



ECONOMIC IMPACT OF *APPLES NEVER FALL* IN AUSTRALIA

**A REPORT FOR THE MOTION PICTURE ASSOCIATION AND
THE AUSTRALIA-NEW ZEALAND SCREEN ASSOCIATION**

DECEMBER 2024



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EXECUTIVE SUMMARY

Apples Never Fall is a Peacock Original television limited series based on Australian author Liane Moriarty's best-selling novel of the same name. Produced by Heyday Television with local production services provided by Matchbox Pictures, the show revolves around the Delaneys, a Florida-based tennis dynasty, hit by the sudden disappearance of Joy, the family's matriarch. Australian actors Sam Neill (Stan), Georgia Flood (Savannah), Essie Randles (Brooke), and Conor Merrigan Turner (Logan) all played key roles in the production.

The filming and production of the TV series generated considerable economic activity across Australia, as business spending occurred all across the country, with the highest concentration in Queensland. The show's production also supported activity in a wide range of industries through its procurement, and through local spending of Australian residents employed by the production and its supply chain.

This study, commissioned by the Motion Picture Association (MPA) and the Australia-New Zealand Screen Association (ANZSA), focuses on the limited series, and analyses the production's total economic impacts in Australia in 2023–2024. The study also considers the wider impact on boosting the Australian economy, such as increasing film-induced tourism. Similar production budgets and spending patterns across Australia are likely to produce similar economic impact results as those presented in this study.

During 2023–2024, **the production of *Apples Never Fall* resulted in total spending in Australia of approximately A\$81.9 million.**¹ Some 51% of this spending was with local suppliers of goods and services, at A\$41.8 million. The remaining 49% was spent on compensation paid to local production crew and other labour, at A\$40.0 million.

Oxford Economics estimates that expenditure by **the production of the *Apples Never Fall* limited series stimulated a A\$135.0 million contribution to Australia's GDP in 2023–2024.** We find that for every A\$1 million that the production's own activities contributed to the economy, it supported a further A\$2.4 million along its supply chain and through the payment of wages.

We find that the expenditure undertaken by **the show's production stimulated a total of 1,700 full-time and part-time jobs across Australia in 2023–2024.** For every 100 people the production directly employed, its expenditure stimulated another 53 jobs across the country.

Finally, the production of the series benefitted from substantial tax incentives from both federal and state sources. We calculate that for every dollar of tax incentive received for local expenditures, the production supported A\$4.2 in domestic GDP.²

A\$135m

Total contribution to
Australia's GDP supported
by *Apples Never Fall*

1,700

Full-time and part-time jobs
supported across Australia as
a result of *Apples Never Fall*

¹ The monetary values presented in this report are in 2023 prices.

² This ratio only includes federal and state incentives in relation to work carried out in Australia by Australian entities.

THE ECONOMIC IMPACT OF APPLES NEVER FALL IN AUSTRALIA

DIRECT IMPACT OF PRODUCTION

51%
spent on
local goods
& services

A\$81.9m
spent across
Australia

49%
spent on
employee
compensation

More than
1,100
local
businesses
supported

1,100
full-time and
part-time local
jobs created

TOTAL IMPACT OF PRODUCTION

A\$135m
total contribution to
Australia's GDP

1,700
full-time and
part-time jobs
stimulated by
production in
Australia

OXFORD
ECONOMICS

MPA

1. INTRODUCTION

Apples Never Fall is a Peacock Original mystery drama television limited series, based on Australian author Liane Moriarty's novel of the same name. The show is about a couple of tennis coaches, Stan and Joy, who are ready to retire when Joy goes missing and their four children come to terms with their idealized image of their parents.

The TV series was produced by Heyday Television, which is part of Universal International Studios (UIS), a division of Universal Studio Group (USG), and filmed across Queensland, Australia. UIS's Australian based production company Matchbox Pictures provided local production services and Australian actors Sam Neill (Stan), Georgia Flood (Savannah), Essie Randles (Brooke), and Conor Merrigan Turner (Logan) all played

key roles in the production. The show's filming occurred from March through December 2023, and it premiered in March 2024 on Peacock.

Oxford Economics was engaged by the Motion Picture Association and the Australia-New Zealand Screen Association to conduct an independent economic impact assessment of the production of the *Apples Never Fall* limited series on Australia's economy during the production period. For the study, Oxford Economics used data provided by NBCUniversal to estimate the economic impacts arising from the production of the show.

Similar production budgets and spending patterns across Australia are likely to produce similar economic impact results as those presented in this study.

"Productions like this create jobs for our arts and entertainment workers. I'm really pleased to see a novel by a great Australian author being retold for the screen."³

**—Minister for the Arts,
Tony Burke**



***Apples Never Fall*, "The Delaneys" Episode 101.** Pictured: (L-R) Conor Merrigan-Turner as Logan, Essie Randles as Brooke, Sam Neill as Stan, Annette Bening as Joy, Alison Brie as Amy, Jake Lacy as Troy. | Photo by: © Vince Valitutti/PEACOCK. All rights reserved.

³ Screen Queensland, "*Apples Never Fall* to film in Queensland, Australia—Joint statement from the Minister for Employment and Workplace Relations, Minister for the Arts and Leader of the House, the Honourable Tony Burke MP," February 10, 2023.



