ADVANCE QUEENSLAND

SCREEN INDUSTRY 10-YEAR ROADMAP AND ACTION PLAN

Queensland Government

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Cover and inside front cover:
Hardworking Queensland crew filming in downtown Brisbane on the set of *Thor: Ragnarok*.

FOREWORD

Queensland is home to a vibrant and growing domestic screen industry. In recent years, Queensland has established itself as a destination of choice for international screen productions, and is now well positioned to grow the state's presence in the international market.

The screen industry is a fast-moving, global industry driven by advancements in technology and audience demand for content. The strengths and competitive advantages inherent in the Queensland screen industry have allowed Queensland to take part in a multi-billion dollar global industry that supports millions of jobs directly related to film, television, and gaming.

Additionally, our screen industry is supported by high-level creative and technical expertise, the creation of rich and diverse content across a range of genres and platforms, and investment in world-class infrastructure.

As part of the Advance Queensland initiative, the Advance Queensland Screen Industry 10-Year Roadmap and Action Plan has been developed to target emerging opportunities in the sector, aiming to build Queensland as a global commercial and creative leader in the screen industry, creating jobs and enriching the community with content that tells the stories of all Queenslanders.

The Roadmap aims to support the existing contribution the screen industry makes to the cultural fabric of our community, while recognising and maximising the sector's economic impact.

Informed by stakeholder and community input, the Advance Queensland Screen Industry 10-Year Roadmap and Action Plan will contribute to driving growth in the Queensland screen industry, ensuring it remains competitive in the global marketplace and supports local jobs by building international networks and enhancing collaboration; investing in new and emerging practitioners; building business, technical and creative capability in the industry; and growing an industry and regulatory environment conducive to the success of the sector.

The Roadmap recognises the breadth of the industry, encompassing a range of genres and content types including film, television, online content, and digital gaming, as well as the diversity of content creators including those from regional and urban areas, Aboriginal and Torres Strait Islander screen practitioners and women in screen. The Roadmap also highlights the potential of the screen industry to converge with other industries such as healthcare, education and tourism, supporting broader economic opportunities and growth.

The Advance Queensland Screen Industry 10-Year Roadmap and Action Plan provides Queensland with a strategic and dynamic pathway to strengthen the industry and realise the global growth potential of our screen industry.

In preparation of the Advance Queensland Screen Industry 10-Year Roadmap and Action Plan, we have ensured key industry stakeholders, including industry practitioners, small businesses, production companies, local and regional councils, and representative bodies, have had the opportunity to contribute to the Roadmap. This consultative approach will continue as actions under the Roadmap are implemented and delivered.

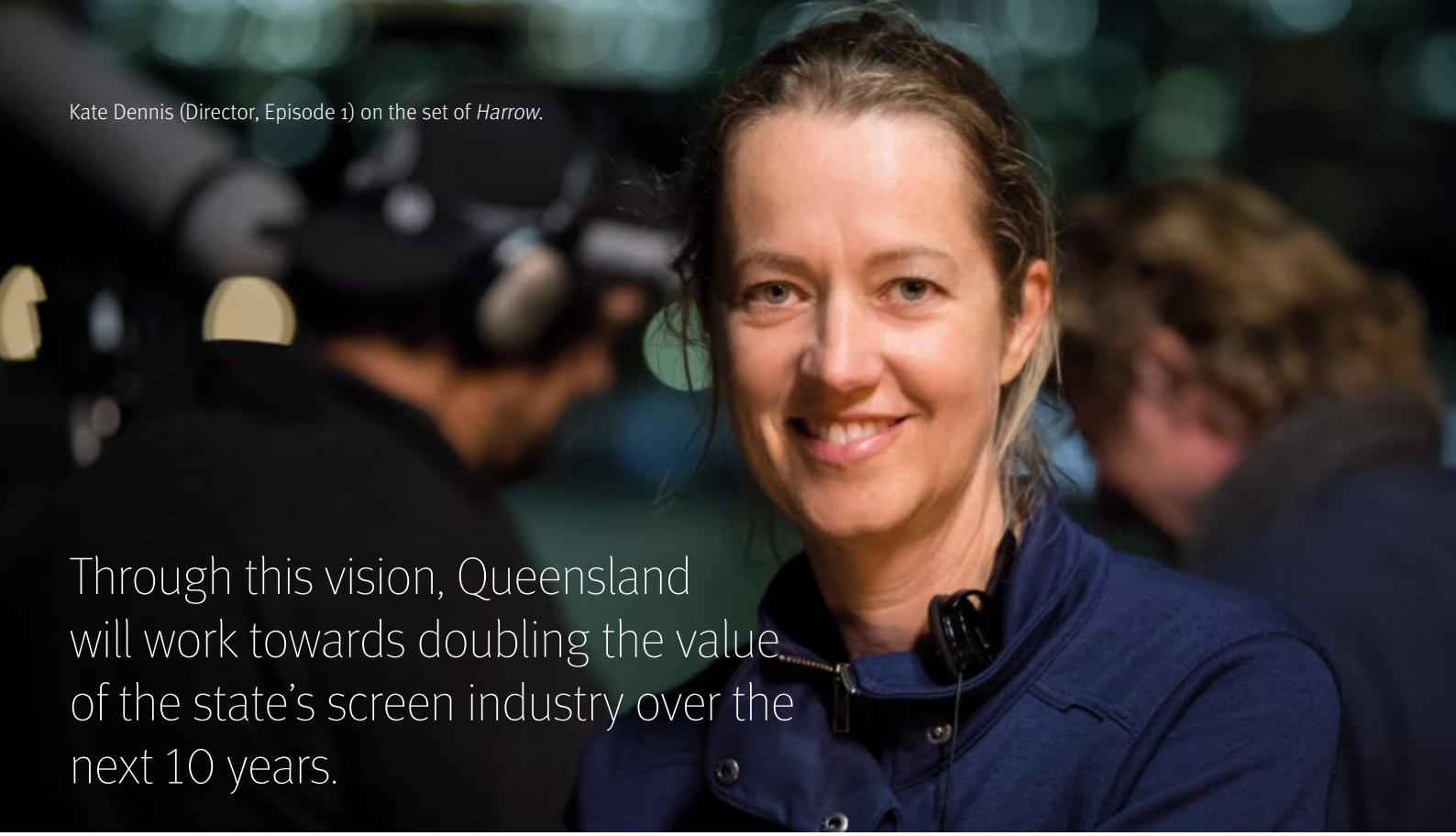
As the domestic and international screen industry continues to grow and develop, the Queensland Government will ensure the Roadmap remains responsive to the future needs of the sector, maintaining engagement with our stakeholders and ensuring our actions harness the full potential of our screen industry.

The Honourable
Annastacia Palaszczuk MP
Premier of Queensland
and Minister for Trade

Director of Photography Paul Spurling and Katie Orlowski, on the set of *Film to Fashion*, a Manifold Media production.

OUR VISION

By 2028, Queensland will be a globally recognised commercial and creative leader in the screen industry, creating jobs of the future, boosting our economy, and enriching the community with diverse content, created for Australian and global audiences in all formats and for all platforms.



Kate Dennis (Director, Episode 1) on the set of *Harrow*.

Through this vision, Queensland will work towards doubling the value of the state's screen industry over the next 10 years.

All Queenslanders will see the benefits of increased employment and economic activity associated with a thriving screen industry.

Building on the Queensland screen industry's recent successes, the Queensland Government is committed to strengthening the competitiveness of the industry, and investing in the creative jobs of the future, ensuring Queenslanders have high-tech skills and access to the facilities needed to maximise the full potential of the sector.

The Advance Queensland Screen Industry 10-Year Roadmap and Action Plan forms part of the government's Advance Queensland initiative investing in key industries with global growth potential, and provides a strategic and dynamic pathway to cement consistent and long-term growth in the screen industry, establishing Queensland as a key player in the global screen marketplace.

