



Economic contribution of Australian Subscription Television and Radio Association members in 2022

Australian Subscription Television and Radio Association

November 2023

The Australian subscription television industry generates economic activity and jobs and provides Australian viewers with a vast range of content.

The economic contribution of the Australian subscription television industry

In 2022, the Australian subscription television industry contributed:

- **\$2.78 billion in value added**, \$1.25 billion direct and \$1.54 billion indirect¹
- **16,000 full-time equivalent jobs**, 2,500 direct, and 13,500 supported in downstream industries
- **36.7 per cent of the total economic contribution** of the Australian broadcasting industry
- **17.6 per cent of total full-time equivalent jobs** in the Australian broadcasting industry.

In 2022, the subscription television sector contributed **17.4 per cent more** in value added to the Australian economy **than in 2021**, supported by a 5.4 per cent increase in direct value added.

Consumption of subscription television in Australia

Viewership of subscription television and streaming services continued to be popular across Australia in 2022:

- **834,000 hours** of content was **distributed** by members of the Australian Subscription and Television Radio Association (ASTRA)
- **794 million hours of ASTRA content** viewed throughout the year
- Australians spend an average of **19 hours per week** viewing television or video content
- This includes **5.5 hours of streaming** and **2.0 hours of subscription television** per person, on average
- Over **four in five** Australians utilise **subscription streaming** video services.

Note: (1) Figures may not add due to rounding

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Economic contribution in 2022

\$1.25b

In direct value added contributed by subscription television

37%

Subscription television share of the Australia broadcasting industry

\$1.54b

In indirect value added contributed by subscription television

1:1.2

Ratio of direct to indirect economic contribution

Employment in 2022

16,000

Full-time equivalent jobs supported by subscription television

\$150,000

Average income for subscription television workers, 51% higher than the national average

For every person employed directly by the subscription television industry

Over 5 full-time equivalent jobs are supported in other industries



Growth since 2021

17.4%

Growth in total value added since 2021

18.0%

Growth in total employment since 2021

Television and streaming viewing in 2022

Four in five (81%)

Australians have at least one subscription video streaming service at home

>19 hours

spent viewing video or television content per person per week, on average

One in five (22%)

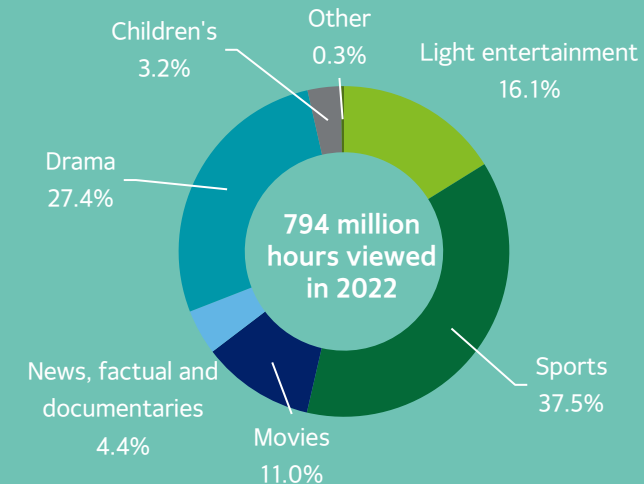
Australians watch subscription television in a given week

Three in five (59%)

Australians use multiple subscription video services

794 million hours

Of subscription television was viewed in 2022. Of sports and drama were the most popular genres amongst viewers



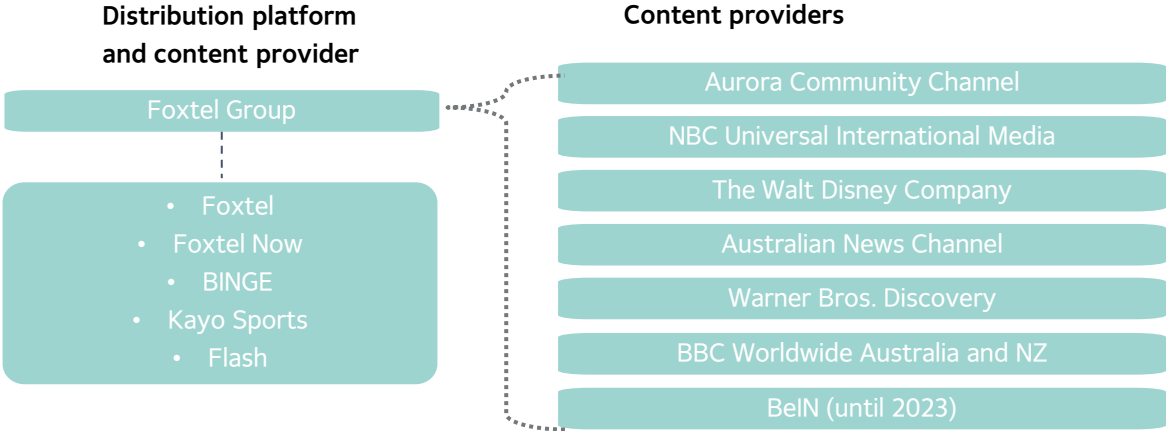
This report demonstrates the economic contribution of Australian Subscription Television and Radio Association members to the national economy in 2022.

The subscription television industry in Australia

Australian Subscription Television and Radio Association (ASTRA) is the peak body representing the Australian subscription media industry. ASTRA members are media companies involved in subscription television distribution and content provision in Australia. The operations of ASTRA members engaged in the distribution and provision of subscription television content are referred to in this report as the ‘subscription television’ (or subscription TV) industry.

Distribution platforms within the subscription television industry include both the longstanding Foxtel platform in addition to online platforms which allow for live and on-demand viewing of Foxtel content, including Foxtel Now, BINGE and Kayo Sports. Importantly, subscription television as referred to in the context of this study forms a sub-sector of the wider ‘subscription media’ industry. Other components of this broader industry include online subscription-based streaming services (such as Netflix, Disney Plus, Amazon Prime and others), media sales agencies and other subscription communications companies.

Figure 1: An overview of the subscription television industry in Australia



This report

Deloitte Access Economics was engaged by ASTRA to analyse and provide a snapshot of the economic contribution of subscription television in 2022. This includes the direct and indirect contributions of the industry to gross value added (GVA) and full-time equivalent (FTE) employment in Australia. In addition, the report provides an overview of the changing subscription television industry and demonstrates the role of subscription television in supporting Australian niche sports. This report is an update to Deloitte Access Economics’ studies on the economic contribution of subscription television in 2019 and 2021.