2. PRODUCTION SPENDING

When a TV series is produced locally, it creates jobs, revenue, and related infrastructure development. Physical productions provide an immediate boost to the local economy, fostering job creation and economic activity in other industries across the production supply chain. In 2023–2024, production of *Apples Never Fall* resulted in **total spending in Australia of approximately A\$81.9 million.**

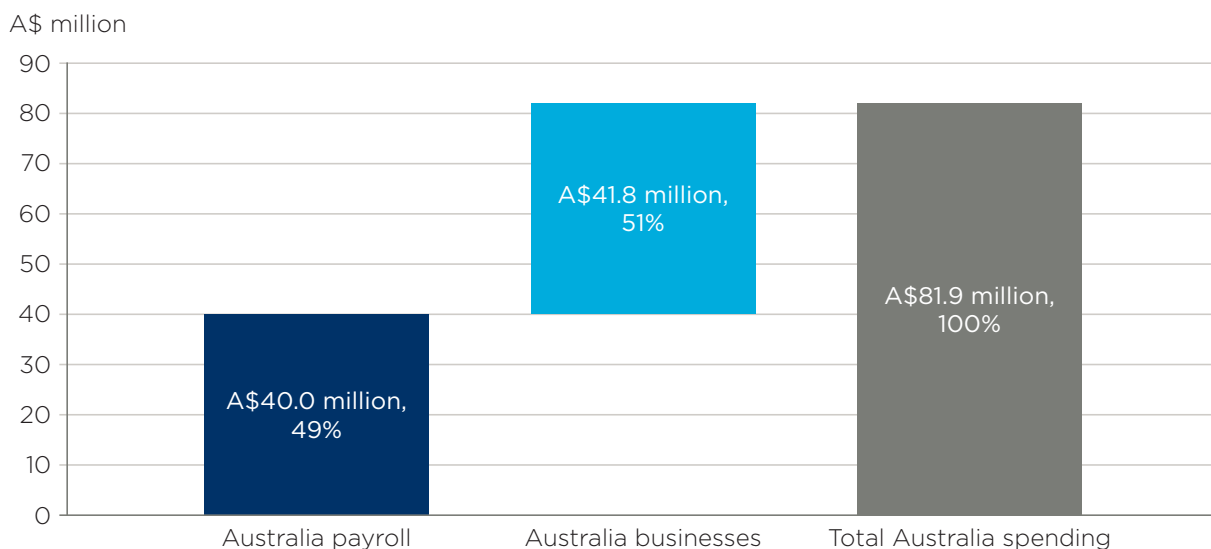
Spending with local vendors of goods and services made up 51% of the total expenditure at A\$41.8 million (see Fig. 1). The remaining 49%, or A\$40.0 million, was spent on compensation for local production crew and other labour.

A\$81.9m

Total production expenditure in Australia

Spending with local vendors on goods and services was \$41.8 million while spending on production crew and qualifying labour was \$40.0 million

Fig. 1: Production spending of *Apples Never Fall* in Australia, by type



Source: NBCUniversal, Oxford Economics

Totals may not sum due to rounding.

2.1 BUSINESS SPENDING

Production spending engaged over 1,100 businesses across the country. Business spending occurred predominantly along the east coast, with A\$31.8 million, or 76%, being spent in Queensland. The cities with the highest spending were Gold Coast, Brisbane Inner City, and Inner Melbourne. These localities received the largest amounts, with A\$30.2 million in spending combined. Fig. 2 below shows the distribution of business spending.

The production of TV shows typically relies on a wide

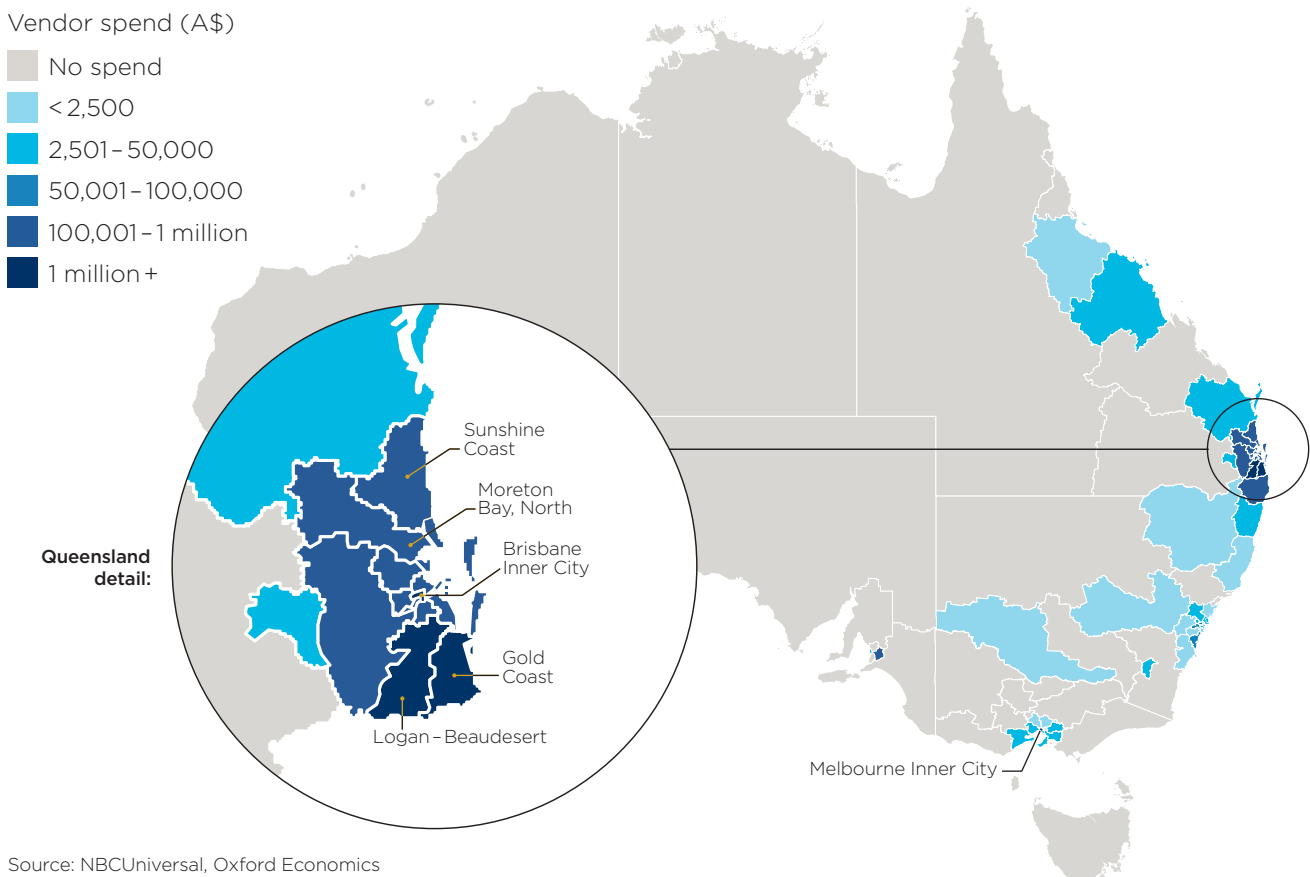
range of goods and services, engaging multiple local businesses across numerous industries (see Fig. 3). The largest category of spending (at 23%) was studio, stage, location, and set decoration. This included spending with Village Roadshow Theme Parks, which operates several theme parks across Australia and provided stage rental services for the production.