Queensland is well placed to strengthen our position and continue to grow as a leading screen destination.

According to Deloitte Access Economics:

Queensland is recognised as a production paradise and film-friendly state—known for its diverse and unrivalled natural locations, strong financial incentives, world-class facilities, post-production and visual effects studios, and award-winning talent and crew.

Over the past decade, fundamental changes to the way individuals consume content have taken place in the media landscape—defined by the entry of new online platforms offering streaming, catch-up TV, video on demand and user-generated video. However, with change comes opportunity, and the screen industry in Queensland has the potential to be well placed to capitalise on change and 'future proof' the industry.

This Roadmap establishes a long-term vision for industry, government and other stakeholders to work towards ensuring the cultural, creative and economic legacy of the Queensland screen industry. To achieve our collective ambition for the screen industry we will work together to:

- expand the global reach of Queensland's screen industry
- support Queensland's diverse local practitioners
- boost capability in the Queensland screen sector
- build a screen-friendly Queensland.

Our vision for the screen industry is deliberately broad and our strategies and supporting actions are flexible and agile to ensure we are able to capitalise on a wide range of future opportunities as the sector in Queensland grows, and new technologies and sub-industries emerge. Progress and implementation of the actions will be reviewed in 2023, taking account of development in the industry.

QUEENSLAND'S SCREEN INDUSTRY

Queensland has a well-established, thriving screen industry that encompasses film, television, games, streaming or subscription video on demand (SVOD), and other interactive platforms.

More than 340 film and video production and post-production businesses and digital game businesses operate in Queensland, employing up to 3017 people.

In 2016–17, Screen Queensland funded 37 screen productions, which generated an estimated $214 million in Queensland Production Expenditure (QPE).

The 37 projects included four international productions and 33 domestic productions, including 28 Queensland-based screen entities and five interstate screen entities working in Queensland.

Queensland is at the forefront of production on new screen mediums, producing Australia's first television series of virtual reality experiences for SBS, the first to secure an Australian-made series for Netflix and the first to partner with Stan to produce a full-length feature.

Queensland's diverse and talented cast and crew have been recognised with Academy Awards, Emmy Awards, BAFTAs and other international awards for their content, created for multi-platforms.

Queensland is also home to a diverse array of screen practitioners producing content to enrich and strengthen our community. Aboriginal and Torres Strait Islander companies and creatives have long contributed to the distinct storytelling of Queensland, reflecting our unique culture to domestic and international audiences.

The Queensland screen industry continues to offer industry attachment and masterclass opportunities to support early-career screen practitioners through professional skill transfers, business development and networking opportunities. During the filming of *Thor: Ragnarok,* 30 Aboriginal and Torres Strait Islander filmmakers took part in a masterclass with director Taika Waititi.

These initiatives, as well as walk-on roles and opportunities to attend film premieres, are often embedded in Queensland productions and create ongoing opportunities for our diverse Queensland practitioners.

Opportunities to increase community engagement are also identified, such as the Welcome to Country performed by Goodjinburra Dancers on the first day of filming for *Aquaman* at the Gold Coast Village Roadshow Studios.

Queensland's interactive game industry specialises in online games and games for mobile devices that have been downloaded all around the world.

There is also a growing interest in the use of interactive games and immersive technology such as virtual reality and augmented reality to address issues in other sectors including tourism, education and health.

Screen infrastructure and businesses are largely located in South East Queensland, however talented and skilled practitioners and companies based across the state have created smaller screen hubs attracting national and international productions.

Investing in Queensland's domestic screen industry will be essential to building a resilient and sustainable sector, ensuring a continuous pipeline of productions and positioning Queensland as a leader in the global screen marketplace.

QUEENSLAND'S SCREEN INDUSTRY

There are

341

film and video production, post production and digital game businesses in Queensland

Home to the

LARGEST

sound stage

in the Southern Hemisphere and the largest purpose-built water tanks in Australia

37 film-friendly councils

$1.3 million

invested in Aboriginal and Torres Strait Islander projects, talent and businesses in 2016–17

37 productions

funded by Screen Queensland in 2016–17, generating an estimated

$214 million

in Queensland Production Expenditure and

2340 direct jobs

for Queenslanders

More than

35 film festivals

across the state

First

Netflix Original Series and **Stan feature**

in Australia

In 2016–17,

33 domestic productions

(including 28 Queensland-based screen entities and five interstate screen entities working in Queensland), and **four international productions**

12 international

blockbusters in the past five years

$573 million

direct Queensland Production Expenditure in the past three years

Royal Theatre, Winton, at the Vision Splendid Outback Film Festival.

Economic contribution of Queensland's screen industry

In addition to the rich and diverse social and cultural importance of the Queensland screen industry, the sector also makes a significant economic contribution.

Given the growth of the global industry and developments in new technologies and applications, there is potential to grow this economic contribution and maximise Queensland's share in the global industry by harnessing new and emerging opportunities and investing in our existing strengths and competitive advantages.

Harnessing this future growth in the industry will be made possible through existing investments in the Queensland screen industry. Already the Queensland Government's $50 million *Production Attraction Strategy* (PAS) has enabled the attraction of a pipeline of 'blockbuster' international screen productions to the state, making 2015–16 and 2016–17 the most successful years for screen production in Queensland in the past 10 years.

Deloitte Access Economics has estimated that between 2016–17 and 2021–22, production in Queensland will increase in value by 15 per cent, creating a 12 per cent increase in employment in the sector. It is expected the Queensland screen industry will generate growth in the future in three key areas, including the production of content across various content types and platforms, the exhibition and screening of films and other content, and the online broadcast of content on the internet and various on demand platforms.

In 2016–17, Queensland's screen industry contributed an estimated $981 million to the Queensland economy. In this same period, it is estimated the Queensland screen industry supported 7180 full-time equivalent (FTE) positions across the sector, from content creation to final audience consumption. This forms part of an estimated US$653 billion global industry supporting more than 6.5 million jobs directly related to film, television and gaming.

The economic contribution of the screen industry is drawn from across the supply chain and generated by a wide range of different content creators via numerous platforms.

Key areas of growth in the industry include the interactive games industry, which is projected to grow to more than US$96 billion globally. In Australia, the gaming sector is estimated to contribute $91 million to the Australian economy, employing 728 FTEs, with the demand for upstream activities created by the development of games, contributing an additional $24 million of indirect value.

WINTON

Winton, a small town in a remote part of Queensland, had a strong rural sector and a healthy tourism industry for many years. In the early 2000s they were looking to diversify and build a stronger economic future for the town. At this time a large Australian-British co-production, The Proposition, decided to shoot in the area. This production, with a cast and crew of 500, spent three months in town and the economic impact was massive and immediate.

Since 2005, four feature films have been shot in Winton and this year the town will host the fifth annual Vision Splendid Outback Film Festival. Winton Shire Council is at an advanced design stage to build a film studio for visiting film makers and the Shire's new Economic Development Plan will dedicate a chapter to the growth of the film industry in the town.

Still from Roni the Flying Fish

Queensland-based games development accounts for approximately 19 per cent of this total market, with significant potential to grow this share. Overall, the digital games sector is expected to experience a strong increase in growth in the next five years, contributing an additional $21 million to the economy compared to 2016–17.

In addition, the screen industry in Queensland supports the transfer of skills and knowledge across different sectors, producing flow-on benefits for the economy.

For example, virtual reality and gaming are increasingly being used in education, health and wellbeing, and tourism to improve customer and consumer experiences. It has been estimated that core Australian content generated $252 million in export earnings in 2014–15, and the screen industry as a whole generated $725 million in tourism expenditure in Australia. Approximately 230,000 international tourists visited or extended their stay in Australia as a result of viewing Australian film and TV content, according to survey results.

