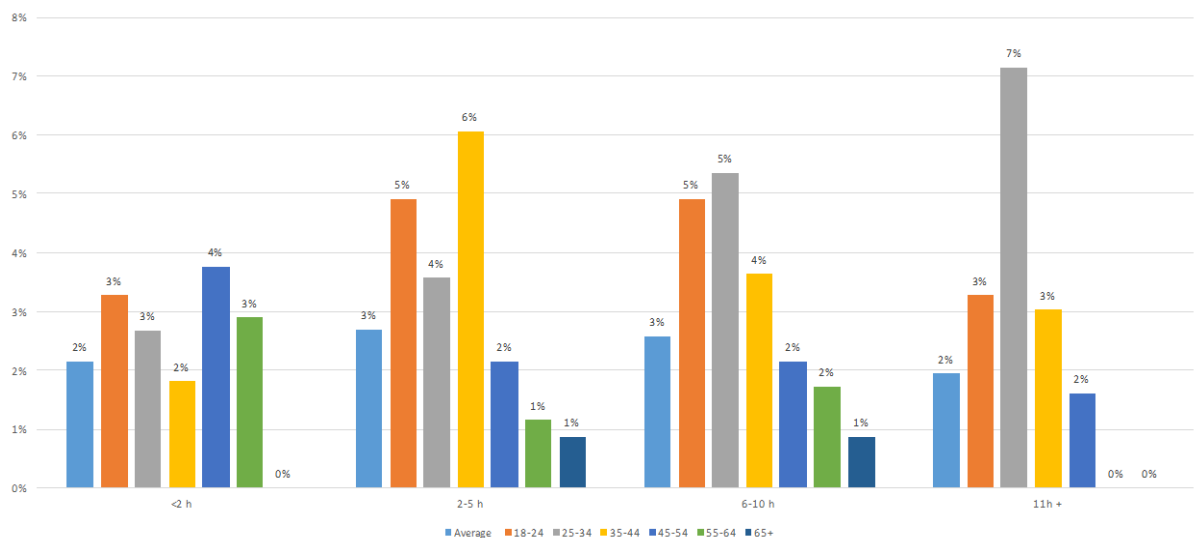
More recently, Screen Australia added to this research, highlighting again that YouTube was the most significant service used by Australians online, with 69% of the sample accessing it.²² This was followed by ABC iView (54%), Plus 7 (48%), SBS On Demand and tenplay (both 38%). 74% of those considered by the sample used VoD to watch catch-up TV, with paid VoD taking a smaller segment of the market – transactional VoD was at 41%, and subscription VoD (or SVoD) at 37%.²³

Beyond this research, Screen Australia's engagement with such content has been significant – 100 of the country's top online creators have been supported through the multiplatform drama strand, generating over 2 billion views over all their original content.²⁴ This demonstrates that the audience considers them to have some value, though at this stage no methodology exists to compare this value with that generated by television viewership.

5.3.3. Survey Analysis

As with the Swinburne analysis presented above, our survey asked broad questions about online viewership of content, and does not provide a way to isolate the impact of multiplatform drama within this (Figure 23).

Figure 23 - Content Viewership on Mobile/Tablet by Demographic Band



These data clearly show that for the mobile and tablet space, engagement is highest among the younger demographics, particularly the 25-34 age group – those in the 18-24 age group are far more prone to use a PC or laptop (Figure 24).

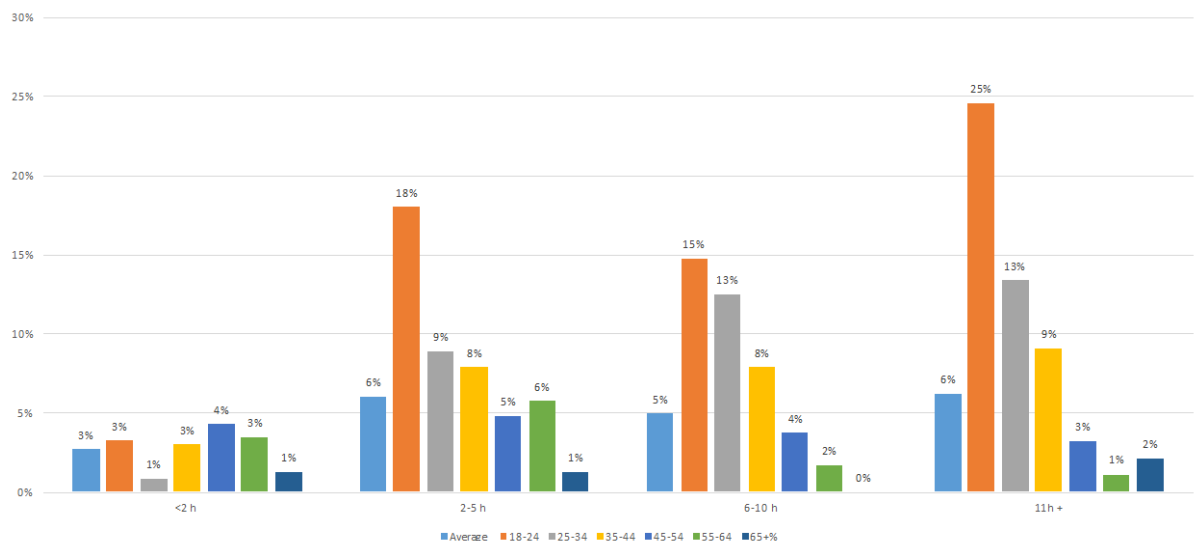
²¹ *ibid*, p. 36

²² Australian Audiences are Watching Online, *Screen Australia* (March 2015)

²³ Transactional VoD refers to a service where payment is given for individual episodes or series, for example iTunes; SVoD is where a subscription provides access to a range of content, which is the model used by Netflix

²⁴ Annual Report 2015/16, *Screen Australia* (2016) p. 4

Figure 24 – Content Viewership on PC/Laptop by Demographic Band



The reason for this differentiation is unclear – the commoditisation of smartphone ownership in recent years means cost is likely not an issue, though cost of data for viewing content on the move may be. It may also be the case that those in the older age group – being more likely to be employed as opposed to students – are required to engage with online content more during commuting time, leading to a preference for hand-held devices. This would explain the 7% of 25-34 year olds spending more than 11 hours using a mobile or tablet, when if they were at home a different device would be more convenient.

Such a form of engagement would open up a new model for cultural impact, as it does not require the viewer to be in the home environment, but experience of this in other markets does not limit such engagement to online-only titles. In many developed countries, it is increasingly common for people to use commuting time to catch up on networked-programming or films, though we have not been able to find data to prove this either way in the Australian context.

It is also a limitation of the dataset that we were not able to survey under-18s for safeguarding reasons. Given the propensity of this generation to engage frequently with online content, this is a limitation – a significant, likely academic study would be required to get around this challenge.

5.3.4. Conclusions

The available data and our survey make clear that online content is an increasingly important part of the consumer marketplace for screen content. However, as the emergence of multiplatform drama has coincided with the ability of consumers to view other content on the move, the available data do not allow us to disentangle these trends.

What is apparent from Screen Australia's data is that people view a large amount of Australian multiplatform drama online. More than two billion views have been recorded for leading Australian YouTube stars such as the Philippou Brothers, which represents a major achievement, but the ability to contextualise this against other screen sectors is lacking.

Undeniably, online content is a major trend for the younger generations in all societies. Based on the survey data, we estimate that the average Australian who uses online video spends 16

hours a week engaging with this, increasing to 19.2 hours for the 25-34 year age group. This is a significant proportion of leisure or commuting time, but exactly how it breaks down is, as yet, unclear.

5.4. Overall Impacts

Australian television engages with a significant percentage of the population, and has had the major cultural impact over the years of generating the sense of a single nation as a result. This trend began in the 1960s, when productions began to reflect Australian culture back to the population, and has continued ever since.

The literature around television in Australia demonstrates the long-running social impact of television drama within the country, underlined through productions like *A Country Practice*, which addressed issues of consequence, including sexuality, personal relations, and poverty. Through such instrumental impacts, Australian drama has a rich history of generating social debate and social progress, a production model which continues to this day through productions like *The Habibs*, *Go Back to Where You Came From* (Case Study 8), and *The Family Law*.

Case Study 8 – *Go Back to Where You Came From*

Years of Broadcast 2011-2015

Audience	Over 1 million viewers (series 2)
Ratings	8.4/10 on IMDb
Notable Awards	International Emmy for Outstanding Non-Scripted Entertainment (2013) Logie Awards for Outstanding Factual Programme in 2012 and 2013 Roses d'Or in 2012 for Factual Entertainment and Best of Rose (the first Australian show to win this international award)
Critical Reaction	"The first season was inspired, thought-provoking and, at times, cringe-inducing television that deservedly won huge ratings for SBS and major awards at home and abroad for production company Cordell Jigsaw." Karl Quinn, <i>Sydney Morning Herald</i>
Background	<i>Go Back to Where You Came From</i> is an unusual project – a TV documentary programme which, while showing on SBS, used the norms of reality television to engage the audience in a difficult topic for Australia: asylum policy. The basic premise of <i>Go Back</i> was to take two parties of six Australians with differing opinions on the asylum debate on a journey back to the asylum-seekers' home countries, including into the war zone of Iraq. In doing so, the participants were faced to force their preconceptions about those seeking refuge in Australia, with the production driving the broader debate in the process.

Impacts	<p>The impact of <i>Go Back</i> is underlined not only by the range of awards it has won – including a Logie award, an International Emmy, and two Golden Roses – but also by the fact that Series 2 averaged the highest-ever audience share for SBS. These strong audience ratings drive the debate around the show, conducted across newspaper columns, in public, and on social media.</p> <p>The success of the show also spurred format sales to other countries – including the Netherlands, Germany, and Denmark – with global media commentary on the Australia original.</p> <p>In doing this, <i>Go Back</i> provided a range of instrumental and institutional impacts, through its generation of the debate on asylum policy, and its increasing of the understanding of what the federal government is trying to achieve. This increased information to the public was at least in part the result of the unusual approach, which used reality toposes like sound effects to increase the tension, and therefore attracted people who wouldn't have watched a traditional documentary.</p> <p>The programme has, furthermore, laid the groundwork for ongoing impact, through the generation of a teaching pack, and its place on the school curriculum.</p> <p>The programme is one of a number of projects from important Australian production house CJZ, which was formed from the merger of three production companies with different focuses. The company demonstrates a range of institutional cultural impacts through the diverse nature of its content offer, which deliver different values to their audiences domestically and internationally.</p>
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While engagement with the television as a medium is highest within the older generations, across all respondents to the survey, engagement with video content remains very high. This underlines the role of television – and its emerging compatriots, such as multiplatform drama – in generating pan-Australian debates and change.

As with film, our Audience Response work also demonstrates the sheer breadth of Australian television production within a year, showing that while comedy and drama are the largest parts of the market, producers and the networks produce a wide variety of content. The most successful of these fitted into a range of different categories, but all contained distinctly Australian themes, characters, and storylines, underlining the audience demand for – and response to – self-reflection in screen media.

The production company Jungle has been responsible for a large number of these productions in recent years (Case Study 9).

Case Study 9 – Jungle

Years of Work 2013-present

Key Productions	AACTA and AWG Awards for <i>A Moody Christmas</i> Best Comedy awards from AFI, SPA, ADGA, and AWGIE
Notable Awards	<i>Here Come the Habibs, The Moodys, No Activity</i>
Impacts	<p>A comedy company based in Sydney, Jungle has been behind a range of the productions noted in this report, including <i>Here Come the Habibs, The Elegant Gentleman's Guide to Knife Fighting, and The Moodys</i>. Having been supported to grow by the Screen Australia Enterprise Funding programme, the company has been able to generate an award-winning range of content, achieving a range of Australian best comedy awards.</p> <p>This success has been achieved in a difficult climate, given the lack of engagement many networks in Australia have with comedy as a genre. Given this, Jungle have focussed on ensure that they produce well-written comedy, competing on the strengths of Australian content rather than trying to out-match big-budget US shows.</p> <p>Jungle are now making shows like <i>No Activity</i> specifically for SVoD platforms, responding to the evolving nature of the market for TV content.</p>

Such programmes have generated cultural value through a range of different models, whether instrumental through discussion of difficult topics, or via exploration of recent events, or institutional by demonstrating government impacts, or generating discussion of government policies. In doing so Australian TV also generates tremendous value for the nation – though compared to film this has, in recent years, been more domestic in nature, the recent production of quality drama is also starting to create export sales, and the basis for further soft power impacts.