The analysis was underpinned by a survey of ASTRA members

The economic contribution of subscription television was informed by a survey of members. The survey gathered financial, employment and business information for the 2022 calendar year relating to ASTRA member subscription television operations within Australia. The survey data was supplemented by select consultations with members to provide further insights demonstrating the role of subscription television in supporting the Australian community.

The operational profile of the two subscription television members who did not respond to the survey was estimated through the use of publicly available data and responses to prior iterations of the survey.¹ The approach to the imputation of missing data is consistent, and therefore comparable, with that adopted for the 2021 contribution analysis.

Analytical framework

The analytical approach employed is consistent with the Australian National Accounting framework, maintained and produced by the Australian Bureau of Statistics (ABS). Direct economic contributions were derived from survey data in addition to imputations for non-respondents. To determine indirect economic contributions, intermediate expenditure data of members was applied to the economic multipliers derived from the ABS Input-Output tables 2019-20.²

Further details on the analytical approach are covered in the Appendix.

1. IBISWorld (2023) and data provided in survey of members for the 2021 contribution analysis.

2. 2020-21 Input-Output tables were not used because the relationship between industries was not representative of that typically observed as a result of COVID-19 impacts.

In 2022, subscription television contributed \$2.78 billion in value added to the Australian economy. This represents 36.7 per cent of the total broadcasting industry.

Scope of economic contribution studies

Economic contribution studies provide a snapshot of the contribution of an entity, or in this case the subscription television industry, to the economy at a particular point in time. This contribution consists of both gross operating surplus (return on capital) and wages paid to labour (return on labour) which together determine the industry's value added.

Key findings

In 2022, the subscription television industry directly contributed \$1.25 billion to the Australian economy, representing 36.7 per cent of the total contribution of the Australian broadcasting industry which includes cable, free-to-air and radio broadcasting.³ The industry also contributed 2,500 direct and 13,500 indirect FTE jobs, representing 17.6 per cent of total FTE employment in the Australian broadcasting industry.

The direct value added captures the wages and gross operating surplus of the industry's own operations – including the management, production, programming and broadcasting of media content. Considering also indirect effects, the subscription television industry contributed a total of \$2.78 billion in 2022. Indirect value added captures the upstream economic activity created by the industry's purchases of intermediate goods and services to complete these operations.

Table 1: Total economic contribution of subscription television, 2022

	Direct	Indirect	Total
Value added (\$m)	1,245	1,535	2,781
Including			
Gross operating surplus (\$m)	870	549	1,419
Labour income (\$m)	375	987	1,362
Employment (FTE jobs)	2,500	13,500	16,000

Source: Deloitte Access Economics modelling

Note: This economic contribution has been calculated based on survey data provided by ASTRA members, and refers only to broadcasting, and distribution activity of members within Australia. Figures may not add due to rounding.

3. The Australian broadcasting industry refers to the ABS ANZSIC group *Broadcasting (except Internet)* in 2021-22, including cable broadcasting, free-to-air broadcasting, and radio broadcasting.

Economic contribution in 2022

\$2.8b

In value added contributed by subscription television

16,000

FTE jobs supported by subscription television

1:1.2

Ratio of direct to indirect economic contribution

84%

Ratio of total value added to industry revenue

Growth in economic contribution over time

The economic contribution of the subscription television industry has grown since 2021.

In 2021, the subscription television industry contributed an estimated \$2.37 billion to the Australian economy. In 2022 this figure had grown to \$2.78 billion, representing a year-on-year growth of 17.4 per cent. The industry's contribution to employment grew similarly over the same period. The subscription television industry supported 16,000 FTE jobs (directly and indirectly) in 2022, representing 18.0 per cent growth on the 13,500 FTE jobs estimated in 2021.

Overall, the subscription television industry is growing faster than the broader economy, despite changing consumer preferences and disruptions to the linear television industry.

Chart 1: Contribution of the subscription television industry to gross value added, 2021 and 2022

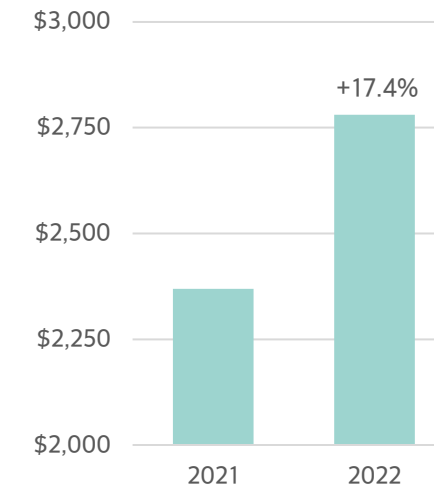
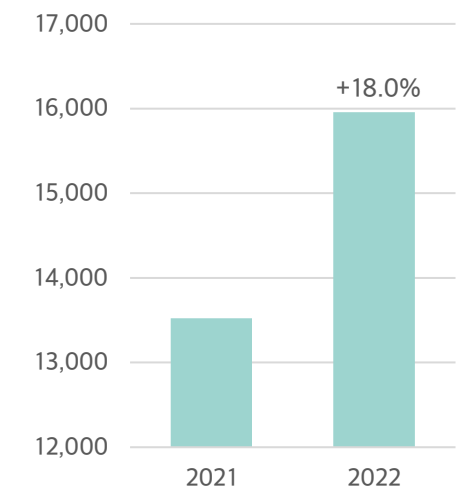


Chart 2: Contribution of the subscription television industry to employment, 2021 and 2022



Source: Deloitte Access Economics modelling, Survey data provided by ASTRA members (2023)

In 2022, the Australian subscription television industry indirectly contributed \$2.78 billion to gross value added. This consists of \$1.25 billion of direct value added and \$1.54 billion of indirect value added.

Components of economic contribution

The indirect economic contribution of subscription television in 2022 was \$1.54 billion, representing a 1-to-1.2 ratio of direct to indirect contribution. The significant indirect contribution of subscription television reflects the high proportion of expenses from the industry that remain within the Australian economy, including local production costs, advertising expenses, sports license fees, and other professional services. The high proportion of indirect economic contribution attributed to labour income is a result of the labour-intensive nature of the industries providing these inputs.

