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Front cover

Ignite Digi

Inside cover

Michael O'Neill, Australia's Best Street Racer that was developed as part of Screen Tasmania's short form comedy development program #ComedyConcentrate.

Minister's foreword

he Tasmanian Government is a strong advocate for Tasmania's cultural and creative industries. We are focussed on job creation in the screen sector and building on the extraordinary success of recent years.

Strategic investment in Tasmania's film sector has seen our state showcased to the world with the Oscar-nominated film Lion. This follows local and international success of The Kettering Incident, The Light between Oceans and the comedy series Rosehaven.

In 2017, the Tasmanian screen industry's success continues with the feature film *The Nightingale* shooting across the state. One of Tasmania's lesser known creatures, a unique cave spider, will star in Bookend Trust's *Sixteen Legs* and four short-form comedy projects from the Screen Tasmania/Screen Australia initiative #ComedyConcentrate were previewed at the State Cinema as part of the Ten Days on the Island festival.

To ensure the industry thrives long into the future, in 2015 the Tasmanian Government released the Cultural and Creative Industries Strategy. Screen Tasmania's Strategic Plan 2017 - 2021 builds on the aims outlined in Tasmania's Cultural and Creative Industries Strategy, taking account of the particular circumstances of the screen industry.

Emerging from this period of exceptional growth, it is time for the industry to consolidate and mature. Through Screen Tasmania, the challenge and opportunity, is to ensure the sector's sustainability and longevity.

To that end, I welcome this Strategic Plan for Screen Tasmania 2017 - 2021, which presents the Tasmanian Government with a blueprint to assist Tasmanians working in screen production.

I am confident the presence of distinctive Tasmanian stories on film and television screens around the world will continue well into the future.



DR VANESSA GOODWIN MLC MINISTER FOR THE ARTS

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Aboriginal acknowledgement

The Tasmanian Government, the Department of State Growth and Screen Tasmania acknowledge the Australian Aboriginal and Torres Strait Islander peoples of this nation. We acknowledge the traditional custodians of the lands on which Screen Tasmania is located, the muwinina people, and the entirety of the Tasmanian Aboriginal community, and we humbly pay our respects to their Elders, past and present.

Image

Little J & Big Cuz, animated for Ned Lander Media and NITV by Blue Rocket Productions.



About Screen Tasmania

Screen Tasmania is the entity within the Department of State Growth which is responsible for delivering Tasmanian Government support to the screen production industry through grants and investment.

Screen Tasmania's Advisory Board provides advice to the Minister for the Arts and Department of State Growth executive on applications for support.

To this end, the aims of Screen Tasmania are intimately bound up in the objectives outlined in the Department of State Growth's Corporate Plan:

- Work with Tasmanian businesses and industry to support growth and job creation.
- 2. Grow and support Tasmania's visitor economy.
- 3. Build Tasmania's brand as the best place in the country to live, work, invest and raise a family.
- Support industry and business growth by strategically managing our infrastructure and transport systems.
- Build organisational capacity by developing our people, safety, systems and culture.

- Screen Tasmania works very closely with other relevant units of the department, including Arts Tasmania, Events Tasmania and the Tasmanian Museum and Art Gallery (TMAG). Screen Tasmania leverages these relationships and other relationships within government effectively to better deliver on our aims.
- The 2016 broadcasts of The Kettering Incident on Foxtel, co-created and produced by Launcestonian Vicki Madden of Sweet Potato Films, and Rosehaven on ABC television, co-created by expat Luke McGregor brought Tasmania's talent, locations, stories and lifestyle to the nation. Both of these series achieved critical and awards success, worldwide sales, awards and audience engagement on broadcast, streaming and catch-up services.
- Hobart's flagship animation company <u>Blue Rocket Productions</u> completed two children's animated series Fanshaw & Crudnut, for the Nine Network, and the first ever Indigenous animated children's series, Little J & Big Cuz, which it animated for Ned Lander Media and NITV. Both of these shows are airing in 2017.
- Tasmania's first Playstation 4 console game, Party Golf was released from Hobart-based Giant Margarita, and has since been ported to PCs.
- Love Shack, a renovation reality series featuring many Tasmanian businesses and tradespeople was broadcast nationally on the Win Television network to great success.