Within this context, SVoD platforms such as Netflix and Stan are increasingly important, with production companies like Jungle now starting to make productions specifically for these. Australians are starting to subscribe to such platforms in ever greater numbers, a factor which may serve to increase the stratification of cultural impacts in Australia in future, as has been seen in other markets.

6. FACTUAL PRODUCTION

6.1. Introduction

This section of the report considers the impact of the Australian factual sector, addressing both film and TV productions that are aimed at documenting one or other aspects of reality, primarily for the purpose of informing, preserving, or educating, with many also looking to entertain.

Given the range of data available, this will primarily be addressed through case studies. The Audience Review methodology is primarily used to describe the breadth of material produced, given the lack of data pertaining to its audience impact.

6.2. Audience Response

6.2.1. Methodology

One of our aims during this study was to generate data in relation to the audience response to a sample of documentaries, as we did for the film and TV sectors. Regrettably, the data to conduct such a study did not prove available, as the vast majority of Australian documentaries did not generate the data on, for example, audience reviews which would allow this to happen.

This is not to say that such documentaries did not have impact – a large number of them did have audience scores and response on social media. Many such documentaries were also mentioned as being of cultural value in the survey, underlining the impact they had. Rather, it did not prove possible to collect this in a structured way, in order for our analytical model to be implemented.

As such, this element of the report will describe the wide range of documentaries released in Australia over the 2011-12 and 2012-13 fiscal years, to underline the results of the literature review, regarding the ongoing importance of documentary and current affairs to the Australian public.

Nonetheless, there are a range of important feature documentaries produced in Australia, and *That Sugar Film* (Case Study 10) is a key example.

Case Study 10 – That Sugar Film

Year of Production 2014

Box Office	US\$1.5 million (Worldwide)
Ratings	91% on Rotten Tomatoes 7.3/10 on IMDb
Notable Awards	AACTA for Best Feature Length Documentary (2016)
Critical Reaction	"Not only entertaining and informative, but also deeply disturbing, as Gameau puts on pounds and inches", Michael O'Sullivan, <i>Washington Post</i> "Fast-paced, entertaining and informative, "That Sugar Film" is a cautionary tale about the hidden sugar content in everyday food products", Alissa Simon, <i>Variety</i>

Background	A social impact documentary supported after pitching Good Pitch, <i>That Sugar Film</i> followed Damon Gameau on an experiment to document the effects of a high-sugar diet on a healthy body. This included a focus on purportedly healthy foods, such as cereal bars, which contained significant hidden sugar content.
Impacts	<p>The film was well received by many for addressing an important subject, and made more than \$1 million at the Australian box office, subsequently reaching fourth place on the Australian iTunes store, and second place in New Zealand.</p> <p>To maximise the instrumental impact – making people consider the impact of their diet – the distributor Madman Entertainment provided 'community screening kits' to allow not-for-profits to maximise the impact of the production.</p> <p>The film was also successful internationally, receiving strong recommendations from campaigners like Jamie Oliver, and achieving good digital sales in the US.</p> <p>However as with many such documentaries, it also attracted a degree of criticism, particularly with relation to its use of science, and the experts cited. Nonetheless, this is also evidence of its instrumental impact, as such debates act to drive the conversation.</p>

6.2.2. Current Affairs and Documentaries Noted in the Survey

Current affairs and documentary programming rated highly in our survey, particularly in the named content segment, and a number of the programmes rate a specific mention in the context of this report (Figure 25).

Figure 25 - Current Affairs and Documentaries Noted in the Survey

Programme or Genre	Number
<i>Four Corners</i>	34
<i>Q&A</i>	26
Current Affairs (as a genre)	21
<i>60 Minutes</i>	20
News Programmes (as a genre)	20
Natural History (as a genre)	15
<i>ABC News</i>	13
<i>Australian Story</i>	13
<i>A Current Affair</i>	8
<i>Insight</i>	8
<i>7:30 Report</i>	6
Anzac Day Programming	5

Four Corners placed eighth in the overall list of named content, indicating significant immediate recognition by survey respondents as a piece of Australian content of cultural value. This demonstrates the role it has played in shaping Australian society.

Natural history programmes were of particular interest to non-Australian respondents, demonstrating that such factual programming forms a key part of how they understand the nation. For the most part, the genre as a whole or specific channels were named, but a number also highlighted Steve Irwin's *The Crocodile Hunter* as being a programme of interest, reflecting its worldwide popularity.

6.2.3. TV Documentary Results

TV Documentary is by far the largest of the samples studied through this methodology, with 330 separate programmes and series originally broadcast over the period in question (Figure 26). This is reflective of the prolific nature of documentary production in Australia – and the strong, ongoing interest of the Australian public in documentary content.

Figure 26 - Genres of Documentaries in Audience Response TV Sample

Subject	Number
Cultures - Australian	47
Art and Culture	40
History & Politics	32
Indigenous	31
Social contemporary, Social Issues & Community Welfare	18
Cultures - International	18
Science	14
Travel & Adventure	13
Environment & Conservation	12
Relationships & Sexuality	11
Religion, Religion and ethics	9
Ethnic Groups & Immigration	8
Natural history	7
Education	6
Drama	2
Biographical, Entertainment, Women	1
Children	1

The primary subjects of documentaries first broadcast in the period were Australian culture, art and culture, history and politics, and Aboriginal and Torres Strait Islander issues. Smaller numbers of documentaries in other genres – such as science, international culture, and contemporary social affairs – were also broadcast. Given the degree to which they were noted in the survey, surprisingly few natural history programmes were broadcast, though this may be reflective of the fact that subscription channels – such as National Geographic and Discovery – did not form part of the sample.

The role of documentaries in cataloguing and helping the audience to understand Australian culture and Aboriginal and Torres Strait Islander life is one which was noted in the literature review, and it is a key instrumental role for such production. By helping groups to understand another's perspective – and in the Australian case, by providing a variety of formats in which this is achieved – documentary plays a vital role in helping societies to develop.

The dataset above demonstrates both of these sides of Australian documentary – a large number are informational, and aim to catalogue and explain issues, providing instrumental impacts in this regard. Others, meanwhile, provide instrumental value primarily through their social impact approach, for example commenting on social issues and community welfare.

For the most part, both will also have inherent cultural value through their role – whether by design or simply on account of their creation – of preserving cultural artefacts and history.

A plurality of the sample in question were short programmes (150), with 129 longer series being broadcast over the period, and 51 feature-length television documentaries.

Figure 27 - Broadcasters of Documentaries in Audience Response TV Sample

Network	Number
ABC1	142
SBS	42
Seven	40
NITV	36
Nine	27
TEN	18
ABC2	11
7two	4
ABC3	3
SBS two	3
7mate	2
ABC News 24	2

As with the broader TV sample, ABC dominated the broadcast of documentary television over the period in question, followed by SBS, Seven, and NITV (Figure 27). This is reflective of the broad, public-interest nature of the documentaries screened, and the instrumental cultural value they generate. It is also demonstrative of the public remit of the channels in question.

6.2.4. Film Documentary Results

As the feature documentaries (intended for cinema release) in the sample had sufficient data with which to compare one another, a data-cut of the overall sample was taken. This considered the 12 films on an equally weighted basis (Figure 28).

Figure 28 - Leading Documentaries in Audience Response Film Sample

Title	Ranking
<i>Storm Surfers 3D: The Movie</i>	9
<i>I am Eleven</i>	19
<i>The Curse of the Gothic Symphony</i>	22
<i>A Deeper Shade of Blue</i>	26
<i>Paul Kelly: Stories of me</i>	28
<i>Autoluminescent</i>	29
<i>Fighting Fear</i>	30
<i>The Tall Man</i>	32
<i>The First Fagin</i>	33
<i>Decadence: Decline of the Western World</i>	41
<i>Chad Morgan: I'm Not Yet Dead</i>	44
<i>Persecution Blues: The Battle for the Tote</i>	52

The top documentaries in this sample were *Storm Surfers* – a documentary following professional surfers trying to find the biggest waves; *I Am Eleven*, a documentary about 11-year-old children; and *The Curse of the Gothic Symphony*, about Australian musicians mounting a 'doomed' symphony.

From a cultural impact perspective, *I Am Eleven* is a particularly interesting project, as it follows a range of different 11-year-old children from 15 countries around the world, over the course of six years. It gained a strong critical reception on account of its subject matter, by providing the viewer with an opportunity to compare the different lifestyles, opportunities, and opinions of the children followed. As a result of this, it provides a strong instrumental impact, though despite its critical success, it has had only a limited audience impact to date.

Worthy of note in the documentary sample is also the unusually large number of music-based films which were released over the period of study. This is not necessarily a reflection of a particular interest from the Australian public in this – most of the titles, such as *Gothic Symphony* and *Paul Kelly* are niche – but it is nonetheless an interesting trend. Were this to be identified over a longer timescale, it would highlight an interest on the part of the Australian audience.

6.3. Positive Externalities and Social Impact

In order to explore the positive externalities and social impact of documentaries in Australia, we will consider the contribution of two bodies set up in recent years for this purpose – DAF, and Good Pitch (Case Study 11).

Case Study 11 – Social Impact Documentary Organisations

Years of Work **2013-present (DAF)**
 2014-present (Good Pitch)

Key Productions	<i>That Sugar Film, Ringbalin River Stories, Gayby Baby</i>
Impacts	<p>Good Pitch and the Documentary Australia Foundation (DAF) are both bodies which have emerged in the recent past to generate and support social impact films, with DAF having launched in 2008, and the more global Good Pitch – which DAF supports – in 2014.</p> <p>DAF is an independent non-profit documentary initiative, which aims to link documentary makers with philanthropists to fund films aimed at social change; this process includes the aim of maximising audience impacts through innovative release strategies.</p> <p>Such productions are supported by educational programmes, providing a suite of tools for teachers to use to assist in the use of documentary in the classroom. DAF also works with NITV to upskill Aboriginal and Torres Strait Islanders creators, helping them to better tell their stories.</p> <p>Since its launch, DAF has been involved with more than 200 documentary films, and received over \$8 million in donations to support these.²⁵</p> <p>Over the last three years, DAF has also supported the international</p>

²⁵ <https://www.documentaryaustralia.com.au/page/64/about-us> [accessed 8th August, 2016]

	<p>Good Pitch programme in Australia, which acts to bring together a range of social impact actors – including foundations, NGOs, policy makers, and philanthropists – into a single location to develop campaigns.</p> <p>Participants get seven minutes to pitch their production – both a film and a social outreach campaign – to the audience at events, with a moderator then leading a feedback session. By participating in Good Pitch, Australian filmmakers are able to tap into a broader global network which includes a number of US arms as well as a UK base, as well as generating much greater awareness of their productions.</p> <p>Both of these initiatives generate strong social value by supporting films with instrumental and inherent value, but without the financial means to otherwise get made. They support and maximise this instrumental value by their use of expansive release strategies, using a range of new techniques to access the market.</p> <p>In doing so, both organisations are generating increasing amounts of institutional value for themselves, particularly as the audience begins to recognise their brands, and to seek out other work they have supported.</p>
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6.4. Future Opportunity

Aside from the immediate instrumental and institutional impacts generated by the range of documentaries Australia has produced, such content also has a strong inherent value, by forming the basis for preservation of history and culture. Such films include the past treatment of Aboriginal and Torres Strait Islander communities and women; folk songs from around Australia; and the emergence of Australia as a nation. At present, the strongest use for these are in local history and education, where film societies are supported to show films which demonstrate what their areas used to look like.

Digitisation would allow for much greater use of this resource – as the BFI has demonstrated with its Britain on Film archive – but at this present juncture, such archival materials predominantly have inherent cultural potential, rather than cultural value.