Chart 3 provides a comparison of direct and indirect economic contribution by wage and gross operating surplus component parts. Of the \$1.25 billion direct economic contribution of the subscription television industry in 2022, \$870 million was attributed to gross operating surplus and \$375 million was attributed to labour income.

Chart 3: Profile of economic contribution, 2022 (\$ billion)

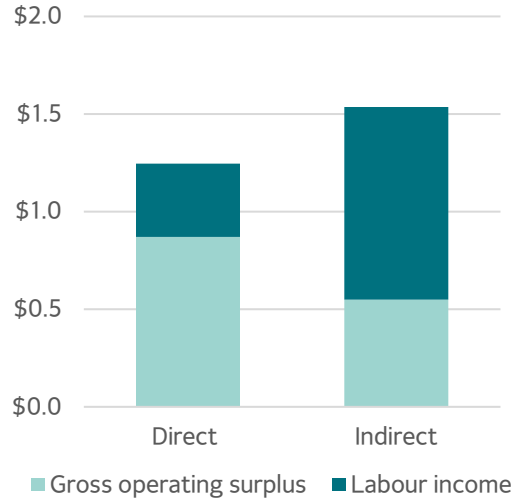
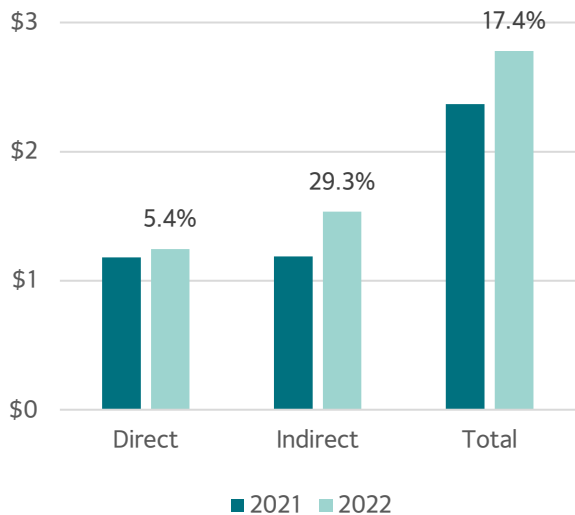


Chart 4: Economic contribution, 2021 and 2022 (\$ billion)



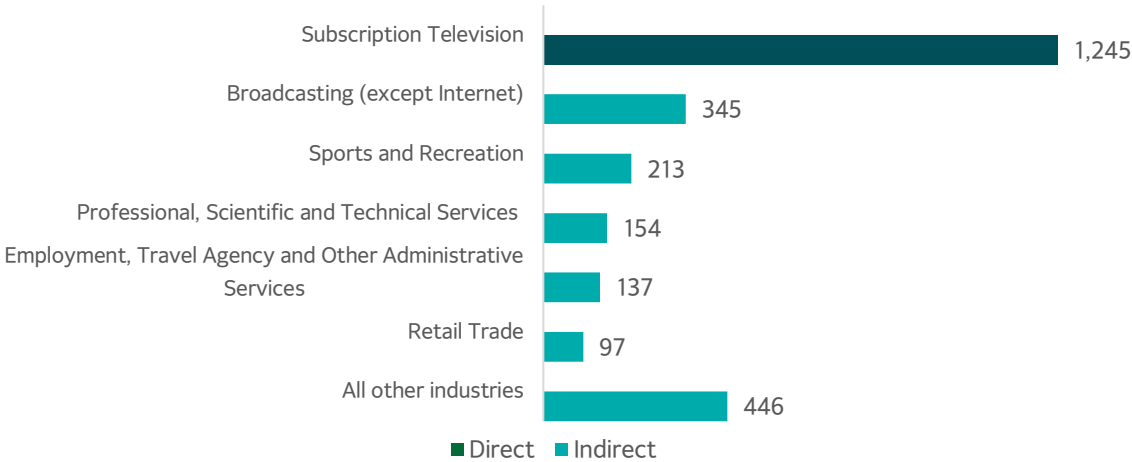
Indirect contribution

Subscription television indirectly contributed a further \$1.54 billion in value added to the wider Australian economy in 2022, through the use of intermediate goods and services purchased from various industries. This amount represents the value-added and contribution associated with upstream suppliers to the subscription television industry.

The largest component of subscription television’s indirect contribution is that towards the non-internet broadcasting industry, at \$345m (22.5 per cent), followed by the sports and recreation industry at \$213m (13.9 per cent) and the professional, scientific and technical services industry at \$154m (10.1 per cent).

These top three industries together comprise 46.4 per cent of subscription television’s total indirect contribution. Notably, these industries have varied labour income shares – at 54.6 per cent, 86.6 per cent and 71.8 per cent of value added respectively – demonstrating the significant skilled labour needs of the television content production and professional sporting sectors. Thus, a large proportion of indirect labour income and employment is also attributed to these industries (\$484m, or 49.0 per cent of total indirect labour income).

Chart 5: Breakdown of indirect value added of subscription television by industry (\$ million), 2022



Source: Deloitte Access Economics modelling, Survey data provided by ASTRA members (2023)

Source: Deloitte Access Economics modelling, Survey data provided by ASTRA members (2023)

In 2022, the subscription television industry supported an estimated 16,000 FTE jobs across Australia, comprised of 2,500 direct and 13,500 indirect FTE jobs.

Employment supported by the industry

In 2022, the subscription television industry directly supported 2,500 FTE jobs. In 2022, those within the industry earned on average \$150,000 per annum, or 1.6 times the average Australian full-time wage.⁴ This demonstrates that the subscription television industry directly supports and develops a specialised and highly-skilled workforce, covering those involved in the production, broadcasting and management of media content.

\$496,000 of value added is contributed to the economy for every direct FTE worker in the subscription television industry. This is attributable to the skill and productivity of workers in the industry, as well as the productive use of subscription television infrastructure. In comparison, the Australian internet service provider industry and telecommunications industries have an average value-added per direct FTE of \$319,000 and \$438,000.

