Australian Government | Screen Australia

MEDIA RELEASE

2015/16 ABS Film, Television and Digital Games Survey results released

Thursday 15 June 2017: Today the Australian Bureau of Statistics (ABS) has released the results of its seventh **Film, Television and Digital Games Survey** covering the financial year 2015/16, including subscription video on demand (SVOD) services for the first time.

"It is encouraging to see that for 2015/16 the total income of the screen sector was up, as was the number of people the industry employs," said Screen Australia CEO **Graeme Mason**. "The survey results also highlight pressures in the industry, such as the increasing cost of creating drama. This, coupled with fragmenting audiences and technology changes, is having a real impact, starkly apparent in television this week."

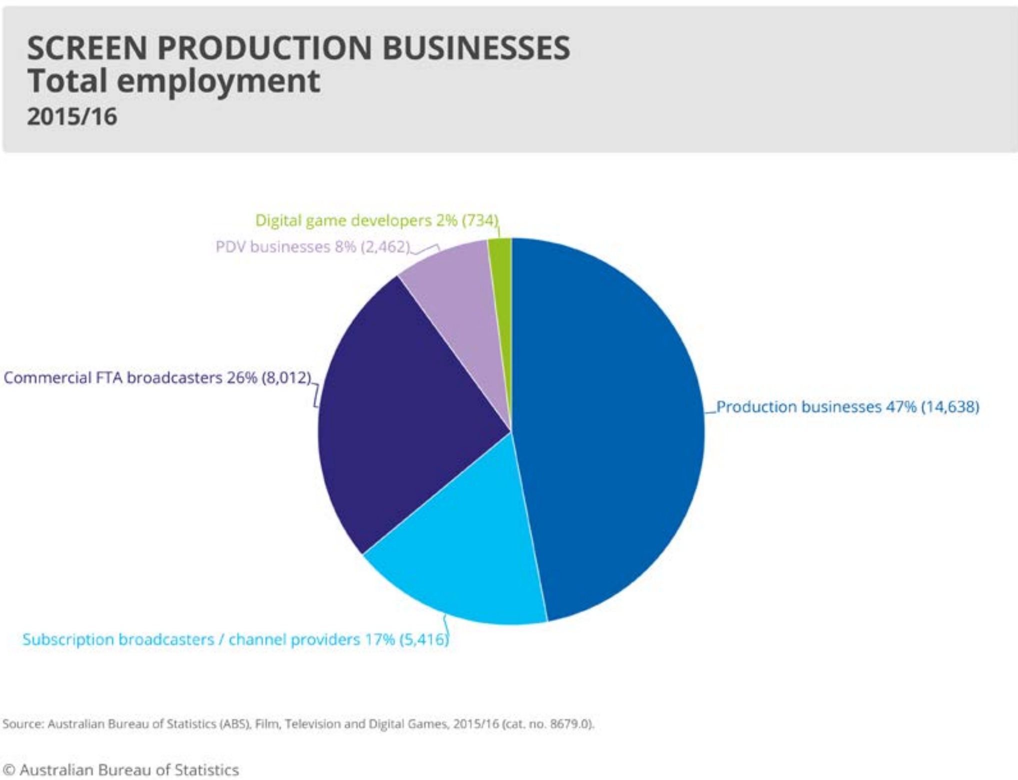
The survey found overall income has increased from $11.9b (2011/12) to $12.1b (2015/16) with the major growth area being subscription broadcasters and channel providers, which was expected as new SVOD services are part of that category.

"Special mention must be made of online content creators who have delivered exponential production growth, now representing $93.6m of non-TV production costs compared to just $5.5m in the 2011/12 survey," said **Graeme Mason.** "This sector is fertile ground for developing new talent and encouraging risk-taking and Screen Australia will continue to invest in this space." Since 2012 Screen Australia has funded 107 online projects including *Soul Mates*, *The Katering Show* and *Starting from Now*.

"The industry growth has not been uniform, with the entry of SVOD services into the market seeing the income of subscription broadcasters eclipse commercial free-to-air broadcasters. However, the operating profit margin between the two is similar, with 9.2% for subscription and 10.6% for commercial free-to-air."