6.5. Overall Impacts

Documentary production has been a key part of the Australian media landscape since the birth of moving pictures, and has over that period provided a critical resource for the preservation, exploration, and explanation of the nation and its people. In doing this, documentary content on film and television has created a tremendous degree of change, whilst simultaneously generating a library of inherent cultural value, captured in archives such as the NFSA. Such archives form the basis of a future opportunity for the nation to explore and build upon its own history.

The audience response to this content – both through surveys and our sample analysis – demonstrates the ongoing value of such production. Domestically, Australians note the particular importance of current affairs and news programmes, which have the instrumental impact of informing them, and helping them to hold the state to account, built behind the institutional value of brands like *Four Corners* and *Q&A*. Internationally, natural history documentary plays a key role in how the public understands Australia, generating soft power in the process.

While documentary is therefore a long-running sector, it is not one which is standing still. The emergence of social impact productions like *Gayby Baby* (Case Study 12) and *That Sugar Film* continues to shape the political debate, while DAF and Good Pitch provide support for the generation of such films. These trends indicate that the documentary sector in Australia is continuing to regenerate itself, finding new ways to generate institutional and instrumental impacts, and building inherent cultural value in the process.

Case Study 12 – *Gayby Baby*

Year of Production 2015

Box Office	US\$ 75,838 (Global)
Ratings	86% on Rotten Tomatoes 6.0/10 on IMDb
Notable Awards	Nominated for AFCA and AACTA awards in 2016
Critical Reaction	"The vibrant personalities of the children at the heart of Maya Newell's documentary make for a measured but entertaining film", Luke Buckmaster, <i>The Guardian</i>
Background	Relationships and sexuality were noted as a key topic in 11 of the television productions in the sample, and they were also key to <i>Gayby Baby</i> , a 2015 feature documentary that followed four children raised by same-sex parents. The film was funded through a crowdfunding campaign, as well as receiving A\$180,000 in pledges from financiers at Good Pitch Australia.
Impacts	<p>This film touched on a highly topical political issue – same-sex marriage – doing so with a significant out-reach project, and generating controversy as a result, being banned from schools by the NSW Education Minister.</p> <p>By exploring family structures that are rarely shown in mainstream media, the film explored a range of important themes, including the role of family, and how children grow up to understand sexuality and gender. It also sought to bring a new voice to a debate on the role of parents in childhood, by enabling the children of same sex couples to articulate their experiences, and their own perspective on their lives.</p> <p>An overt social impact documentary, <i>Gayby Baby</i> sparked a nationwide debate after it was banned in NSW schools; in some of which it had planned to be shown as part of a simultaneous broadcast in schools across Australia. This led to a debate around the issues shown within the press and social media and – according to the film's Facebook page – a rush of demand of the teaching kit for the production, with 350 copies downloaded in the first week.</p> <p>Both of these factors demonstrate the programme's instrumental and institutional impacts, with the reaction of the state government generating a debate around the content of the film, and the questions of gay marriage and same-sex parenting.</p> <p>Aside from the Australian impact, <i>Gayby Baby</i> was recognised internationally, screening at a number of festivals, and receiving a</p>

	<p>recommendation by the German School Cinema Screening Programme; this coincided with a German translation of the toolkit from Vision Kino. The film is also available on Netflix in the UK and US.</p>
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7. CHILDREN'S MEDIA CONTENT

7.1. Introduction

This section of the report considers the impact of the Australian children's content sector, considering film and TV productions aimed at a younger audience, reflecting the particular needs and educational opportunities for this demographic.

As with the documentary element, this will primarily be addressed through case studies. The Audience Review methodology is used in full, but its value is more limited than the broader film and TV sectors, given the limited number of releases over the period in question.

7.2. Audience Response

7.2.1. Methodology

As with the film documentary sample, we have taken a cut of the broader film and television samples in order to identify the value of children's content within these. For both of these sub-samples, we will only consider the equally-weighted figures, given the limited range of productions aimed at the target audience (Figure 29).

7.2.2. Film Sample

Figure 29 – Ranking of Children's or Family Films in Audience Response Sample

Title	Ranking
<i>Red Dog</i>	1
<i>Happy Feet 2</i>	6
<i>Mental</i>	8
<i>Santa's Apprentice</i>	9
<i>I am Eleven</i>	19
<i>Return to Nim's Island</i>	36
<i>Oakie's Outback Adventures</i>	53

Of the films in the sample list, seven were either 'children' or 'family' features, including four of the top ten; this is indicative of a sector which, though small, is successful in achieving prominence for its productions.

The two leading children's films – *Red Dog* and *Happy Feet 2* – have been mentioned previously, and they demonstrate very different cultural impacts. As noted in the film section, *Red Dog* is more culturally Australian, and in this way it demonstrates the value of children having content which helps them understand the place in which they live. This form of impact is both instrumental and institutional, given how it helps to shape the child's understanding of place.

Happy Feet 2 is a more international film, and as we have noted, has the institutional cultural value of demonstrating Australian technical success to those individuals in the world who correctly recognise it as an Australian film. Whereas *Santa's Apprentice* was not highlighted in the survey, it was also an international film (though in this case a co-production between Australia and France) with similar technical value, and the potential to underline Australian creative strength.

More recently, the film *Paper Planes* (Case Study 13) has performed strongly in Australia, as well as winning awards internationally.

Case Study 13 – Paper Planes

Year of Production 2014

Box Office	A\$9.6 million (Australia)
Ratings	82% on Rotten Tomatoes 6.2/10 on IMDb
Notable Awards	AACTA award for Best Original Screenplay Won Best Children's Film at Jerusalem Film Festival and Audience Award at Cinéma des Antipodes Nominated for Crystal Bear at Berlin Film Festival
Critical Reaction	"An energetic kids' film that harnesses the interior logic of children's minds to pleasing and inspiring effect", Eddie Cockrell, <i>Variety</i> "A sweet-natured family comedy – but gentle, and... best for very young audiences." Peter Bradshaw, <i>The Guardian</i>
Background	An award-winning production, supported by a range of A-list talent, and participating in A-list festivals, <i>Paper Planes</i> is an unusual film for modern Australia. It focuses on the passion of a young Australian boy for flight, and his subsequent challenge to compete in the World Paper Planes Championship.
Impacts	The film generated a strong domestic box office following its 2015 release, becoming the 31 st highest grossing Australian film of all time. Loosely inspired by a true story, <i>Paper Planes</i> underlined a range of key themes for young people, including ingenuity and resilience. By dealing with a serious subject – a grieving father – within the context of such a production, it also helped to teach lessons to the audience about how to cope with loss. While the impact of such lessons cannot yet be known, the success of the film, its critical acclaim, and our general knowledge of the value of children's media suggest this should help to generate good downstream cultural impacts. Aside from its domestic success, the film was sold to a range of international territories – including North America, Western Europe, and Japan – though its international performance appears to have been limited. The film also inspired a father in Brisbane, Dan Adler, to hold a paper plane competition, with the aim of getting children and their parents to connect away from their laptops and iPads. ²⁶

²⁶<http://www.abc.net.au/news/2016-10-17/paper-plane-championships-teach-children-about-community/7938188>

7.2.3. Television Sample

Figure 30 - Ranking of Children's or Family TV Programmes in Audience Response Sample

Title	Ranking
<i>Dogstar series 2</i>	13
<i>Guess How Much I Love You series 1</i>	14
<i>Dance Academy series 2</i>	15
<i>Bananas in Pyjamas series 6</i>	44
<i>The Adventures of Figaro Pho</i>	53
<i>The Woodlies</i>	55
<i>You're Skitting Me series 1</i>	56
<i>A gURLs wURLd</i>	57
<i>Flea-Bitten!</i>	61
<i>Lightning Point</i>	62
<i>Pixel Pinkie series 2</i>	69
<i>Ghosts of Time</i>	73
<i>Shezow</i>	78
<i>The Elephant Princess series 2</i>	81
<i>Mind Over Maddie</i>	82
<i>Mal.com</i>	83
<i>Exchange Student Zero</i>	84
<i>Teenage Fairytale Dropouts</i>	86

Compared to the film sector, children's TV programmes do not rank so highly on the sub-sample (Figure 30), with the exception of the top three programmes – *Dogstar*, *Guess How Much I Love You*, and *Dance Academy*. Many of the others drop close to the bottom of the overall ranking, though this may be a function of the data gathering model, and the limitations of getting data on audience response to programmes which have a target audience who are unlikely to review online.

As a result, this would underline the particular success achieved by the three top programmes, of which *Dance Academy* (Case Study 14) is the most interesting from a cultural value perspective.

Case Study 14 – Dance Academy

Years of Broadcast 2010-2013

Audience	A\$ 20.2 million (Global)
Ratings	9.2/10 on TV.com 8.2/10 on IMDb
Notable Awards	Won two Logie awards for Most Outstanding Children's Programme from three nominations Nominated for Three AACTA Awards Nominated for two International Emmy awards in 2011 and 2014
Critical Reaction	"This is a show about teens in a dance school, and they're not all in the grip of an eating disorder. It might be a fantasy world, but that's a fantasy world I want to live in.", David Baxter, <i>Manhattan Review</i>

Background	A teen-focused children's drama with an iconic Sydney Harbour setting, <i>Dance Academy</i> concentrated on a small number of talented young dancers on a tough course at the National Dance Academy. In following the group, the programme explores a range of key issues for younger Australians, such as eating disorders, bullying, and sexuality – all of these are of interest to the target age group.
Impacts	<p>The subject matter demonstrates a direct instrumental value, by providing guidance around tricky issues of personal development. The programme also included a well-received Aboriginal and Torres Strait Islander storyline, which has helped set the stage for a new Aboriginal and Torres Strait Islander teen drama, <i>Ready for This</i>, which has recently been released.</p> <p>Internationally, the production has been sold in more than 135 countries, and has achieved a cult following in the US among the young adult audience. This sets the stage for downstream soft power impacts given its overtly Australian character and setting. The programme has also provided a solid basis for its stars – several actors who took part in the programme have since moved onto a range of Hollywood productions, including <i>The Flash</i>, and the remake of <i>Point Break</i>.</p> <p>As a result of this range of factors – the instrumental value of discussing key personal growth topics, and of presenting an Aboriginal and Torres Strait Islander storyline, the international acclaim, and the downstream success of the actors – <i>Dance Academy</i> has generated a range of instrumental and institutional cultural impacts already. It has the potential to continue doing so as it is repeated in the future.</p>

7.2.4. Conclusions

The data collected in the film sample underline the particular value of Australian family film productions to the audience. With four of the six films ranking in the top ten of our overall weighted scorecard model, the data is suggestive of a particular value audiences place on domestic family content, in spite of the difficulty producers have in making it.

Children's television does not rank so highly, but there are a number of shows within this sample of clear cultural value. *Dance Academy* is the most prominent of these, and demonstrates the impact which high-quality Australian content can have domestically and internationally.

7.3. Overall Impacts

Strong evidence exists to demonstrate the particular importance of quality children's content in general, and this is underlined in the Australian context by the impact of a number of high quality productions. These include *Little Lunch*, which helps children to understand the world around them, as well as help with school preparedness; *Round the Twist*, which influenced a generation, and remains popular to this day; and *Paper Planes*, with its focus on ingenuity and resilience.

In general, it is apparent that while any high-quality and well-designed children's production has value for childhood development, domestically made ones are most important. These have the particular value of placing things in context for children, helping them to understand

where they come from, and what their place is in the world. Such productions can also – as *Dance Academy* demonstrates – be a launch pad for longer careers.

Internationally, Australian content is also successful – well-made productions from *Round the Twist* to *Dance Academy* sell around the world, and have similar downstream impacts to adult productions. While the 'Memory Project' – recently run by the Australian Childrens Television Foundation to collate memories of children's TV – focused on Australian respondents, there is good evidence from around the world for the impact of *Round the Twist*, particularly in the UK and Ireland (Case Study 15).

