



Home and Away

June 2022
Report to Seven West Media

Economic and Global Impact of
Home and Away
1988-2021

Ray Meagher (actor, 1988 to present)



Preface

Home and Away has been at the heart of Australian life and central to our television landscape for the past 34 years. The much-loved drama reflects the hopes, challenges and fears of its viewers through authentic Australian stories, told via the lens of community and family.

With its stunning scenery, evolving characters and often bold storylines, Home and Away has always provided a talking point for the nation and remains the most-watched drama in Australia today.

Seven commissioned this report to measure the impact Home and Away has had on the Australian economy, cultural landscape and creative industries over the past 34 years.

The report highlights Home and Away's impact on economic activity and the Australian production sector, its significant contribution to our society, and highlights free-to-air television's important role in shaping our national identity. No other medium has the power to reach as many viewers, engage them in important issues and entertain them with unforgettable stories.

Seven is integral to the Australian television and creative industries. We fund local jobs and ensure that high-quality Australian content like Home and Away continues to thrive and connect with people across the country and around the world.

James Warburton

Managing Director and
Chief Executive Officer Seven West Media





Introduction

ACIL Allen was commissioned by Seven West Media to report on Home and Away's economic and social impact. This report is wide ranging, covering many aspects of how the program has affected and influenced Australia, from its (very significant) impact on the economy, to how it grows and nurtures talent in the Australian film and television industry, to the export dollars it brings from its vast international audience, and much more.

ACIL Allen thanks the many people at Seven West Media who assisted us with this report and especially thanks the current and former Home and Away cast and crew who generously made themselves available for interviews.

Multifaceted Benefits of Home and Away

Home and Away is an Australian television program which commenced broadcast on the Seven Network on 17 January 1988

It has become the second longest running drama series in Australian television. It follows the lives of the residents in Summer Bay, a fictional seaside town. Palm Beach in Sydney's Northern Beaches district has been used as the location for Summer Bay since 1988.

The exterior scenes are filmed mainly in Palm Beach and the interior scenes are filmed at Australian Technology Park in Eveleigh. Over the years it has directly contributed to the Australian economy and cultural industry in a number of ways.



ECONOMIC IMPACT

Provides job opportunities in the film and entertainment industry and benefits to the economy broadly. [Page 8](#)



EXPORTS

Has been sold across 145 countries around the world and generated a significant amount of export revenue, more than \$1 billion, for the Australian economy, making it one of Australia's most successful media exports. [Page 8](#)



IMPACT ON PRODUCTION AND EMPLOYMENT

A number of cast and crew who started their careers with this program have gone onto other domestic and international productions. [Page 9](#)



GLOBAL REACH

Has been screened in many languages and reached millions of viewers across the globe. [Page 15](#)



IMPACT ON TOURISM

Has directly and indirectly contributed to Australia's reputation internationally and generated benefits through domestic and international tourism. [Page 16](#)