- Roar Film's educational game The Voyage, produced with the Australian National Maritime Museum, continued to receive great acclaim and awards recognition. The company also released feature documentary Death or Liberty, a co-production with Irish company Tile Films. Roar Film continued its innovative working relationship with TMAG, preparing the interactive aspects and a documentary for the landmark kanalaritja an unbroken string, an exhibition which celebrates the unique practice of Tasmanian Aboriginal shell stringing - past, present and future.
- The one-hour natural history documentary Last Devils was produced by Wild Creature Films in Bicheno on Tasmania's east coast and released worldwide by Nat Geo Wild to great acclaim.
- Late 2016 saw the release of feature film Lion by See-Saw Productions and Aquarius Films. Lion tells the intrinsically Tasmanian story of Saroo Brierley, and the film was nominated for six Academy Awards, including Best Picture, and, at the time of writing, has taken over US\$120 million worldwide at the box office. This film showcases Tasmania's beautiful landscapes to the world, as did The Light between Oceans, which, while not set in Tasmania, featured the north west coastal town of Stanley and the iconic Nut.

I Box Office Mojo, retrieved 17 March 2017.



Тор

Light Between Oceans, Touchstone Pictures. Filmed on location at Stanley.

Above

Fanshaw & Crudnut. Image Blue Rocket Productions and Beyond International.



Wreck Seekers interactive game developed by Roar Film.

Bottom

Location image of Mount Roland.







The screen production landscape

In past years, media production has changed in an unprecedented manner. Before the commencement of Screen Tasmania's last strategic plan in 2011, Netflix had barely started offering streaming-only subscriptions and was available only in Northern and Latin America, smartphone penetration in Australia was at about 40 per cent, the iPad was a year old and Screen Australia was yet to launch its Multi-Platform Fund. The world has changed.



Image

The Kettering Incident, DOP: Ari Wegner. © TKI Holdings Pty Ltd 2015. Photo by Ben King. Picture courtesy of FOXTEL. Australian screen content is undeniably valuable. A recent Screen Australia report calculated that in 2014-15, the Australian screen production industry contributed over \$3 billion in value-add to the economy, and over 25 000 full-time equivalent employment positions. The same report also outlined the value that Australian screen content delivers to consumers, with Deloitte Access Economics calculating a total audience value of \$17 billion in consumer welfare benefit for Australian content released in 2014-15.²

The distribution of content has proliferated across platforms, particularly online and to streaming services, fragmenting audiences and threatening traditional business models. Audiences of independent cinema are stagnant,³ although new platforms have increased the opportunities for independent cinema to find audiences outside of traditional cinemas.⁴ The use of television as a primary screen for content consumption is declining, particularly for the young, but the access to television or television-like content on online platforms is conversely increasing.⁵

High-end television is increasingly the 'new cinema', with subscription television revenue stable and subscription video on demand (SVOD) revenues expected to increase markedly over the next five years.⁶

- 2 Screen Australia, Screen Currency: Valuing our Screen Industry, 2017.
- 3 Screen Australia, Issues in Feature Film Distribution, 2015, page 14.
- 4 Screen Australia, Online and On Demand, 2014, page 12.

Notably, the value of television drama has increased markedly in recent years, with the cost per hour for drama increasing 15.2 per cent from 2011-12 to 2015-16.7

Despite this drive towards high-cost programming, the total output of the sector continues to increase, with 87 466 commercial broadcast hours produced in 2015-16, an 11.2 per cent increase from 2011-12.8

While there are a multitude of platforms across which to attempt to release content, monetising that content continues to be challenging.