Case Study 15 – *Round the Twist*

Years of Broadcast	1989-2001
Ratings	8.2/10 on IMDb 7.6/10 on TV.com
Notable Awards	Two AFI Awards for Best Children's Television (1991 and 1993) Two Logie Awards for Most Outstanding Children's Programme (2001 and 2002) Banff Television Festival award for Best Children's Program (2000)
Critical Reaction	"You really won't find a more enjoyable, absurd or well put together twenty-five minutes in many other places." Carley Tauchert, <i>Den of Geek</i>
Background	Based on a series of fantasy novels, <i>Round the Twist</i> was a globally-successful live-action drama, focusing on a family living in a lighthouse.
Impacts	<p>The programme was both high-concept and notable for pushing the boundaries of what was acceptable in children's television, and as a result fulfilled the criteria of honesty and strong children's characters which often permeate successful content for younger audiences.</p> <p>Noted for its bizarre plotlines and Australian humour, the programme was able to alight upon a range of issues of interest to its target audience, including birth, death, and homosexuality; the programme is also noted for its heavy environmental message, and use of the Australian landscape.</p> <p>As such, it not only sits within the tradition of quality Australian children's television, but also has elements of the social impact messages of dramas like <i>A Country Practice</i>.</p> <p>This combination was not only successful in Australia – the show was hugely popular in the UK and Ireland, as well as in the Netherlands, Germany, and Canada.</p> <p>Its ongoing impact within Australia is also demonstrated not only through the 'Memory Project' (see above), but also the major response the programme had when it was re-released on Netflix in 2015. This acts as evidence of its inherent cultural value, being a particular cultural asset, recognised and considered of ongoing interest by its target audience.</p>

Despite this strong preference for Australian content though, and the opportunities for downstream and international impacts, output remains limited, as Screen Australia's *Child's Play* report reflected. This represents a challenge for the sector moving forward, if the past success of Australian children's content is to be regained.

8. INDIGENOUS SCREEN CONTENT

8.1. Introduction

This section of the report considers the particular nature, value, and role of content made under the creative control of Aboriginal and Torres Strait Islander screen practitioners.

It will use all of the methodological tools leveraged in other segments of this report, though with some adaptations in reflection of the limited ability of the ratings system to capture the audience share of Indigenous-focused channels and services. The primary audience for these services are Indigenous communities, many of which are located in remote locations outside the ratings catchment area

8.2. Audience Response

8.2.1. Methodology

In order to conduct an audience response survey for Aboriginal and Torres Strait Islanders content, we adopted a similar model to that used for children's media, taking a cut of the data which looked at those productions with Aboriginal and Torres Strait Islanders in key creative positions. As this sample was limited in size for the broader databases, only the equally weighted tables were considered.

As a large percentage of the output of Australian documentaries also comes under Aboriginal and Torres Strait Islander creative control, a separate set of statistics to explore this is also noted in this sub-chapter.

8.2.2. Film Results

Figure 31 - Ranking of Films in Audience Response Sample with Aboriginal and Torres Strait Islander Involvement²⁷

Title	Ranking
<i>The Sapphires</i>	2
<i>Housos vs Authority</i>	11
<i>Satellite Boy</i>	27
<i>The Tall Man</i>	32
<i>Toomelah</i>	38

Five of the films released over the period contained significant Aboriginal and Torres Strait Islanders creative involvement (Figure 31), with one of these – *The Sapphires* – being among the most culturally impactful.

Satellite Boy, *The Tall Man*, and *Toomelah* all tell Aboriginal and Torres Strait Islander-focused stories, of which *Satellite Boy* is interesting from a cultural communications perspective, reflecting its story about an Indigenous boy torn between his traditions and the modern world. This holds significant potential for cultural impact, a fact which has been recognised through the production of a teaching pack for the film.

²⁷ Aboriginal and Torres Strait Islander involvement is logged by Screen Australia in their data on projects, and these data have been used in our analysis

8.2.3. TV Results

Figure 32 - Ranking of TV Programmes in Audience Response Sample with Aboriginal and Torres Strait Islander Involvement

Title	Ranking
<i>Redfern Now series 1</i>	11
<i>Swift and Shift Couriers series 2</i>	32
<i>Housos series 1</i>	36
<i>Rush series 4</i>	37
<i>Mabo</i>	41
<i>The Elegant Gentleman's Guide to Knife Fighting</i>	59

Redfern Now (Case Study 16) is the stand-out TV series with Aboriginal and Torres Strait Islander creative control over the period (Figure 32), having had impacts for both the Aboriginal and Torres Strait Islander audience and the wider Australian community.

Case Study 16 – *Redfern Now*

Years of Broadcast 2012-2015

Audience	1.05 million (average, 5 City Metro and Regional, season 1)
Ratings	7.9/10 on IMDb
Notable Awards	Three Logie Awards, two for Most Outstanding Drama Series (2013 and 2014) Four AACTA Awards from 13 nominations, including Best Television Drama Series (2014)
Critical Reaction	"There might be some examples floating around in the tele-sphere but I can't think of another Australian drama that has our working class front and centre.", Melinda Houston, <i>Sydney Morning Herald</i> "Redfern Now is an exquisitely distinguished soap opera with a high-end look and scale that makes a feature-length finale feel right." Luke Buckmaster, <i>The Guardian</i>
Background	<i>Redfern Now</i> was a drama series about Aboriginal and Torres Strait Islanders' living in the Sydney suburb of Redfern. The show followed six inner-city households navigating the difficulty of life in the inner-city suburb, including domestic violence, mental and physical illness, and crime.

<p>Impacts</p>	<p>A rare and nuanced portrayal of Redfern, which was commonly associated with poverty and violence, was considered particularly valuable for going “beyond the headlines”. The authenticity of the stories and characters were in no small part attributed to the fact that the show was the first ever drama series for a major network produced by an all-Aboriginal and Torres Strait Islander cast and crew.</p> <p>The show was an immediate success when it launched in 2012, and the first series attracted more than 1 million viewers per episodes, a large audience for an Indigenous-focused show in Australia.</p> <p>The authenticity and quality of the writing and the performances was also appreciated by audiences. Responses from interviewees for the <i>Hearts and Minds</i> report showed that it helped foster empathy for a community which is often stereotyped and a better understanding of their situation and the lingering impact of Australia's history today.²⁸</p> <p>After two seasons, the show concluded its run with a telemovie which aired in April 2015. It has been credited for propelling contemporary Aboriginal and Torres Strait Islander stories into the mainstream. In addition, with an all-Indigenous cast and crew it an infrastructure for real career opportunities for creative Aboriginal and Torres Strait Islanders.</p> <p>One of the directors of the show, Catriona McKenzie, was recently selected by Screen Australia and the ADG to have a Director's Attachment on Ridley Scott's next film while it shoots in Australia.²⁹ This scheme is designed to help emerging directors to develop their craft by working with experienced filmmakers.</p>
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8.2.4. TV Documentaries

Thirty documentaries were originally broadcast during the period of analysis, having been made under Indigenous creative control. Many dealt with Aboriginal and Torres Strait Islander issues, whether cultural, historical, or health-related.

ABC was the largest broadcaster for these productions, with 16; NITV broadcast 12, and SBS, two. The majority (22) were short, standalone documentaries, with six series and two feature-length documentaries – both relating to Aboriginal involvement in sports – broadcast over the period.

One particularly impactful documentary – broadcast prior to this sample – was the Blackfella Films-produced *First Australians* (Case Study 17).

²⁸ *Hearts and Minds*, Screen Australia (2013) p.7

²⁹ Two Female Australian Directors to Join Ridley Scott on *Alien: Covenant*, Screen Australia (2016); Catriona also worked on *Dance Academy*

Case Study 17 – First Australians

Year of Broadcast 2008-2009

Ratings	8.9/10 on IMDb
Notable Awards	AFI and Logie Awards for Best Documentary Series Australian Writers Guild Award for Outstanding Writing in a Documentary
Critical Reaction	"An energetic, amusing and resolutely feel-good-film-with-a-message", Mark Adams, <i>Screen International</i>
Background	<p><i>First Australians</i> was a seven-part historical documentary series which traces Australian history, beginning in 1788 and ending in 1993. Significantly, all historical accounts were obtained from and told from the perspective of Indigenous Australians over the course of six years of development and consultations – particularly with the descendants of the individuals portrayed in the documentary. The community consultation process also involved checking the content of the scripts, and showing several cuts of the documentary for comment.³⁰</p> <p>The series also respected the Aboriginal and Torres Strait Islanders' Cultural and Intellectual Property rights, ensuring the cultural content of Aboriginal and Torres Strait Islander people. Notably, <i>First Australians</i> was released as part of a greater project that consists of a hard-cover book, a community outreach program and a substantial website featuring more than 200 mini-documentaries, broadening the cultural value generated by the project.</p>
Impacts	<p>Upon airing, the series was very well received and won many awards including the AFI Award and Logie Award for Best Documentary series. It was described by the Sydney Morning Herald as "<i>the documentary of the decade</i>".³¹</p> <p>The popularity of <i>First Australians</i> has been long lasting, especially as an educational tool, allowing the project to generate a continuing cultural impact. In 2013, it was revealed that the series have earned more than A\$1 million in royalty payments from the education sector.³²</p> <p>The research conducted for the <i>Hearts and Minds</i> report (see appendix 9.2), also published in 2013, found that Australian individuals also valued the series as a unique and important account of the country's history. Describing their opinion of the show, one respondent said:</p> <p><i>First Australians... it's the story of how Aboriginals have been treated. It's horrific. And I think every single child should watch that in school. It introduced the history of Australia</i></p>

³⁰ *About The Series*, First Australians/SBS website (undated)

³¹ *Curator's Notes* by Sophia Sambono, Australian Screen entry: First Australians (undated)

³² First Australians Has Earned More than \$1m in Education Royalties, Screenrights (2013)

that we never learnt in school. I didn't know anything about it. I think that's horrific that we live here and yet we know absolutely nothing. There is no Australian history taught in schools like that.³³

8.2.5. Conclusions

Reflecting the scale of the Indigenous population, only a limited number of the productions released in the Audience Response sample had leading Aboriginal and Torres Strait Islanders creative involvement, but two of those which did – *The Sapphires* and *Redfern Now* – had particular cultural value, which we have developed as case studies. Consultees have, furthermore, noted that such productions are becoming ever less unique – Aboriginal and Torres Strait Islander-led television is increasingly an ordinary part of the Australian TV landscape, exemplified not only by *Redfern Now*, but also by a more recent show such as *Cleverman*. While these have yet to generate the cultural value which is the focus of this report, they nonetheless suggest a bright future for the Indigenous screen sector in Australia.

8.3. Overall Impacts

Indigenous screen content comes in a variety of forms, aiming at a variety of policy goals, but the data which exist to demonstrate its impact are nonetheless difficult to piece together.

What is clear from the literature review is that remote Aboriginal and Torres Strait Islander communities have begun to catch up fast with the availability of communications in more urban parts of Australia. This has generated a range of cultural value impacts, including the self-reflection of models like CAAMA and BRACS, and the ability of communities to catalogue and preserve their own history and culture, through programmes like *Songlines on Screen*. However, as with the broader sector, the future is unclear as a result of technological change, the full impacts of which are yet to manifest.

Indigenous-controlled content has also had a range of impacts in the non-Aboriginal and Torres Strait Islander community, with productions like *First Australians* helping to generate an agreed history for the first time, and presenting it to the wider world. *Redfern Now* and, more recently, *Cleverman* both show good engagement figures, though it is arguably too early to label this as a trend. Along with other Indigenous projects, *Cleverman* has received significant acclaim abroad; this has been a trend with recent Indigenous-led screen content, which has been significantly awarded in international competitions in recent years.

There is strong evidence that screen production has helped Aboriginal and Torres Strait Islander communities to develop inherent stores of cultural value through the production of documentary content, had instrumental impacts through telling this story to the wider world, and generated valuable institutions like Blackfella Films (Case Study 18). This is exemplified through the availability of productions like *Redfern Now*, which shows strong ratings in both Indigenous and non-Indigenous communities, with anecdotal evidence that this and other productions are starting to build greater understanding of Indigenous Australia.