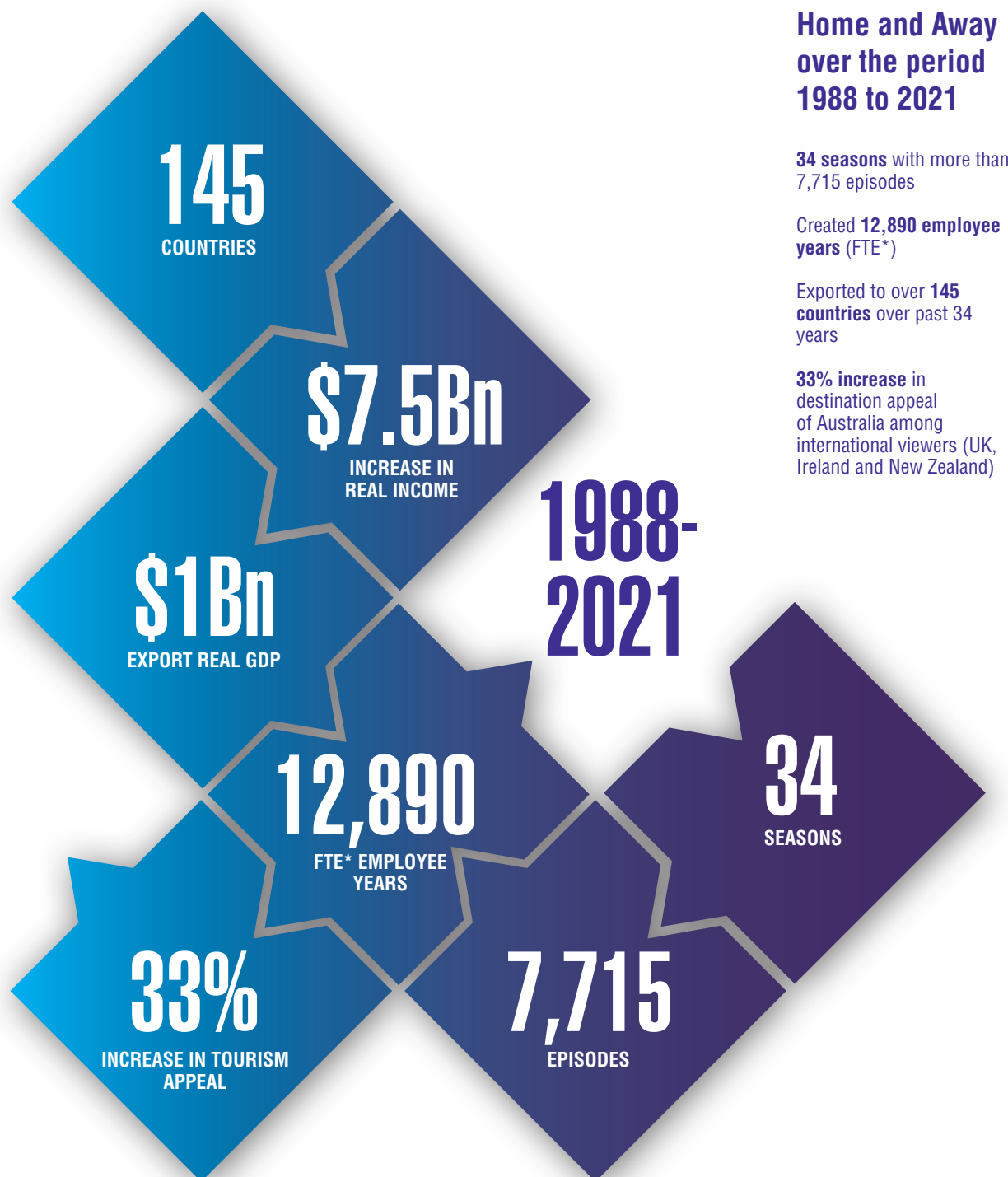


SOCIAL RELEVANCE

Reflects social and contemporary challenges of Australian society. [Page 18](#)



Snapshot of Findings



*Full Time Equivalent

Economic Impact



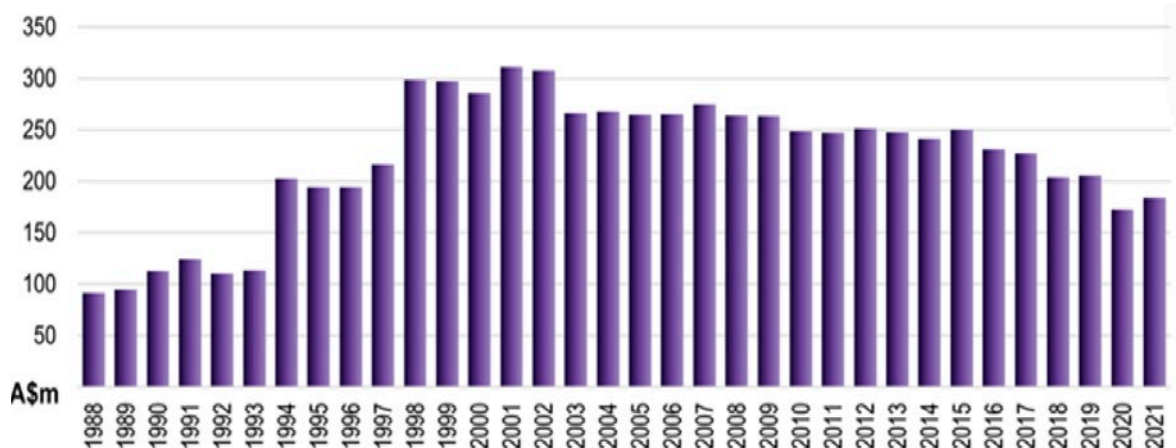
Over the period 1988 to 2021:

We estimated Home and Away's impact on the Australian economy by calculating its immediate impact and its flow-on effects to the industries it is connected with (which is just about all them).

Real income

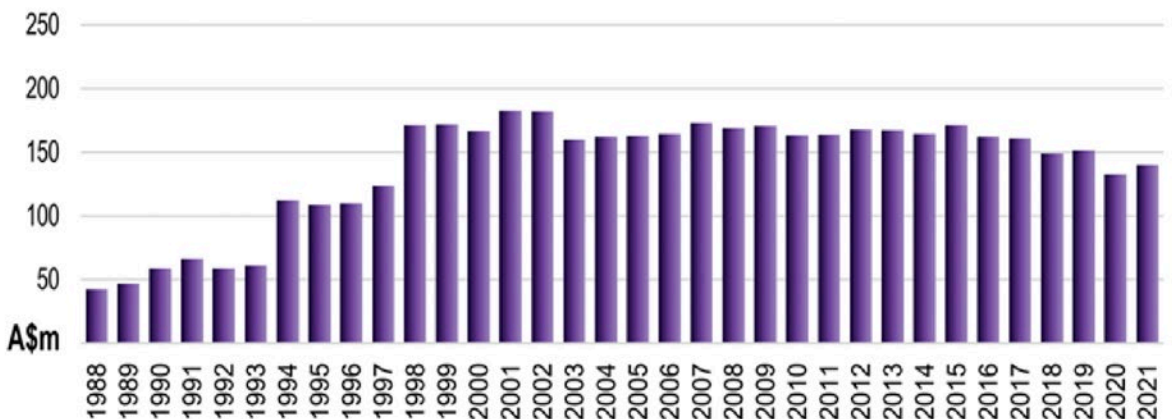
Over the period 1988 to 2021:

Home and Away increased the real income of Australia by a total of **\$7.5 billion**, or an average of **\$221 million per year**. This is the addition to Australian wealth attributable to Home and Away.



