

Screen

FutureNow is the Western Australian Training Council for the creative, leisure and technology industries. The Council is a skills advisory body that represents the voice of industry, advising the State Government on the training and workforce development needs of our industry sectors.

Current Industry Environment

Western Australia is home to a vibrant, culture-defining screen sector, known for its warm portrayals of people and landscapes. From epic tales like Red Dog, to intimate explorations of everyday lives, such as new ABC television series The Heights, the Western Australian screen sector delivers world class work, worthy of the highly competitive global market it operates in. Awareness is growing of the significant contribution made by our screen sector to the local, national and global understanding of Western Australia, and the consequent impact on perceptions of liveability, as well as inbound tourism.

Nationally, the Screen Production sector is estimated to have delivered \$1.2 billion in revenue in 2018, with a secondary cultural and audience value of \$18 billion. The sector supports 20,000 workers and 43% of Australian screen production related businesses export their product.¹

Audience viewing habits

The film and television production sectors have access to increased audiences through the entry of Netflix and other subscription platforms (SVOD, or subscription video on demand), and have seen declining levels of piracy in recent years owing to the affordable SVOD model. These platforms act as commissioning agents, growing the demand for content, though also have access to historical and international product and directly challenge the viability of alternative platforms.

Free-to-Air broadcast television has seen a fall in market share directly in relation to growth in the SVOD market. Owing mostly to Seven West Media, Western Australia houses 9.8% of free-to-air businesses in Australia, yet only 6% of screen production enterprises. With 10.8% of the general workforce, and a declining free-to-air sector, industry seek opportunities to grow screen production in the state in order to maintain and improve market share.²

Workforce Characteristics

Gender disparity appears to have worsened slightly over the past twenty years, with women making up 45% of the workforce nationally in 2016, versus 48% in 1996.³ Disparity varies significantly across roles, and is worse in technical or 'below-the-line' occupations. Job Outlook data shows that nationally Film, Television, Radio and Stage Director occupations have experienced very strong growth since 2011, have a higher than average percentage of workers working full-time, and lower than average unemployment.⁴ At the technical level, Performing Arts Technicians occupations, including screen-industry workers, have also seen moderate growth, with average unemployment outcomes and 56% of workers working full time. This data suggests that careers in the screen sector are relatively stable and sustainable, once established, despite the project-based nature of the work.⁵

The project driven nature of most work in the Screen sector underlies the character of its workforce and in particular its career pathways and associated issues. Screen projects are generally short-term and characterised as high-risk financially, and this situation contributes to an environment where employers prefer to work with established professionals, rather than invest in emerging creatives and technicians. The Screen Australia report Emerging Visions identified a 'career wilderness' where early career workers needed to 'prove themselves' but were largely unable to access opportunities to do so.⁶

A snapshot of Screen

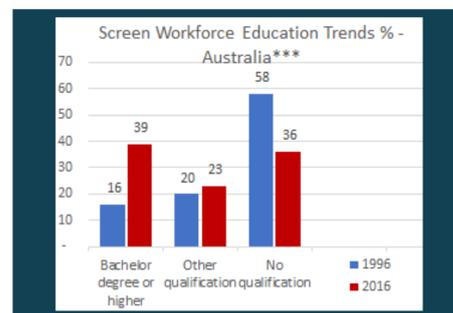
Film | Television | Outside Broadcast | Animation | Video Production | Post Production | Broadcasting | Subscription Video on Demand



\$18B

Estimated cultural and audience value generated by the Screen industry in 2018**

The Screen industry employs 20,000 people directly, with a large economic impact beyond initial production revenue.



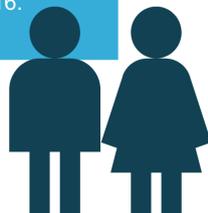
A twenty year comparison shows students are attaining higher levels of education and training than previously.

Women in Screen

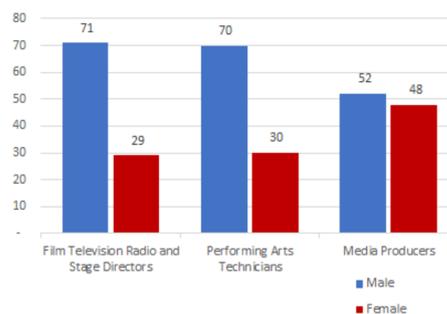
There are 652 fewer women in the sector than there were 20 years ago.