LIQUID ANIMATION

Liquid Animation is an award-winning animation and design studio. Combining traditional 2D artistry with 3D digital production, the studio works with some of the world's leading entertainment companies including Disney, Warner Bros. and Mattel.

Their work spans a broad range of production including TV series, TV commercials, virtual reality content, educational and digital animations, mobile shorts, theatrical releases and the development of their own intellectual properties.

Liquid Animation is equally at home in 2D and 3D animation. Three areas define the essence of Liquid Animation:

- **Their design and development work—they have a very strong and experienced design and pre-production team that has worked on diverse projects, including many of their own intellectual properties. Recently they undertook the character and show visual design development for the upcoming *Muppet Babies* TV series for Disney TVA.**
- **Their specialist character animation—they started out as a traditional cell animation studio on *The Proud Family* for Disney Channel. This is imprinted in the Liquid DNA. Several artists from this show are still with the studio today and now form the backbone of the studio's animation leads. This enables Liquid to retain their strong character animation skills across 2D and 3D animation.**
- **Through their television commercial experience, Liquid has developed the ability to work across many hybrid forms of animation, integrating 2D plates into 3D space to developing stop motion animation techniques with mixed physical and 3D sets, through to integrating compositing live action with high end VFX and animation.**

QUEENSLAND'S SCREEN INDUSTRY

International blockbusters and high-end television projects supported by the Queensland Government have generated significant direct investment and jobs growth for Queensland:

Harrow
$15.4 million expenditure
90 jobs for Queenslanders

Harrow, a new television drama series filmed in Brisbane and South East Queensland in partnership with Queensland company Hoodlum Entertainment, ABC Studios International and ABC, is estimated to have injected $15.4 million of direct expenditure into Queensland and created more than 90 jobs.

Danger Close
30 roles—principal cast and bit-parts
120 full-time jobs for Queenslanders

Danger Close, which commenced filming in Queensland in May 2018, is predicted to create 120 full-time jobs for Queensland crew members, and offer 30 principal cast and bit-part roles.

Aquaman
$100+ million expenditure
750 jobs for Queenslanders

Aquaman, the Warner Bros Pictures' film is estimated to have generated expenditure of more than $100 million and supported approximately 750 jobs for Queenslanders.

Tidelands
$16.39 million expenditure
80 jobs for Queenslanders

Tidelands, currently in production in Queensland in 2018, and the first Netflix Original Series to be commissioned in Australia is estimated to generate $16.39 million in direct expenditure supporting employment for 80 Queenslanders.

Thor: Ragnarok
$145 million expenditure
1800 crew (80 per cent Queenslanders)

Thor: Ragnarok, generated $145 million in Queensland Production Expenditure and employed more than 1800 crew, of which more than 80 per cent were Queenslanders.

Chris Lilley & Netflix comedy project
$6.35 million expenditure
350 jobs for Queenslanders

A new comedy project between Netflix and Chris Lilley, also currently filming in Queensland, is generating approximately $6.35 million for the local economy and employing approximately 350 cast, crew and extras.

Dora the Explorer
30–40 roles—cast and bit-parts
350 full-time jobs for Queenslanders

The next blockbuster to be filmed at the Gold Coast's Village Roadshow Studios, will be a live-action version of *Dora the Explorer* from Paramount Pictures. It is expected to support employment for 350 full-time Queensland crew, and offer 30 to 40 cast and bit-part roles for actors.

THE GLOBAL PICTURE

The global screen industry is constantly evolving as a result of technological innovations, increasing competition and changing audience preferences.

Digital technology

Around the world, digital technology is disrupting every aspect of society and the screen industry is no exception to this phenomenon. Advances in technology have made the creation of screen content more cost effective, efficient and impressive.

From shooting films in high definition digital to creating immersive 3D worlds in gaming, technology has enabled the design, production and distribution of screen content that was not possible previously.

Emerging screen practitioners are also benefiting from open, instant, and in many cases, free access to a critical mass of users via online distribution platforms such as YouTube.

Global subscription video on demand (SVOD) use is forecast to reach 546 million by 2022, with the **Asia Pacific region** predicted to account for **43 per cent of global SVOD subscriptions** within the same timeframe.

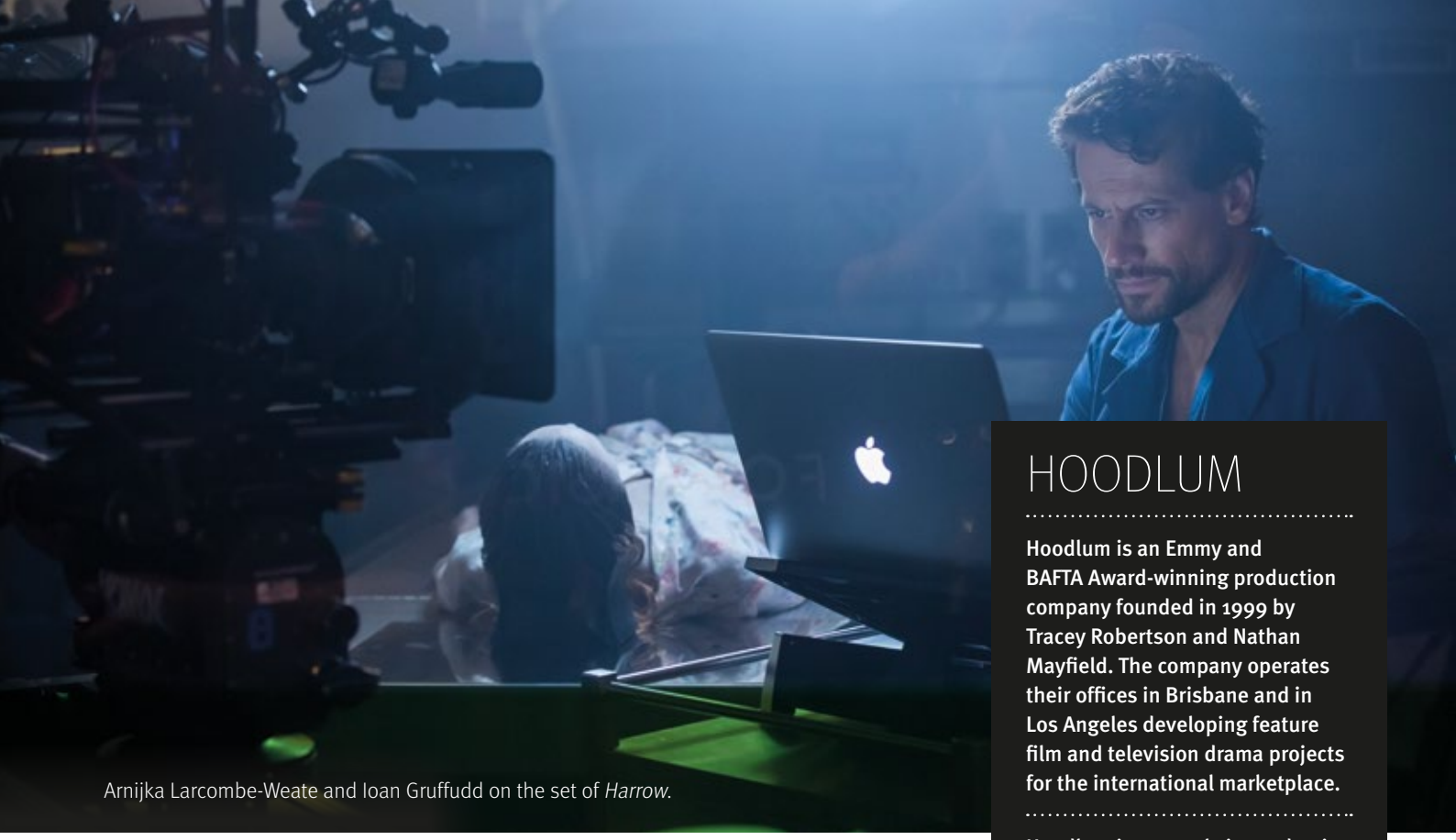
Nearly half of all Australian adults accessed a catch-up service in the six months to June 2016, and in the two years since commercial operations began in Australia, SVOD services have amassed 3.7 million paid, free and trial subscriptions.