The second largest category of spending, with A\$7.7 million, was spent towards transport, travel, accommodation, and catering. Some A\$7.2 million towards lighting, visual effects,

grip, and camera costs. Local companies in this category include Blackbird, the vendor featured in the case study overleaf, and Heliguy, a local drone company whose innovative technology has even assisted scientists with the collection of whales' spouting mist.⁵

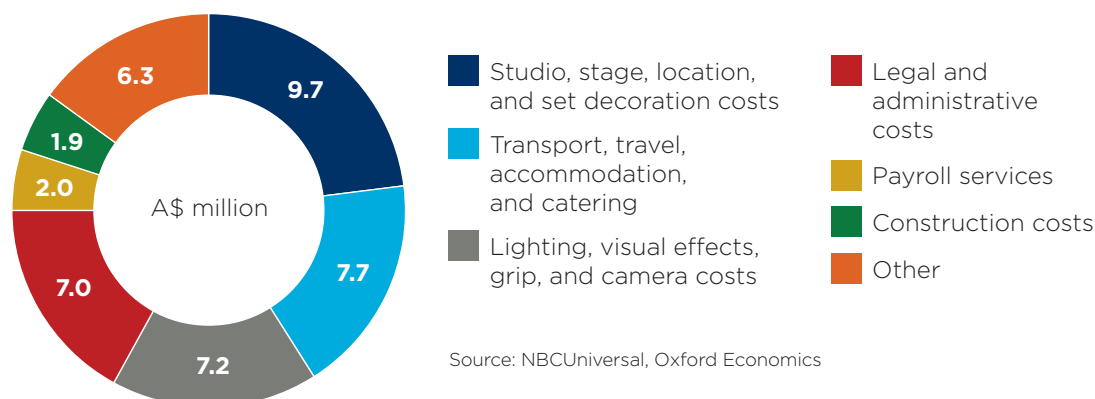
The production also hired several local instructors to provide tennis lessons, and collaborated with local commercial maritime companies, including Marine Civil Contractors and Cushy Fishing Charters.

Fig. 2: Map of spending with Australian businesses by locality⁴



⁴ The top 5 localities for spending are labeled.

⁵ Ausfilm, Scientists use Heliguy's custom drone technology to collect samples of humpback whale snot, June 2022.

Fig. 3: Spending on goods and services in Australia, by item

FILM BUSINESS CASE STUDY: VFX FIRM STUDIO BLACKBIRD

Visual effects are a vital ingredient for any television show. When NBCUniversal was looking for a visual effects (VFX) supplier for the Australian filming of *Apples Never Fall*, it selected Studio Blackbird on a referral from a VFX producer it had collaborated with on a previous project. The Sydney-based company's work on two seasons of the NBC science fiction drama *La Brea* put it on the radar for this production. Co-founder and managing director Nerissa Kavanagh says that, as a small independently-owned company, Blackbird provides a high-performance and nimble approach that fits with production companies' needs. "I once heard the term 'speedboat' company to describe us," she says. "I think we often surprise people with the volume and quality of work we can deliver."

Clients increasingly come to Blackbird to help them solve a specific technical or creative challenge. Its team of around 30 creative producers and artists—typically coming from the local area—provide the full spectrum of visual

post-production. Ms Kavanagh says this enables Blackbird to punch above its weight in terms of both shot count and the level of finish. Around 16 to 20 people worked on *Apples Never Fall* over the six months of production. They worked on 37 individual shots spread over five episodes. VFX included invisible effects-type shots such as background replacements, adding virtual blood to shots, and adjusting sets for continuity. "We also had to add a hurricane in a couple of shots, which was fun," Ms Kavanagh says.

