

DID YOU KNOW?

A QUARTERLY SNAPSHOT FROM SCREEN AUSTRALIA'S STRATEGY & RESEARCH UNIT

AUGUST 2011

POLICY

% OF TOTAL DRAMA ON FREE-TO-AIR TV, 2011¹

63%
US

16%
UK

10%
AUSTRALIAN

2011 GOVERNMENT FUNDING FOR

ABC: \$956.1 MILLION²

SBS: \$216.5 MILLION³

FREE-TO-AIR TV CHANNELS

6 IN 2008 | **15** IN 2011

3/15 SUBJECT TO AUSTRALIAN CONTENT STANDARD COMPLIANCE WITH STANDARD 2009/10 **100%**⁴

SUBSCRIPTION TV CHANNELS

IN 2011: **100+++**

COMMERCIAL FREE-TO-AIR TV

COMBINED REVENUE

\$3.5 BILLION⁵

SUBSCRIPTION TV

\$2.8 BILLION⁵

B'CASTER SPEND ON AUSTRALIAN DRAMA

\$145 MILLION⁶

\$35.3 MILLION⁷

% TOTAL DRAMA SPEND COMMERCIAL FREE-TO-AIR TV⁶

30%
AUST.

70%
IMPORTED

AV. PROGRAM COST TO BROADCASTERS⁸

\$300K-1.3M/HR
FOR NEW AUSTRALIAN DRAMA
\$100K-400K/HR
FOR US DRAMA

ECONOMY

FREE-TO-AIR TV 2008-2011:⁹

AV. AUDIENCE: **UP 14%** ↑

COMMERCIAL B'CASTERS:⁹

AUDIENCE SHARE FOR AUSTRALIAN PROGRAMS:

↓ **ALL TYPES:**
DOWN FROM 62% TO **53%**

↓ **DRAMA:**
DOWN FROM 22% TO **12%**

AUDIENCE PARTICIPATION 2010¹⁰



94% FREE-TO-AIR TV
19% SUBSCRIPTION TV
20% ONLINE VIDEO

PVR PENETRATION IN AUSTRALIAN HOMES¹¹

(ALLOWING USER TO SKIP ADS)

2010: **30%**

2011: **42%**

92% SHARE OF COMMERCIAL FREE-TO-AIR TV REVENUE FROM ADVERTISING⁶

FORECAST:

5.5 MILLION

TABLET OWNERSHIP IN AUSTRALIA BY 2015⁵



25% USE THEIR TABLETS TO WATCH TV⁵
30% TO WATCH FILMS⁵

TECHNOLOGY

1. All free-to-air channels, incl public and multi-channels. Screen Australia analysis of OzTAM data: Jan-Jun 2011
2. Office for the Arts and Department of Broadband, Communications and The Digital Economy 2010/11 Portfolio Budget Statements
3. SBS Annual Report 2009/10 p 48
4. ACMA: http://acma.gov.au/webwr/aba/tv/content/requirements/australian/documents/comparison-2002_to_2010_compliance_results.pdf
5. In 2010; PwC, *Outlook - Australian Entertainment and Media 2011-2015*, pp57 - 59, 103, 171

6. In 2008/09; ACMA, *Broadcasting Financial Results 2008/09*
7. By 26 classified drama channels 2009/10; http://acma.gov.au/WEB/STANDARD..PC/pc=PC_310687
8. Compiled by Screen Australia
9. Screen Australia analysis of OzTAM data, 5-city metro consolidated, average audience, 6am to midnight
10. Proportion of people regularly engaging in the activity; compiled by Screen Australia using Roy Morgan Single Source
11. OzTAM 2011, Percentage of Household Estimates, Metro 5 City, 6 July 2011