93 per cent of Australian households have some form of gaming console.

There were **3.773 billion global internet users** in 2017, equalling 50 per cent of the worldwide population and **4.92 billion global mobile phone users**, which represented 66 per cent of the worldwide population.

Each home in Australia now has on **average 6.6 screens** capable of viewing screen content, and almost one in two homes has an internet-connected smart TV.

The **Australian video game industry** is estimated to be worth $2.958 billion and 47 per cent of Australians report being involved in some form of gaming.



Arnijka Larcombe-Weate and Ioan Gruffudd on the set of *Harrow*.

Shifting consumer preferences

The ways we watch and interact with screen content are constantly evolving. Consumers now demand more content and choice around how and where they access it, at a time that suits them.

The increasing prevalence of high-speed internet and subscription video on demand (SVOD) services has placed an unprecedented level of power in the hands of consumers.

Increasing demand for new content

Screen content is now generated at a rapid rate to meet increasing demand. Fifty-nine per cent of respondents surveyed by Deloitte in their Media Consumer Survey 2017 reported that watching television on any device is their preferred entertainment activity.

Fifty-nine per cent of respondents also reported binge watching (watching three or more consecutive TV episodes in a single sitting). In the United States, where streaming services have been available for longer, 73 per cent of survey respondents report binge watching. In Australia, SVOD rates (32 per cent) surpassed subscription rates for Pay TV (31 per cent) for the first time in 2017.

The prevalence of binge watching, a shift in consumer preferences and increasing sophistication of mobile devices has influenced the amount of screen content available online. Globally, video traffic is predicted to be 82 per cent of all consumer internet traffic by 2021.

The interactive games industry is the fastest growing entertainment industry globally. This growth is expected to continue, up by 8.9 per cent compounded annually to 2018.

Growth will be driven by the continued expansion of online and mobile games markets, the new generations of consoles and the expansion of interactive game making into other fields such as health, education and training.

Increasing competition

There is an increasing level of competition among states and countries to attract screen productions. Often this competition is based on available rebates and/or offsets offered by governments to encourage production companies to base their productions in a certain location.

While this presents production companies with more choice on where to base their productions, governments must ensure they

HOODLUM

Hoodlum is an Emmy and BAFTA Award-winning production company founded in 1999 by Tracey Robertson and Nathan Mayfield. The company operates their offices in Brisbane and in Los Angeles developing feature film and television drama projects for the international marketplace.

Hoodlum is currently in production on *Tidelands*, the first Netflix Original Series to be produced in Australia. This follows on from *Harrow*, a 10-part series with ABC Australia and ABC Studios International (ABCSI), which has just been confirmed for a second series. *Harrow* is ABCSI's first scripted drama outside the USA.

This support has included access to Screen Queensland's development program, support to travel to key industry markets to sell their shows, investment in production, and working with Hoodlum to provide new career pathways for a range of industry including writers, editors and post supervisors.

The Kindergo children's reading app offers high quality, curated books designed to encourage discoverable learning.

LIKE A PHOTON

Children's storytelling app Kindergo has been developed by Like a Photon Creative and provides a reader-driven experience using different modes of reading with multiple levels of interaction. The app allows children to improve over multiple books and is already gaining momentum in the marketplace, including being made available on Virgin Australia's inflight entertainment system.

remain competitive in a global context by ensuring their location-based incentives are comparable to international jurisdictions. Australian states are also competing for federal screen funding from Screen Australia, as state governments become increasingly aware of the recognised economic and social flow-on benefits of screen productions.

Faster internet speeds and the increasing accessibility of online shopping channels are anticipated to continue to support the digital purchase of video games over the next five years.

The online video game sales industry is also expected to continue facing strong competition from mobile gaming. However, gaming console manufacturers' initiatives to promote small or independent games with lower price points may partly offset the competition.

Changing financial environment

The costs associated with the various components of the screen industry are likely to change in response to global trends.

For example, in the motion picture and video distribution sector, profit margins have benefited from the lower costs associated with digital film distribution to cinemas, however sector profitability has weakened over the past five years as falling revenue has outpaced the decline in production and distribution costs.

The gaming sector has seen the rise of downloadable content where publishers rely on advertisements and in-game micro transactions to drive revenue. However, it can be difficult for developers to create and sustain long-term profitability with free-to-play games that rely on this model.

STRENGTHS AND OPPORTUNITIES

Queensland's screen industry is well positioned to build on its existing strengths and take advantage of emerging opportunities.

Competitive advantage

The southern hemisphere's largest sound stage (3716 square metres or 40,000 square feet) with nine stages and three water tanks is located at Village Roadshow Studios on the Gold Coast. These world-class facilities have attracted international blockbusters including *Pirates of the Caribbean: Dead Men Tell No Tales, Thor: Ragnarok* and *Aquaman*.

Queensland's diverse natural landscape, including a mix of desert, agricultural land, tropical rainforest, secluded beaches, small towns and sophisticated urban environments mean that filmmakers have an array of choice for filming locations, all within the same state.

These natural landscapes also hold an important cultural significance for their Traditional Owners, and for the Aboriginal and Torres Strait Islander screen practitioners who seek to respect and uphold cultural knowledge and values through their work.

Queensland is enriched by the storytelling of Aboriginal peoples, Torres Strait Islander peoples and people from culturally and linguistically diverse backgrounds. Championing this diversity in our domestic screen industry allows unique Queensland stories and experiences to be shared with an international audience, opening up new markets for screen practitioners.

Capability

Queensland's strengths are bolstered by the high level of skilled Queensland screen practitioners attracting productions to the state.

Queensland's vocational education and training providers and universities offer a wide range of screen qualifications, and the state's creatives and production cast and crew are experienced and professional.

There is an opportunity to establish clearer pathways for students studying screen qualifications, to transition into the industry, gain practical industry experience and secure ongoing employment, while ensuring practitioners are developing the necessary digital skills and capabilities to thrive in the industry.

Attracting skilled practitioners to work in Queensland's screen industry is a further way to bolster the capability and status of the sector. There is an interdependency between large-scale international productions and the domestic industry, particularly in the attraction and retention of highly skilled practitioners who can share their knowledge and assist with further building the skills and capability of the Queensland screen industry workforce.

New platforms and partnerships

The evolution of new online platforms offering streaming, catch-up TV, video on demand and user-generated video has irrevocably changed the ways people consume screen content, how it is created and delivered, and the sheer amount of content choice available for audiences.

Championing this diversity in our domestic screen industry allows unique Queensland stories and experiences to be shared with an international audience.

The rise of these platforms has presented new opportunities for creators to distribute and monetise their work. Depending on the platform the content will be available on, creators need to juggle managing business strategies, sponsorship and advertising revenue, merchandising, branding and licensing to ensure the project is financially viable. If this can be done successfully, content creators now have a world of opportunity to showcase their work and find ways to bring in revenue.

A key avenue for growth through new platforms and screen content markets is by establishing and fostering strategic

Children interacting with Point Zero's HoloSpace.

POINT ZERO

Ipswich-based Advance Queensland Hot DesQ program recipients, Point Zero, specialise in developing interactive holographic display technology that provides engaging and immersive solutions for advertising, education, and messaging.