The Blackbird team developed innovative practices for the production. This included building a set of new procedural tools to help with integration into the remote review pipeline used by NBCUniversal. This minimized the time spent shipping files and cross-referencing review notes, meaning that individual artists' time could be used more effectively. They also developed a lighting tool in their studio that enabled it to "turn on" the lights in hundreds of buildings in an aerial shot of Miami.



Nerissa Kavanagh

Blackbird is able to take advantage of a deep talent pool within Australia and has succeeded in employing a number of crew directly out of tertiary education, many of whom have found long-term employment and career growth with the company. Ms Kavanagh says, "Our focus right now is on sustainability and finding that sweet spot in terms of a scale that enables us to flourish long term without losing the essence of what makes us great at our current scale."

This collaboration with Blackbird showcases the important role played by international productions in supporting local businesses. At the same time, companies like Blackbird help make Australia an even more attractive location for audiovisual content producers.

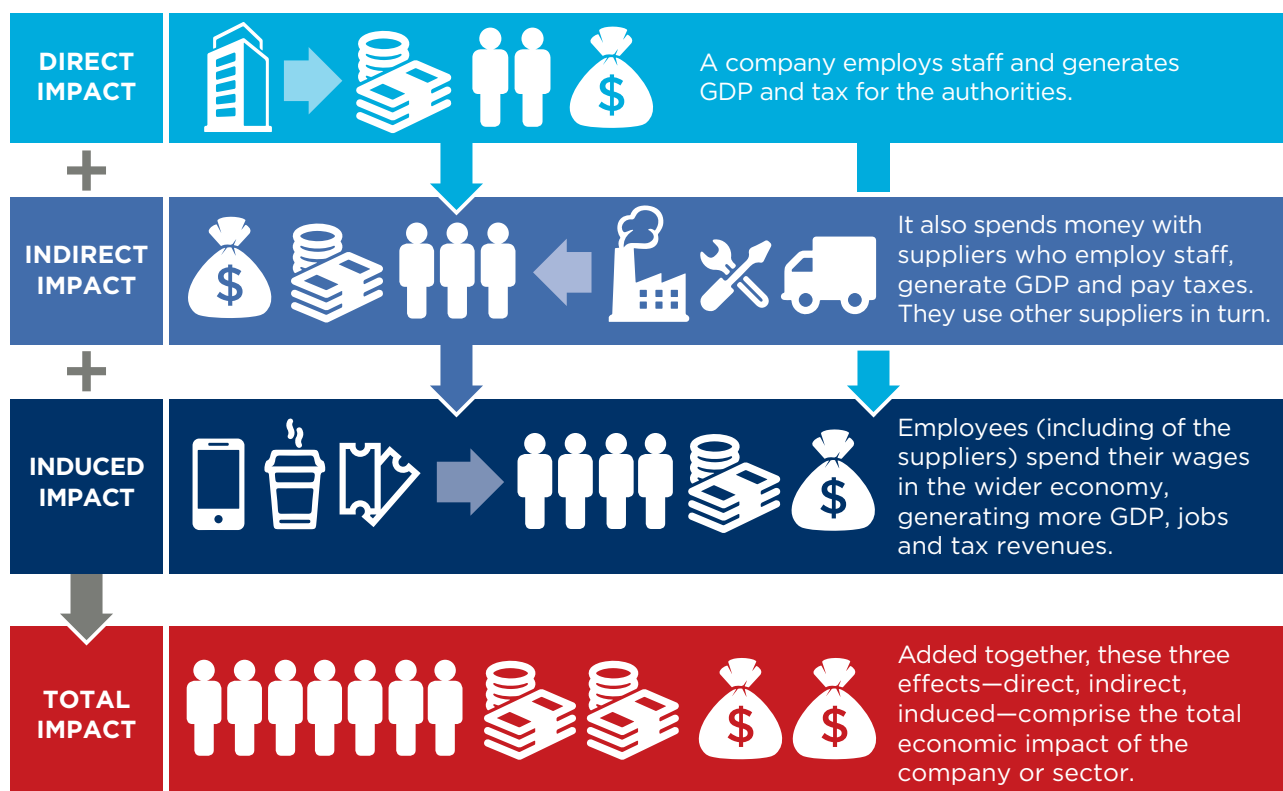


AIR PONTON

3. ECONOMIC IMPACTS

3.1 CHANNELS OF IMPACT

The impact of filming the *Apples Never Fall* TV series on Australia's economy is calculated using an economic impact assessment. This involves quantifying the production's economic contribution across three channels of expenditure, where the total impact is the sum of the three channels.



Source: Oxford Economics

A\$135m

Total contribution to
Australia's GDP supported
by *Apples Never Fall*

1,700

Full-time and part-time jobs
supported across Australia as
a result of *Apples Never Fall*

