

CEO's 2019 Year in Review and 2020 Preview

Tuesday 21 January 2019: Today the Motion Picture Distributors Association of Australia ([MPDAA](#)) published the finalised box office data for 2019, with Australian films taking \$40.2 million at the local box office. Rachel Griffiths' directorial debut *Ride Like A Girl*, which was funded through Screen Australia's Gender Matters program, was the highest-grossing feature.

The data completes the [set of annual, objective metrics](#) Screen Australia utilises to monitor the health of the local screen industry, including the annual [Drama Report](#), ratings, viewership, and the agency's own spend on content.

"The Australian screen industry performed solidly in 2019, with creators not only producing works that resonated with audiences, but with the sector remaining incredibly resilient despite the upending of entertainment business models globally," said **Graeme Mason**, CEO of Screen Australia. "In part that is due to the bedrock of direct and indirect government funding that ensures Australian stories are told, but the bottom line is a film or series needs to be quality to attract the kind of solid viewership we're seeing. To that end, our local creators are to be congratulated."

"Despite the explosion of choice, Australians are still seeking out local stories on television, at the cinema and online. Compared to other English-speaking markets, Australia produces exceptional, internationally regarded content at a fraction of the budget one would expect in the UK and US, and at a volume that belies our small population."

"Where and how Australians are consuming that content is undeniably changing, with real time TV viewing shrinking as catch-up is growing. We're also seeing consumers make very deliberate choices about the type of film they want to see at the cinema, as opposed to enjoying at home, compounded by the continued squeeze on the indie film market. Documentary remains popular, particularly on the public broadcasters, and the resurgence of theatrical docs that started in 2016 is continuing. The online content we're funding is growing in production values and often duration, and the fact the 2019 [top trending YouTube video](#) in Australia was a scripted series by Superwog is extraordinary."

"How commercial success can be measured is diverging by format, and as an industry we need to take a more nuanced approach rather than relying on old metrics in isolation. Linear television series are still expected to perform strongly from episode 1, as are films on their opening weekend. Yet in practice, this is the opposite of the viewing behaviour that streamers and online platforms like YouTube are training us to adopt, where you discover and consume content in your own time."

"Whilst the viewer may make no distinction about how a piece of content got on their screen, in reality productions are now also financed in completely different ways. Producers of a film made for cinema or a terrestrial TV series will typically enjoy a long tail of income as international, home entertainment and auxiliary rights are sold. Conversely, streamers are now buying the worldwide release of a title for a flat fee, providing a swift payday and incredible profile to creators, but with no further income due and no promise they will ever know how many people watched their work. Online platforms are offering an entirely different business model again, and in Australia we often see scripted creators supplementing that income with live theatre offerings."

"As a result, at Screen Australia we are looking to fund productions that are not only creatively exceptional, but are crafted and financed for the new market conditions. We want to see very deliberate choices in budget, the use of Offsets, target audience, release strategy and international partners, with success measures that are realistic. The aim is to support creatively and culturally significant work that resonates with audiences, and from which the creators financially benefit."

Screen Australia directly injected nearly \$76 million into the screen sector in 2018/19, including over \$54 million in TV, film and documentary production funding which triggered over \$360 million in activity (refer [appendix 3](#)). An additional \$207.69 million was provided by the Federal Government through the Producer Offset tax incentive administered by Screen Australia.



The [latest Drama Report](#) found 2018/19 expenditure on Australian scripted titles was a record-breaking \$768 million, driven by an all-time record spend on Australian television and a five-year high spend on Australian features.

“All signs point to 2020 being an incredibly busy year for both the production and release of Australian stories. Coupled with the fact the production of foreign works in Australia has been bolstered by several large productions, Australia has become a very robust and competitive screen market.”

As of January 2020, Screen Australia has 35 films, 29 feature documentaries, 14 TV shows, 27 TV documentaries, 10 kids’ shows, 12 online series and 10 online documentaries in various stages of production or release.

2020 cinema releases have already begun with *True History of the Kelly Gang* and *Go!* (to be released as *Go Karts* outside of Australia on Netflix), with confirmed release dates for *H is for Happiness* (6 Feb), *Miss Fisher and the Crypt of Tears* (27 Feb), *The Wishmas Tree* (27 Feb), *Undertow* (27 Feb), *Never Too Late* (23 Apr), *I Am Woman* (21 May), *The Dry* (27 Aug), and *Penguin Bloom* (1 Jan 2021). Indigenous anthology *Cook 2020* will also screen. Gender Matters developed feature *Relic* will have its world [premiere at Sundance](#) Film Festival and *H is for Happiness* will have its international premiere at Berlinale.