³³ *Hearts and Minds*, Screen Australia (2013) p.6

Case Study 18 – Blackfella Films

Years of Work	1992-present
Key Productions	<i>First Australians</i> , <i>The Tall Man</i> , and <i>Redfern Now</i>
Notable Awards	<p>Logie Award for <i>First Australians</i></p> <p>ADG Award and four AACTA Award nominations for <i>The Tall Man</i></p> <p>Four AACTA Awards from 13 nominations, and two Silver Logies for <i>Redfern Now</i></p>
Impacts	<p>Having operated for more than twenty years, the Rachel Perkins-founded Blackfella Films is the leading indigenous owned and operated production company in Australia, and was responsible for a large number of the productions mentioned in this report.</p> <p>Blackfella Films makes a range of productions with different targets, with a production like <i>First Contact</i> – focusing on contemporary Australian attitudes towards the Aboriginal and Torres Strait Islander population – being tailored towards the needs of the target, non-Aboriginal and Torres Strait Islander audience. This ability to translate messages, speaking from one culture into another whilst at the same time making popular, internationally-acclaimed content, means Blackfella Films has tremendous institutional cultural value.</p>

9. APPENDIX 1- LITERATURE REVIEWS

This research has built on a range of previous literature on the impact of Australian content and these content genres in general, which are outlined here.

9.1. Film: Literature Review

A range of existing research documents exist to highlight the cultural value of Australian Film, and the level of audience engagement. These show how Australian film has been defined by the Australian public and by other stakeholders, and demonstrate how this has generated cultural impacts in the past.

9.1.1. Existing Research on Cultural Impact

In 2013, a report was conducted for Screen Australia called *Hearts and Minds*, which analysed the way in which the Australian public valued screen content. This underlined the degree to which Australian films were valued domestically due to their reflection of reality, and their ability to relate to day-to-day life. Seven key elements were highlighted by the authors:

1. Stories were relatable, and recognizable to the audience as a result of their Australian character, whether humour, locations, or a recognisable way of life;
2. The educational value of Australian content, particularly with relation to Aboriginal and Torres Strait Islander stories;
3. The 'down-to-earth' nature of Australian content, being smaller than international films, but telling nuanced, contemporary stories;
4. Australian content-makers' ability to do a lot with relatively little money;
5. That there is a great variety of content available in the Australian media sector, from reality and light entertainment, to hard-hitting documentary;
6. The increasingly sophisticated nature of Australian screen content over the previous 10 to 20 years, reflecting the evolution of Australian society; and,
7. The essential role of TV in delivering local screen stories.

These findings underline a range of different cultural impacts within Australian content – the instrumental educational value in point two, for example, is contrasted with the institutional value seen in point six and seven, helping Australians to understand their evolving society. All of this is underpinned through the relatability underlined in the first point, without which no cultural value would be possible, as the audience would not engage.

9.1.2. Defining Australian Film

This perspective aligns with that of O'Regan, who argued that self-representation is a key part of how the audience receives Australian film, and a reflection of the production aims that creatives bring to the table. He highlighted that Australian film tries to undertake a range of roles, including: "international publicity... nation-building and citizenship... cultural protection [and] situating Australians in their own history."³⁴

O'Regan argues that Australian national film shares the UK characteristics of being predominantly English language, with others more akin to Canada and the Netherlands, reflecting the mid-size nature of the country. As a result of this combination, Australian film is fundamentally diverse, ranging from *Picnic at Hanging Rock*, via *Mad Max*, to *Muriel's*

³⁴ O'Regan, T. *Australian National Cinema* (London, 1996) pp. 18-19

Wedding. As a result of this, by comparison with other nations with defined national film cultures – for example Italy or France – “Australian cinema is fundamentally dispersed.”³⁵

This is not to say that Australian films don't have characteristics that are recognisable by the audience, rather that these relate to message rather than form. Australian film is defined by its diverse colour pallet – driven through the unique range of natural backdrops available in the country – by its world-class cinematography, and by its characterisation and humour.

Similar to O'Regan, Dermody and Jacka noted that there was not really one, but probably two Australian film industries – one based on the 'AFC genre', and one more 'Hollywood' focused. These were broken down into two separate industries (Figure 33):

Figure 33 - Dermody and Jacka's 'Two Industry' Model

Industry 1	Industry 2
Socially concerned	Social concern is not the business of film; entertainment is
Search for an Australian identity	Australia is part of the international scene; national identity is equivalent to xenophobia
Leftish Labor	No pointed political affiliation but could be Liberal voters
Modestly budgeted films for local audiences	Big-budget films for an international audience
Didactic films, films with social purpose	Anti-message films; they are 'audience downers' or 'social engineering'
Interested in other arts, literate, middle-class	Anti-snobbery, anti-art, middlebrow
Film literate or film buffery	Anti-art film
Anti-monopolistic values; champions of independence	Pro-Hollywood: 'they do it bigger and better – we can learn from them'
In favour of government regulation of the industry	For the 'free market'
Against cultural imperialism	'Cultural imperialism? Never heard of it!'
Cultural and political benefits for film not necessarily quantifiable	'Bums on seats' and box-office dollars are all that count

From Verhoeven, D., 'Film and Video' in *The Media and Communications in Australia*, eds. Cunningham, S., and Turner, G. (Sydney, 2006), after Dermody and Jacka, 1987

As Verhoeven notes, in the 1990s and 2000s, a third 'industry' emerged, with Jane Campion, Baz Luhrmann, and George Miller bridging the gap between these two industries through their crossover content. This was cinema made with larger budgets and international resources, but was artistically aligned more closely with Dermody and Jacka's 'Industry 1'. Jane Campion's 1994 film *The Piano* – produced by Jan Chapman – is noted as being the first of these 'art-house blockbusters.' In a conversation for this report, Chapman outlined the feeling that Australian films have a unique voice compared to the other English-language producers. This includes a strong visual sense, building on Australia's diverse range of landscapes, as well as unconventional and unique characters. Such production values help Australian films stand out against their backdrop, representing Australia to the world, and as a result generating cultural value and soft power.

³⁵ *ibid*, p. 2

All of this highlights the point made in *Hearts and Minds*, that there is a broad range of content which the Australian public can respond to, depending on their personal preference. Of course, this also generates a diverse range of different kinds of content which can have cultural impact, a factor which is reflected in our work through the use of a range of different techniques, not least case studies of specific pieces of content.

9.1.3. How Australians See Australian Film

The 'honesty' value of Australian film is seen through the 2009 research Film Victoria conducted (Figure 34), relating to the highest-earning films at the Australian box office. Many of these were quintessentially Australian in character, including *Crocodile Dundee*, *The Man from Snowy River*, and *Gallipoli*.

Figure 34 - Leading Australian Films at the Australian Box Office (2009)

TITLE	YEAR	RECORDED BOX OFFICE	BOX OFFICE EQUIVALENT 2009
<i>Crocodile Dundee</i>	1986	\$47,707,045	\$104,001,358
<i>Babe: The Gallant Pig</i>	1995	\$36,776,544	\$52,958,223
<i>The Man from Snowy River</i>	1982	\$17,228,160	\$50,133,946
<i>Crocodile Dundee 2</i>	1988	\$24,916,805	\$46,843,593
<i>Australia</i>	2008	\$37,555,757	\$38,306,872
<i>Gallipoli (1981)</i>	1981	\$11,740,000	\$38,037,600
<i>Alvin Purple</i>	1973	\$4,720,000	\$36,721,600
<i>Mad Max 2</i>	1981	\$10,847,491	\$35,145,871
<i>Moulin Rouge</i>	2001	\$27,734,406	\$34,668,008
<i>Happy Feet</i>	2006	\$31,786,164	\$34,646,919

Source: *Australian Films at the Australian Box Office*, Film Victoria (2009)

Revising this research to the present day – taking the Australian Bureau of Statistics' Consumer Price Index figures to the end of 2015 – we find that the top 10 films in the sample are identical (Figure 35).³⁶ Indeed, the only change in the top 20 list presented by Film Victoria's original list is the addition of *Red Dog*, displacing *The Piano* in the final place; *Mad Max: Fury Road* also outstrips *The Piano*'s adjusted box office, but no other release to the end of 2015 has.

Figure 35 - Leading Australian Films at the Australian Box Office (2015)

TITLE	YEAR	RECORDED BOX OFFICE	BOX OFFICE EQUIVALENT 2015
<i>Crocodile Dundee</i>	1986	\$47,707,045	\$119,544,986
<i>Babe: The Gallant Pig</i>	1995	\$36,776,544	\$60,873,148
<i>The Man from Snowy River</i>	1982	\$17,228,160	\$57,626,765
<i>Crocodile Dundee 2</i>	1988	\$24,916,805	\$53,844,649
<i>Australia</i>	2008	\$37,555,757	\$44,032,064
<i>Gallipoli (1981)</i>	1981	\$11,740,000	\$43,722,548
<i>Alvin Purple</i>	1973	\$4,720,000	\$42,209,864
<i>Mad Max 2</i>	1981	\$10,847,491	\$40,398,633

³⁶ For the purposes of this analysis, we used the CPI figures from the end of each year, and assumed that the All Groups CPI figures had been used for the original analysis, rather than the sectoral inflation rates for Communications or Entertainment

<i>Moulin Rouge</i>	2001	\$27,734,406	\$39,849,350
<i>Happy Feet</i>	2006	\$31,786,164	\$39,825,109
<i>Strictly Ballroom</i>	1992	\$21,760,400	\$39,019,691
<i>Picnic at Hanging Rock</i>	1975	\$5,120,000	\$34,487,358
<i>They're a Weird Mob</i>	1966	\$2,417,000	\$30,032,722
<i>Young Einstein</i>	1988	\$13,383,377	\$28,921,174
<i>The Adventures of Priscilla: Queen of the Desert</i>	1994	\$16,459,245	\$28,378,768
<i>Phar Lap</i>	1983	\$9,258,884	\$28,096,675
<i>Muriel's Wedding</i>	1994	\$15,765,571	\$27,182,746
<i>The Dish</i>	2000	\$17,999,473	\$27,103,380
<i>Mad Max</i>	1979	\$5,355,490	\$24,069,570
<i>Red Dog</i>	2011	\$21,327,512	\$23,152,796
<i>Mad Max: Fury Road</i>	2015	\$21,685,344	\$21,685,344
<i>The Piano</i>	1993	\$11,240,484	\$19,768,277

Source: Olsberg•SPI Analysis based on *Australian Films at the Australian Box Office*, Film Victoria (2009), Screen Australia Box Office data, and the Australian Bureau of Statistics' CPI data

Part of the challenge for Australian films is the very 'honesty' that many Australians state they admire so much – the corollary to this is that such films are not seen to be as high quality as productions made in the United States or other territories, with consumers being less inclined to pay attention to them as a result. This was reflected in Film Victoria's later research, where 34% of respondents were unable to name an Australian feature film, and 40% were unable to nominate a domestic documentary.³⁷

This split is exacerbated by the degree to which US films dominate at the Australian box office. Research Undertaken by Swinburne University in 2013 showed this, demonstrating that while Australia had the second highest per-capita cinema attendance in the world – 4.13 visits per person, per year, behind only Iceland – 84.5% of ticket sales between 2006 and 2010 were on US films.³⁸

9.1.4. Conclusions

All of this underlines the challenges of Australia as a market for domestic feature films – the Australian public are supportive of a domestic film sector (this is underlined by DAE's work), and they enjoy Australian film. However, they appear to be not quite sure whether Australian film is quite what they want it to be, as Dermody and Jacka's 'two industries' analysis underlined.

Australian film occupies a variety of spaces within this, rather than having a dominant national cinema culture. As a result, it delivers a range of different kinds of production, ranging from popular entertainment, exemplified by *Mad Max* and *Crocodile Dundee*, through comedy-dramas like *Priscilla, Queen of the Desert* to high-concept art house productions, such as *The Piano*. Each of these reveals a different facet of a complex country to the audience, building on Australian creative and acting talent – and it is equally clear that each of these forms of production has an audience.

Such a variety is unusual, but from our perspective, it presents ample opportunities for cultural impact, given the variety of different forms of production generated. As *Hearts and*

³⁷ Australian Feature Films, Fictional Television, and Documentary, Film Victoria (2010)

³⁸ *Cinema in Australia*, Swinburne University (2013) pp. 27 and 48

Minds highlighted, there is something for everyone in Australian content, and as a result everyone is impacted by Australian content.