Real GDP Impacts, 1988-2021

Home and Away has added an average of **\$139 million per year** (in real, inflation-adjusted terms) to the output of the economy, measured as real GDP. Since the late 1990s, it's been over **\$150 million per year**.



\$1bn

Export Revenue

Over the period 1988 to 2021 Home and Away has been sold across 145 countries around the world and generated more than \$1 billion in export revenue for the Australian economy, making it one of Australia's most successful media exports.

Production and Employment Impact

Home and Away is arguably Australia's launching pad for local talent into Hollywood and the global stage.

Many of Australia's internationally recognised actors gained early television experience and exposure on Home and Away, including **Isla Fisher, Julian McMahon, Simon Baker, Naomi Watts, Guy Pearce, Chris Hemsworth, Melissa George, Heath Ledger, Dannii Minogue, Luke Mitchell, and Isabel Lucas.**

But this is only part of the story.

Home and Away has also nurtured and grown the talents of those behind the scenes, who have gone on to have successful Australian and international careers. Home and Away is recognised internationally for the talent it produces.

For Example: Home and Away director Jet Wilkinson has successfully pursued her career in the US directing a number of hit US TV dramas including Madam Secretary, Nashville, and American Gothic.

We interviewed eight former and current cast and crew on what working on Home and Away meant for them and their careers. They all began on Home and Away early in their careers. Many have gone on to work successfully domestically and overseas, on major film and television productions. They include actors, directors, writers, producers, cinematographers, and hair and make up creatives. What is evident from these interviews is that Home and Away provides a valuable training ground for the Australian production industry.

Here's some of what they said:



The show tells Australian stories, and that's important

It was tough and competitive

Home and Away is incredibly important in promoting talent and is a training ground for many people

So many people have had long careers because of it

I learned things like, professionalism, respect for others, respect for everybody's job, everybody's role on the set

Kate Ritchie

Home and Away: Actor

Credits (Selected): Underbelly (Nine), Mr & Mrs Murder (Ten), Kate, Tim & Joel (Nova Entertainment)



Home and Away is very important in developing careers

It was very sought after, very competitive to land a job on Home and Away

I learnt people management skills, there's so much pressure, and you're working with so many people

Jet Wilkinson

Home and Away: Runner, Second Assistant Director, Continuity, Director, Producer

Credits (Selected): Madam Secretary (CBS), How to Get Away with Murder (American Broadcasting Company), Jessica Jones (Netflix), Dare Devil (Netflix)



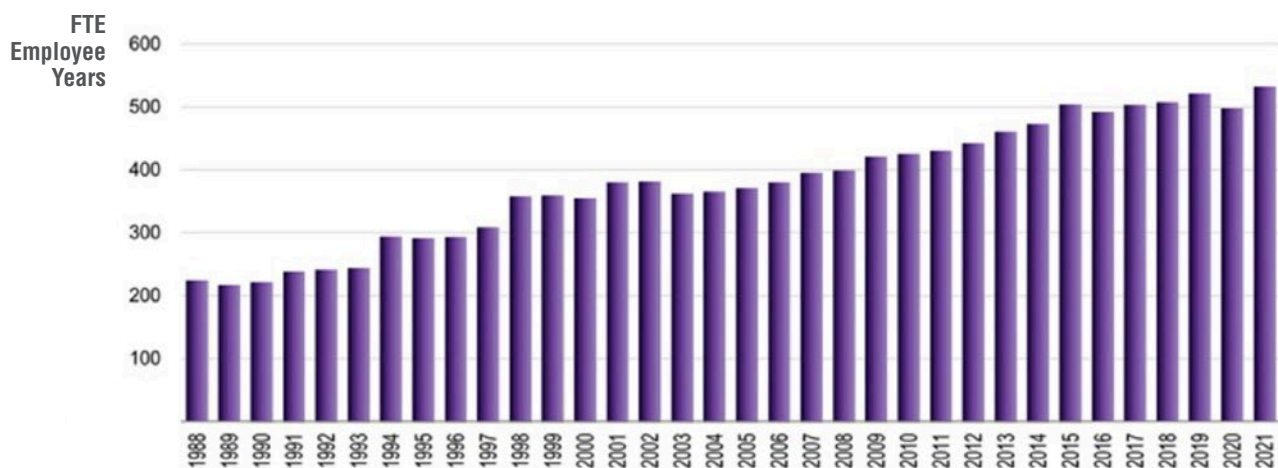
Production and Employment Impact

In every year since it began in 1988, Home and Away has employed between 1,500 - 2,000 people, whether it be a week as an extra or decades behind the camera, or as in the case of actor Ray Meagher, a 34 year distinguished career as character Alf Stewart.

