

FutureNow.

Screen

FutureNow is an independent body that provides industry informed advice to influence skills development strategies across the Creative, Leisure and Technologies sectors. Our work assists Western Australia to be prepared with the new order skills required by the evolving economy and our changing society.

Western Australia is home to a vibrant, technically skilled screen sector, known for its warm portrayals of communities and landscapes. At a time when people all over the world are spending more time at home in search of entertainment, and when exclusive live premieres have been replaced by all-access subscription service launch dates, audiences, government, and the screen industry itself have come to appreciate the unique contribution Western Australian stories can make, and the opportunities that wait to be exploited.

The Western Australian film industry has experienced mixed fortunes in 2020-21. While nationwide, Australia enjoyed a 114% increase in overall screen production value to \$1.9 billion – a record¹ – the proportion of activity in WA fell to 5.6%² - barely half of our population share of 10.4%.³ While international production companies cite Australia's relatively low levels of Covid-19, and therefore minimal restrictions on activity as a key point of attraction to film here⁴, Western Australia, with the lowest rates in the country, proved too difficult to engage with- particularly because of a lack of physical infrastructure.

The WA screen industry make a significant contribution to the local, national and global understanding of Western Australia, and while the current environment is challenging for the sector, industry sees opportunities to turn conditions to their favour and grow the size of the Western Australian screen workforce considerably in the long term. A well promoted campaign to advocate for improved physical infrastructure for the WA Screen sector has delivered a commitment from the WA state government to build a \$100 million screen industry hub housing studio, production and post-production suites as well as premises for creative technologies businesses. However, for the industry to thrive, an accompanying whole-of-sector workforce development plan will be required to ensure that Western Australia has access to the talent necessary to deliver ongoing activity and capacity for the sector.

Current environment and emerging trends

Impacts of COVID-19

The WA Screen sector is facing supply-chain challenges in the current environment, with quarantine measures in response to the COVID-19 pandemic having had a profound effect on film and television production globally, including in Western Australia. Social distancing requirements made filming some scenes challenging, and a halt to interstate and international travel has made it difficult or impossible to assemble a full production crew in one place.

Screen sector workers cross the creative and technical divide and, depending on the scale and nature of the project, can require high degrees of specialism or very broad skills. The smaller scale of

WA's screen sector means that industry can struggle to find workers with deep, rigorous knowledge in specific areas when required. 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. A halt to travel has therefore had a significant effect on local industry's capacity to work.

Additionally, screen production involves a high level of up-front investment with unpredictable returns. This permanent feature of the industry makes it vulnerable to economic fluctuations, and current global uncertainty is creating additional challenges for the sector in this respect. Decreased capacity to generate investment is limiting activity and producers have reported issues accessing insurance, since operational risk around the safety of performers cannot be adequately managed without substantial additional cost, if at all.

Government investment

Government investment at both the state and federal levels has increased, and to a limited degree offset commercial challenges, though in various instances, this funding has or is due to come to an end. 47.0% of the financing for film productions and 24.0% of the financing for TV drama productions between 2017-21 has been from government. The federal government in 2021 committed to an additional \$140.0 million over four years from 2019-20 to encourage foreign producers to film large-budget productions in Australia.^{5 6 7 8 9 10 11}

\$2.5m in Lotterywest funding was redirected to the Western Australian Screen Industry Sustainability Package via Screenwest in response to the pandemic in 2020. The package included the Taking Care of Business funding initiative which saw \$1.5m directed to supporting 60 production and post-production companies and producers to sustain and develop their businesses during the COVID-19 pandemic and; the Bright Ideas Crew Capacity Initiative, targeted at below-the-line crew and directors, which supported 27 practitioners to deliver 25 projects during the quarantine period.

Australian Content Quotas, SVOD, and Australian workforce implications

The film and television production sectors have access to expanded audiences through the entry of Netflix, Disney and other SVOD (subscription video on demand) platforms. These services act as commissioning agents, growing the demand for content, though also directly challenging 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.¹²

SVOD service providers are not held to the Broadcasting Services Act 1992,¹³ which requires free-to-air broadcasters to screen at least 55% locally produced content. Research suggests SVOD catalogues can hold as little as 2% Australian content.¹⁴ Consequently, consumers are accessing a higher proportion of foreign content than previously, limiting opportunities for local producers.¹⁵ In April 2020, Australian content quotas were temporarily suspended as part of a broadcast media relief package.¹⁶ While this puts Free-to-Air broadcasters on a level playing field with SVOD providers, it diminishes opportunities for Australian content producers and their associated workforce. As of 2021, content quotas for children's programming have been permanently removed.¹⁷

Conversely, in November 2018, the European Union legislated that SVOD producers should screen at least 30% European content.¹⁸ An Australian Federal Inquiry into the issue- and subsequent Options Paper¹⁹ which closed for review on 3rd July 2020, highlighted a wide range of positions are held across the broadcast and production sectors, and an August 2021 survey found the majority of Australians

would support a 20% quota being placed on SVOD services here.²⁰ Australian industry is watchful of potential changes following on from the review- given the rapid growth of SVOD, any change could significantly impact demand for local production, and consequently for skilled local labour.

Workforce development strategies

Key skills and labour challenges

Labour shortages are worsening for the screen sector in WA and nationally, as competition for a relatively small pool of labour intensifies. Owing to very thin markets in some specialist areas, WA currently struggles with capacity when more than two productions are running concurrently.

The most pressing labour gaps are identified in technical, or “below-the-line” occupations. These roles provide excellent access to work opportunities, and career progression, helping industry entrants to build networks, prove their reliability, and gain screen credits. However, industry report little interest in these roles among students and graduates, despite their being the most common pathways to sustainable careers.

Several of these occupations are ideally suited to vocational training, and could be supported by the delivery of qualifications including the Certificate III Live Production and Technical Services, and the Certificates III and IV in Screen and Media.

In 2021, FutureNow advocated on behalf of industry for the Certificate IV in Screen and Media to be added to the Lower fees, local skills half-price course list.²¹ The course has not been added to the list to date, and this remains an ambition of industry for which FutureNow will advocate.

Industry-immersed training

Because of the significant financial risk around any screen project, the international screen industry relies heavily on reputation, experience, and screen credits when hiring crews. Given the issues this creates for graduates, and the subsequent impact on the sector of a lack of mid-career specialists, industry seeks solutions to nurture sustainable career pathways for new industry entrants. A lack of industry networks and screen credits are cited as the key barriers to becoming established in the Australian screen sector, so training programs which provide opportunities to be immersed in the field are vital.

Screenwest collaborated with Matchbox Pictures and For Pete's Sake Productions on 30-episode series *The Heights* in 2018-19.^{22 23} 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.

While the benefits of such a structure are obvious, achieving a more permanent solution has proven difficult for industry to date. A permanent arrangement would be reflective of the screen environment of the mid-twentieth century, when Australia's industry boomed, and the guilds ensured that career pathways were available and well-defined.

FutureNow will work with industry, training, and government stakeholders in 2022 to explore sector-wide strategic workforce planning.

Please get in touch with FutureNow

FutureNow is continually seeking broad input from stakeholders and representatives in the Western Australian digital technology 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:

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Note that unreferenced information in this snapshot is based on direct consultation by FutureNow with WA industry.

All references current as at 25.1.2022

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