9.2. Television: Literature Review

9.2.1. The History of Australian Television

Whereas television was first introduced in Australia in 1956 – in time for the Melbourne Olympic Games, though only in Sydney and Melbourne – until the mid-1960s, Australian television showed little domestic content, with 97% of drama shown between 1956 and 1963 being imported either from the US or the UK.³⁹

It was not until 1964 that the first truly successful domestic production took off, with the success of Channel Seven's police drama, *Homicide*. As with film, Flew and Gilmour point to "the shock of self-recognition" within this, as the Australian public engaged with domestic police in Ford Falcons, rather than Californian police in Chevrolets.⁴⁰ This led to an early boom in the production of police and crime dramas, as other channels looked to mirror the success of Seven, as well as the start of Australian dramas taking over from imported ones.

This genre – police crime series – was the first of three identified by researchers in the history of Australian Television content. As McKee notes "there have been three 'formative genres' in the history of Australian television drama: 'police crime series, soap opera, and the historical mini-series'".⁴¹

These second and third genres came about as the sector evolved, fuelled by the boom in content productions over the second half of the 1960s and, particularly, between 1970 and 1990. Over this period, the amount of spend on overseas programming fell to 30%, driven by a "mix of audience demand, policy, and regulatory activism".⁴² This led to a range of different productions, including seminal Australian programmes such as *The Sullivans*, *Number 96*, and *Prisoner*, all of which were noted by survey respondents.

One notable success story is *McLeod's Daughters* (2001-2009), a long-running Australian serial drama about five women running a cattle station in rural South Australia, presenting a positive representation of women in the Australian countryside.

The show also demonstrates an ongoing instrumental impact through the continuing tourist visits to the show's location (Case Study 19).

³⁹ 'Television and Pay TV', by Flew, T. and Gilmour, C. in *The Media and Communications in Australia*, eds. Cunningham, S. and Turner, G. (Sydney, 2006) p. 178

⁴⁰ *ibid*, p. 178

⁴¹ 'Prime-time Drama', by McKee, A. in *The Australian TV Book*, eds. Turner G., and Cunningham, S. (Sydney, 2000), p. 143

⁴² Flew and Gilmour, p. 179

Case Study 19 – McLeod's Daughters

Years of Broadcast **2001-2009**

Audience	Averaged 1.5 million from seasons one to four
Ratings	8.8/10 on TV.com 7.1/10 on IMDb
Notable Awards	Nominated for 41 Logie awards over its lifetime, winning eight times.
Background	<p><i>McLeod's Daughters</i> was a long-running Australian serial drama, which over a number of series generated good TV ratings, strong international sales, and a career-building opportunity for the cast and crew.</p> <p>Aside from its rural focus, its story of five women running a cattle station in rural South Australia presented a positive representation of women in the Australian countryside.</p>
Impacts	<p>Over its eight seasons, the show garnered a strong audience, averaging more than 1.5 million viewers from seasons one to four.</p> <p>Aside from this audience, the show demonstrates an ongoing instrumental impact through the continuing tourist visits to the show's location. The Kingsford Homestead which served as the fictional farm is now a well-visited five-star retreat, and the western edge of the Barossa has been popularised as a tourist destination on the back of the show's success.</p> <p>Across its run, the programme sold widely internationally, and garnered a fanbase in a range of countries, including the US, Canada, and Ireland. It has since been made available on Netflix in the US, and was cited by a number of respondents in the survey – particularly international ones – as being a piece of Australian content with value.</p> <p>This underlines its instrumental and institutional cultural impact in the international space, generating a positive perception of Australia and its natural landscape.</p>

As noted by *Hearts and Minds*, the modern Australian television sector has evolved to a position whereby there is something available for everyone. A range of different regulatory models have underpinned this – from the quota to the original 10BA incentive – but none of the success would have been possible without the demand from the Australian audience.

9.2.2. Australian TV and Social Impact

Across all of these genres, Australian TV has touched on a range of social issues, oftentimes pushing an agenda in a way which other television cultures do not. This is reflective of the unique nature of television within Australia – as O'Regan notes, given the relatively small size of the market, and the enormously spread-out nature of the population, the medium takes on a particular role in the Australian context. It is an agent of 'popular socialisation', and as a

result “provides a common public or civic culture for a disparate population” in a way in which other kinds of creative media cannot.⁴³

As with other elements of the Australian media sector, this popular socialisation took a range of different forms. McKee notes that whereas Australian police dramas were relatively conservative – showing a clear division between criminals and police, or right and wrong – social dramas tended to adopt a more challenging model. *A Country Practice* is given as the key driver of this, constructing its serials around a social issue, in general an element of public concern at the time of writing. As a consequence, since *A Country Practice* “in many ways, Australia’s drama programmes are particularly (small ‘l’) liberal in their attitudes towards social issues.”⁴⁴

This attitude has permeated Australian drama series since this point, with such programmes taking on a particular instrumental role in taking forward the Australian discussion around a range of tricky issues. These have included sexuality, personal relations, and inner-city poverty, all of which have been brought into the nation’s living rooms through a highly popular and accessible format. In recent years, race relations have been a particular topic of conversation in this same vein, and are exemplified by three programmes: *Here Come the Habibs*, *Go Back to Where You Came From* (produced by CJZ, Case Study 20) and *The Family Law*.

Case Study 20 – CJZ

Years of Work	2012-present (merger of other production companies)
Key Productions	<i>Go Back to Where You Came From</i> , <i>Bondi Rescue</i> , <i>Gruen</i>
Notable Awards	International Emmy for <i>Go Back to Where You Came From</i> Roses d’Or for <i>Go Back</i> and <i>Gruen</i>
Impacts	Formed from the merger of three production companies with different focuses, CJZ has grown into a strong Australian production house, generating a range of TV series with good international appeal. The company demonstrates a range of institutional cultural impacts through the diverse nature of its content offer, which deliver different values to their audiences domestically and internationally. This delivery is underpinned by a company which has been able to leverage the tools provided by the federal government – in particular the Producer Offset – to fuel its growth and acquisitions.

9.2.3. How Australians Value Domestic TV

Whereas O’Regan’s research underlined the value of Australian TV as a unifying medium in a diverse country, Film Victoria’s 2010 paper suggested that the public engaged less with TV drama than with film. This report stated that whereas 85% of respondents watched Australian films, only 75% watched Australian fiction television.⁴⁵ Film Victoria’s research also suggested that a good percentage of Australian television viewership was driven by passive

⁴³ *Australian Television Culture*, O’Regan, T. (Sydney, 1993) p. 81

⁴⁴ McKee, p. 151

⁴⁵ Film Victoria (2010)

factors, either watching on after a programme choice had finished, or watching whatever was on, as nothing was of particular interest.

These results, however, do not correlate with our more recent survey data and we consider them to be likely a function of the particular TV climate of the time. In the 2000s, Australian TV production was going through a major slump – after the end of the long boom from the '70s to '90s, production dropped off, with reality TV becoming a dominant genre. This is underlined in Film Victoria's analysis of genres across FTA TV – conducted around the same time – which demonstrated that Animation and Children's (25%), News and Current Affairs (23%), and Reality and Variety (11%) were the largest genres on Australian TV at the time.⁴⁶ Only 9% of time was taken up by drama and 8% by comedy.

9.2.4. Conclusions

Since this point, our consultation process has demonstrated that the Australian television sector has become healthier, with a greater variety of challenging content entering into the marketplace, and with viewers engaging more as a result. This has drawn Australian television back towards its historical roots, based on solid drama and challenging social commentary, which engaged viewers, reflecting back their world and helping to shape the audience's perceptions of a changing society.

The literature that has been produced underlines the unique role of Australian TV in fostering social change, which has occurred over almost the entire lifespan of the medium (also demonstrated in Documentary.) This is demonstrative of a strong degree of instrumental cultural impact, with popular content frequently being used to inform and challenge, as well as to entertain.

Australian producers have even been able to use the norms of reality television to engage the audience with challenging topics, creating compelling, widely discussed content in the process.

9.3. Documentary: Literature Review

9.3.1. Early Australian Documentary History

Documentary has been a key part of Australian cinema and television from the earliest days of both, reflecting the development of both media within the Australian context, and forming a major part of how Australia presents itself, its culture, and its natural history to the world.

Australian culture and history have been captured on film from the first days of cinema, including Barnett and Sestier's film of the 1896 Melbourne Cup, made less than 12 months after the Lumière brothers' first demonstration. This led to a range of early documentary production in Australia, ranging from the foundation of the Australian Commonwealth in 1901 (which was widely exhibited) to Shackleton's 1914-16 expedition, and anthropological films of the cultural ceremonies and customs of the Torres Strait Islanders.

All of these generated major institutional cultural value for the early Commonwealth, helping people to understand the diversity of their new country, and its place in the wider world. Such productions, whether through the export films used for international expeditions or the entrepreneurial explorer-filmmakers setting off in a wide range of directions, provided a common sense of nationhood for the new country, and a single face to the world. They also provide – through the continued preservation of the National Film and Sound Archive – a

⁴⁶ Television Genre Analysis, Film Victoria (2010)

strong base of ongoing intrinsic cultural value, though one which remains hard to access and utilise.

As Fitzsimons, Laughren, and Williamson note, this early documentary boom lasted through the First World War, with Frank Hurley's postings to the front in France and Palestine documenting a formative phase of Australian history, and the creation of a single nation.⁴⁷ While this early phase of documentary production was stymied by the Great Depression and the introduction of sound, the early work played a vital instrumental role in the creation of a nation. It continued to do so through the Second World War, with newsreels helping to contextualise events for the wider population.

9.3.2. Documentaries on Television

As with film production, the introduction of television in Australia was followed quickly afterwards by the development of television documentary, which also had an immediate instrumental impact. These early television documentaries were particularly focused on Aboriginal and Torres Strait Islander issues, with 1957's *Manslaughter* – which looked at the conditions for communities living near the Maralinga nuclear test range – leading to immediate calls for change. As Fitzsimons (et al) note, "this broadcast, and community screenings by Indigenous leaders... fostered movements to change the laws governing Indigenous Australians."⁴⁸

Through the remainder of the 1950s, documentaries of this form were sporadically produced, but from 1961, *Four Corners* on ABC became a key forum for provocative public affairs content. Originally placed in a graveyard slot, "within weeks, *Four Corners* revealed the appalling conditions in the Box Hill Aboriginal reserve in NSW [establishing a] tradition: upsetting governments and ABC management alike."⁴⁹ This led to a move to a prime-time Saturday-evening slot, with a Sunday repeat, following audience demand.

Since the introduction of television, this has become the primary medium for Australians to interact with documentary content – even where the format was originally cinematic, television forms the key medium. As with the drama and comedy impacts noted in the wider television chapter, the messages delivered through Australian television documentary have helped to shape the country Australia has become, generating instrumental impacts, and changing institutions as a result.

9.3.3. Natural History and Social Impact

In 1975, the ABC Natural History Unit was introduced, prior to the launch of colour television, and as our survey has underlined, such production has helped to shape how Australia is seen around the world. By documenting the vast natural history of the country – as well as its inherent fragility – natural history documentary performs a vital instrumental role, and has undoubtedly also generated soft power and associated tourism impacts in the international market.

The 1970s also saw the emergence of independent documentary production, which sought to address more difficult, social impact topics. These included issues such as urbanisation, Aboriginal and Torres Strait Islander land rights and oral history, and women's rights in

⁴⁷ *Australian Documentary: History, Practices and Genres*, Fitzsimons, T., Laughren, P., and Williamson, D. (Melbourne, 2011) p. 43

⁴⁸ *ibid*, p. 62

⁴⁹ *ibid*, p. 64

Australia, all of which – as with drama content – helped to describe the evolving nation to its population, generating instrumental change in the process.

9.3.4. Conclusions

Australia has a broad history of documentary production, which – uniquely – spans the entire history of the Commonwealth. In filming the early stages of the country's modern history, documentary allowed the creation of a more single state, providing part of the instrumental and institutional basis for citizens to understand their place in the world.

As television became the dominant medium, documentary programmes helped to describe the challenges facing the nation, particularly for its Aboriginal and Torres Strait Islander citizens, promoting change in the process. This instrumental impact continues to the present day, and has helped to shift perspective on urbanisation, Indigenous land rights, and the role and place of women, whilst at the same time documenting the changing face of the Australian nation and people.

In doing this, documentary production has built a base of inherent cultural value, with huge potential for further study, also working to preserve the nation's history.