Through its direct and indirect impacts on the Australian economy, Home and

Away has led to many more jobs being generated, a total of **12,890 employee years** of full time equivalent direct and indirect jobs in Australia. The jobs created by Home and Away across the economy are in all occupations, including managers, professionals, technicians, and machinery operators.

Employment Impacts, 1988-2021



When I'm hiring people now, if they have Home and Away experience that's a big plus

You learn a lot at the schools, but there's no better training than Home and Away

The actors who come from Home and Away are so technically skilful

There was always a culture of promoting from within

Cameron Welsh

Home and Away: Actor, Director, Producer, Writer

Credits (Selected): Constantine (NBC), Ash v Evil Dead (STARZ), Krypton (Syfy), Foundation (Apple TV)

“

The show does open doors

In the UK, people knew the show, it helped get me jobs

The show nurtures people, and teaches them

Laura Vazquez

Home and Away: Actor, Hair and Makeup Artist, Supervisor – Hair and Make Up, Head of Hair and Makeup
Current: Home and Away (Seven)

”

A great training ground

You make great contacts

The show is a stepping stone

Sheldon Wade

Home and Away: Hair and Make Up Artist, Head of Hair and Make Up
Credits (Selected): Better Man (2017), The Gloaming (Stan), The Kettering Incident (Foxtel) and Shantaram (Paramount).

We worked very fast and I learnt many skills I still use today

Jason Ewart

Home and Away: Camera Operator
Credits (Selected): No Time To Die (MGM), The Batman (Warner Bros), Hobbs and Shaw (Universal), Star Wars Episode VII: The Last Jedi (Lucas Films)

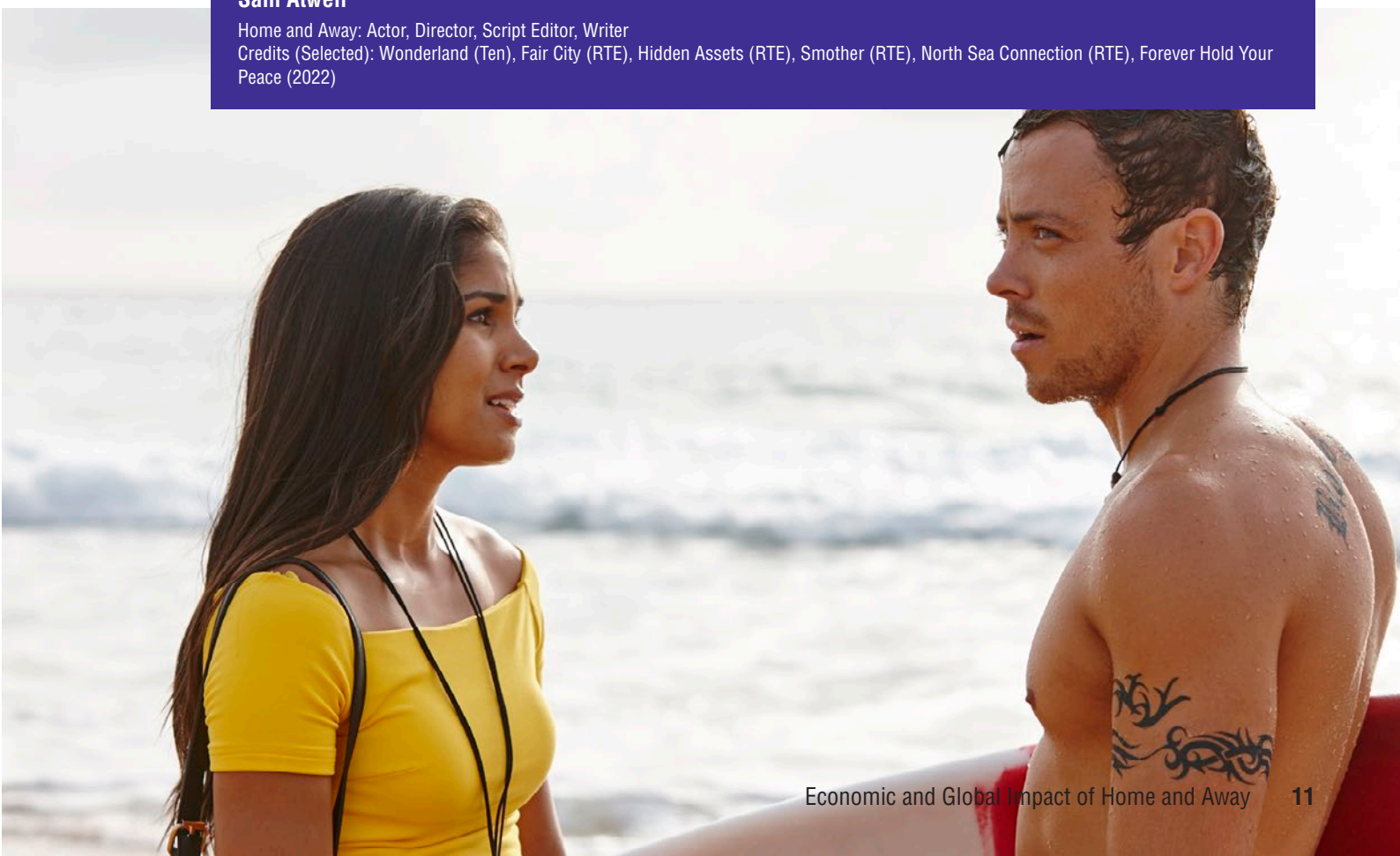
”



