Australian Government | Screen Australia

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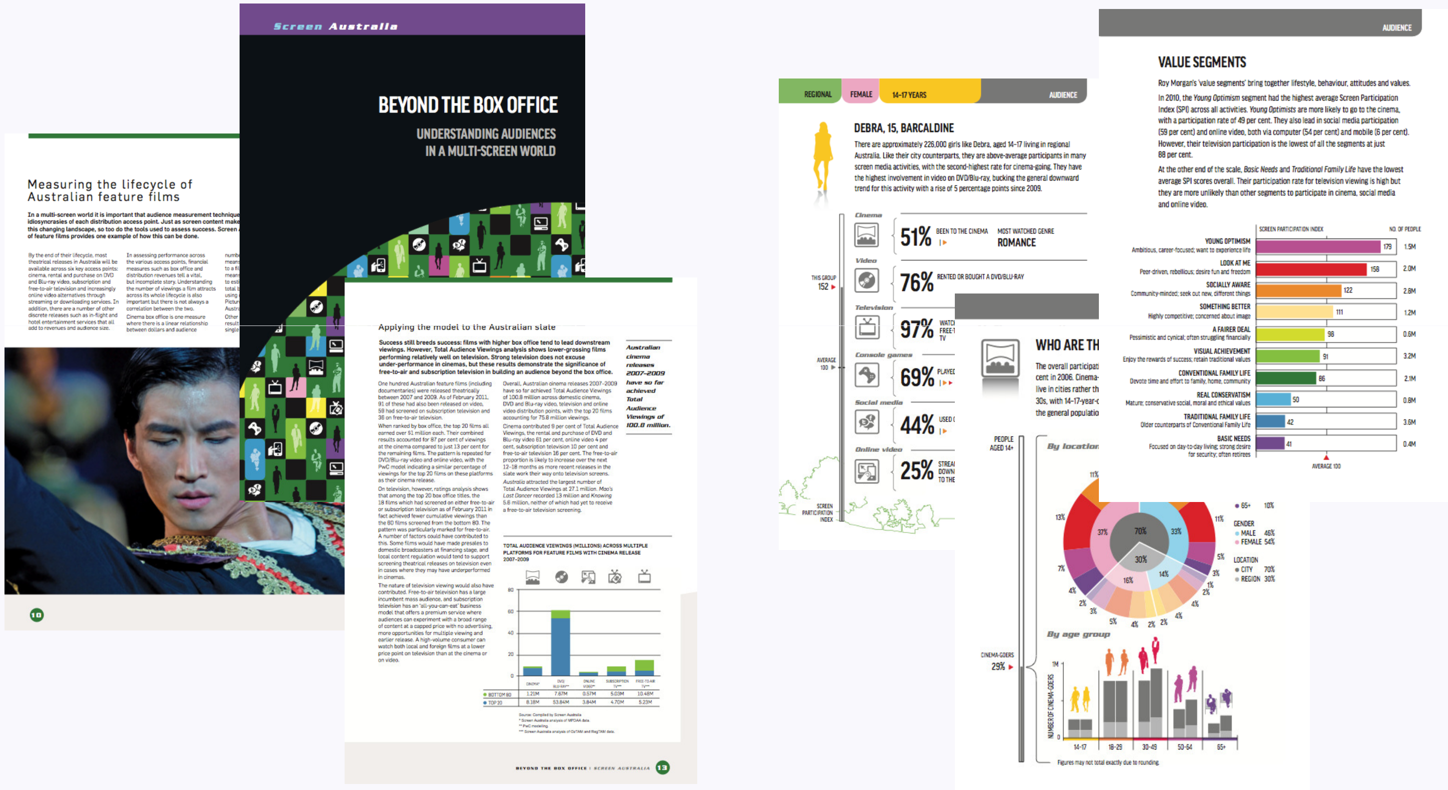
BEYOND THE BOX OFFICE: UNDERSTANDING AUDIENCES IN A MULTI-SCREEN WORLD

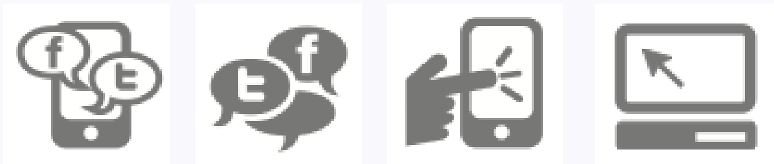


THERE ARE **FIVE KEY FINDINGS**:

1. AUDIENCES ARE ADDING NEW SCREENS TO OLD
2. THIS PRESENTS SOME CHALLENGES TO OLDER ONES
3. AMID SUCH CHANGE, PERFORMANCE MEASURES MUST ALSO ADAPT
4. BY LOOKING AT VIEWINGS WE CAN BETTER UNDERSTAND THE IMPACT OF THE PHYSICAL AND ONLINE VIDEO MARKETS
5. BIGGER AT THE BOX OFFICE IS BETTER, BUT TELEVISION ENABLES MANY LOWER-GROSSING FEATURE FILMS TO CAPTURE A NEW AUDIENCE

ESTABLISHED DISTRIBUTION POINTS

EMERGING DISTRIBUTION POINTS



JUST AS CONTENT MAKERS **NEED TO ADAPT** TO CHANGING AUDIENCES, SO TOO DO THE METHODS OF MEASURING SUCCESS.