9.4. Children's Media: Literature Review

This literature review will address two aspects – firstly, it will consider the generic value of television to children, then it will look at the particular evidence relating to the impact of children's film and television in Australia.

9.4.1. The Generic Value of Television to Children

Dafna Lemish's 2007 book, *Children and Television: A Global Perspective* underscores the particular place that television occupies in the upbringing of a child in the 21st century. She notes that they "enjoy it tremendously, and learn far more about the world from it than from any other socializing agent."⁵⁰ Additionally, Lemish demonstrates that it is both pervasive in the lives of children and also, uniquely, one of the few experiences shared in a homogenous way by children worldwide – they share the same content in a way seldom experienced in other media.

The impact of television on children and their development is not unidirectional – they react both to what they see on screen, and to how it makes them feel. These effects are crucial both for their cultural development – picking up the underlying cues and shared meanings that form part of the everyday experience for a culture – as well as their educational development. Within this, Lemish notes that "children are not passive, proverbial 'tabula rasa' upon which television messages leave their marks... [they] are active consumers of television. They react to, think, feel, create meanings."⁵¹

9.4.1.1 Television and Language Acquisition

There is a body of evidence for the value of television programming in learning, particularly language acquisition, and this is a particular area of focus for children's content in many jurisdictions. Lemish notes that a longitudinal survey of *Sesame Street* showed evidence of this in the US, with children who started viewing at age 3 – and, crucially, engaged with adults

⁵⁰ Lemish, D., *Children and Television: A Global Perspective* (2007) p. 1

⁵¹ *ibid*, p. 3

in the world around them – picking up a greater range of vocabulary than those who started watching later.⁵² Two important conclusions are drawn from this research: firstly, that age-appropriate viewing is necessary for the maximisation of educational outcomes, and secondly that television requires active engagement from parents to be most effective.

9.4.1.2 Media Literacy

A 2007 review – *Can Television be good for Children?* – written by Kaoruko Kondo, highlights that kids also develop televisual literacy from an early age, developing representational thinking skills from ages 2 to 7, while only appreciating abstract codes and conventions at a later age. It is noted that “young children start to understand television from an early age. As they mature they learn to draw distinctions between their own world, what is shown on television and whether it is true to life.”⁵³ Children learn to understand television and other media through this process in an increasingly sophisticated manner – in this way, they learn to understand the social cues that form part of broader societal norms, both within and without the televisual space.

9.4.1.3 School Readiness

Kondo also reflects on studies of *Sesame Street*, which show that young adults who had watched the programme as children achieved higher grades in English, maths, and science; this was particularly true among boys. Furthermore, these individuals read more often, had higher academic self-esteem, and valued academia more. “This suggests that those who watch educational programming enter school with learning skills... [which set] them up for academic success.”⁵⁴

Of course, it is accepted that values which engender engaged learning are equally likely to come from parents and Lemish's conclusions that engaged parenting is necessary for the maximisation of success are also noted in the context of this analysis. Nonetheless, together with *Sesame Street*, other programmes were also cited as having positive impacts. Meanwhile, while Kondo is not able to identify specific impacts of Australian television programming, she states that “parents were ‘generally very positive about the role of media in their young children's social, emotional, linguistic and cognitive development.’”⁵⁵

In the Australian context, *Little Lunch* presents a good example of this. This innovative, mockumentary-style production is aimed at younger children, which sets stories in a primary school playground at snack time. The programme demonstrates a number of the characteristics we identify in this report, by teaching and reinforcing lessons, and helping children to understand and read media, on account of its format. It has also sold to Netflix in the US and UK, beginning to generate an international impact.

Little Lunch (Case Study 21) has, furthermore, begun to be used in Australian schools to underline and reinforce some of the messages that teachers are putting across, as well as using it to open discussion of some of the social issues presented in the series. By doing this,

⁵² Lemish highlights that *Sesame Street* is a useful touchpoint for studies as it is both effectively the original modern children's programme, and the longest-running – as such it allows for longitudinal impact studies in a way which other, comparable shows in the US or elsewhere do not.

⁵³ Kondo, K., *Can Television be good for Children?* (2007) p. 3

⁵⁴ *ibid*, p. 8

⁵⁵ *ibid*, p. 10

it provides good instrumental value, in helping to support the education of younger Australians.

Case Study 21 – Little Lunch

Years of Broadcast 2015-present

Ratings	8.6/10 on IMDb
Notable Awards	Nominated for one Logie and two AACTA Awards Internationally, nominated for the Japan Prize
Critical Reaction	"Little Lunch... packs smart scenarios, clever interplay and dexterous performances into episodes a mere 15 minutes long..", Craig Mathieson, <i>Sydney Morning Herald</i>
Background	<i>Little Lunch</i> is an innovative, mockumentary-style production aimed at younger children, which sets stories in a primary school playground at snack time. Based on a book series by Danny Katz, the programme demonstrates a number of the characteristics we identify in this report, by teaching and reinforcing lessons, and helping children to understand and read media, on account of its format.
Impacts	The programme has won critical acclaim and positive reviews on account of its screenwriting, being noted by the Sydney Morning Herald as "possibl[y]... better than a lot of our grown-up television." ⁵⁶ This production value has led to it winning prizes internationally, and to sales to Netflix in the US and UK, beginning to generate an international impact. <i>Little Lunch</i> has, furthermore, begun to be used in Australian schools to underline and reinforce some of the messages that teachers are putting across, as well as using it to open discussion of some of the social issues presented in the series. By doing this, it provides good instrumental value, in helping to support the education of younger Australians.

9.4.2. Children's Content in Australia

9.4.2.1 The History of Australian Children's TV

Children's TV has always been considered an area of particular value – or concern – in Australia. Whereas in the 1950s, when TV was first introduced, this concern was focused around the issue of family life and the ill-effects of children's TV, Potter argues that by the mid-1960s, "these concerns... had crystallized into public dissatisfaction with the poor quality of the television on offer to Australian children."⁵⁷ The result of this concern was a series of Federal government interventions to ensure a sufficient supply of quality content, including the Children's Television Standards from 1979.

⁵⁶ 'Little Lunch: it's what we're good at' by M. Houston, in *The Sydney Morning Herald*, 19th July, 2015

⁵⁷ *Creativity, Culture, and Commerce*, Potter, A. (Bristol, 2015) p. 5

Potter states that this support has been vital in ensuring the production of Australian content of global quality and reach, exemplified in particular by *Skippy*, *Round the Twist*, *H2O: Just Add Water*, and *Dance Academy*. This form of television "with high production values, pro-social values, and local cultural relevance" provides children benefits as it does with adults, in this case by helping them "be better situated within, and have a grasp of, their own national space, and its history and traditions."⁵⁸

Within this market there are, however, tensions – as the world has developed, many more forms of content are available to the modern Australian child, from multi-channel TV to digital services. Australian children's content is also challenged – despite its success on the international market, producing for a mid-sized domestic audience makes it difficult to earn a profit, requiring co-production or co-financing, with its inherent compromises. This balance, as Potter highlights, makes it difficult to ensure the cultural value of content, not least as a result of the "creative, industrial, economic and regulatory changes... as Australia made its transition to a fragmented digital regime."⁵⁹

9.4.2.2 The Present Context

Within the Australian TV context, children's content continues to play an important role – this was highlighted in the 2009-10 Film Victoria study, which showed that 25% of free-to-air content time was taken up by animated or children's content.⁶⁰ Despite this apparently strong position, Screen Australia's 2013 *Child's Play* report underlines the myriad difficulties facing the sector. While the report showed that children appreciate the programmes which are targeted at their age group – marginally preferring these to 'family' oriented programming – these struggled to get made, given the difficult funding environment.⁶¹

In the domestic context, Australian content was of particular value – and also much preferred by the audience. The report further underlined the value of this in foreign markets, suggesting cultural value through export sales, a factor demonstrated by *Dance Academy*.

The comparable Film Victoria data for film tend to underline that television is the key market for children's content, with the average family film taking only A\$217,830 at the Australian box office between 2000-09.

One particularly successful film of recent years was the critically-acclaimed *Paper Planes*, which generated a strong domestic box office following its 2015 release, becoming the 31st highest grossing Australian film of all time. *Paper Planes* underlined a range of key themes for young people, including ingenuity and resilience. By dealing with a serious subject – a grieving father – within the context of such a production, it also helped to teach lessons to the audience about how to cope with loss. While the impact of such lessons cannot yet be known, the success of the film, its critical acclaim, and our general knowledge of the value of children's media suggest this should help to generate good downstream cultural impacts.

9.4.2.3 The Long Tail

Recently, the Australian Children's Television Foundation (ACTF) has conducted a 'Memory Project' which underlined just how long memories of children's television impact an

⁵⁸ *ibid*, p. 5

⁵⁹ *ibid*, p. 6

⁶⁰ Film Victoria (2010b)

⁶¹ *Child's Play*, Screen Australia (2013) p. 1

individual. This project surveyed 1,000 Australians, most of whom were in their childhood in the 1990s and 2000s, to ask what their favourite Australian TV programme was growing up, and why.

Overwhelmingly, *Round the Twist* was considered the favourite, with 64%, with other productions like *Mortified* and *Lockie Leonard* also rating highly.⁶² Participants noted the value of 'genuine and unique' characters, with relatable children playing them in familiar countryside, rather than the US or UK. This underlines the particular value of children's TV in placing the world in which the viewer is growing up in context, helping them to understand and explain their place in the world.

Round the Twist was a globally successful live-action drama, both high-concept and notable for pushing the boundaries of what was acceptable in children's television. The programme was able to alight upon a range of issues of interest to its target audience, including birth, death, and homosexuality; the programme is also noted for its heavy environmental message, and use of the Australian landscape. As such, it not only sits within the tradition of quality Australian children's television, but also has elements of the social impact messages of dramas like *A Country Practice*. Its ongoing impact within Australia is also demonstrated not only through the 'Memory Project', but also the major response the programme had when it was re-released on Netflix in 2015. This acts as evidence of its inherent cultural value, being a particular cultural asset, recognised and considered of ongoing interest by its target audience.

9.4.3. Conclusions

There is significant evidence that content designed specifically for children can have broad, positive impacts for their wellbeing and development, generating specific instrumental value with regard to issues such as school readiness and language acquisition. The available studies also show that the value for children is maximised when this content is reflective of the world around them, and fits in a local context.

In the Australian case, *Little Lunch* is a particularly good example of this, and is already being used in schools to underline and reinforce lessons. Such programmes build on an Australian tradition of high-quality children's programming which is exported round the world, but which is increasingly difficult to produce as a result of the evolving media environment.

9.5. Aboriginal and Torres Strait Islander Media: Literature Review

9.5.1. The Study of Aboriginal and Torres Strait Islander Media in Australia

Aboriginal and Torres Strait Islander engagement with creative media is an area of emerging study, and as a consequence, the level of existing research is somewhat more limited than in other areas of this report. Our focus in this section is solely on projects where Aboriginal and Torres Strait Islander had creative control, which serves to remove productions like *Rabbit-Proof Fence* which – while telling an Aboriginal Australian-focused story, was not produced under their control.

Marcia Langton's seminal 1993 essay, *Well I Heard it on the Radio and I Saw it on the Television...* explores this issue, underlining the degree to which much 'Aboriginality' is made of "the stereotyping, iconising and mythologizing of Aboriginal people by white people who

⁶² <http://actf.com.au/news/10249/lasting-memories-of-australian-children-s-television> [accessed 9th July, 2016]

have never had any substantial first hand contact with Aboriginal people.”⁶³ Langton noted that this was one of three kinds of Aboriginal representations in the media, the others being those made by Indigenous creators themselves, and the third following dialogue between Indigenous and non-Indigenous creators, generating mutual understanding. The essay, published in 1993 – the year of the foundation of the Indigenous Branch of the then-Australian Film Commission – underlines the degree to which much of storytelling about Indigenous issues and characters focused on the interpretation of non-Indigenous creators, an issue which Australia as a whole was considering increasingly unsustainable.