Sam Atwell, originally from Brisbane, joined Home and Away after completing acting school. He was on Home and Away from 2001 to 2006 in the role of Kane Phillips. He moved into directing, leaving the show in 2013. He then moved to Dublin, to Raidió Teilifís Éireann (RTE), the Irish broadcaster, as a director. He is now Drama Development Executive for RTE. Sam says having Home and Away on his CV was “absolutely everything” for him landing his first job at RTE.

Sam Atwell

Home and Away: Actor, Director, Script Editor, Writer
Credits (Selected): Wonderland (Ten), Fair City (RTE), Hidden Assets (RTE), Smother (RTE), North Sea Connection (RTE), Forever Hold Your Peace (2022)





Cast of 1988

1988

The people are in a tight knit group who know how to work with each other

Every day's different. I like the challenges it presents, good or bad challenges, they're still challenges

We bring to the industry, something that works 46 weeks of the year. We work with inexperienced cast and crew, teach and mentor them to develop their skills. They then to go out into the world of the hour dramas or the movies, they get to that place and go wow Home and Away's such a slick machine

Nicole Roberts

Current: Home and Away - Continuity, Production Manager, Line Producer



Cast of 2021

2021

The culture was about enhancing peoples' skills

If Home and Away didn't exist, there would be a gap in the industry

I learnt people skills and budget skills

My Home and Away experience was integral to landing a job in Ireland

Sam Atwell

Home and Away: Actor, Director, Script Editor, Writer

Credits (Selected): Wonderland (Ten), Fair City (RTE), Hidden Assets (RTE), Smother (RTE), North Sea Connection (RTE), Forever Hold Your Peace (2022)

Global Reach

International superstar Ed Sheeran
guest starred on Home and Away
(October 2015)




WAPANGA
Shire Council

**SUMMER BAY
BEACH**

THIS BEACH IS
PATROLLED ONLY WHEN
THE RED AND YELLOW
FLAGS ARE DISPLAYED
BY LIFE GUARDS

THIS SERVICE IS PROVIDED
BY SUMMER BAY
SURF LIFE SAVING CLUB

Global Reach

Global Reach Over 34 years

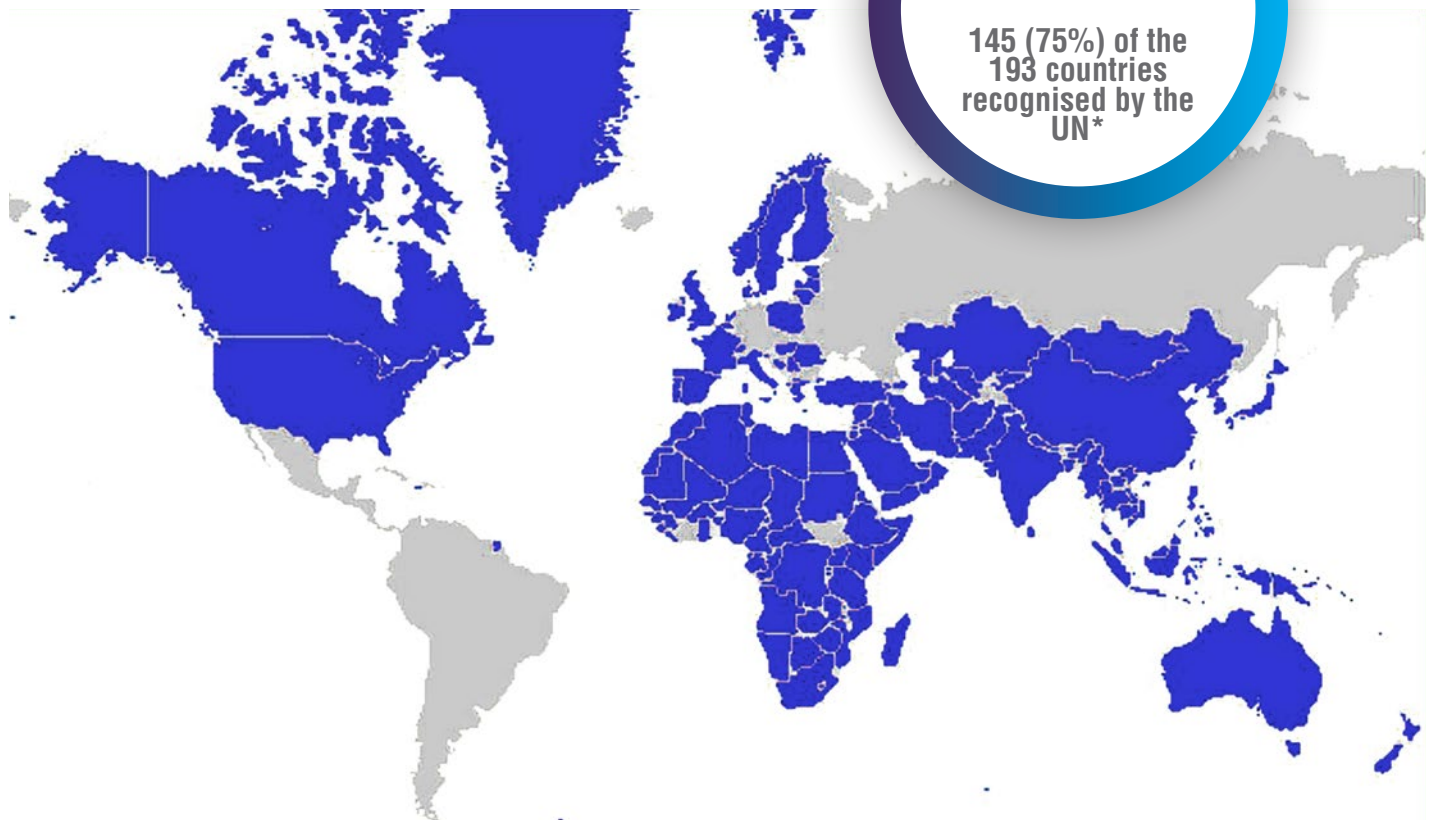
Since its inception, Home and Away has amassed an enormous global audience.