Women in Screen 1996-2016:*

Women made up 48% of the Screen workforce in 1996, but only 45% in 2016.



Gender Profile in Screen Occupations- Australia**



References:

- * <https://www.screenaustralia.gov.au/fact-finders/people-and-businesses/employment-trends/men-and-women>
- ** <https://www.screenproducers.org.au/assets/Media-Release/20180625-Screen-Producers-Australia-Report.pdf>
- *** <https://www.screenaustralia.gov.au/fact-finders/people-and-businesses/employment-trends/qualifications>

Industry Developments

Funding Environment

While a sustained period of economic uncertainty has led to a decline in private investment in the arts, which has impacted across the creative industries, governments at the state level are keenly aware of the growth potential of screen industries, and have been competing to offer the best incentive packages.

Screenwest is working with WA government to identify strategic applications for government funding and are considering the area of small productions as a unique, unexplored funding area. Supporting small productions would create more opportunities for work for independent practitioners and early-career professionals. Barriers to entry into the production side of the sector have fallen significantly since advances in technology have reduced the hardware costs traditionally associated with film production.

Development of a screen hub, similar to South Australia's Adelaide Studios,⁷ housing industry standard production studios as well as post-production businesses and other related organisations on-site is under consideration. National production companies have recently highlighted that current facilities in WA are an inhibiting factor when considering where to film productions.

Western Australian Regional Film Fund

This Screenwest Fund⁸ is intended to generate 'the greatest possible regional outcomes through developing and supporting regional based business, services and talent by delivering a coordinated investment strategy into regional screen industry activities...'. A stated aim of the fund is to facilitate job creation in the regions of WA. Industry and regional local authorities are reporting positive outcomes from the fund, including increased tourism and better job outcomes for regionally based talent.⁹

Local content quotas

SVOD service providers are not held to the Broadcasting Services Act 1992, which requires free-to-air broadcasters to screen at least 55% locally produced content. Recent research suggests SVOD catalogues can hold as little as 2% Australian content. Consequently, consumers are accessing a higher proportion of foreign content than previously, and opportunities for local producers are mixed. In November 2018, the European Union legislated that SVOD producers should screen at least 30% European content, and Australian industry is watchful of similar potential changes in Australia.^{10 11} Given the rapid growth of SVOD, such a change would significantly increase demand for local production, and consequently skilled local labour. In this instance, current enrolments in screen-related VET and higher education qualifications may not be sufficient to meet industry demand in the short term.

Workforce Opportunities

The credits component of any feature length film begins to give a sense of the diversity of roles within the digital media workforce. They cross the creative and technical divide and necessitate a significant level of adaptability. Depending on the scale and nature of the project, workers can require high degrees of specialism or very broad skills. The smaller scale of WA's screen sectors mean that workers need a broad range of skills to build a portfolio career that is sustainable; however, industry can struggle therefore to find workers with deep, rigorous knowledge in specific areas when required. The high degree of specialisation in the screen workforce means ageing workforce issues can arise. There are few Foley artists in Western Australia, and currently not enough reliable work to sustain more entrants to the workforce. This workforce is ageing and not currently being replaced by new specialists, meaning reliance on imported labour is likely to increase in the future. This is a contributing factor in the mobile nature of the sector, where temporary and large teams assemble here or in other states from across the country and internationally. It can be difficult in this context to distinguish what constitutes WA industry.

Bespoke content

Affordability, ease of access and a shift by audiences into online social media spaces, is driving increased demand for bespoke

filmed content for marketing purposes, and is contributing to an associated rise in demand for the services of WA's post-production businesses. A shift towards software solutions is alleviating previous cost-pressures associated with investment in equipment and hardware for production, while spurring a constant demand for upskilling. These trends are underpinning a rise in the number of small-scale enterprises, especially in the documentary space. Producers at this level require pitching and project management skills to support their projects.

Outside broadcast

Evolving technology in the outside broadcast arena is changing the face of this significant workforce also, with fewer workers required on site, and an increased demand for studio-based editors with higher level qualifications.