Point Zero's product HoloSpace is a world first for combining the power of 3D visualisation with interactive technology. It immerses viewers into a world of virtual reality without requiring them to put on goggles.

partnerships with international players—such as large US networks and broadcasters looking to enter the Australian market.

Queensland producers, Hoodlum, partnered with Netflix to create *Tidelands*, the first Netflix Original Series produced in Australia. This is a positive step forward in building relationships with influential international partners.

Convergence with other industries

The screen industry is uniquely positioned to support other industries through skills transfer and innovation. The increasing use of gamification in the health and wellbeing and education sectors is one example where screen can be used to benefit other industries. Games can serve as a powerful tool for education providers in childhood education, primary and secondary school, university courses and skilled professional training.

Not only can games be produced for domestic education providers, but they can also be exported to international markets that are also experiencing growth in demand for education and health services.

Studios can play a key role in applying game mechanics and game design techniques to engage and motivate people—this is an area that Queensland has the potential to grow and reclaim market share in the gaming subsector of the screen industry.

Diversity

The telling of stories through film, television and other screen media is vital to a community's understanding of itself, and representation to others. The screen industry makes an essential contribution to the cultural landscape including through its ability to showcase diversity.

There are also significant opportunities for Aboriginal and Torres Strait Islander screen practitioners, those from culturally and linguistically diverse backgrounds, and women in the screen industry to tell unique stories and be involved in the creation of screen content that reflects their experiences.

While Queensland's competitive advantages have attracted numerous international productions to the state, the production of local screen content presents clear opportunities to tell Queensland-specific stories, and represent Queensland's diversity. Continuing investment in the diversity of Queensland's screen industry will contribute to the cultural and economic strength of the sector.

INDUSTRY CHALLENGES

While the Queensland screen industry has a number of strengths and advantages, the growth of the industry will face a set of key challenges, particularly if the industry is not able to harness and invest in existing assets and emerging opportunities.

Maintaining competitiveness

To continuing growing the screen industry, Queensland needs to provide a competitive edge over other jurisdictions.

Each state in Australia is actively committed to attracting screen investment and improving their market share of production activity. There is also strong competition to attract production activity from interstate and overseas. Across the globe, hundreds of screen funding bodies compete to attract, secure and develop screen content and thousands of content developers are vying for business in an exceptionally competitive market.

Queensland and Australia have a large range of incentives and investment funds to attract and support the development of screen content. However, incentives and investment have not kept pace with changes in global incentives and the emergence of new technology.

Until recently, Australia had one of the lowest Location Offsets globally, making it less competitive in the attraction of international and high-value broadcast series. The recent increase in the Location Offset from 16.5 per cent to a more competitive 30 per cent will ensure Queensland's screen industry can continue to attract international productions to the state.

Some of the world's biggest gaming studios departed Australia after the global financial crisis, and in their place, independent, home-grown studios popped up—and they moved south, taking Queensland's industry share with them. Queensland was home to 49 per cent of digital games industry workers in 2006–07, and this figure is now 19 per cent. Maintaining competitiveness in the gaming sector is a challenge, especially in attracting and retaining skilled talent.

Career progression

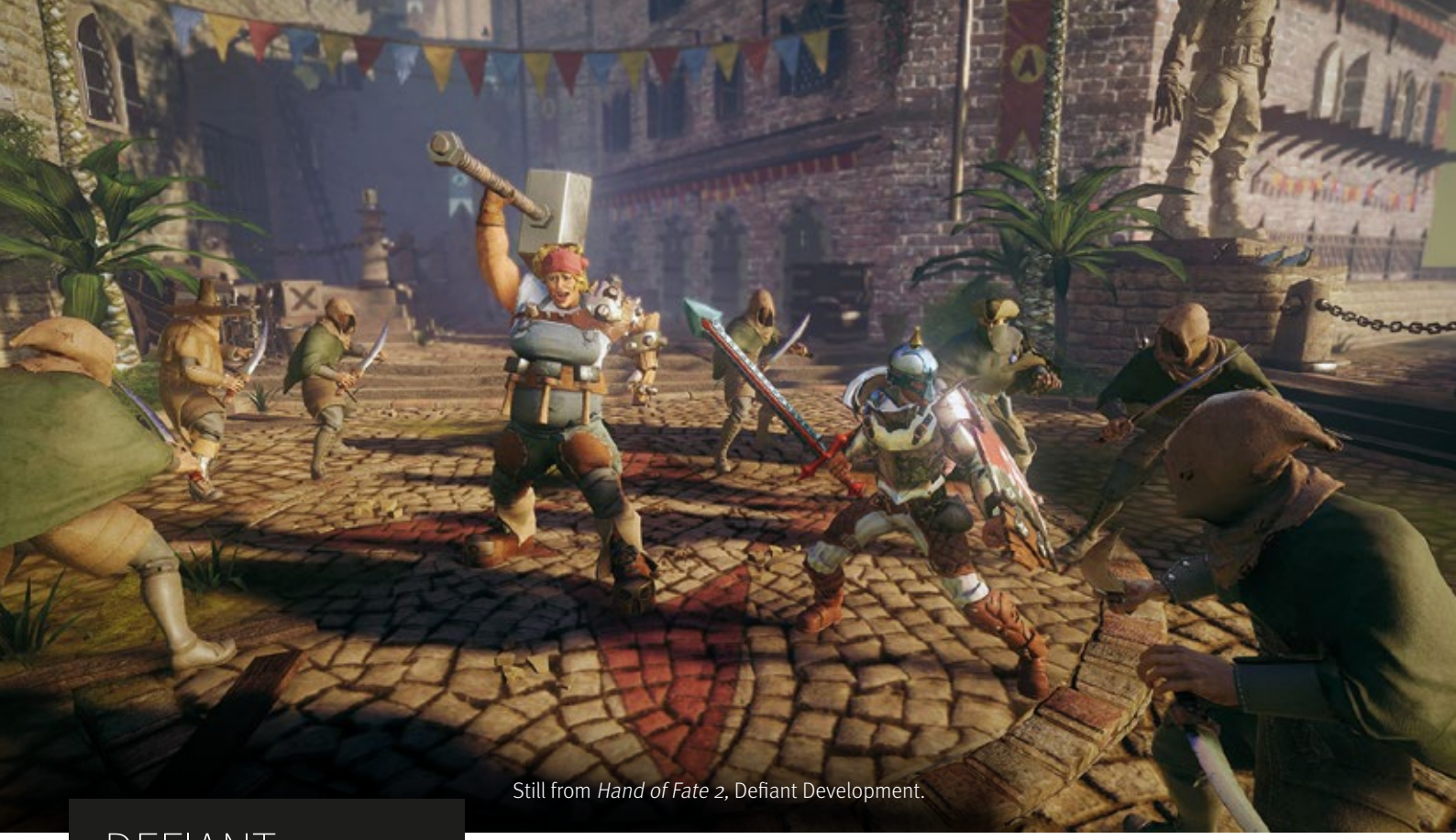
Retaining Queensland's technical and creative talent is a common challenge across the film, TV and games production subsectors. The small number of large film and TV production companies and large games companies in Queensland means disparate work for practitioners, making it difficult to build a career. Regular migration of talent is common within Queensland's industry as practitioners pursue job opportunities around Australia and overseas.

Any increase in production activity needs to be supported by locally-based creatives, administrators, business managers and crew. A strengthened industry will need to provide university graduates and emerging practitioners with access to opportunities to broaden and diversify their skills, and established practitioners will need opportunities to grow their portfolios of work.

Until recently, Australia had one of the lowest Location Offsets globally, making it less competitive in the attraction of international and high-value broadcast series.

The Game Developers' Association of Australia notes there is currently an oversupply of graduates in Australian games production—or an undersupply of jobs in the sector.

This has led to strong competition among graduates for the few employment positions, with many graduates forced to find employment in other industries, take up contracting positions supplemented by other employment or move interstate and overseas.