Pricewaterhouse Coopers forecasts that the market for filmed entertainment in Australia will increase by only 0.7 per cent as Compound Annual Growth rate from 2017-21.9

In the games space, Australian consumer spend is predicted to rise from \$2.44 billion in 2017 to \$3.09 billion in 2021,10 but the Australian interactive games development sector has been contracting, focussing on smaller studios largely developing games for mobile platforms.11

- 5 See, for example, Roy Morgan Research, 1 in 7 Australians now watch no Commercial TV, nearly half of all broadcasting reaches people 50+, and those with SVOD watch 30 minutes less a day, 1 February 2016, Accessed 17 March 2017
- 6 \$2 616 million to \$2 791 million; \$419 million to \$894 million (2016-21), Pricewaterhouse Coopers, Media and Entertainment Outlook 2016-2020.
- 7 ABS, 8679.0 Film, Television and Digital Games Australia, 2015-16.
- 8 ihid
- 9 Pricewaterhouse Coopers, op cit.
- 10 ibid.
- 11 Senate Environment and Communications References Committee, Game on: more than playing around, April 2016, see paras. 2.18 -2.36.

The Tasmanian context

The Tasmanian cultural and creative industries are recognised as having undergone significant growth in recent years. Increasingly, Tasmania has a unique position in Australia's imagination.



mage

Image from Noirhouse, Latitude Films. Photo by Carlie Devine. From left to right David Hudspeth, Melanie Irons, Shaun Wilson, and Sara Cooper. The opening of the Museum of Old and New Art (MONA), the reinvigoration of TMAG and the Queen Victoria Museum and Art Gallery (QVMAG), the delivery of cultural festivals such as MONA FOMA, Dark MOFO, Junction Arts Festival, Festival of Voices and Ten Days on the Island have all formed part of this increased attention. Further, many of the state's individual artists (visual, performance, written and others) have received worldwide acclaim, and Tasmania's screen content and talent is now part of the national industry conversation.

Tasmania is increasingly being recognised as a preferred destination for tourists and for our cultural environment and industries. Our creative sector is working toward being an export industry of note, working hand-in-hand with our tourism, cultural, cuisine, natural environment and fresh produce sectors.

These various sectors can, and increasingly do, work together to leverage opportunities and collaborate for the good of the state.

Tasmania's screen production industry has developed enormously over the last six years, but in many aspects it is still emerging. Tasmania is home to many young and eager people who are keen to be given opportunities in the screen industry. These people have limited professional industry experience (compared with their compatriots located in larger screen production centres on mainland Australia) and often need to work in other industries between securing limited but increasing screen jobs on offer in Tasmania. The Tasmanian screen sector and its people are ready and available to take advantage of new opportunities developing in the industry.

Today, the Tasmanian film, television and documentary screen production industry ('narrative' screen production)¹² is moving towards being a full-time, professional industry which is capable of creating popular, successful projects and servicing high-profile imported productions that are created elsewhere.

The industry can tell Tasmanian stories, whether they are about Tasmania or offer a Tasmanian perspective on a subject offshore, for audiences across Tasmania, the mainland and the world. We have seen the emergence of top-flight Tasmanian producers, writers and directors (referred to as 'key creatives' in screen production), such as Rolf De Heer, Sean Byrne, Jonathan auf de Heide, Vicki Madden, and actors with international careers including Simon Baker, Rachel Taylor and Essie Davis.

At the same time, we have a nascent interactive games development sector, comprised of innovative, dynamic Tasmanians with the potential for strong employment and export outcomes.

The creative aspects of the Tasmanian economy are genuinely leading to positive economic and social outcomes for the state. The Tasmanian screen industry aims to achieve ongoing, sustainable success – but it must be nurtured, given strategic direction and assisted. While the potential is great and the industry is growing, there is more work to be done.

Tasmania is looking for new ways to compete for investment capital, knowledge capital and entrepreneurial capacity. To be competitive, Tasmania needs to retain and develop its current position and capabilities that distinguish it from its competitors, and acknowledge both its advantages and constraints.

¹² Narrative or linear screen content such as feature films, television drama, documentaries or short-form content online is often distinguished from interactive content such as games or interactive websites and apps.