Skills and Training Strategies

Industry current training

A review of technical screen and media units of competency, for currency and alignment with digital developments, is due to complete in 2020.¹² Industry have identified a need for flexibility within the training package, to allow for the rapidly evolving technology environment workers will need to train for. Changing consumer preferences and access to online content have also been captured through industry consultation.

Though the specifics of the technical developments within each sub-sector of industry and within each occupation will differ, certain commonalities can be found, primary amongst which is the need to be adaptable to change and able to pursue self-directed learning, since change will be a constant feature of these industries going forward. Transferable skills will be a focus of the updated units of competency, in recognition of the fact that most workers in the sector will transition through various creative roles throughout their career.

Addressing gender disparity

Vocational qualifications are delivering occupational outcomes in some technical areas facing the worst gender disparity, including in the Performing Arts Technician occupational category which captures lighting and sound technicians, camera operators and other equipment operators.¹³ Therefore initiatives could be considered to attract more women into these courses or to direct female students into work placement initiatives such as traineeships or internships.

Supporting early-career practitioners and graduates

Given the issues faced by graduates, and the subsequent impact on the sector of a lack of pathways to established careers, industry seeks solutions to nurture sustainable careers for graduates. Strategies to ensure a pipeline of skilled graduates and early-career practitioners into this growing sector could focus on industry-immersed workplace training. Exposure to industry and an opportunity to build a portfolio, network and demonstrate talent and reliability are crucial factors in creating pathways to sustainable careers in the sector.

Traineeships and work placements

Screenwest collaborated with Matchbox Pictures and For Pete's Sake Productions on 30-episode series *The Heights* in 2018-19.¹⁴ The production model saw students from North Metropolitan TAFE and the WA Screen Academy work with experienced creatives across the team. The production supported 41 interns and attachments, gave 30% of staff their first screen credit, and adopted a proactive diversity hiring strategy. A second season has now been commissioned.

In 2019-20, industry will explore the possible application of the traineeship model in Western Australia, including the potential of adopting a group training model to address issues around the project-based nature of work in the sector. Traineeships provide for paid, industry immersed training and work experience and would support students to begin to build networks and demonstrate their value to employers.

Please Get in Touch

FutureNow is continually seeking broad input from stakeholders and representatives in the Western Australian Screen sector. If you would be interested in providing your perspective on this snapshot or related workforce matters for your sector, our Creative Industries Industry Manager would love to hear from you:

Ann-Marie Ryan | Industry Manager - Creative and Cultural Industries | Information Communications Technology

0412 033 038 | amryan@futurenow.org.au

References

All links accessed 11.11.19

- 1 <https://www.screenproducers.org.au/assets/Media-Release/20180625-Screen-Producers-Australia-Report.pdf>
- 2 <http://clients1.ibisworld.com.au/reports/au/industry/default.aspx?entid=1816>
- 3 <https://www.screenaustralia.gov.au/fact-finders/people-and-businesses/employment-trends/men-and-women>
- 4 <https://joboutlook.gov.au/Occupation?search=&code=2123>
- 5 <https://joboutlook.gov.au/Occupation?search=&code=2123>
- 6 https://metroscreen.org.au/EmergingVisions_Metro_Screen.pdf
- 7 <https://www.safilm.com.au/adelaide-studios/facilities-overview/>
- 8 <https://www.screenwest.com.au/film-in-wa/wa-regional-film-fund/about/>
- 9 <http://www.gedc.wa.gov.au/GEDCRDS/media/documents/Annual%20Reports/GEDC-Annual-Report-2018-19.pdf>
- 10 <https://www.meaa.org/news/screen-creatives-on-both-sides-of-camera-call-for-action-on-local-content/>
- 11 https://www.aph.gov.au/Parliamentary_Business/Committees/Senate/Environment_and_Communications/AustralianContent
- 12 <https://www.skillsforaustralia.com/project-page/culture-screen-media-and-broadcasting/>
- 13 <https://joboutlook.gov.au/Occupation?search=Career&code=3995>
- 14 <https://www.screenwest.com.au/news-events/2018/06/abc-new-series-the-heights-western-australia/>