Still from *Hand of Fate 2,* Defiant Development.

DEFIANT DEVELOPMENT

Defiant Development is an independent game development studio founded in 2010. Defiant has developed a range of games for mobile, PC, augmented reality and console platforms.

They are known for *Ski Safari* (iOS and Android), *Hand of Fate* (PC, PS4 and Xbox One) and their latest release, *Hand of Fate 2* (PC, PS4 and Xbox One), taking out the Game of the Year accolade at the 2017 Australian Game Developer Awards.

The Queensland Government through Screen Queensland (SQ) has supported Defiant Development through a range of programs including travel support to key markets for games including South by Southwest, the Games Developers Conference and PAX East.

Kim Allom from Defiant Development was awarded a $20,000 SQ Mentorship to support her work as a games developer.

Pressure on infrastructure

Queensland is the second largest state in Australia, covering a total area of 1.73 million square kilometres. While the vastness of Queensland's geography provides a range of location options for productions, costs to transport equipment and crew presents a challenge when it comes to working in the regions.

Even within South East Queensland, where most current productions are concentrated, additional infrastructure is required to sustain a constant pipeline of domestic and international work.

Access to enabling digital infrastructure and high speed digital connections are also crucial for screen industry practitioners, including content producers and gaming developers. Ensuring the delivery of critical digital infrastructure outcomes across Queensland, is critical to the prosperity of the screen industry.

Production pipeline

While Queensland's screen industry is expanding rapidly, compared to global industry leaders like the United Kingdom, California and Georgia in the United States and Bollywood in India, the industry is small and niche. These huge global players benefit from economies of scale that arise from vertical integration and/or clustering, and are supported by strong local networks.

This clustering ensures they attract a consistent pipeline of productions. In the absence of economies of scale, coordination of Queensland's industry presents a challenge, limiting the development of a sustainable screen ecosystem. Without coordination, the industry is vulnerable to fluctuations in demand, making it difficult to guarantee ongoing work.

QUEENSLAND GOVERNMENT ACTIONS TO DATE

The Queensland Government has invested in a range of initiatives and programs to support and grow the screen industry in the state.

Production attraction

The $50 million *Production Attraction Strategy* (PAS) has attracted a pipeline of 'blockbuster' international screen productions and high-end television productions to Queensland, including *Thor: Ragnarok, Aquaman*, and domestic productions such as *Tidelands* and *Harrow*. To date this investment has supported 15 productions, providing more than 5200 employment opportunities for Queenslanders. The PAS is forecast to inject $630 million into the Queensland economy.

Marvel: Creating the Cinematic Universe

The world-exclusive *Marvel: Creating the Cinematic Universe* exhibition at Queensland Art Gallery | Gallery of Modern Art (QAGOMA) ran from 27 May to 3 September 2017.

The exhibition attracted more than 269,000 visitors, making it QAGOMA's most successful international exhibition. *Marvel: Creating the Cinematic Universe* contributed to making 2016–17 a record-breaking year for the gallery in terms of visitor numbers and attendance at ticketed events.

Events and festivals

From 2018 to 2022, Australian television's premiere event, the TV WEEK Logies will be held on the Gold Coast.

Queensland will host the World Congress of Science and Factual Producers in November 2018, the must-attend event for industry professionals and executives working in specialist factual television and media.

The World Congress is estimated to attract more than 700 people, including 500 international broadcasters, producers and executives to Queensland to discuss industry trends and showcase excellence in factual programming.

As part of Myriad Festival 2018, held in Brisbane from 16 – 18 May 2018, the *Future of Play*, an interactive gaming stream, was incorporated as part of the program offerings, exploring the future of screen based play.

Queensland hosts more than 35 film festivals and other events across the state, including:

- Brisbane International Film Festival
- Asia Pacific Screen Awards
- Gold Coast Film Festival
- Heart of Gold Film Festival
- Port Shorts Film Festival
- Queensland Touring Film Festival
- Travelling Film Festival
- Vision Splendid Outback Film Festival
- CILECT (The International Association of Film and Television Schools) Congress
- Game On.

Screen Queensland programs

Screen Queensland is Queensland's dedicated authority supporting the screen industry to be a significant contributor to the economic and cultural wellbeing of Queensland.

Queensland hosts more than 35 film festivals and other events across the state.

Screen Queensland delivers a number of programs to support the Queensland screen industry including:

- **Screen Production Investment**—supports direct investment in the production of high-quality domestic screen projects. In 2015–16 and 2016–17 this program alone supported 46 projects, generating more than $49 million Queensland Production Expenditure.
- **Screen Development Investment**—a program that invests in projects with at least one Queensland key creative attached to support the development of screen stories with commercial, creative and cultural potential (this program includes the Talent Fund, which allows writers who are yet to attach producers to their project, to access support for mentored script development).
- **Game Development and Marketing Investment—**supports Queensland game developers to create and market

Director Mairi Cameron with Rachael Blake on the set of *The Second*.

high-quality games, including computer games, console, mobile virtual reality and augmented reality games.

- **Travel and Marketing Funding**—a program to support Queensland production companies and games development companies to take their projects to key markets in Australia and internationally with a view to raising finance and securing commissions.

Screen Queensland also delivers a number of targeted initiatives to support the Queensland screen industry and create career pathways for talent (key creative and crew) including:

- **The Queensland Originals Program** is a major program supporting the development and production of content across genres and for all screen platforms. In recent years, it has involved partnership with ABC iView, SBS and Stan and an exhibition partnership with *ScreamFest LA*. This is a major initiative, the first of its kind in Australia and with scope to grow, which includes short film, short-form online series (factual and fiction), virtual reality, and feature film. This suite of initiatives includes development workshops, workshops to support production and development of skills in this field, and production/post production. All are credit-based programs, allowing practitioners to add them to their professional portfolio and find further work.
- **SQ Attach**—an attachment program to support early career Queensland-based screen professionals to work on mid and large-scale productions.
- **Incubait, SQ Projector** and **Retold**—initiatives to develop writing talent and strong scripts, with the support of internationally-renowned mentors, that will appeal to fans and financiers.
- The **Greg Coote Scholarship**—awarded to a writer, producer, director or creative executive and provides a unique opportunity to spend six to eight weeks in an established television series writers' room.
- The **Gender Parity Program** to ensure appropriate female representation in key creative film roles.
- The ***Screen Queensland Aboriginal and Torres Strait Islander Strategy 2016–19***—initiatives to advance the distinct storytelling voices of Queensland's Aboriginal peoples and Torres Strait Islander peoples.
- **SQ Shorts**, which supports production of 12 short films by early and mid-career practitioners, providing the opportunity to develop, produce and market a short film aimed at prestigious Australian and international festivals.
- **The sqhub**—a shared workspace dedicated to the screen industry that will accommodate games developers, programmers, audio designers and business leaders.
- **SQ Business program**—initiatives to develop strong screen businesses and ensures production entities transform into thriving creative production companies through strong stories and good business understanding and partnerships.

The sqhub co-working space located in Teneriffe, Brisbane.

The Queensland Government is also investing in strategies to create career pathways through *Advancing education: An action plan for education in Queensland*. This plan includes *The Schools of the future STEM Strategy* for Queensland state schools, and *#codingcounts: A plan for coding and robotics in Queensland state schools*.

The action plan promotes fast-tracking the digital technologies curriculum including coding, which will mean that Queensland children will have the skills to enter the screen industry, particularly digital and visual effects, gaming, app development and virtual and augmented reality platforms.

Advance Queensland

Since 2015, the Advance Queensland initiative has been driving innovation and economic growth in Queensland through a range of programs and partnerships designed to build capability, foster collaboration, attract investment, stimulate jobs growth and encourage an entrepreneurial culture.

