

2021/22 ABS Film, Television and Digital Games Survey results

MEDIA RELEASE

Thursday 22 June 2023: The Australian Bureau of Statistics (ABS) has released the results of its eighth [Film, Television and Digital Games Survey](#) covering the financial year 2021/22. The survey provides valuable insights into the Australian screen industry's performance – shining a light on key metrics and trends that shape the industry.

The 2021/22 survey highlights the strength of the Australian screen industry with large gains in employment and growth in digital games. For the first time, data covering film and video distribution businesses and film exhibition businesses has also been included.

Screen Australia's CEO **Graeme Mason** said, "We are pleased to share these results from the ABS, which provides a snapshot of how large and dynamic the Australian screen industry is and how it has grown since the last survey."

The Australian screen industry employed approximately 55,000 people and contributed over \$6 billion in valued-added* to the Australian economy in 2021/22, making it the largest creative contributor.

"It's really exciting to see employment opportunities and career pathways for our talented and skilled workforce are on the rise and that the billion-dollar digital games sector is booming. This proves that no matter what your area of passion is, there are more opportunities than ever to seek a career in the Australian screen industry," **Mason** said.

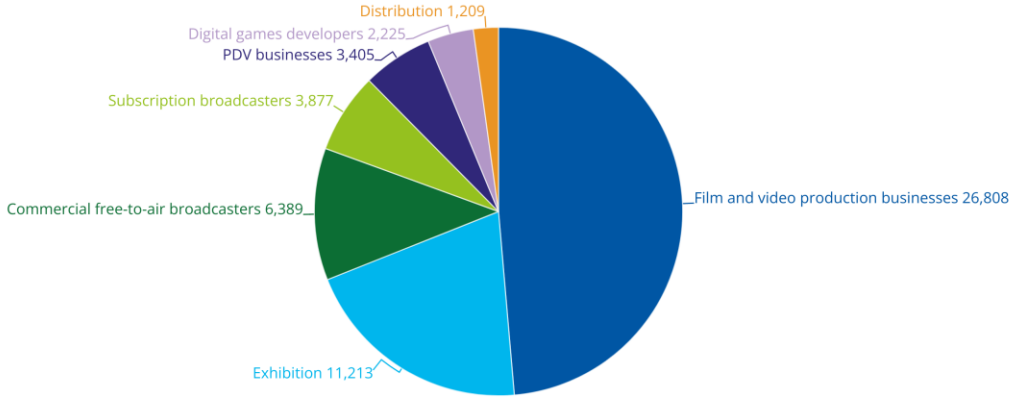
Industry employment on the rise

One area that has seen significant growth is employment. Total industry employment has grown by 37% since 2015/16, excluding distribution and exhibition businesses, which were not included in the previous survey. This reflects the scale of the screen workforce, its strength and vital contribution to the Australian economy.

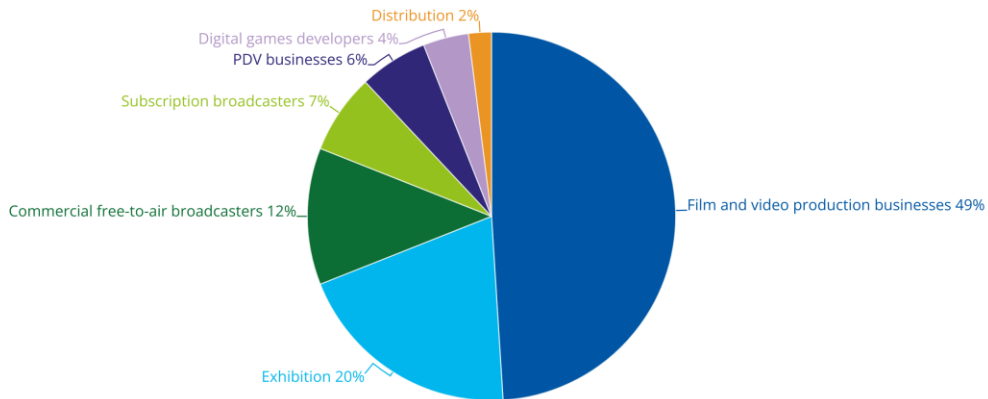


EMPLOYMENT BY SECTOR 2021/22

no.



%



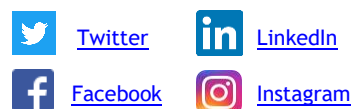
Source: Australian Bureau of Statistics (ABS), Film, Television and Digital Games, 2021/22.