The activities of subscription television supported significant employment for its most-connected industries of sports and recreation, professional, broadcasting (except internet) and employment, travel agency and other administrative services. As depicted on Chart 4, subscription television's contribution to sports and recreation employment outweighs its own direct employment. This is due to the high labour needs of professional sports organisations, teams and venues.

In addition to those employed directly in subscription television, the industry supports a range of indirect jobs in upstream industries. Indeed, in 2022, the subscription television industry supported 13,500 indirect jobs, induced by spending on intermediate suppliers, equivalent to a 1:5 ratio of direct to indirect FTE jobs supported by the subscription television industry. For comparison, the Australian internet service provider and telecommunications industries have a direct to indirect labour ratio of 1:2.5 and 1:2.2, respectively.⁵

Compared to 2021, indirect FTE job support of the subscription television has grown by 23 per cent, leading to subscription television overall contributing to 18 per cent more FTE jobs across the economy since last year, despite direct FTE jobs falling by three per cent.

4. Australian Bureau of Statistics (2022a)

5. Australian Bureau of Statistics (2022b)

Employment contribution in 2022

2,500
Direct FTE jobs in the subscription television industry

1.5
Ratio of direct to indirect FTE jobs supported by subscription television

13,500
Indirect FTE jobs generated by subscription television

\$496,000
Direct gross value added per FTE employee

Chart 6: Breakdown of full-time equivalent employment generated by subscription television by industry, 2022 (FTE jobs)

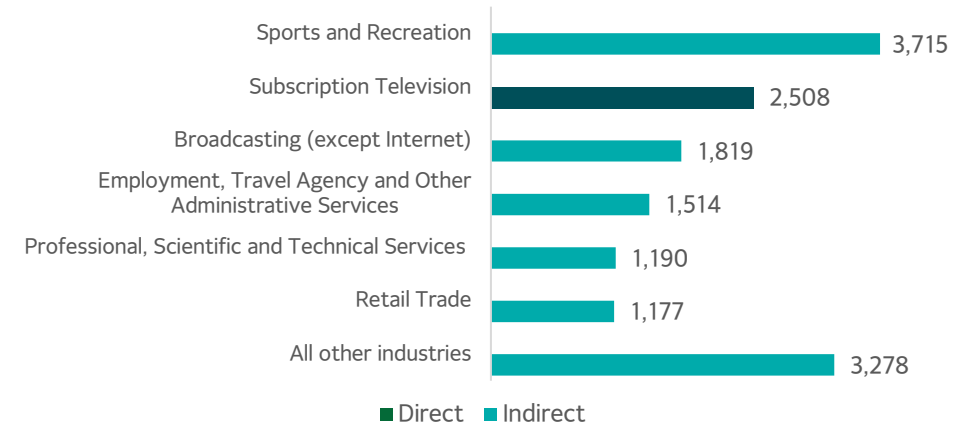
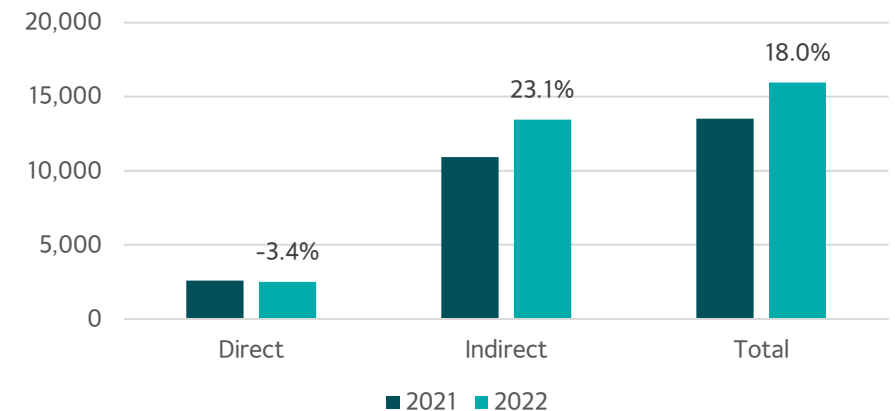


Chart 7: Growth in subscription television FTE jobs since 2021



Source: Deloitte Access Economics modelling, Survey data provided by ASTRA members (2022)

In 2022, 794 million hours of content were viewed by Australian subscribers, 81 per cent of which was sports, drama and light entertainment programming.

An overview of subscription television consumption in Australia

Subscription television content distribution is diversified across genres to best cater to the varying tastes of the Australian public. Light entertainment, sports, news, movies, factual and drama categories each comprise at least 9 per cent of content hours distributed by subscription television.

The proportion of content distributed by subscription television in 2022 did not shift significantly since 2021. Entertainment (including light entertainment and drama), movies, children's and news, factual and documentaries genres each maintained a similar share of content distribution year on year. There was a slight increase in content distributed from other, non-traditional genres.

Over 794 million hours of content was viewed by Australians accessing subscription television content. Sports capture 37.5 per cent of all viewing hours, with drama and light entertainment comprising a combined 43.5 per cent of total viewing hours.

In 2022, Foxtel and its streaming subsidiaries had over 4.5 million subscribers,⁶ representing just under half of all Australian households. The average subscriber viewed 177 hours of content in 2022, or 3.4 hours per week.

Although overall viewership has declined, sports content viewing has seen a significant increase in prominence. Subscribers watched an extra 15 million hours of sports content in 2022 compared to the previous year, shifting sports' share of content viewed from 23.0 per cent in 2021 to 37.5 per cent in 2022.

Drama content comprises 27.4 per cent of viewership despite making up only 9.6 per cent of hours distributed, demonstrating strong appetite for this content among consumers.