These programs have the potential to support and grow the Queensland screen industry by creating new opportunities for innovators, supporting industry divergence and strengthening regional capabilities.

Advance Queensland programs supporting the Queensland screen industry include:

- The **Business Development Fund**, which provides early stage co-investment funding to Queensland-based businesses that are commercialising research, or innovative ideas, products or services.
- The **Ignite Ideas Fund**, which supports startups and SMEs commercialise market-ready innovative ideas.
- The Advance Queensland **Create Queensland** grants program, which provides creative YouTubers with funding, production resources and expert support to develop high-quality digital content and reach new global audiences.

The sqhub

The sqhub was launched in 2018 as the first co-working space in Australia dedicated to the screen industry.

It currently houses 13 full-time tenants—all of them young, dynamic businesses working at the cutting edge of games and content creation for new and traditional screens—two hot desks and runs a program of masterclasses, workshops and events aimed at encouraging collaboration and connection, and developing skills for creative excellence and business development and growth.

The sqhub is funded and operated through Screen Queensland.

Director of Photography Murray Lui
on the set of *Grace Beside Me*.

FUTURE ACTIONS

Actions being undertaken provide a foundation for the screen industry to build upon. The Queensland Government will implement additional specific actions to achieve our vision, capitalise on our strengths and make the most of our opportunities. Four key strategies will support further growth of the screen industry in Queensland.

1. Expand the global reach of Queensland's screen industry

Enhancing Queensland's status as a leader in the screen industry will contribute to attracting major international productions to Queensland, building international networks, and enhancing opportunities for creative and commercial collaboration.

The following actions support this strategy by encouraging the production of international blockbuster films in Queensland, supporting local jobs and growing the economy, and by building Queensland's profile through industry events.

Actions are targeted towards building Queensland's national and international profile as a leader in the industry, while advocating for the right regulatory and investment environment to grow the industry and create jobs.

Deliver the Far North Queensland screen production strategic plan to develop a stronger screen industry in Far North Queensland.

Lobby the federal government to extend the Location Offset legislation to include subscription video on demand (SVOD) for series television.

Seek regulatory changes to ensure SVOD providers (such as Netflix and Stan) spend at least 10 per cent of their Australian subscription revenue on commissioning new Australian content.

Foster a pipeline of events to showcase Queensland's screen industry, including:

- **hosting the World Congress of Science and Factual Producers in 2018 to promote Queensland as a cutting-edge location for screen and related cultural events to major international broadcasters**
- **host the *TV Week Logies* from 2018–2021 using this platform to raise the profile of the Queensland screen industry.**

Develop a trade strategy for the screen industry to increase Queensland's attractiveness as an investment destination and facilitate trade links for the screen industry through trade missions.

On location filming *Harrow.*

2. Support Queensland's diverse local practitioners

Supporting Queensland's diverse local practitioners ensures that practitioners at all levels, across different platforms and genres, are able to successfully operate throughout Queensland, contributing to the cultural fabric of the screen industry and growing the local economy.

Introduce and promote a 10 per cent post production, digital and visual effects (PDV) rebate to encourage productions to undertake their post-production work in Queensland and grow Queensland's PDV sector.

Champion and reinvigorate the games industry in Queensland including through the:

- **appointment of Screen Queensland's first board member with specialist expertise in the gaming sector to raise the profile and provide leadership in supporting the specific needs of the sector**
- **appointment of a dedicated gaming liaison officer within Screen Queensland to support the gaming sector in Queensland.**

Undertake a feasibility study into the viability of a new film precinct to support small productions in South East Queensland.

Grow the sqhub, Screen Queensland's co-working space for game developers and screen industry professionals to enable collaboration within the screen industry for innovative approaches.

Proactively pursue the establishment of Australia's first YouTube Space in Queensland to provide local producers greater opportunity to showcase their online content and access international markets.

Include a dedicated gaming development space in the expansion of the precinct linking games developers with startups, incubators, investors and mentors ensuring growth in this industry is fostered and supported.

3. Boost capability in the Queensland screen sector

This strategy recognises the existing creative and technical expertise that characterises Queensland's screen industry and seeks to invest in it, by creating new pathways for emerging practitioners, increasing awareness and access to existing support systems in place, and encouraging greater collaboration across the industry.

Actions that form part of this strategy have been crafted to target greater support for emerging practitioners, encouraging practitioners to diversify their skills and providing established practitioners with opportunities to grow their exposure and portfolio.

These actions will also contribute to increasing employment and investment opportunities for Aboriginal and Torres Strait Islander screen industry practitioners and businesses operating in the industry. These actions also recognise the importance of equipping practitioners with the relevant digital and technical skills needed to thrive in the industry.

Pilot a screen industry careers forum to showcase the opportunities the screen industry presents for employment, providing an opportunity for emerging practitioners to learn from more experienced industry players, and link practitioners with training providers.

Partner with universities and training providers to offer advice on business and financial management capabilities required of graduates to be successful in the screen industry.

Work with industry, universities and training providers to develop a framework of qualifications required to work in the screen industry to ensure there is clarity for those entering the industry or seeking to further their career in the industry.

Recruit new screen industry mentors into the Mentoring for Growth program to provide advice and support to screen industry practitioners operating as small businesses, fostering the sharing of business and industry knowledge and expertise.

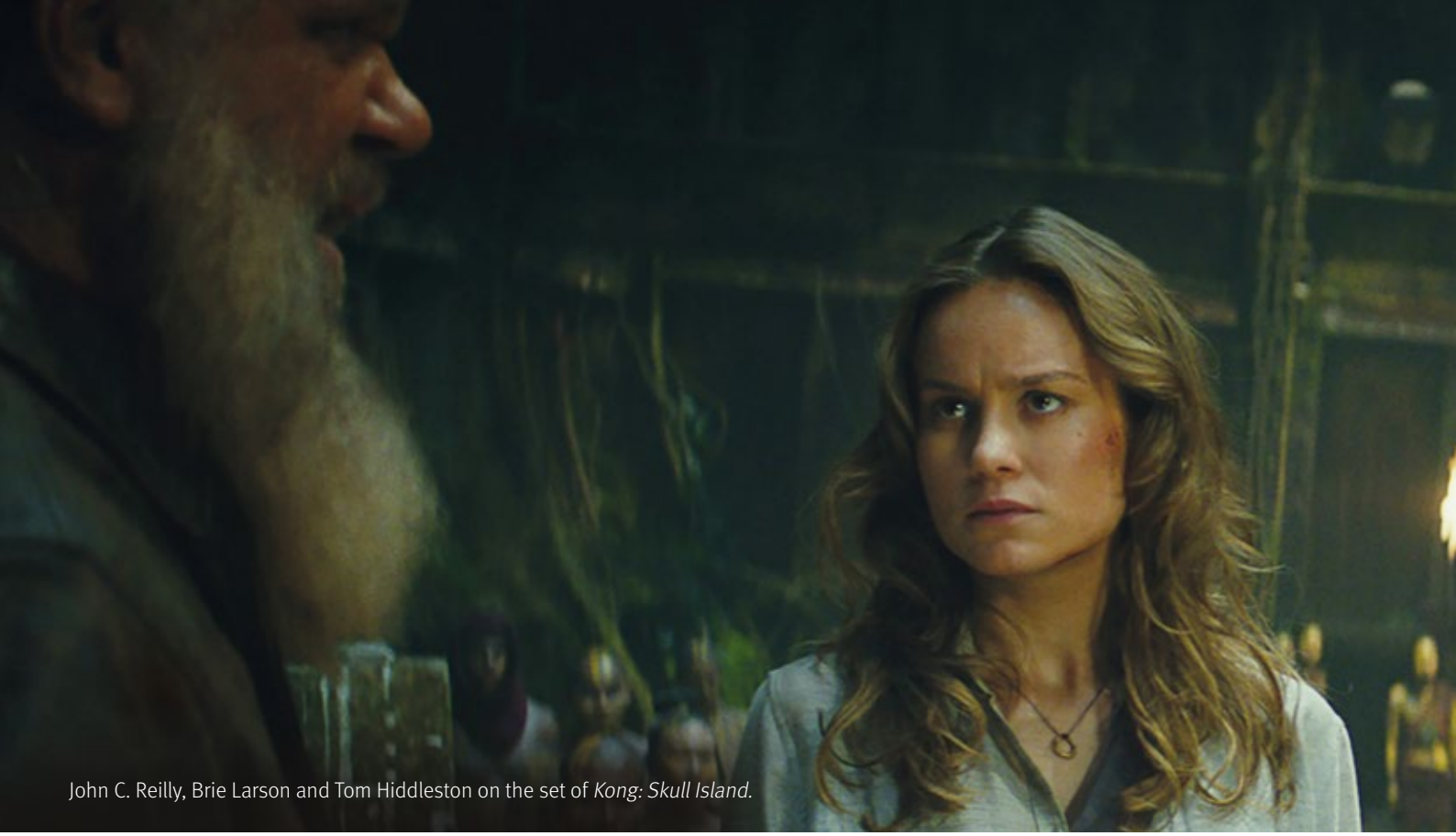
Connect small businesses in the screen industry to Queensland Government grant programs, business workshops, forums and networking opportunities, such as the Office of Small Business Mentor Chats, to discuss business challenges and share ideas for harnessing new and emerging opportunities.