The survey found a record 31,262 people were employed in the screen sector across 3,359 businesses, up from 29,671 employees in the previous survey (2011/12).

"Employment across the sector is up 5%, but the standout driver of this growth has been digital game developers, with employment up 26% since the 2011/12 survey," said **Graeme Mason.**



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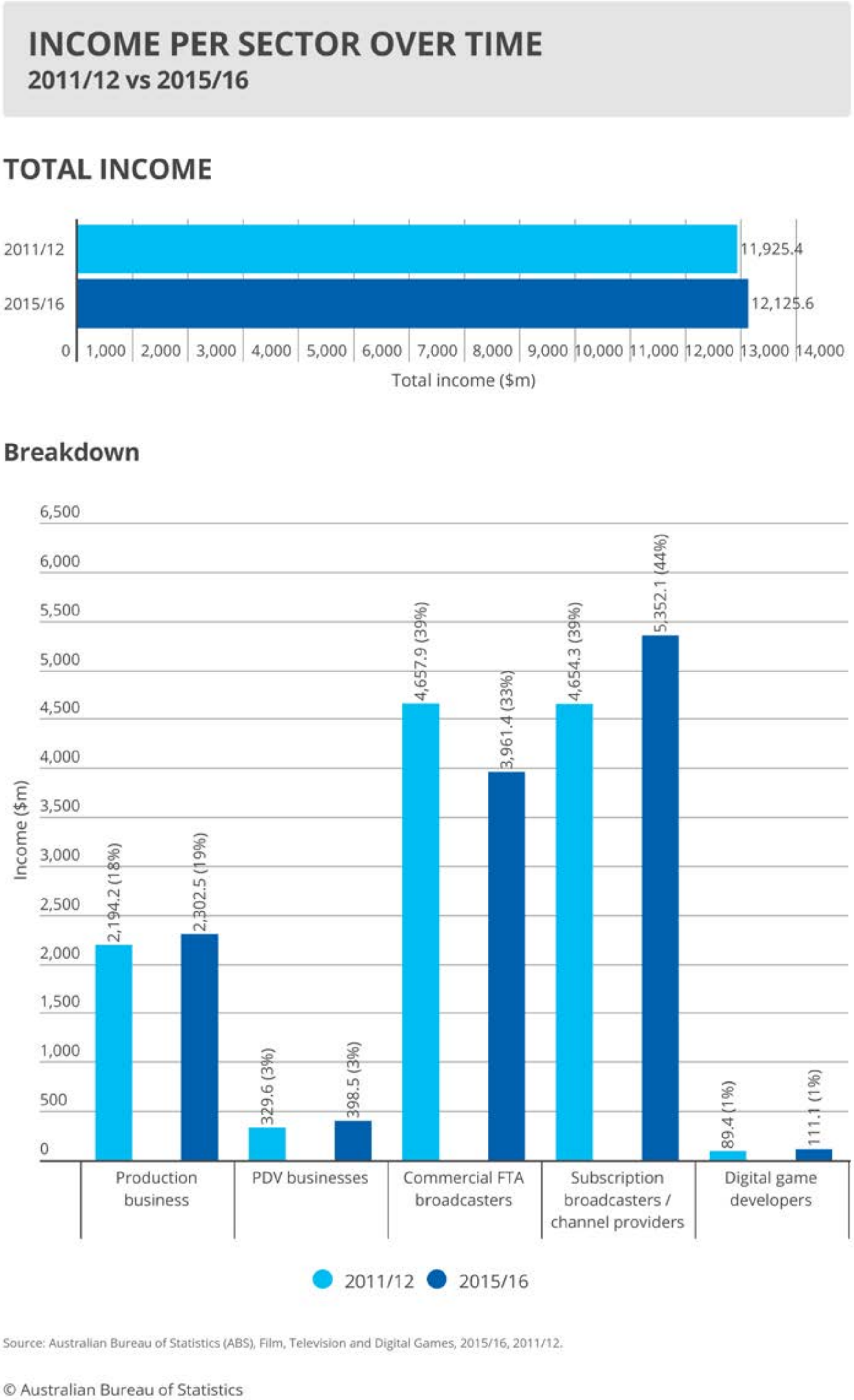
All sectors derived the majority of their income locally, however 49.4% of end-to-end digital games development income was sourced from overseas.