From its launch in 1988 to the current season, Home and Away has been sold across 145 countries, or 75% of recognised UN Nations.

In 2019 Seven, as producer of Home and Away, was recognised for its global impact, receiving the Premier's New South Wales Export Award for Creative Industries.

Home and Away's most significant global markets include New Zealand (TVNZ), Ireland

(RTE), and the UK (Channel 5), where it airs five days a week. Home and Away is also available on the ABC Australia service, broadcast across the Asia, Pacific and Indian subcontinent region and further afield in Norway (TV2).



*Global reach accounts for 145 (75%) of the 193 countries recognised by the UN. The only notable exclusions are countries in South America (a market known for its strong local soap/telenovela production) + Russia.



Tourism Impact

Home and Away Markets Australia to the World

Tourism is very important to the Australian economy. In 2018-2019 (pre-COVID 19), international tourists spent \$47 billion and contributed \$18 billion to Australian GDP. Marketing Australia as a tourism destination is a significant priority for the Australian Government, particularly in the post-COVID recovery phase. Tourism Australia receives \$190 million* a year to promote Australia as a desirable tourist destination.



In addition to the economic modelling presented in this report, we undertook market research into how Home and Away has contributed to international Home and Away viewers' desirability to visit Australia. Research was conducted in the UK, Ireland, and New Zealand and the results reveal, that among those who watch or have in the past watched the show, Home and Away significantly increases desirability to visit Australia for leisure travel.

Our research found:

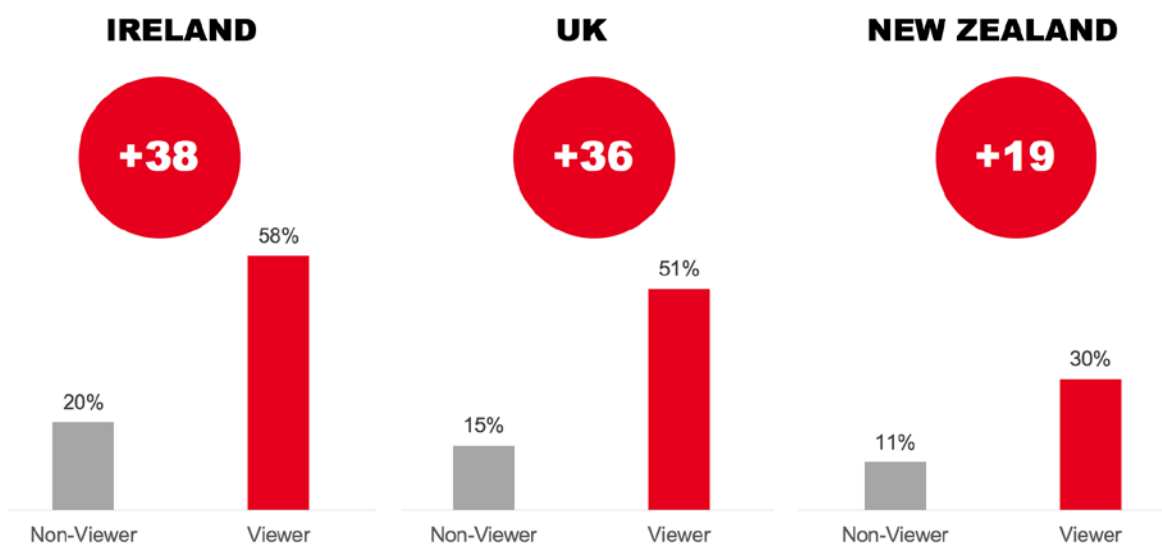
- Home and Away viewers are more likely to find Australia a desirable leisure destination compared to those who haven't watched; +33 ppt* on average across all markets
- Viewers residing in Ireland and the UK exhibited the most influence on Australian visitation desirability, followed by New Zealand. This is despite the additional time and cost associated with travel from Ireland and the UK

*33% is the weighted average

Desirability to Visit Australia

Note: ~50% of the survey population classified as Home and Away viewers (current and previous)

n=2665



Question: Which of the following best describes how the TV show Home and Away impacts on your desire to visit Australia for a leisure trip?