FINANCIAL MEASURES TELL **A VITAL, BUT INCOMPLETE STORY**.

DOLLARS AND EYEBALLS DO NOT ALWAYS CORRELATE.

OUR **NEW MEASURE** WAS DEVELOPED IN TWO PHASES:

- A SURVEY OF MORE THAN 1,800 ADULTS AND CHILDREN
- EXTRAPOLATION OF SURVEY RESULTS TO GENERATE MULTIPLIERS FOR MISSING VARIABLES

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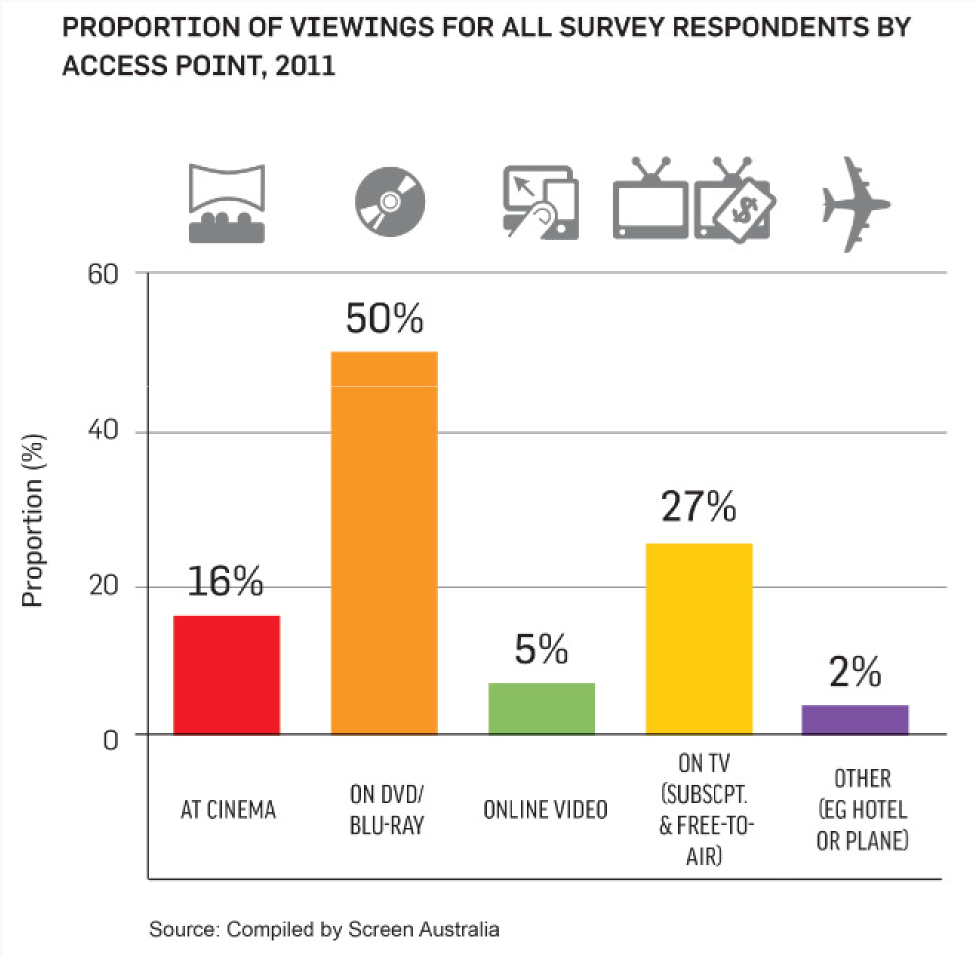

THE MOVE FROM PHYSICAL TO ONLINE VIDEO PRESENTS **AN OPPORTUNITY TO BETTER MONETISE** THE PHYSICAL AND ONLINE VIDEO MARKETS.

BY USING ESTIMATES INFORMED BY THESE SURVEY FINDINGS WE NOW HAVE A **ROBUST, REPEATABLE AND UNPRECEDENTED MEASUREMENT** FOR FILMS BEYOND THE BOX OFFICE.