Of the 55,126 people employed in the industry over the 2021/22 period, the largest proportions were seen in film and video production (26,808) and exhibition (11,213), with the largest growth occurring among digital games developers, who saw a 203% increase compared to 2015/16.

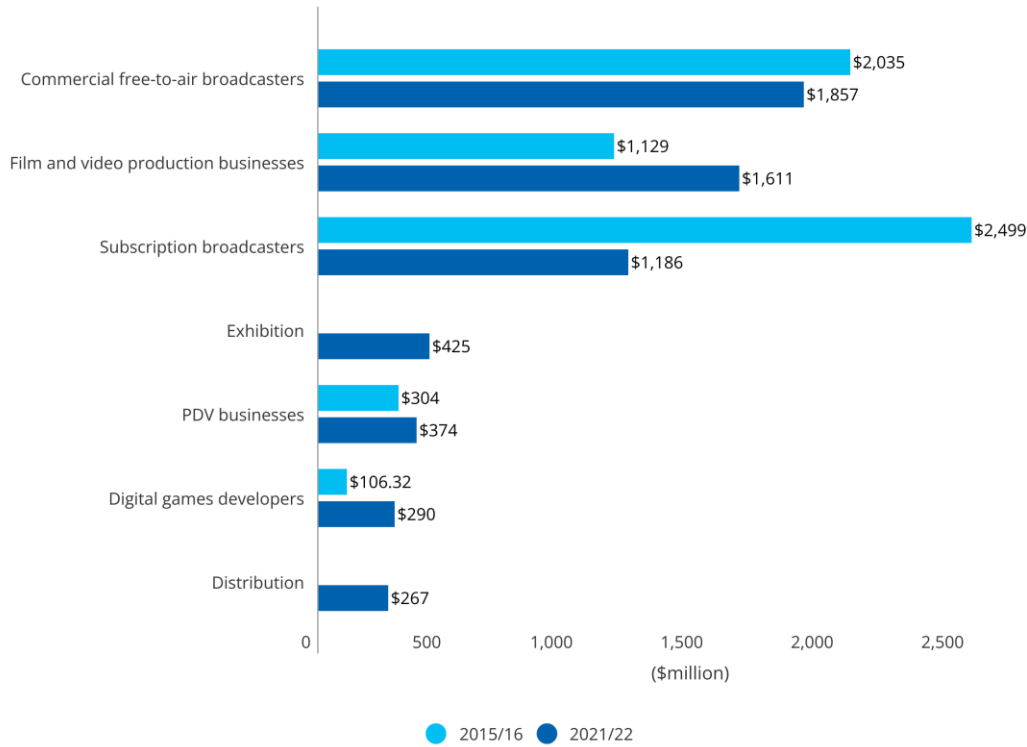
Although the recent production boom has increased employment opportunities for workers in the industry, it also highlights short-term challenges such as sourcing crew. This has prompted the introduction of additional initiatives such as Screen Australia’s [Industry Development Programs for below-the-line roles](#) to maintain the momentum in meeting these demands.

Media enquiries: Ted Rose
+61 456 588 679 | ted.rose@screenaustralia.gov.au
www.screenaustralia.gov.au



Financial activity trends differ across sectors

INDUSTRY VALUE ADDED BY SECTOR (\$m)



Source: Australian Bureau of Statistics (ABS), Film, Television and Digital Games, 2021/22, 2015/16. 2015/16 figures are converted to 2021/22 dollar terms to adjust for inflation. Distribution and Exhibition figures are only available for 2021/22.

The survey reveals film and video businesses have seen significant growth in output (or industry value-added) since 2015/16, increasing by 43% to \$1,611 million in 2021/22. This increased output has led to a significant increase in income for film and video production businesses, growing by 75% to \$4,575 million in 2021/21.

Interestingly the data showed that film and video production businesses received significantly more post-production, digital and visual effects (PDV) services income compared to 2015/16 (\$389 million, up 193%) – reflecting a trend of production businesses bringing more PDV work in-house.

However, film and video production businesses have also seen significant increases in expenses (104% growth since 2015/16), driven largely by rising labour costs.

For film and video post-production businesses, \$604 million total income was generated in 2021/22 (increase of 34% since 2015/16), while value-added increased by 23% to \$374 million in 2021/22.

The 2021/22 survey includes film and video distribution and film exhibition businesses. These sectors reported a combined \$2,757 million of income and an aggregated profit of \$155 million.

Graeme Mason said, “Film distribution and exhibition businesses have experienced significant hardship over the past few years, but it’s heartening to know that watching a film at the cinema continues to be Australia’s most popular cultural pastime.”