The Kettering Incident, DOP: Ari Wegner. © TKI Holdings Pty Ltd 2015. Photo by 3en King. Picture courtesy of FOXTEL.

In an attempt to explore Tasmania's place in this constantly shifting landscape and to focus on evidence-based policy development, the Screen Tasmania Advisory Board, in conjunction with Tasmanian Creative Industries Ltd and Skills Tasmania, commissioned a Workforce Development Plan (WDP) for the screen production industry.

The WDP has informed the development of this Strategic Plan as it recommended a number of strategies for building the capacity of the industry.

Research for the WDP reveal that the Tasmanian industry is largely formed of very small, low-turnover businesses and a few professionalised companies. There is also a cohort of screen industry freelancers who have their home in Tasmania but either work partly in other professions or travel throughout the nation working on screen projects.

The WDP has identified six workforce challenges.

For those Tasmanians wishing to enter the screen industry, the twin challenges are:

- aligning education and training programs with industry needs
- disseminating accurate information on screen industry career pathways needing to be addressed.

For those who have moved beyond initial training, the challenges are:

- improving the connections between screen businesses and prospective employees
- improving the business, legal and marketing skills of screen business owners
- improving the screen industry's approach to learning opportunities
- improving knowledge transfer within the workforce.

Screen Tasmania has commenced working with industry towards implementing this WDP.

Mission

To grow and develop a sustainable Tasmanian screen production industry to showcase Tasmanian talent, stories, creativity and our landscape

Featured

Rosehaven Series One Pty Ltd Stills Photographer Ben King (Left to right) Celia Pacquola - 'Emma' Liz Goulding - key make-up and hair designer / Olivia Zak make-up and hair artist.

Below

The Kettering Incident. Matt LeNevez.
DOP: Ari Wegner. © TKI Holdings Pty
Ltd 2015. Photo by Ben King. Picture
courtesy of FOXTEL.



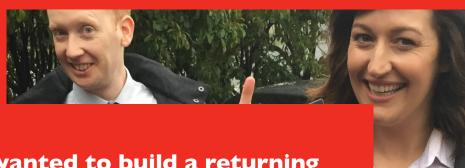






Left

The Voyage interactive game by Roar Film. Steve Thomas / Creative Director - Roar Film, Matt Daniels / Digital Design and Jan Dabrowski / Illustrations.



We wanted to build a returning series with Rosehaven and Screen Tasmania have been with us from the get go. It is hard to imagine Rosehaven happening without a collaborator like Screen Tasmania. Our show was the perfect scale for Tasmania and we found an amazing screen community and a couple of our stars on the island. We can't wait to get back down there.





Aims

Over the next five years, Screen Tasmania will focus on the following aims:

- Encourage optimal production levels across all formats to sustain Tasmanian production businesses, a professional full-time crew base, and a robust game development sector to deliver strong economic outcomes to the Tasmanian economy – production focussed.
- Support the development of Tasmanian talent to build Tasmanian businesses and tell Tasmanian stories for export to the world – creativity focussed.
- Actively promote the development of a sustainable, innovative digital content sector in Tasmania – innovation focussed.

- Work towards increased inclusiveness in the narrative and interactive screen production sector, by addressing gender, ethnic, geographic and Aboriginal imbalances and promoting the involvement of all Tasmanians in screen production – community focussed.
- Continue to transform Screen
 Tasmania as an efficient, transparent
 arm of government that operates to
 the highest standards best practice
 focussed.



Strategies to support Screen Tasmania's aims

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Encourage production levels across all formats to sustain Tasmanian production businesses, a professional full-time crew base and a robust game development sector to deliver strong economic outcomes to the Tasmanian economy.



Above

Party Golf, Giant Margarita.

Previous page

kunanyi / Mount Wellington curtesy of Tourism Tasmania.

Expenditure on production in Tasmania has increased markedly over the last six years. As production has increased, so has the proportion of Tasmanian cast and crew employed on those productions and the expenditure on Tasmanian goods and services. However, without a critical mass of production, the ability for businesses, technicians, actors, animators, developers and creatives to be full-time professionals is limited and the output of the state's industry, and the industry itself, is at risk of stagnation.