The Gloaming (Stan) began the 2020 television debuts, to be followed later in the year by *Stateless* (ABC, 1 March), *RFDS* (Seven), *Halifax Retribution* (Nine), *The Secrets She Keeps* (10), *Hungry Ghosts* (SBS), *New Gold Mountain* (SBS), *First Day* (ABC), *Fallout* (ABC) and Fresh Blood comedy graduate *Why Are You Like This?* (ABC/Netflix). *Stateless* and *Mystery Road* series 2 will both premiere at Berlinale. Returning series include *Little J & Big Cuz* (NITV), *Bluey* (ABC), *How to Stay Married* (Ten), *The Heights* (ABC) and *Bloom* (Stan).

Online content due for release includes the LGBTQI+ drama *Cloudy River*, horror anthology *Deadhouse Dark* and Tilda Cobham-Hervey and Dev Patel’s animated virtual reality short *Roborovski*.

2020 documentary releases began with SBS’s *Marry Me, Marry My Family*, with forthcoming titles including feature *Firestarter - The Story of Bangarra*, Scott Pape’s *Money School* (Foxtel), *Revelation* with Sarah Ferguson (ABC), Warwick Thornton’s *The Beach* (NITV), *Who Gets to Stay in Australia?* (SBS), *Dark Emu* (ABC), and Shaun Micallef’s *On The Sauce* (ABC). *Australia in Colour* and *Every Family Has a Secret* will both return to SBS.

TELEVISION

“In 2019 we saw a wave of new shows on the small screen that were of an incredibly high calibre. Foxtel’s *Lambs of God* became the most nominated show in AACTA history, ABC’s *Total Control* was Australia’s first series selected for the Toronto International Film Festival and Network 10 quickly ordered season two of *Five Bedrooms* such was the audience demand. True Australian stories on TV also remain perennially popular, with 2019 producing landmark titles such as *Australia in Colour* and *Love on the Spectrum* that became community talking points.”

“It’s also fantastic to see creators benefiting from their original IP. Every Cloud Productions developed the *Miss Fisher* property originally for the ABC, followed by a hit spin-off for Channel Seven last year, a [Chinese adaptation](#) on the way and now one of the most anticipated films of 2020 in *Miss Fisher and the Crypt of Tears*.”

“Amongst the new players, it was telling that Stan built its entire 2019/20 summer strategy around four Australian titles, which was a very public endorsement of the ability of local content to attract audiences.”

Half of the top 10 Australian dramas in 2019 were broadcast on the ABC, with all the commercial free to air broadcasters also represented amongst the most popular shows. Most of the top 10 were debut series.



Position	Title	Episodes	Broadcaster	Ratings [^]
1	<i>Utopia</i> series 4	8	ABC	1,200,000
2	<i>Home and Away</i> series 32	243	Seven	1,031,000
3	<i>Total Control</i> *	6	ABC	1,012,000
4	<i>Seachange</i> *	8	Nine	997,000
5	<i>The Cry</i>	4	ABC	936,000
6	<i>Bad Mothers</i> *	8	Nine	934,000
7	<i>Harrow</i> series 2	10	ABC	934,000
8	<i>Five Bedrooms</i> series 1*	8	Ten	865,000
9	<i>Ms Fisher's MODern Murder Mysteries</i> *	4	Seven	805,000
10	<i>Les Norton</i> *	10	ABC	775,000

*Screen Australia funded. [^]average audience, metro + regional 28 day, see source notes.

The decline in linear television viewing is in part being offset by growing catch-up consumption. For instance, *The Hunting* became SBS's highest-rated drama commission ever with 624,000 viewers[^], which was further amplified by 194,000 to 242,000# viewers watching each episode on SBS on Demand. *The Cry* recorded the biggest catch-up audience of any Australian drama with 267,000 - 318,000 viewers per episode on ABC iview#. The introduction of OzTAM's [Virtual Australia](#) in 2020 is expected to make it easier to measure total viewership going forward. (#VPM, video player measurement see source notes.)