6. Foxtel Group (2022)

2022

4.5 million

Subscribers to Foxtel, BINGE and Kayo Sports

834,000

Hours of content distributed by subscription television

3.4 hours

of subscription television content viewed by an Australian subscriber per week on average

794 million

Hours of subscription television content viewed by Australians

Chart 8: Hours of content distributed by subscription television, by genre, 2022

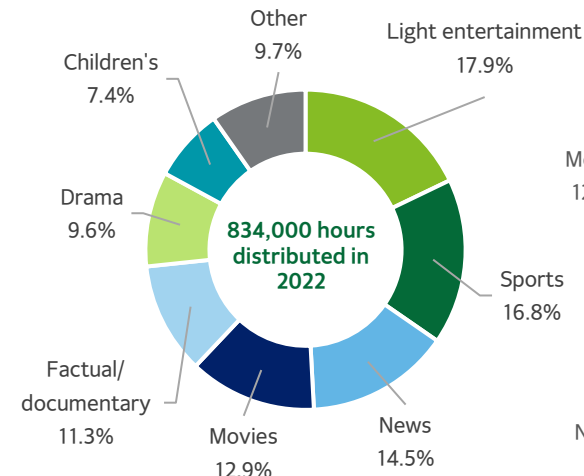
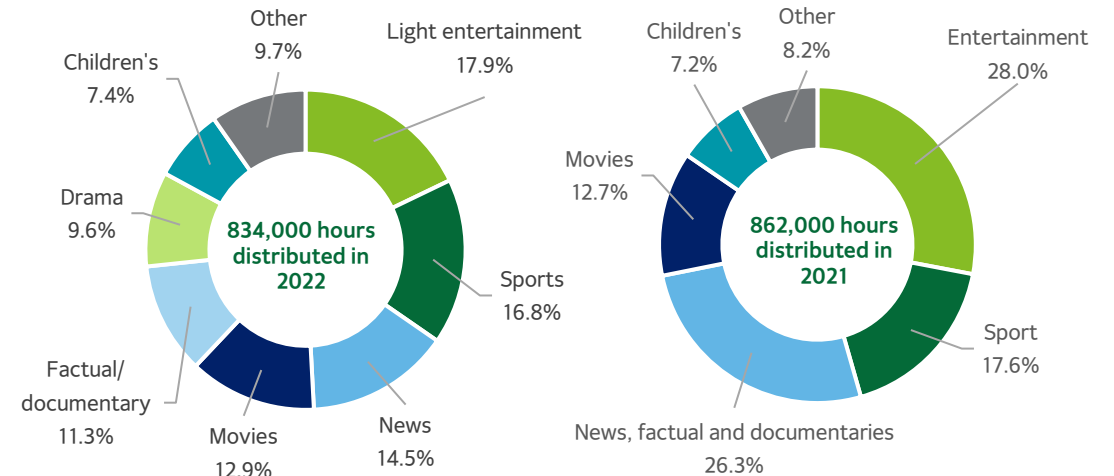
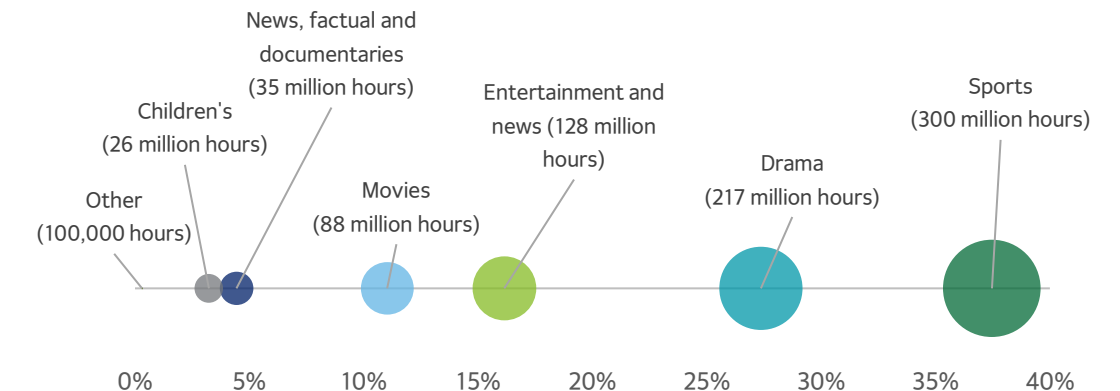


Chart 9: Hours of content distributed by subscription television, by genre, 2021



Note: In 2021, 'Drama' and 'Light entertainment' genres were combined as 'Entertainment and News' while 'Factual/documentary' were combined as 'News, factual and documentaries'. Figures may not add due to rounding.

Chart 10: Share of hours viewed on subscription television, by genre, 2022



Source: Survey data provided by ASTRA members (2023)

Over one-fifth of content distributed by subscription television in 2022 was developed in Australia, capturing 31 per cent of all viewership hours.

The origin of subscription television content distributed in Australia

In 2022, 23 per cent of all content distributed by subscription television originated from Australia. Comparatively, subscription television distributed over 303,000 hours (37 per cent) from the United States, 165,000 hours (20 per cent) from Europe and 106,000 hours (13 per cent) from Asia in 2022.

Compared to 2021, in 2022, 21 million more hours of content distributed by subscription television originated from regions outside Australia, USA, Europe and Asia, demonstrating a move to capture more diverse sources of content. Likewise, The largest growth was seen in content originating from regions outside Australia, USA, Europe and Asia, which grew from 6 per cent to 9 per cent of total content distributed. This contrasts the trend in viewership, where these regions saw a decline from 27 per cent to 11 per cent.

The share of content distributed originating from Australia has declined over 2020-2022, partially as a result of the COVID-19 pandemic impacting local content production. Despite a decline in content distributed, Australians viewed 37 million more hours of Australian content in 2022 compared to 2021. This represents an increase from 26 per cent to 31 per cent of total viewership hours.

Australians primarily view content from Australia and the United States, comprising 81 per cent of total content viewed in 2022, but viewership of content from other regions is growing.

Interest in content from regions outside Australia, Europe and the USA has grown significantly between 2021 and 2022, while hours of American content viewed declined. Viewership of Asian content has grown, with viewership hours increasing from 360,000 in 2021 to 13 million in 2022. Likewise, Asia's share of viewership rose from nearly 0 per cent in 2021 to 2 per cent in 2022. Audiences viewed 46 million more hours of content outside Australia, USA, Europe and Asia, overall demonstrating growing demand for multi-cultural content provision.

Interest in content originating from the USA has declined amongst this change in viewership trends, despite continuing to lead in both distribution and viewership.