Develop an industry-specific web page on Business Queensland, bringing together advice, forms and links for businesses operating in the screen industry to help them better navigate the business and financial aspects of their endeavour, and facilitate access to available government support in one place.

Work with financial institutions and finance industry bodies to overcome barriers to lower interest rates and non-secured loans for the screen industry.

Ask Jobs Queensland to develop a workforce plan for the screen industry mapping out strategic needs of the future workforce in the screen industry.

Undertake a whole-of-government review of eligibility criteria across Queensland Government funding programs designed to foster innovation and the economy, to remove unnecessary barriers and encourage the participation of screen industry practitioners.



John C. Reilly, Brie Larson and Tom Hiddleston on the set of *Kong: Skull Island.*

4. Build a screen-friendly Queensland

This strategy targets factors contributing to a successful and prosperous environment for the screen industry. Actions have been designed to foster a screen eco-system that is conducive to the success of the Queensland screen industry more broadly.

Specifically, these actions are intended to build capability at all levels of the production cycle by ensuring the appropriate facilities are available in Queensland and by encouraging a culture of industry and regulatory awareness among key stakeholders, and local and state governments.

Dedicate $12 million over four years to establish a fit-for-purpose studio for small film and television productions in Brisbane to make it easier for local and emerging businesses to make local productions.

Undertake a feasibility study into the development of the Winton Film Production Studio as a foundation to explore the potential of regional film hubs.

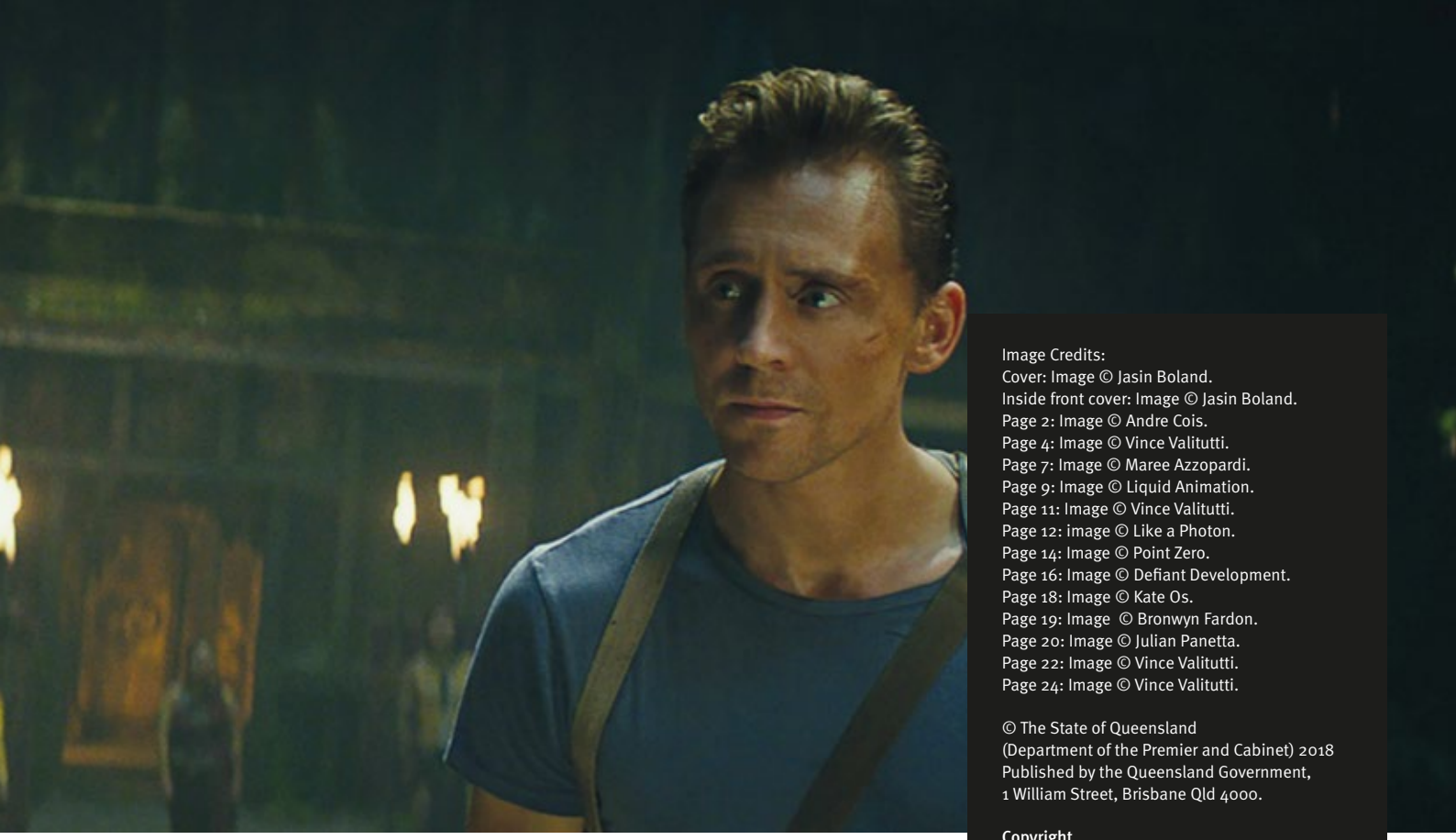
Review the regulatory environment of the screen industry to identify regulatory impediments impacting on business growth.

Develop film-friendly guidelines for local governments and state government departments to make it easier for productions to occur across Queensland, particularly in regional areas.

Work with the tourism industry to identify and pursue emerging opportunities to promote film location-based tourism and experiences.

Establish an industry-based advisory committee to advise the Queensland Government of emerging opportunities and challenges facing the screen industry in Queensland.

Develop a Queensland Screen Business Directory, similar to the existing Screen Queensland Crew Directory, to provide screen-related businesses across Queensland with more opportunities to partner with each other and to be commissioned by others to take part in new projects.



Oversight of the Roadmap's implementation will be provided by the establishment of a Queensland Government screen industry inter-departmental steering committee.

For more information:

Online: advance.qld.gov.au/our-vision/roadmaps.aspx

Email: screen@premiers.qld.gov.au

Post: Advance Queensland Screen Industry 10-Year Roadmap and Action Plan
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