3.2 TOTAL IMPACT

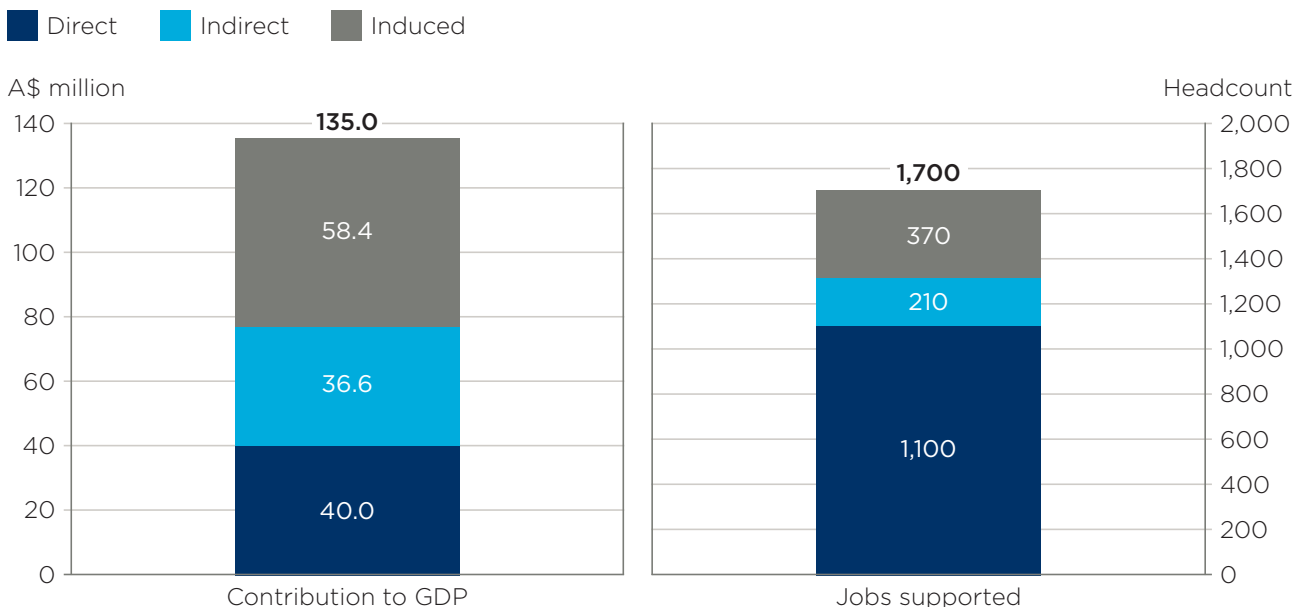
Combining all channels of impact, we find that *Apples Never Fall* supported A\$135.0 million towards Australia's GDP during the production period. Approximately A\$40.0 million, or 30%, of this was generated by the production itself (direct). The Australian spending on goods and services supported another A\$36.6 million along the supply chain (indirect), which represented 27% of the total.⁶ The spending of wages of Australian residents stimulated a A\$58.4 million contribution to GDP (induced), or 43% (Fig. 4).

For *Apples Never Fall*, for every A\$1 million in direct GDP

generated by the production's own activities, it supported a further A\$2.4 million across Australia.⁷

The production of the show also had a significant impact on employment in the country. In 2023–2024, *Apples Never Fall* supported 1,700 full-time and part-time local workers across Australia. The TV series production directly employed 1,100 full-time and part-time Australia-based workers, or 65% of the total. The spending on goods and services with Australia-based vendors supported another 210 jobs along the supply chain, or 13% of the total. A further 370 jobs, or 22% of the total, were supported by the spending of wages across the country

Fig. 4: The total GDP and employment contribution supported by *Apples Never Fall* in Australia by channel of impact



Source: Oxford Economics

Totals may not sum due to rounding.

⁶ While production spending with Australia based vendors totals approximately A\$41.8 million, these local vendors may spend some part of this with companies outside of the country, resulting in an estimated impact of A\$36.6 million.

⁷ This GDP multiplier effect is calculated by dividing the total impact (A\$135.0 million) by the direct impact (A\$40.0 million) and subtracting 1.

by Australian production crews and by employees of the show's suppliers.

For every 100 people the production directly employed, a further 53 jobs were supported across the country through secondary effects.⁸

Apples Never Fall benefitted from substantial tax incentives from both federal and state sources. We estimate that the production supported

A\$4.20 in GDP for every dollar of tax incentive received for local expenditures.⁹

The remainder of this section describes the three channels of impact in more detail.

3.3 DIRECT IMPACT

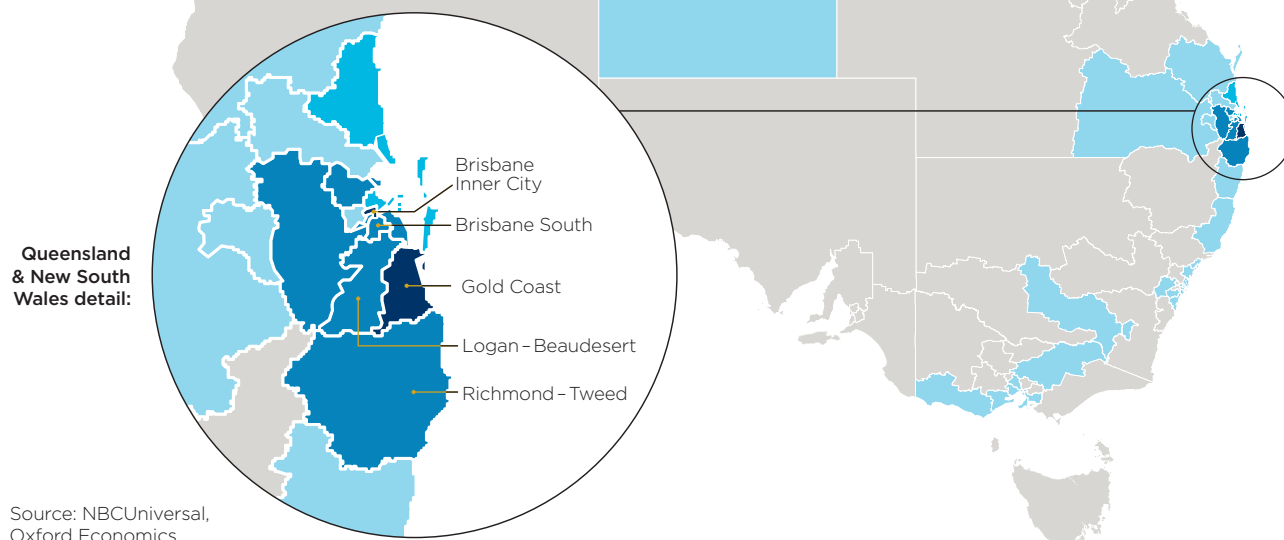
During the production period, *Apples Never Fall* directly employed around 1,100 full-time and part-time Australia-based workers

across the country. The vast majority—85%—of these workers lived in Queensland, especially in Gold Coast and Brisbane.