Chart 11: Proportion of content distributed by subscription television, by place of origin, 2021-2022

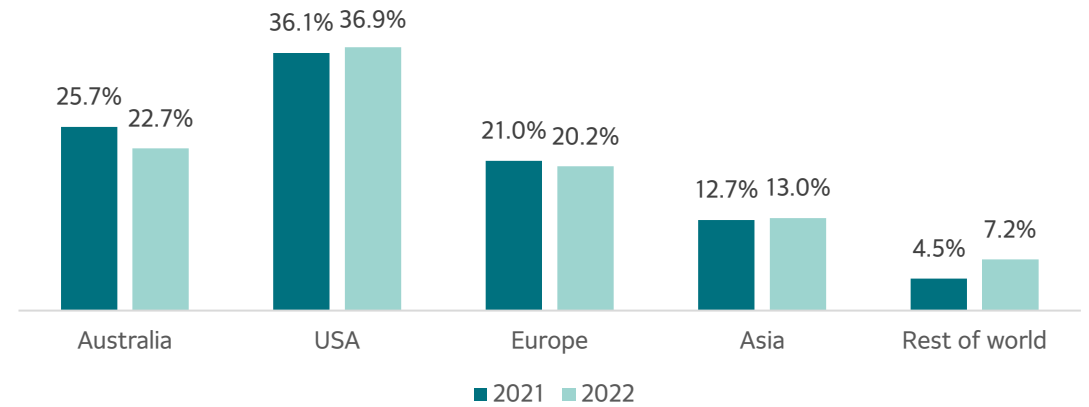
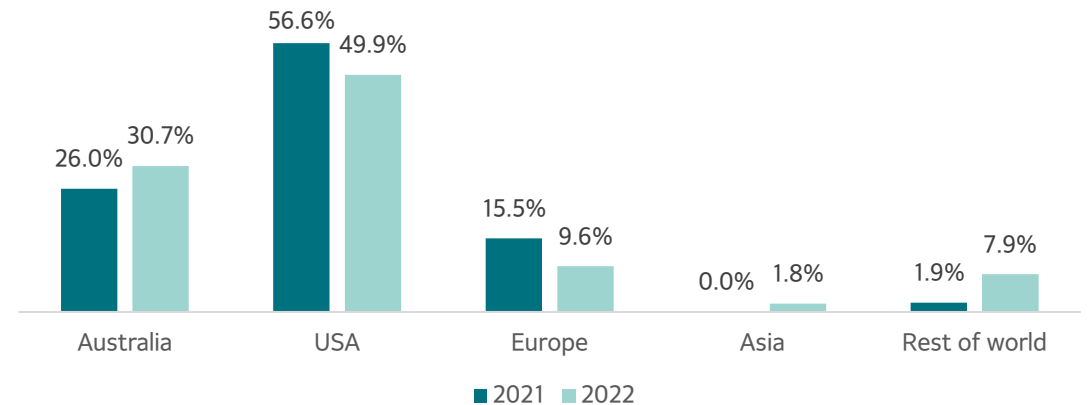


Chart 12: Proportion of subscription television content viewed, by place of origin, 2021-2022



Source: Survey data provided by ASTRA members (2023)
 Note: Figures may not add due to rounding

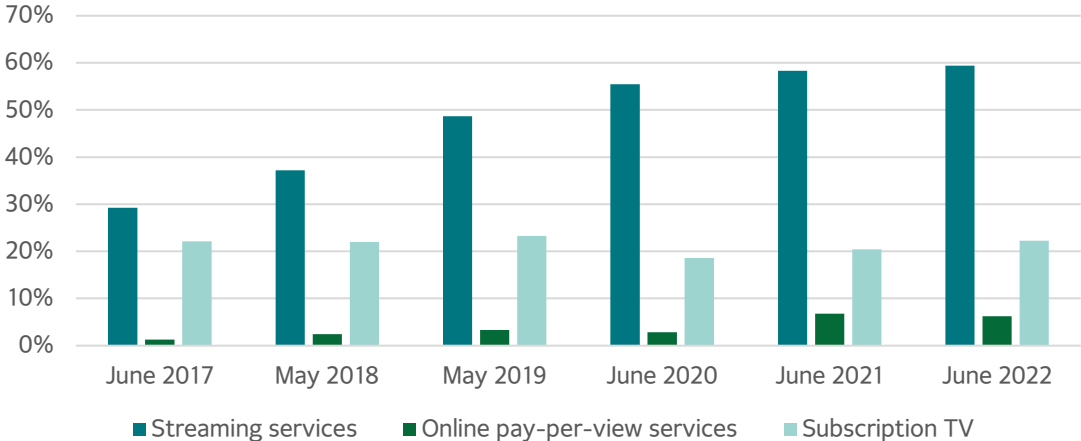
Australia's video streaming industry captures subscription TV as well as video streaming services, free-to-air, including catch up, TV, online pay-per-view, and user generated or short-film content.

Subscription television's role in the broader video streaming industry

The subscription television industry is one part of a broader 'video streaming' industry, encompassing free-to-air TV and other online and paid video streaming options. In particular, streaming video services, such as Kayo Sports, Netflix and Disney Plus have seen a strong recent growth in popularity, which has continued into 2022, with 59.0 per cent of Australians using a streaming service to access video content on a weekly basis.

Despite competitive pressures and continued technological disruptions, subscription television has shown resilience throughout the COVID-19 pandemic. Foxtel and other ASTRA members are developing new products and services, such as Sky Glass and Project Magneto, to attract new customers and retain existing ones. Indeed, over one-in-five households (22 per cent) had a subscription TV service in 2022, compared to 18.5 per cent in 2020, demonstrating a 3.7 percentage point growth in consumers since the onset COVID-19. Increasing popularity of online pay-per-view services is also observed, with the consumer base growing from 2.4 per cent of adults in 2018 to 6.2 per cent in 2022.

Chart 13: Proportion of Australians aged 18+ using video services to watch video content in the past 7 days, 2018-2022



Source: Australian Communications and Media Authority (ACMA, 2023)

June 2022

Four in five (81%)
Australians have at least one subscription video streaming service at home.

One in five (22%)
Australians watch subscription television in a given week.

>19 hours
spent viewing video or television content per person per week, on average.