Response: Respondents that answered Home and Away makes me want to visit Australia either a little or much more were classified as more likely to find Australia as a more desirable leisure destination.

*Tourism Australia, Annual Report, 2020/21

Social Relevance

Over more than three decades, Home and Away has been part of contemporary daily life for millions of people globally, creating emotional connections and providing escapism in the crystal blue waters of the fictional Australian beach side town of Summer Bay.

From captivating stories, dynamic characters, and a unique setting, Home and Away offers something for everyone while tackling social issues through a family lens.

For international audiences, the bright, sunny backdrop of Sydney's Palm Beach is unique and its idyllic setting evokes holiday memories for many. Watching Home and Away gives them a virtual holiday every day.

Topical Storylines

Home and Away continually evolves to represent what is happening in the real lives of many of its viewers, while telling compelling stories that reflect contemporary Australian culture.

Topical and current issues that are relevant to Australians are explored in an accessible, honest and identifiable way.

Beloved characters bring subject matters to the screen and start conversations in living rooms around the country and across the world.

Home and Away is a show with family at its core. Whether it is biological family, the chosen, the extended or the community – family is the people in your life who want you in theirs.

Storylines of love, friendship, marriage, loyalty, humanity – alongside harder-hitting life

challenges – are told against the backdrop of family and community.

Covering contemporary issues in a compelling way is part of Home and Away's DNA. From teenage angst, romances, adultery, adoption, and family feuds to more serious issues like addiction, bereavement, crime, sickness, and mental health challenges – Home and Away tackles these topics in an honest, respectful, and responsible way and points viewers to the right place if they need help and support.

The show also shines a light on traumatic natural disasters that affect Australians across the country, with storylines that have covered bushfires, floods, storms, earthquakes, landslides, and cyclones.

Through the power of commercial free-to-air

television, Home and Away has brought these stories to millions of people across the country. It has made headlines, broken new ground in television drama and connected with its audience to become a national institution.

It has evolved with the times and its brilliant storytelling, engaging characters, and memorable moments has placed it firmly at the heart of the nation and brought a familiar slice of Australian life to fans across the globe.

The show's
characters bring
subject matters
to the screen and
start conversations
among viewers
around the country
and across the
world.

Real life issues

Home and Away tackles contemporary topics situated in real life, covering problems we all experience or know are around us. The storylines engage people on serious issues through characters we care about.

In 2021, Summer Bay's Justin Morgan, played by actor James Stewart, became addicted to painkillers following a surgical operation. As the power of the pain relief faded and his prescribed supply ended, Justin's life spiralled out of control as he lied to and alienated his partner, family, friends and workmates in his increasing panic to source more painkillers.

Home and Away was able to carefully provide audiences with all the relevant information about the condition and draw attention to the critical importance that family and medical support systems play.

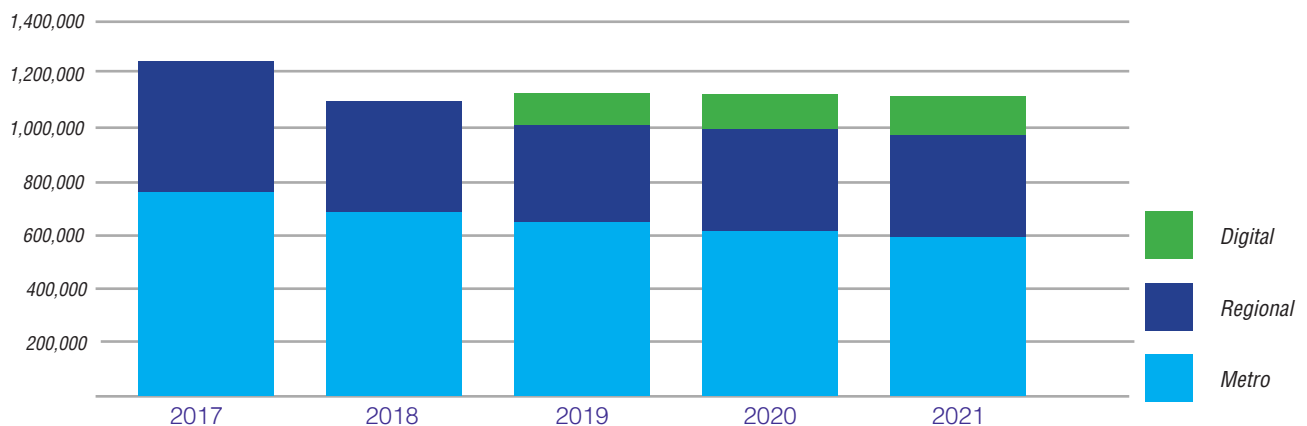
For millions of viewers, this raw and powerful storyline brought to life the reality of being dependent on legally prescribed pain relief and the devastating effects it has on a person's mental state, the family and community around them.