"Although it premiered in 2018, special mention must be made for Ludo Studio's now global hit *Bluey*, which had a series rating of 2.4 million in 2019 on ABC iview alone" (figure courtesy of the ABC, OzTAM Plays Begin Event, VPM Average). [Disney reported](#) *Bluey* reached 16 million US viewers in the last quarter of 2019 since its launch on Disney Junior in October.

Australian television documentaries remain popular, with the bulk of content commissioned by the public broadcasters.

Due to complexities in the definition of documentary, only the top 10 Screen Australia-funded television documentaries are included below. A notable addition is the ABC's *Old People's Home for 4 Year Olds* which captured the nation's heartstrings, and 1,118,000 viewers[^].

Series remain the most popular documentary format, however demand for the Michael Hutchence feature documentary *Mystify* was also strong, despite having had a successful cinema run in the same year.

Position	Title	Episodes	Broadcaster	Ratings [^]
1	<i>Magical Land of Oz</i>	3	ABC	928,000
2	<i>The Cult of the Family</i>	3	ABC	818,000
3	<i>Love on the Spectrum</i>	4	ABC	797,000 preliminary
4	<i>The Crown and Us: The Story of the Royals in Australia</i>	2	ABC	787,000
5	<i>Aftermath: Beyond the Firestorm</i>	1	ABC	767,000
6	<i>Mystify</i>	1	ABC	746,000
7	<i>The Pool</i>	2	ABC	669,000
8	<i>Australia in Colour</i> series 1	4	SBS	578,000
9	<i>Employable Me</i> series 2	3	ABC	556,000
10	<i>Every Family has a Secret</i> series 1	3	SBS	541,000

[^]average audience, metro + regional 28 day, see source notes.



FILM

59 Australian films were released in 2019 (36 of which were fiction), earning \$39.8 million. They competed with 694 foreign films released in 2019 locally that earned \$1.09 billion. Four features did over \$4 million, and the resurgence of theatrical documentary continues, with both 2040 and Mystify entering the all-time top 10 Australian feature documentaries at the box office.

In 2019 Australian films also recorded substantial business in the local home entertainment market, for instance Storm Boy was digitally rented over 30,000 times and purchased 50,000 times in Australia alone.

All of the top 10 Australians films at the box office received Screen Australia funding:

Position	Title	Release	2019 Box Office
1	Ride Like a Girl	Wide (200-399 prints)	\$11.58m
2	Top End Wedding	Wide (200-399 prints)	\$5.28m
3	Storm Boy	Wide (200-399 prints)	\$4.98m
4	Palm Beach	Wide (200-399 prints)	\$4.50m
5	Hotel Mumbai	Wide (200-399 prints)	\$3.30m
6	Danger Close: The Battle of Long Tan	Wide (200-399 prints)	\$2.97m
7	2040	Speciality (20-99 prints)	\$1.52m
8	Mystify	Mainstream (100-199 prints)	\$1.15m
9	The Australian Dream	Mainstream (100-199 prints)	\$1.14m
10	The Nightingale	Speciality (20-99 prints)	\$0.54m

Box office courtesy of the MPDAA.

Australian film’s share of the 2019 local box office was 3.3%. By comparison, in New Zealand it was 2% in 2017. The average share in Ireland across 2010 to 2018 was 3%. Canada does not use the share metric, but in 2015 The Globe and Mail suggested Canadian films rarely reach a 2% share, despite a domestic population of over 37 million.

The 28 foreign blockbuster films released in Australia in 2019 were responsible for 60% of all cinema takings locally. “On the big screen, the market remains incredibly tough for indie films from all countries, so to have both Ride Like A Girl and Top End Wedding break-out was a great result. I was also particularly pleased to see three feature documentaries take over \$1 million, and all subsequently licenced for broadcast. Special mention also to the team from Hotel Mumbai, which took over AUD\$29.3 million internationally, representing an extraordinary commercial result for a mid-budget film.”

“The blockbuster domination of the cinema space is here to stay, and we continue to see even mainstream Academy Award and BAFTA Best Picture nominees struggling to get to \$5 million in Australia. So whilst we will continue to see Australian films that can capture the \$10+ million mark, they will be rare. Our films will absolutely continue to be made, but in terms of how producers monetise these works, it is an increasingly delicate dance between production budget size, distribution, marketing, and attracting international finance and audiences.”