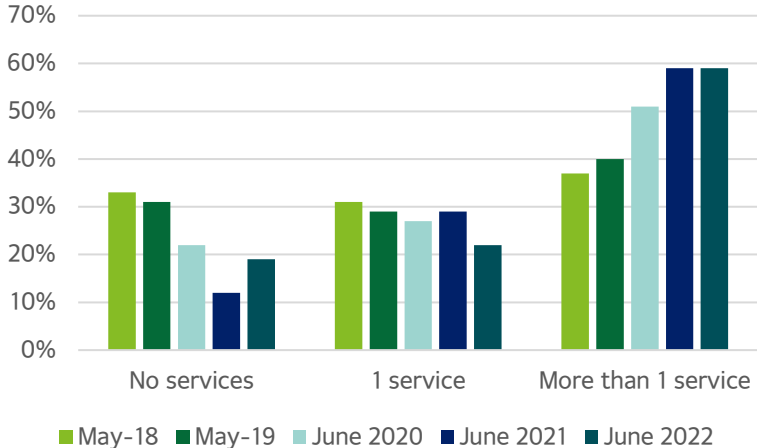
Three in five (59%)
Australians use multiple subscription video services.

Consumers continue to demand a variety of content across multiple subscription video streaming services

As of June 2022, more than half (59.0 per cent) of all Australian households subscribed to two or more video streaming services, unchanged from June 2021. This represents significant growth of 22 percentage points from the 37 per cent observed in May 2018, reflective of the desire of consumers to have access to a broad catalogue of entertainment options.

The share of households with a singular streaming service fell in 2022, from 29 per cent to 22 per cent. This coincided with a growth in the number of households without a streaming service (19 per cent in 2022, up from 12 per cent in 2021).

Chart 14: Proportion of Australians aged 18+ with subscription streaming services at home, 2018-2022



Source: ACMA (2023)
Note: Due to methodological changes, previous estimates have been adjusted to allow comparisons over time.

Subscription television provides a platform for a variety of niche and emerging sports to showcase the skills of athletes and the entertainment value of the sport.

The role of subscription television in supporting niche and emerging sport

The televising of professional sport in Australia has historically been concentrated on mainstream, male sports. The subscription television industry, however, has made a targeted move to supporting the success and growth of niche and emerging sports in Australia by providing an avenue for these sports to reach viewers. Reaching an audience is a crucial step of driving professionalism and increased participation of sports.

A major barrier to growth for many niche sports is funding. Fans want sports streaming services that enhance, but don't overshadow, the game.⁷ Significant investment is required to attract partnerships and produce events to broadcast standard. Broadcasts of sporting events often accounts for a large share of revenue for both broadcasters and professional sports leagues.⁸ Increased revenue then leads to more and better coverage, amplifying the benefits.

ASTRA member, Foxtel, through its Fox Sports subsidiary and Kayo Sports streaming platform, broadcasts a wide range of sports across Australia every week. Indeed, Fox Sports produces live content covering a variety of niche and mainstream sport across seven dedicated linear channels, and Kayo Sports provides an important platform to showcase niche and emerging sports, including for free via Kayo Freebies.

The lower costs associated with streaming can provide an avenue for niche sports to build investment and revenues, and ultimately progress to linear broadcasting and increased viewership. Kayo Sports provides flexibility for smaller sports that may not be able to meet the broadcast standards of linear television. Kayo Sports leverages the broader Foxtel viewership base to showcase these sports to over 1.4 million Kayo Sports subscribers. Sports such as Wheelchair Rugby Australia, Surfing Australia and Netball Australia have expanded live coverage through Kayo Sports, which complements existing live coverage or highlights on linear television.

Professional broadcasting of niche sports can yield a better experience for viewers by providing real-time statistics and analytics, more camera angles, better commentary, and behind the scenes content with athletes. This allows the sport to better engage with fans, which leads to increased popularity and revenue from tickets, merchandise and sponsorships.⁹

Streaming has also played a role in bringing Australian sports to an international audience. Netball Australia and Surfing Australia distribute events through Netball Australia TV and MySurf TV on YouTube respectively.

Benefits of improved exposure of niche and emerging sport

Increasing exposure and participation in niche and emerging sport brings more than just economic value. There is a broader social gain associated with people getting inspiration to go out and get involved with sports and active hobbies. Some of the broader benefits associated with growing niche sports include:

- **Increased access to finance and funding** - Greater access to sponsorships, fans and funding can help sports overcome many of the challenges related to insufficient funding, such as athletes needing to work other jobs to support themselves. Higher earnings give players the opportunity to become full-time athletes. This allows players to dedicate more time to training and compete at a higher level, further establishing the sport's competitive reputation. When more funding is achieved at the elite level, this often flows down to grass roots and entry level organisations, supporting the next generation of athletes.
- **Social benefits** - Heightened exposure can help shift perceptions on niche sports, illustrating that they can be as entertaining and competitive as large mainstream competitions. Sports are culturally significant in Australia, and thus progressive change in sports can make a wider social impact. Greater visibility of professional athletes in these niche sports generate increased viewership and involvement, leading to social benefits such as entertainment and inspiration, an increased sense of belonging¹⁰, and increased 'social capital' (capturing attitude, trust, mutual relationships, and unity in society)¹¹.
- **Health benefits** - Greater visibility of professional athletes can encourage uptake of these sports, contributing to the broad range of benefits associated with increased exercise. Research has shown that increased exposure and promotion of healthy habits through sports media has positive influences on motivation to make healthy lifestyle changes.¹² Some of the longer term health benefits associated with these lifestyle changes include reduced risk of illness, improved mental health, and improved sleep and cognition.¹³

7. Deloitte (2023)

8. Kim et al (2021)

9. Bilue (2023)

10. Better (2022)

11. Karimian et al (2015)

12. Pilar et al (2019)

13. Malm et al (2019)

Subscription television has helped Wheelchair Rugby Australia and the National Rugby League Women's Premiership reach audiences around Australia.

Wheelchair Rugby Australia

Wheelchair Rugby Australia (WRA) was recognised as a National Sporting Organisation in 2023¹⁴ and oversees the growth of wheelchair rugby in Australia, which has been played in Australia since the 1980s¹⁵. Since being recognised as a full medal sport in the 2000 Sydney Paralympic Games, Australia has competed in every Paralympic wheelchair rugby competition.¹⁶

Fox Sports Australia and Kayo Sports have broadcast the Wheelchair Rugby National Championship throughout Australia for the past three years and has broadened its partnerships with WRA during this time to further promote the sport. The Championship event is broadcast live on Kayo Sports over three days, with highlights on Fox Sports linear channels. Prior to this, the Championship had limited coverage through YouTube livestreams.