Feature films, TV drama and children's TV drama are the biggest drivers of income for production businesses, representing 30.7% of their $2.3b income.

Visual effects is the largest driver of income for film and video post-production businesses, delivering $124.4m or 31.2% of total income, followed by animation at 19.8%.



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Incredibly, 87,466 hours of first release broadcast and subscription television were made in Australia, with news and current affairs making up 57% (50,160 hours) and one of the cheapest formats to make with an average cost per hour of $11,900. Drama is the most expensive format at $645,700 average cost per hour, representing 497 hours or 0.6% of total broadcast hours. Children's drama represented 120 hours or 0.1% and is similarly expensive to make at $476,100 average cost per hour.

There were 444 broadcast hours of documentary at an average cost per hour of $230,000 and 347 non-TV documentary productions at an average cost of $117,900.

Compared to the 2011/12 survey, television drama is down from 632 hours to 497 and television documentary is down from 566 to 444 hours. "Whilst we appreciate the cost per hour of drama is up from $560,700 to $645,700, the reduction in the amount of Australian stories on free-to-air television is notable," said **Graeme Mason**.

There were 112 domestic and foreign feature films made in the period, with an average cost per production of $4.6m. Some 3,248 episodes of web series were made in the period compared to just 107 in 2011/12.

"The 2015/16 Film, Television and Digital Games Survey provides a wealth of information on a commercial sector which is providing over $5.3b in value-add to the economy," said Screen Australia COO **Fiona Cameron**. "I wish to thank the Australian Bureau of Statistics for their work and encourage everyone in the screen industry to utilise this data when making submissions to the Australian and Children's Screen Content Review."

The full 2015/16 Film, Television and Digital Games Survey results are available on the ABS website at no cost. Screen Australia will publish a series of graphs over 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.
- 1,202 businesses were surveyed for the 2015/16 report.
- Public broadcasters are surveyed, but are not separated out as a sector due to their sample size. However, it is common for public broadcasters to use film and video production businesses to make their screen content, meaning that expenditure would be captured. Similarly, their broadcast hours are also captured, with the survey report terminology 'commercial broadcast hour' referring to a standard of time rather than just what is aired on commercial television.
- Note this media release includes rounding of the ABS figures.

COMPLEMENTARY DATA

- The previous ABS Surveys should be considered as complementary data rather than directly comparable. Aside from inflation, there were changes in scope and methodology which the ABS has outlined in the explanatory notes.
- The Screen Currency report co-authored by Deloitte Access Economics and Olsberg SPI analysed the 2014/15 financial year, and measured the audience and cultural value of the screen industry in addition to economics. Screen Currency also considered wider impacts of the screen industry e.g. on tourism.
- Like the ABS Survey, the latest annual Drama Report from Screen Australia analyses the 2015/16 year, 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 just drama.
- Note the ABS Survey is not comparable to the recent Stats NZ study as the New Zealand figures include distribution and exhibition.

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Please view the online version of this media release for sharable versions of charts and tables.

SUMMARY OF OPERATIONS
2011/12 vs 2015/16

TOTAL SUMMARY

		2011/12	2015/16
Businesses at end June (a)(b)	no.	2,917	3,359
Employment at end June (c)	no.	29,671	31,262
Total income	$m	11,925.4	12,125.6
Total expenses	$m	10,241.1	11,076.8
Operating profit before tax (d)	$m	1,699.3	1,184.5
Operating profit margin (d)	%	n/a	n/a
Industry value added (d)	$m	4,983.5	5,359.2

^ estimate has a relative standard error of 10% to less than 25% and should be used with caution

** estimate has a relative standard error of greater than 50% and is considered too unreliable for general use

(a) See the Scope and Statistical units section in Explanatory notes for details of the model used to represent these businesses.

(b) The number of commercial free-to-air and subscription broadcasters and channel providers is a reflection of changes to the statistical units model. See the ABS Explanatory Notes for details.

(c) Includes working proprietors and partners of unincorporated businesses.

(d) See Technical Notes on Data Quality, paragraph 6.

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