Australian Audience

Home and Away's cultural and social impact has a far reaching effect on Australia's national identity. The characters and stories of Summer Bay reach over 1 million Australians each week.

Over the past five years Home and Away has an average audience of over **1.1 million people** per episode.



Source: OzTAM (Metro), Regional TAM (Comb. Agg Markets), OzTAM VPM 3.1 Live + VOD, 28 Day program average audience (excl replay, encores), 2017 – 2021.

Research Methodology

Modelling Methodology

ACIL Allen has estimated the impacts of Home and Away on the Australian economy over the period 1988 to 2021.

The impacts have been estimated for:

- Gross Domestic Product (GDP), the total value of goods and services produced in Australia, adjusted for inflation, so in real terms
- National Income, which is equal to GDP plus income from Australian ownership of foreign assets, minus foreigners' income from their ownership of Australian assets, also in real terms
- Exports from all industries, also in real terms
- Jobs created in the Australian economy (full time equivalent).

The methodology, essentially, estimates what the values of key economic variables over the period 1988-2021 would be if Home and Away did not exist. The production of Home and Away leads to a series of interlinked spending decisions throughout the economy. For example, salaries paid to actors and crew members are spent on all the things that people spend their money on (food, clothing, housing, transport, electricity, entertainment etc); equipment bought for the sets is income for the suppliers of that equipment who spent it on their business expenses including paying their staff, who then spend their income; and Home and Away's domestic and foreign sales represent income that is spent. All of this adds up

to Home and Away's direct and indirect effects on the Australian economy. In the absence of Home and Away, these effects would not have occurred. The difference between the estimated values of economic variables absent Home and Away and those that actually occurred are the impacts on the economy of Home and Away. These impacts have been estimated using ACIL Allen's Tasman Global model of the Australian economy. Tasman Global is a dynamic, global computable general equilibrium (CGE) model that has been developed by ACIL Allen for the purpose of undertaking economic impact analysis at the regional, state, national and global level.

Tasman Global captures the interlinkages between 76 industries in each Australian state and territory, taking into account resource constraints, to find a simultaneous equilibrium in all markets. An example of a resource constraint is that the maximum number of people employed in an economy is limited by the total population (and in practice is much less than the total population). Another example is that in sales from industry A to industry B are equal to purchases by Industry B from industry A. The taking account of resource constraints is a critical feature of CGE models that makes their results more realistic than modelling approaches where these constraints are ignored, and for this reason they are often used by governments in estimating the impacts of projects and policies.

In the modelling, labour and investment capital move between industries and regions according to demand for their services, which in turn depend on how much each industry in each region produces in each year. A global CGE model extends this interdependence of the markets across world regions and finds simultaneous equilibrium globally. A dynamic model adds onto this the interconnection of equilibrium economies across time periods. For example, investments made today are going to determine the capital stocks of tomorrow and hence future equilibrium outcomes depend on today's equilibrium outcome, and so on.

A dynamic global CGE model, such as Tasman Global, has the capability of addressing total, sectoral, spatial, and temporal efficiency of resource allocation as it connects markets globally and over time. The model has the capability to project the economic impacts over time of given changes in policies, tastes and technologies in any region of the world economy on all sectors and agents of all regions of the world economy – such as, the impact of Home and Away.

Tourism Research

Tourism appeal research methodology:

Respondents were captured in three different markets; i) United Kingdom, ii) Ireland and iii) New Zealand

Research was in field for eight days from March 25 to April 1 2022, utilising a third party panel provider, Glow.

A total of n=2,665 respondents were captured, with the breakdown by relevant markets as follows:

United Kingdom (n=1,001)

n=503 Viewers; n=412 Non-Viewers; n=86 unaware

Ireland (n=1,040)

n=528 Viewers; n=384 Non-Viewers; n=128 unaware

New Zealand (n=624)

n=310 Viewers; n=256 Non-Viewers; n=58 unaware

Melbourne

**Suite 4, Level 19; North Tower
80 Collins Street
Melbourne VIC 3000 Australia
+61 3 8650 6000**

Canberra

**Level 6, 54 Marcus Clarke
Street
Canberra ACT 2601 Australia
+61 2 6103 8200**

Sydney

**Suite 603, Level 6
309 Kent Street
Sydney NSW 2000 Australia
+61 2 8272 5100**

Perth

**Level 12, 28 The Esplanade
Perth WA 6000 Australia
+61 8 9449 9600**

Brisbane

**Level 15, 127 Creek Street
Brisbane QLD 4000 Australia
+61 7 3009 8700**

Adelaide

**167 Flinders Street
Adelaide SA 5000 Australia
+61 8 8122 4965**

ACIL Allen Pty Ltd
ABN 68 102 652 148

acilallen.com.au