Broadcast coverage has enabled growth in sponsorship opportunities for WRA, helping it to establish itself as an independent entity and launch a National League to expand competition opportunities for para-athletes. On the back of this success, WRA is also working to establish and coordinate Wheelchair Rugby Fiji and Wheelchair Rugby Samoa in cooperation with the Department of Foreign Affairs and Trade, with both countries to be integrated into WRA competitions.

Increased funding has facilitated the removal of athlete entry fees and food and transport costs. The growth in popularity and entry level opportunities has resulted in a 37 per cent increase in participation since 2022,¹⁷ and sufficient growth in participation by women to enable the WRA to launch an Australian women's team in 2024.

Broadcasting exposure has helped drive the sport's growing reputation, allowing it to support new coaching and commentary opportunities for seven former players, the recruitment of 5 more podium potential outlets, and three new operational staff positions in 2023.¹⁸

National Rugby League Women's Premiership

In 2017, the National Rugby League Women's (NRLW) Premiership was established, with the maiden season held in 2018. Four teams participated in the competition between 2018 and 2020, before the competition was expanded to six teams in 2021. Since the 2018 inaugural premiership, the NRLW has been broadcast through Fox Sports and Nine.¹⁹

NRLW has seen significant growth in 2023 with the support of investment from NRLW partners. The 2023 NRLW season will be broadcasted on Foxtel and Kayo Sports in full. Investment and commitment from NRLW partners have been critical to the expansion of the competition which has also been aided by strong pathway programs, growth in participation and support from clubs.

Women's sports fans show more interest in athletes and are more likely to view athletes as inspirational and role models,²⁰ helping encourage more fans to participate in sports. To cater to this heightened interest in the lives of athletes, Fox Sports and Kayo Sports broadcast a weekly show, *NRLW on Fox*, focused on NRLW players' stories.

In 2023, the NRLW expanded from 6 to 10 teams, aided by investment from Fox Sports.²¹

- 14: WRA (2023c)
- 15: WRA (2023a)
- 16: WRA (2023b)
- 17: Data provided by Foxtel (2023)
- 18: WRA (2023d)
- 19: NRL (2018)
- 20: Wasserman (2023)
- 21: NRL (2022)



Image: Wheelchair Rugby Australia (2022)



Image: National Rugby League Women's Premiership (2022)

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Economic contribution framework

Economic contribution studies are intended to quantify measures such as value added, exports, imports and employment associated with a given industry or firm, in a historical reference year. The economic contribution is a measure of the economic value of production by a firm or industry.

Value added

Value added is the most appropriate measure of an industry's/company's economic contribution to gross domestic product (GDP) at the national level, or gross state product (GSP) at the state level. The value added of each industry in the value chain can be added without the risk of double counting across industries caused by including the value added by other industries earlier in the production chain.

Other measures, such as total revenue or gross output, may be easier to estimate than value added but they 'double count'. That is, they overstate the contribution of a company to economic activity because they include, for example, the value added by external firms supplying inputs or the value added by other industries.

The economic activity accounting framework is presented in Figure A.1, showing how total revenue can be disaggregated into component parts in order to measure the economic contribution of an entity or industry. The framework demonstrates the definition of value added being the difference between total revenue and intermediate inputs.

Direct and indirect contributions

The direct economic contribution is a representation of the flow from labour and capital within the sector of the economy in question.

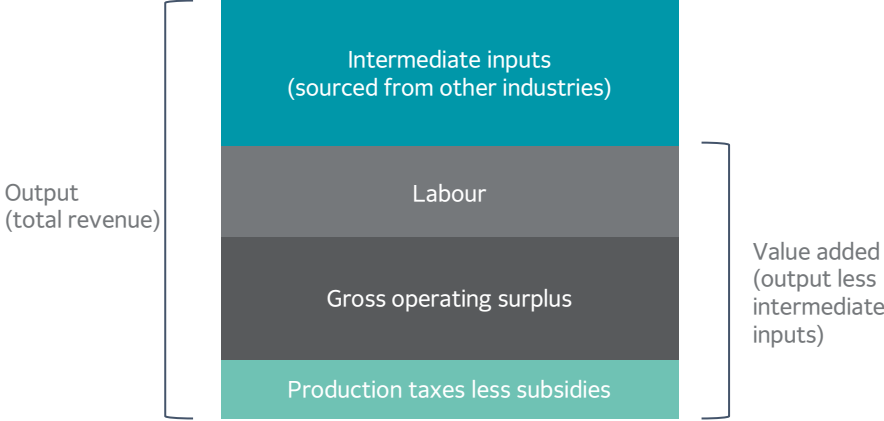
The indirect contribution is a measure of the demand for goods and services produced in other sectors as a result of demand generated by the sector in question. Estimation of the indirect economic contribution is undertaken in an input-output (IO) framework using Australian Bureau of Statistics input-output tables which report the inputs and outputs of specific sectors of the economy (ABS 2021).

IO tables are required to account for the intermediate flows between sectors. These tables measure the direct economic activity of every sector in the economy at the national level. Importantly, these tables allow intermediate inputs to be further broken down by source. These detailed intermediate flows can be used to derive the total change in economic activity for a given sector.

A widely used measure of the spill over of activity from one sector to another is captured by the ratio of the total to direct change in economic activity. The resulting estimate is typically referred to as 'the multiplier'. A multiplier greater than one implies some indirect activity, with higher multipliers indicating relatively larger indirect and total activity flowing from a given level of direct activity.

The total economic contribution to the economy is the sum of the direct and indirect economic contributions.

Figure A.1: Economic activity accounting framework



Source: Deloitte Access Economics

Limitations of economic contribution studies

In a fundamental sense, economic contribution studies are simply historical accounting exercises. The analysis — as discussed in the report — relies on a national input-output table modelling framework and there are some limitations to this modelling framework. The analysis assumes that goods and services provided to the sector are produced by factors of production that are located completely within the state or region defined and that income flows do not leak to other states.

The IO framework and the derivation of the multipliers also assume that the relevant economic activity takes place within an unconstrained environment. That is, an increase in economic activity in one area of the economy does not increase prices and subsequently crowd out economic activity in another area of the economy. As a result, the modelled total and indirect contribution can be regarded as an upper-bound estimate of the contribution made by the supply of intermediate inputs.



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