Commercial free-to-air broadcasters generated a total income of \$3,746 million (decrease of 17% from 2015/16) and saw a decline of 9% to \$1,857 million in value-added. Subscription broadcasters and channel providers generated a total income of \$4,431 million (decrease of 27% from 2015/16) and also saw a decline of 53% in value-added (to \$1,186 million in 2021/22).

Graeme Mason said, “We acknowledge there are challenges for the sector, such as subscription broadcasters and channel providers and commercial free-to-air broadcasters seeing a decline in income and value-added, partly driven by increased global competition.”

**To account for inflation and ensure comparability of results over time, Screen Australia has converted 2015/16 figures into 2021/22-dollar terms. This has been done using publicly available ABS Consumer Price Index (CPI) data.*

Boost in film and video production activity

The survey results found that total hours of television produced increased by 1.7% since 2015/16, with strong growth in broadcast hours of particular genres, such as television drama (70%) and documentary (165%). However total cost increased by 45%, driving up average cost per hour for television productions.

For non-television film and video production, there was significant growth between 2015/16 and 2021/22 in numbers of feature films (133%), film documentaries (46%), short films (152%), and short form online content (60%). Average cost per production declined for feature films (-35%), and short films (-85%) and increased for film documentaries (5%) and short form online content (76%).

It is important to note that although Australia has experienced a boom in productions in recent years, the industry is still waiting for the income of these productions to have an impact as the projects hit our screens in the future.

Substantial growth in digital games

A notable area of growth identified in the survey is digital games. During 2021/22, digital game development businesses produced 299 games, which was a 68% increase since 2015/16, with multiplatform games having the largest increase in productions (325%).

Despite an increase in expenses for digital games businesses of 282% between 2015/16 and 2021/22, this sector reported a 204% increase in operating profit before tax, reaching \$84 million in 2021/22, reflecting the strong income growth (265% since 2015/16) in the industry.

The introduction of the Digital Games Tax Offset, which will have retrospective effect from 1 July 2022, and the \$12 million over four years through the Federal Government’s National Cultural Policy, *Revive* will also provide additional opportunities for games developers in Australia.

Looking ahead and utilising the survey data

Graeme Mason said, “Our focus now is to use this data to make the most of these opportunities and drive change – ensuring that we are in the best position to strengthen the domestic industry and encourage more Australian stories on screens locally and globally.”



Australian Government



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“The screen industry continues to punch above its weight and we know its value both economically and culturally, however more action will be needed to keep the momentum going, with these results informing decisions and collaborations across the industry.”

“We thank the ABS for their work on this survey and encourage the industry to utilise this data when making submissions to Screen Australia,” said **Mason**.

The full survey results for 2021/22 are available on the [ABS website](#) at no cost. Screen Australia will be publishing a series of graphs in the coming weeks, analysing the survey data in the Fact Finders section of screenaustralia.gov.au.

The Survey

- The Film, Television and Digital Games Survey is funded by Screen Australia as part of the agency’s research function.
- The survey has been done periodically since 1993/94, with games included since 2006/07, and subscription video-on-demand services included since 2015/16.
- The 2021/22 survey is based on a sample of 1,252 businesses.
- Public broadcasters are covered in the production activity data, however are not surveyed in the financial or employment data. However, it is common for public broadcasters to use film and video production businesses to make their screen content, meaning that some expenditure would be captured.
- Note that in this media release, Screen Australia has rounded ABS figures and converted 2015/16 figures to 2021/22-dollar terms to ensure comparability of results over time.
- *‘Value-added’ measures business output, calculated as sales and service income, capital works, Government funding and changes in inventories, minus the cost of goods and services used in production.
- Subscription broadcasters includes traditional subscription broadcasters, as well as newer subscription video-on-demand (SVOD) services. Multinational SVOD providers will only be captured in the survey if they had an active Australian Business Number (ABN) in the relevant financial year. Further, only the Australian operations of these businesses will be captured.

Complementary Data

- 2021/22 figures should not be compared to survey results prior to 2015/16, due to significant changes to scope and methodology since these earlier surveys.
- Like the ABS Survey, the latest annual Drama Report from Screen Australia analyses 2021/22, however there are methodology differences e.g., the Drama Report details expenditure in the financial year in which principal photography commenced. The scope is also different, with the ABS Survey including all screen content rather than only drama.

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Media enquiries: **Ted Rose**
+61 456 588 679 | ted.rose@screenaustralia.gov.au
www.screenaustralia.gov.au



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