ONLINE

“It was fantastic to see a locally made, scripted title by Superwog take out Google Australia’s top-trending video title - the second time the comedy duo have done so. Of Screen Australia-funded titles, 2019 was the year of experimentation reaping rewards, including our first vertical show Content, YouTube global superstar Wengie making her first scripted show Parked and Australia’s first Canneseries win for dark comedy Over and Out.”

Most online programs that Screen Australia funds are released on multiple platforms, including BVOD services (e.g. ABC iview), YouTube and Facebook which all utilise different measures of a view. Considering YouTube in isolation, the most watched Screen Australia-funded online productions were:



Position	Title	Episodes	Channel	YouTube views	First Published
1	<i>Meta Runner</i>	10	supermarioglitchy4	9,711,018	25/07/2019
2	<i>Glennridge Secondary College</i>	16	TheAuntyDonnaChannel	5,834,319	20/02/2019
3	<i>Australia's Best Street Racer</i>	8	australiasbeststreetracer	1,559,382	02/10/2019
4	<i>Parked</i>	1	wwwengie	1,318,004	12/10/2019
5	<i>Lucy and D.i.C.</i>	8	wemadeathingstudios	479,754	14/08/2019

YouTube views as at 13 January 2020.

SCREEN AUSTRALIA 2020

Screen Australia is currently working with the ACMA on an [Options Paper](#) to advise the Federal Government on how to best support the local screen sector into the future. The agency is also mid-way through [revising its documentary funding](#) programs.

“At Screen Australia, 2019 had a heavy focus on industry consultation with the documentary sector, in terms of how to best fund productions into the future. I was pleased the proposals put forward to the industry in September were well received, and the feedback was very helpful. We’re on track to activate the revised programs from 1 July 2020.”

“Our Digital Solutions team also spent much of last year preparing the roll-out of our new application portal, which went live in December. This is the first agency-wide change to the way we manage funding applications since 2013, and aside from reducing our software costs, we expect the new system will significantly improve the applicant experience. Throughout 2020/21 we will also work to simplify and unify our guidelines across the agency.”

“In 2018/19 Screen Australia received 1,299 applications across our programs, 522 of which were successful. This is a significant volume of work for a small agency, and considering we have over 20 standard funding programs running at any given time, we expect 2020 will remain very busy. A huge amount of effort is put into communicating funding opportunities to the industry, so I encourage creators to make full use of these resources. I want to particularly reach out to emerging creators from all backgrounds and geographic locations, and urge you to become familiar with our development funding programs and special initiatives.”

“Despite tremendous technological and structural change in the global screen industry, Australian creators continue to do exceptional work and tell amazing stories. Collectively, we have a lot to be proud of and even more to look forward to.”

RESOURCES

- [Top 100 Australian films at the box office](#)
- [Top 10 Australian feature documentaries at the box office](#)
- [Top 5 Australian films at the box office by year](#)
- [Top Australian TV dramas by year](#)



SOURCE NOTES

Please source all data when reporting.

- Metropolitan data is copyright to OzTAM and Regional data is copyright to RegionalTAM and may not be reproduced, published or communicated in whole or part without the prior consent of OzTAM or RegionalTAM.
- All ratings are courtesy of OzTAM and RegionalTAM, 5-city-metro, combined markets, total people, average audience, consolidated 28 day except where noted.
- Top 10 Australian dramas (metro viewers): 941,000, 659,000, 693,000, 695,000, 675,000, 686,000, 643,000, 629,000, 518,000 and 481,000. Top 10 Screen Australia funded documentaries (metro viewers): 600,000, 554,000, 561,000 tbc, 531,000, 514,000, 538,000, 446,000, 428,000, 398,000, 379,000. Top 10 Australian TV Docos (metro viewers): 1,128,000, 971,000, 824,000, 794,000, 686,000, 731,000, 600,000 631,000, 591,000 and 585,000.
- OzTAM Video Player Measurement - consolidated 28. VPM Rating: total minutes played divided by content length. Top programs are for episodes with a minimum length of 15 minutes. Includes catch up minutes only and is not restricted to the five metropolitan cities. Live streaming channel viewing is reported separately.
- *Bluey* VPM data supplied by the ABC.
- All domestic box office figures courtesy of the MPDAA.
- All international box office figures courtesy of Comscore.