Aboriginal and Torres Strait Islander content, stories, and knowledge are now of significant importance to modern Australia. As *Pathways and Protocols* highlights, “the carrying on of knowledge, through the practice of art, is a legacy that Indigenous Australians must maintain for the benefit of future generations.”⁶⁴ Such a position demonstrates at least two separate but interrelated policy goals – the preservation of Aboriginal and Torres Strait Islander culture for their community’s own use and safe-keeping, and the transmission of this culture to the wider world, within Australia and beyond, to increase understanding; these reflect two of Langton’s views of cultural ‘Aboriginality’. To these two, we can add a third key goal for Australian public policy – ensuring that the broader film sector in Australia is reflective of the diversity in the country, including Aboriginal and Torres Strait Islander participation. The 2010 review of the Australian Government’s investment in the Indigenous broadcasting sector added a further reason to this: the opportunity which investment offered for the *Closing the Gap* agenda.⁶⁵

Whereas the policy goals are clear, measuring the impact of this is a challenge: major reports on the wider creative sectors in Australia – including those from Swinburne and Film Victoria – do not break out Aboriginal and Torres Strait Islander content or engagement as separate categories. As such, we will use the sections which follow to address each of these issues, and will add a fourth – the role of content in the ‘Closing the Gap’ agenda, reflecting the value of children’s content noted above.

9.5.2. Aboriginal and Torres Strait Islander Engagement in Production

Screen Australia’s *The Black List* highlights the range of productions with which Aboriginal and Torres Strait Islanders have been involved, as well as key dates within the development of Aboriginal and Torres Strait Islander production. The chronology begins in the 1970s, with early Indigenous filmmakers only starting in 1972, over 80 years after Torres Strait Islanders’ culture was first documented on camera.

These data show that, between from 1980-2009, only 15 full feature film productions had major Aboriginal and Torres Strait Islander engagement, though with the number, scope and impact of these productions steadily growing over time. TV Drama, shorts and, particularly, long-form documentary have instead been the major repositories of Aboriginal and Torres Strait Islander creativity to date. Documentaries in particular have value in the preservation of traditional Australian culture, and its transmission and explanation to the wider world, though such productions are always likely to be by their nature, niche.

Aboriginal and Torres Strait Islander engagement in content production has continued to increase in the present decade, and is exemplified by productions like *Redfern Now*, *Samson and Delilah* and *Bran Nue Dae*, which speak to increasingly wide audiences. Such productions

⁶³ Langton, M., *Well I Heard it on the Radio and I Saw it on the Television...* (1993) p. 81

⁶⁴ *Pathways and Protocols: A filmmaker’s guide to working with Indigenous people, culture and concepts*, Terri Janke (2009), p. 4

⁶⁵ Review of Australian Government Investment in the Indigenous Broadcasting and Media Sector (2010) p. 22

were seen by consultees as evidence of progress, and serve a key instrumental purpose, exemplified by *Redfern Now*, which helped to change the broader Australian perspective on a historically troubled Sydney suburb.

Redfern Now is just one of the productions of Blackfella Films, the leading Aboriginal and Torres Strait Islander production company in Australia. The company has operated for more than 20 years and has other credits including *First Australians*, *The Tall Man*, and *First Contact*. This ability to translate messages, speaking from one culture into another whilst at the same time making popular, internationally acclaimed content, means Blackfella Films has tremendous institutional cultural value.

9.5.3. Content for Aboriginal and Torres Strait Islander Communities

In addition to Aboriginal and Torres Strait Islander engagement in productions seen across Australia, the development and filming of content within remote Aboriginal and Torres Strait Islander populations has been a key trend over the last 40 years, facilitating communication within and between communities. The late entry of such communities into the production environment was identified by Kral as being a function of the remoteness of the territories in which such communities live. Whereas communities in the Northern Territories were exposed to outdoor cinema from the 1930s, "it wasn't until 1982 for example that the first home system was taken into Yuendumu, a remote community in the Northern Territory..."⁶⁶ Such initial forays were very much focused on the VCR space, with the Central Australian Aboriginal Media Association focusing on radio, and only later moving into the moving picture space.

CAAMA proved to be a key starting point for the development of Australian Aboriginal and Torres Strait Islander-led content though, a process which was accelerated with the launch of the AUSSAT system in 1985. This model allowed remote communities access to broadcast TV and radio for the first time, and – being seen as a potential threat to the continuing existence of remote Aboriginal and Torres Strait Islander culture – was a spur to efforts to preserve language and culture. One result of this was the launch of BRACS – the Broadcasting in Remote Aboriginal Communities Scheme – following a government enquiry from 1987; by 1996, this was available in 107 communities, providing them with a choice of content.⁶⁷

Kral notes that while BRACS was launched in a variety of communities, it was given little support, with little training or investment in the early years, and competitors such as the PAW (Pintubi, Anmatyerr, Warlpiri) radio network (now PAW Media) emerged to deliver content in 2001. At the same time, Indigenous Community Television was launched, and by 2006 it was being transmitted to 150 remote communities, with 8-12 hours of new content per week, of which 80% was in Aboriginal and Torres Strait Islander languages. Such a move provided the opportunity of such communities to develop their own content, with a central network "building on the local, where people in remote communities were both the producers and the audience."⁶⁸

ICTV was itself replaced in 2007 by National Indigenous Television (NITV), a predominantly English-language platform. Such a move has coincided with the emergence of digital media, which provides a new avenue for content production and reception, and which has impacted the Australian Aboriginal and Torres Strait Islander audience as much as the broader population.

⁶⁶ Plugged In: Remote Australian Indigenous Youth and Digital Culture (CAEPR Working Paper No. 69/2010), Kral, I. (2010) p. 1

⁶⁷ *ibid*, p. 2

⁶⁸ *ibid*, p. 3

Undeniably, the variety of content generated over this period has produced substantial cultural value of various kinds for the Aboriginal and Torres Strait Islander communities involved. The inherent cultural value generated by the preservation of culture and stories – given the potential range of future uses for such content – is substantial. Similarly, the ability of Aboriginal and Torres Strait Islander communities to speak to themselves, each other, and the wider world through productions which reflect their own culture, languages, and experiences has tremendous instrumental value.

One important initiative has been *Songlines on Screen* (Case Study 22), a scheme of the Indigenous Department of Screen Australia with NITV, to fund up to ten productions, with a range of outcomes, including the creation of a piece of broadcast media.

Case Study 22 – *Songlines on Screen*

Years of Work	2014-present
Aim	<p>An initiative of the Indigenous Department of Screen Australia with NITV, <i>Songlines on Screen</i> is a project designed to give place to the Aboriginal and Torres Strait Islander songlines which are part of the makeup of Aboriginal and Torres Strait Islanders culture.</p> <p>The initiative has funded over ten productions – ten in its original incarnation, and a further ten presently being supported – with a range of outcomes, including the creation of a piece of broadcast media.</p>
Impacts	<p>The programme has the goal of preserving songlines and language, communicating the story of these songlines or songline segments to a broader audience within Australia, and to develop the production skills of the communities who are engaged in their recording. These short films were broadcast on NITV in June and July 2016, with further productions now in progress.</p> <p>Aside from these direct cultural impacts, <i>Songlines</i> has the inherent cultural value of the creation of a body of content documenting the dance, song, art, body painting, and sites which make up each of the songlines covered.</p> <p>This provides an invaluable cultural record under the control of the communities filmed, with 20-40 hours of video content created, for the community to use as they choose.</p>

9.5.4. *Aboriginal and Torres Strait Islanders Use of Media*

The most recent survey of media consumption among Aboriginal and Torres Strait Islanders was collated for NITV and SBS in 2014, based on interviews conducted with 400 individuals who self-identified as Aboriginal or Torres Strait Islander. In order to ensure parity, this work placed a limit on the number of responses by demographic band, state or territory, and kind of location (metro, regional, or remote).

This survey highlighted that 96% of Indigenous Australians are familiar with NITV, with 87% having watched it, though only 49% in the previous week.⁶⁹ McNair Ingenuity's research also highlighted that a majority of respondents (54%) strongly agreed that NITV made them feel

⁶⁹ McNair Ingenuity, *Indigenous Media Report* (May 2014) p. 8

proud of their culture, with 97% agreeing overall. The service was highly regarded as a trusted source relating to Indigenous news and issues.

Prior research has also underlined that remote Australian communities engage with the wider Australian screen sector, though at a lower rate than the mainstream. Whereas Johnson underlines that remote communities do watch programmes like *Home and Away*, Australian movies, and sport, McNair Ingenuity's research tends to underline a preference for Indigenous-focused content.⁷⁰

9.5.5. *Children's Media for Aboriginal and Torres Strait Islanders Australia*

Children's media was identified as a priority by the Australian Council for Educational Research in 2010 as part of this change, given the opportunities which it offers for contributing to the 'closing the gap' agenda. Such a model ties into the evidence for the impact of children's content noted above, and proposes to use the NITV platform as a role. In such a way, a range of benefits are expected, including maximising learning opportunities for Aboriginal and Torres Strait Islander children, helping to "preserve and celebrate linguistic and cultural traditions and to provide positive representations of Indigenous people..."⁷¹

NITV are presently in the process of putting this model into effect, having developed a 13-part animated series to try and ease the home-to-school transition, with support from ACER and the Secretariat of National Aboriginal and Islander Child Care. The aim is for this production to be expandable – with literature and online content – and to be overdubbed into multiple languages, starting with Pitjantjatjara.

9.5.6. *Conclusions*

Reports such as *Hearts and Minds* underline that film and TV is a key way for people from other Australian communities to engage with Aboriginal and Torres Strait Islander content and stories. However, within these communities themselves, it is difficult through the existing research to identify specific cultural impacts. Whereas many such pieces of work hint at this – focusing for example on the instrumental value of minimising the physical gaps between communities – these data cannot be successfully generalised.

What can be concluded is that the value of preservation, representing both an instrumental and an intrinsic cultural impact, has been vast. Projects like *Songlines* and *First Australians* have taken great strides in collating and explaining traditional Australian culture. There is a deep potential for cultural impact, though more work needs to be done to identify what the value of this has been to date.

⁷⁰ Technology use among Indigenous adolescents in remote regions of Australia', by G.M. Johnson in *International Journal of Adolescence and Youth*, Volume 21, no. 2 (2013) p. 223

⁷¹ Using television to improve learning opportunities for Indigenous children, ACER (2010) p. 4

10. APPENDIX 2 – BIBLIOGRAPHY

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11. APPENDIX 3 – LIST OF CONSULTEES

Australian Guild of Screen Composers

Australian Production Design Guild

Australian Screen Editors

Australian Screen Sound Guild

Australian Writers Guild

Kingston Anderson, Australian Directors Guild

Ian Ang, University of Western Sydney

Ian Booth, Screen West

Juliette Brassington, DFAT

Jenny Buckland, ACTVF

Jason Burrows, Jungle

Bridget Callow-Wright, ScreenThink

Fiona Cameron, Screen Australia

Sally Caplan, Screen Australia

Jan Chapman, Jan Chapman Productions

Scott Dawkins, Screen Australia

Andrew Dillon, Screen Australia

Peter Drinkwater, ScreenThink

Ben Eltham, Deakin University

Emily English, Screen Australia

Emma Fitzsimons, Princess Pictures

Jock Given, Swinburne University

Mitzi Goldberg, DAF

Casey Gregory, Academy of Interactive Entertainment

Elena Guest, Screen Australia

Matt Hancock, SPA

Ester Harding, ScreenThink
Richard Harris, Screen Australia
Ron Johanson, Australian Cinematographers Society
Helen Kellie, SBS
Michael Lobenstein, NFSA
Graeme Mason, Screen Australia
Georgie McClean, Screen Australia
Penelope McDonald, Screen Territory
Media Entertainment and Arts Alliance
David Melzer, NITV
Rebecca Mostyn, Screen Australia
Nick Murray, CJZ
Monica Penders, Screen ACT
Neil Peplow, AFTRS
Anna Potter, University of the Sunshine Coast
Alex Sangston, Screen Tasmania
Annabelle Sheehan, SAFC
Penny Smallacombe, Screen Australia
Jane Stapleton, Screen Tasmania
Liz Stevens, Screen Australia
Daryl Talbot, WTFN
David Throsby, Macquarie University
Jenni Tosi, Film Victoria
Tracy Vieira, Screen Queensland
Visual Effects Society
Simon Weaving, Canberra International Film Festival
Joanna Werner, Werner Film Productions