100 AUSTRALIAN FILMS THEATRICALLY RELEASED IN THE THREE YEARS SINCE 2007:

- 91 HAVE BEEN RELEASED ON VIDEO
- 59 ON SUBSCRIPTION TELEVISION
- 36 ON FREE-TO-AIR TELEVISION

TELEVISION ENABLES AUSTRALIAN FEATURE FILMS TO BE **SEEN BY MORE PEOPLE IN MORE AREAS** ACROSS THE COUNTRY

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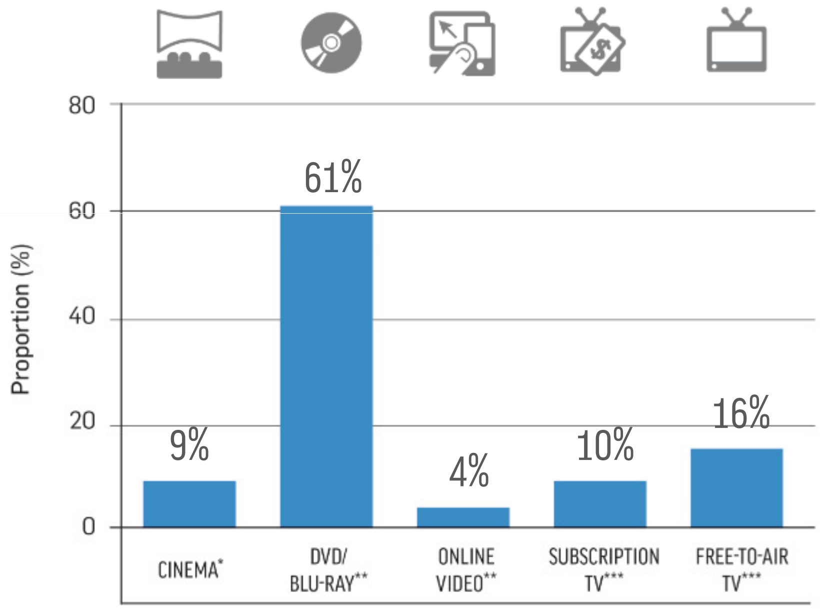
PROPORTION OF TOTAL AUDIENCE VIEWINGS ACROSS MULTIPLE PLATFORMS FOR FEATURE FILMS WITH CINEMA RELEASE 2007–2009



Source: Compiled by Screen Australia
* Screen Australia analysis of MPDAA data.
** PwC modelling.
*** Screen Australia analysis of OzTAM and RegTAM data.

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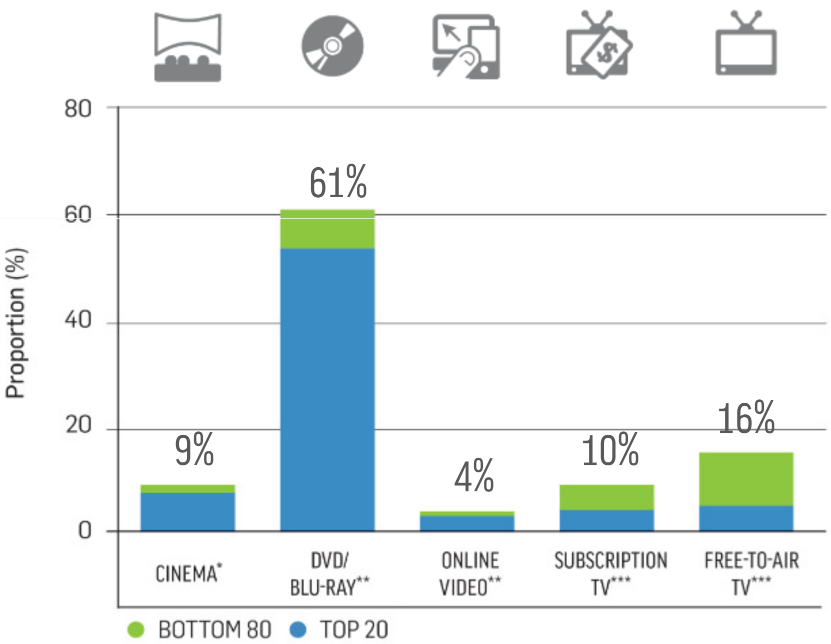

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THERE ARE SEVERAL CONSIDERATIONS AS TO WHY **BRAN NUE DAE** RATED HIGHER THAN **AUSTRALIA** ON TELEVISION, THEY INCLUDE:

- LENGTH OF LIFECYCLE
- AUDIENCE DEMOGRAPHICS
- SUPPLY CONSTRAINTS

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