We estimate that the production of the *Apples Never Fall* limited series made a A\$40.0 million direct contribution to the country's GDP in 2023-2024, which came from the payment of employee compensation to locally based staff.¹⁰

Fig. 5: Map of production workers by residence in Australia¹¹

Employment
(headcount)



Source: NBCUniversal,
Oxford Economics

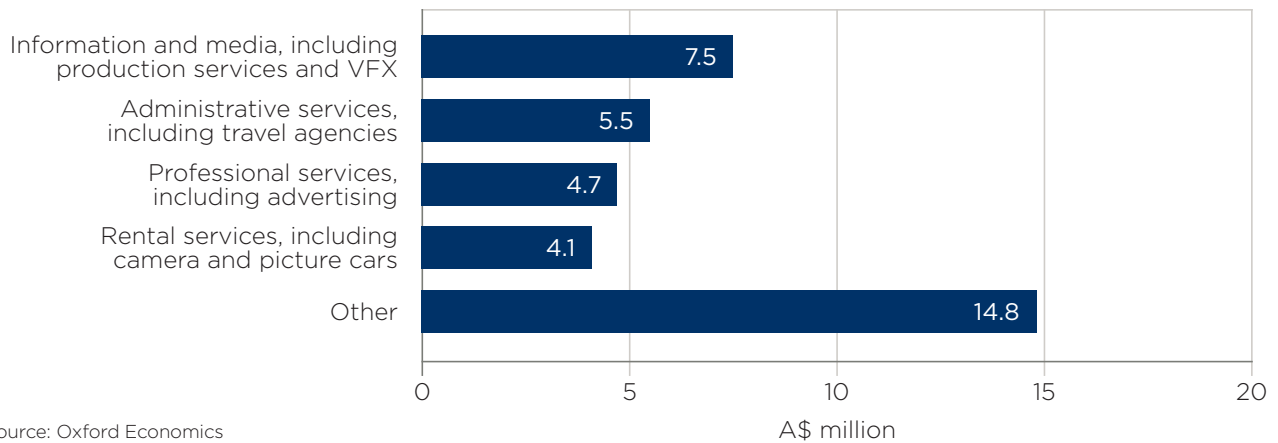
⁸ This employment multiplier effect is calculated by dividing the total employment impact (1,700) by the direct employment impact (1,100) and subtracting 1. While the employment figures presented in this report are rounded, all calculations are based on the actual figures.

⁹ This ratio only includes federal and state incentives in relation to work carried out in Australia by Australian entities.

¹⁰ The contribution to GDP generated by a company or a project can be calculated as the sum of its surplus (profits) and employee compensation. This approach, known as the income approach, is consistent with the principles of national accounting. For the purposes of this study, we take a conservative approach to this calculation and focus on the employee compensation of local workers, excluding the profits associated with the production in our calculation of direct contribution to Australia's GDP.

¹¹ The top 5 localities for employment are labeled.

Fig. 6: GDP contribution stimulated by the procurement of goods and services from local suppliers, by industry



3.4 INDIRECT IMPACT

The production's positive contribution to the country's economy, however, extends past the contribution it makes directly through its own operations. This is related to the purchases of goods and services made from other firms in order to produce the show. This spending stimulates additional economic activity along the supply chain. This is referred to as the *indirect* impact.

We estimate that the procurement associated with *Apples Never Fall* stimulated a A\$36.6 million contribution to Australia's GDP along the domestic supply chain.

Information, media and telecommunications, which includes visual effects and other video and music production companies, received over 20%

of the indirect impact. Administrative and support services constituted around 15% of the indirect impact (Fig. 6), reflecting the large amounts spent on administrative costs and payroll services. The professional services sector made up 13% of this impact, primarily as a result of legal and publicity costs.

The show's expenditure on inputs of goods and services from locally based suppliers also stimulated 210 full-time and part-time jobs across Australia.

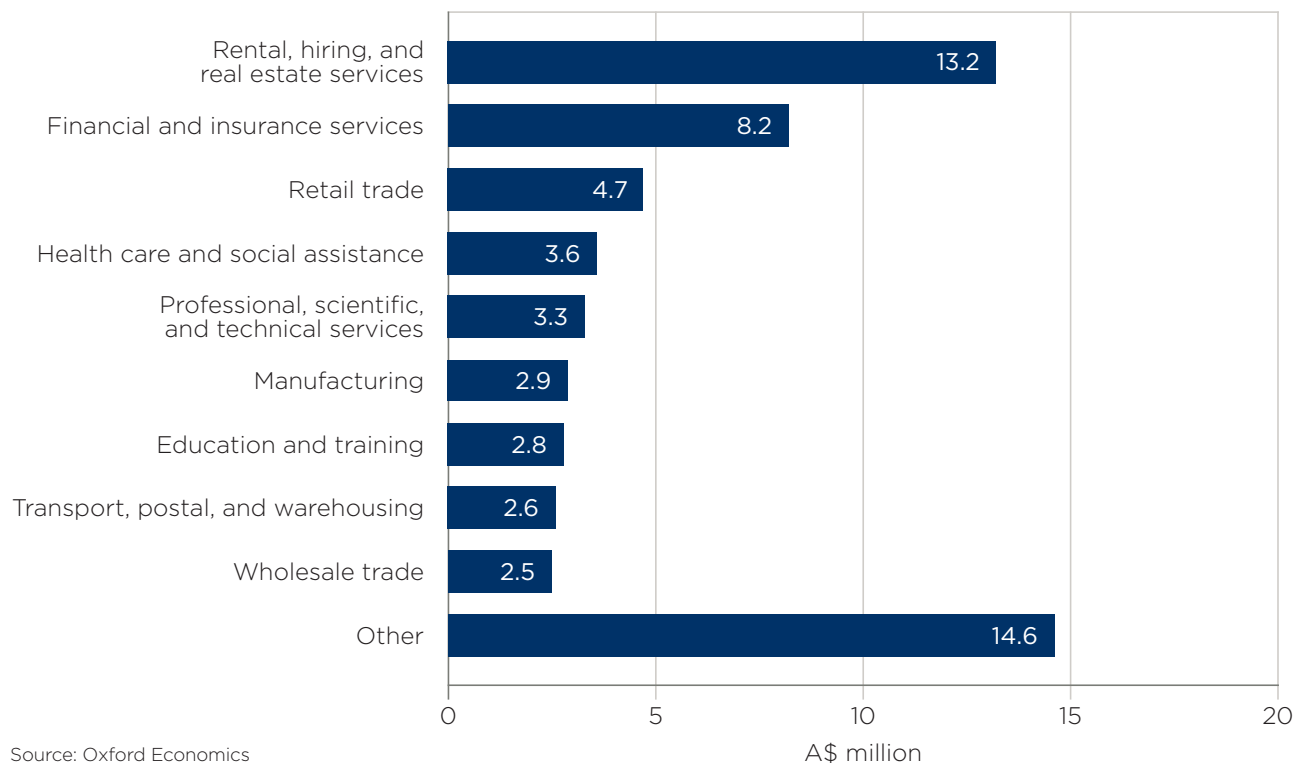
3.5 INDUCED IMPACT

Production cast and crews employed by the show, as well as workers employed along the supply chain spend a proportion of their wages at retail, leisure, and other outlets across the province. This

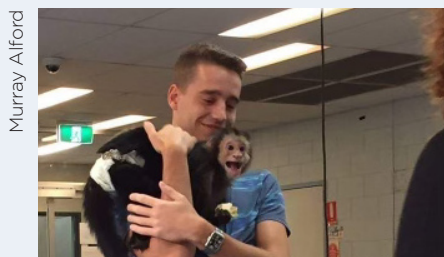
spending stimulates economic activity and employment at these consumer-focused establishments and along their supply chains. This is referred to as the show's *induced* impact.

We estimate the wage-financed spending of local production crews and workers at locally based suppliers stimulated A\$58.4 million toward Australia's GDP during the production period. Many of the businesses that benefited from the induced channel of impact were part of the real estate & rental, financial, and retail industries (Fig. 7).

We estimate the wage-financed consumer spending of local production crews and workers within the show's supply chain supported 370 full-time and part-time jobs across Australia in 2023–2024.

Fig. 7: GDP contribution stimulated by the payment of wages to locally based workers, by industry

SPOTLIGHT ON THE JOB: UNIT PRODUCTION MANAGER/PRODUCTION SUPERVISOR¹²



Murray Alford lives in Queensland and works in the film and TV industry as a Unit Production Manager (UPM)/Production Supervisor. He works on feature films—including *Elvis*, *Love and Monsters*, and *Aquaman*, and series such as *Boy Swallows Universe*, *Irreverent* and *The End*, before working on *Apples Never Fall* in 2023. With the opportunity to contribute to a variety of projects,

including major international productions, he has worked his way up from production runner to assistant production coordinator, production coordinator, production supervisor and unit production manager.

What does a UPM/Production Supervisor do? Murray says that consists of managing the day-to-day work, focusing on what needs to be done on that day as well as planning the next day. For example, he may be called upon to approve different equipment, hire additional crew members, draft contracts, approve payroll, make payments, manage petty cash, and accommodations, react to and fix any issues that

might come up, and facilitate other departments' needs—in no particular order!

Murray reports, "The film and TV industry is busy in Queensland, from small to large budget productions." There's a huge growing demand for experienced production crew, and a growing crew skill base that moves from smaller projects to big TV series fairly quickly. On one project, he received 160 resumes for one junior position they were trying to fill and had many in-person interviews. Productions like *Apples Never Fall* bring more work to skilled workers and give new workers opportunities to build important skills.

¹² This case study was prepared by the Motion Picture Association.



Photo by: © Jasin Boland/PEACOCK. All rights reserved.

4. WIDER IMPACTS

In addition to the economic impacts that arise through production spending, television series such as *Apples Never Fall* can produce impacts that extend beyond the jobs and GDP they support.

As it is often the case when localities are used as filming locations, Queensland's Gold Coast may start attracting visitors and fans of the show as a result of the filming. Film induced tourism is a well-known phenomenon and it has increasingly been viewed as an important component of tourism marketing.¹³

While Australia is known to attract the film and TV industry for its highly skilled crews, picture-perfect locations, and world-class facilities, local policymakers have been facilitating the growth of the industry through

investments and tax credits. Screen Queensland, the state's Government agency for the industry, supports locally produced films and series, and secures international and interstate production and post-production activities into Queensland. Screen Queensland also has a range of initiatives to build skills and careers for local screen practitioners and funds film festivals and industry conferences.

The attraction of large-scale projects such as *Apples Never Fall* helps to further develop the already growing film industry in the state. Thanks to these projects, local filmmakers, actors, and other industry workers find themselves with opportunities to work alongside experienced professionals, while investment in the industry also encourages further advancement opportunities

for local talent. This show is part of a pipeline of Universal/Matchbox shows created by the state's thriving screen industry, including *Young Rock 1 & 2*, *Irreverent*, *Joe vs Carole*, *La Brea 3* and now *Apples Never Fall*. All six of these titles filmed in Queensland, with more than A\$300 million spent across Australia since 2021.¹⁴

While we have not measured the wider impacts of the production of *Apples Never Fall* in this study, it is worth observing that film and TV productions can also create additional economic, community, and social benefits. These may comprise the creation of job openings or apprentices or students, the development of business ventures, the formation of spin-off firms, and contributions to community and culture.

¹³ See for example, Jeeyeon Hahm & Youcheng Wang (2011) Film-Induced Tourism as a Vehicle For Destination Marketing: Is it Worth the Efforts?, *Journal of Travel & Tourism Marketing*, 28:2, 165-179 or Beeton, Sue. "Understanding film-induced tourism." *Tourism analysis* 11, no. 3 (2006): 181-188.

¹⁴ Ryan, et al., "A Re-evaluation of Screen Production on the Gold Coast After COVID-19," October 2023.



APPENDIX: METHODOLOGY

The impact of the filming of *Apples Never Fall* on Australia's economy is calculated using an economic impact assessment. This involves quantifying the production's economic contribution to the state across three channels of expenditure. The channels of impact are:

- **Direct impact** relates to the employment and economic activity generated at the filming locations across Australia.
- **Indirect impact** captures the economic activity stimulated by the procurement of inputs of goods and services from the locally based supply chain.
- **Induced impact** comprises the wider economic benefits that arise from the payment of wages by the television series, and the firms in its local supply chains, to staff who spend a proportion of this income in local retail, leisure, and other outlets.

The total impact is the sum of the three channels. This enables us to build a picture of the series' overall contribution to the country across two key metrics:

- The gross value-added contribution to Australia's GDP.¹⁵
- Employment, measured on a headcount basis.

The results are presented on a gross basis, ignoring any displacement of activity from other firms or activities. The results do not consider what the resources currently used by the show's production, or stimulated by its expenditure, could alternatively produce in their second most productive usage. Additionally, the results also exclude economic activity generated outside Australia, employment of Australia non-residents, and spending with suppliers located outside the country.

Data on the direct impact of *Apples Never Fall*—including the show's contribution to GDP and jobs created—were provided directly by NBCUniversal. Direct GDP contribution in the country is taken to be equal to local employee compensation.

To estimate the indirect and induced GDP impacts of the show, Oxford Economics used the Australian National Accounts: Input-Output Tables, 2018–19. A basic domestic input-output table gives a snapshot of an economy at a given point in time. The model shows the major spending flows from “final demand” (i.e., consumer spending, government spending, investment, and exports to the rest of the world); intermediate spending patterns (i.e., what each sector buys from every other sector—the supply chain in other words); how much of that spending stays within the domestic/provincial economy; and the distribution of income between employment income and other income (mainly profits). In essence, an input-output table shows who buys what from whom in the economy.

As input for the analysis, we used the amount spent by type of goods and services purchased from Australia-based businesses over the course of the production period. In order to calculate the induced impact, we took the figures for wages paid to workers, as provided by NBCUniversal, and allocated those to the sectors where they would have spent those wages in line with the proportions in the Australia input-output table. We then used those figures to show how many dollars of GDP the show's production supported in the Australian economy for every A\$1 of direct GDP contribution; and how many jobs were stimulated across the country for each 100 people directly employed on the production.

¹⁵ Where GDP is the main indicator of economic activity in the country. It is used to measure the rate of growth or decline of the economy, and when it enters a recession.

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Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts, and analytical tools on more than 200 countries, 100 industries, and 8,000 cities and regions. Our best-in-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social, and business impact.

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December 2024

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To discuss the report further please contact:

Alice Gambarin

agambarin@oxfordeconomics.com

Fabian Juarez

fjuarez@oxfordeconomics.com

Oxford Economics
5 Hanover Square
8th Floor
New York, NY 10004

Tel: +1 646-786-1879



**Global headquarters**

Oxford Economics Ltd
Abbey House
121 St Aldates
Oxford, OX1 1HB
UK
Tel: +44 (0)1865 268900

London

4 Millbank
London, SW1P 3JA
UK
Tel: +44 (0)203 910 8000

Frankfurt

Marienstr. 15
60329 Frankfurt am Main
Germany
Tel: +49 69 96 758 658

New York

5 Hanover Square, 8th Floor
New York, NY 10004
USA
Tel: +1 (646) 786 1879

Singapore

6 Battery Road
#38-05
Singapore 049909
Tel: +65 6850 0110

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Asia Pacific

Singapore
Hong Kong
Tokyo
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Melbourne

Email:

mailbox@oxfordeconomics.com

Website:

www.oxfordeconomics.com

Further contact details:

[www.oxfordeconomics.com/
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