As part of this strategic aim, Screen Tasmania will:

- build on the achievements of the last few years to grow the level of professional standard production in Tasmania
- rebuild the crew database to support the ability of Screen Tasmania to enable production activity
- assist with the implementation of the Workforce Development Plan
- drive and encourage the use of Tasmanian cast and crew on productions

- drive skills growth and professional networking in the games development industry
- facilitate the interest of in-bound productions to drive production activity
- work with partner government agencies to leverage productions as they are released and increase tourism and export outcomes
- provide bridges between games development and other parts of the wider screen industry
- generate a financial return on investments.

¹³ Screen Australia data provided to Screen Tasmania. Typically, before 2014-2015, approximately \$2 million was spent on drama production each year in Tasmania. In 2014-2015, \$15 million was so spent and in 2015-2016, \$9 million.

Support the development of Tasmanian talent to build Tasmanian businesses and tell Tasmanian stories for export to the world.



Image
Still image from Lion, Dev Patel as Saroo
Brierley, photographer Mark Rogers.

Tasmania is renowned across the world as a highly-creative centre of the arts and culture. Projects written and/or produced by Tasmanians such as *The Kettering Incident*, *Rosehaven*, *Noirhouse*, *Death or Liberty*, *Emo the Musical* and *The Devil's Candy* have received national and international attention. The market has become attuned to Tasmanian key creatives' work whether they are working in, or outside of Tasmania.

The Tasmanian brand encompasses a quality lifestyle, a welcoming community paired with a stunning and diverse natural environment. At the same time there is an endless fascination with Tasmania's history and the darker aspects of society.

Tasmanian creatives need to be in a strong position to take advantage of opportunity and Screen Tasmania will support them to tell their stories and export these to the world. Without investment in the skills of Tasmanian key creatives, any production risks being 'factory-based', one without Tasmanian ownership of intellectual property and any consequent share in financial returns. Similarly, there is a risk that stories emanating from Tasmania do not have the unique selling point that the 'Tasmanian' brand provides.

Notwithstanding this, the involvement of key creatives and production companies from outside Tasmania in Tasmaniangenerated intellectual property and stories raises the likelihood of Tasmanian projects being financed and entering production, and transferring skills to Tasmanian creatives.

As part of this strategic aim, Screen Tasmania will:

- focus on the emergence of developing Tasmanian practitioners
- identify and support talented Tasmanian key creatives, including by providing for emerging industry members to work on professional productions ('attachments') locally and interstate
- assist in the writing of high-quality
 Tasmanian scripts and development of high-quality interactive concepts
- assist in the delivery of training and professional development to support the development of creative businesses and individuals in the screen sector
- engage with experienced expat
 Tasmanian key creatives and encourage
 them to return to Tasmania to work
- encourage the development of scripts and concepts from Tasmanian writers and producers and assist with the involvement of key creatives from around Australia
- work with local talent to attract finance to advance well-developed stories into production.

Actively promote the development of a sustainable, innovative digital content sector in Tasmania.

games development sector increased 26.3 per cent from end June 2012 to end June 2016. Tasmanian digital content creation, including games, app and web design is developing at an increasing rate in Tasmania. In many ways, it is an emerging sector, but is also competitive and collaborative. Screen Tasmania will actively encourage this sector's continued development, including through partnerships with the more traditional narrative content sector. Screen Tasmania is platformagnostic, not proscriptive, and open to all opportunities for sectoral development

Across Australia, employment in the

As part of this strategic aim, Screen Tasmania will:

- drive the production of digital content in Tasmania, including interactive and narrative content across all platforms
- encourage and support emerging businesses in this space
- take advantage of Tasmania's natural advantages, such as low overheads and well-developed National Broadband Network rollout, and the lack of 'tyranny of distance' in digital content delivery
- build linkages between various parts of the industry and organisations outside of the industry
- ensure that all sectors of the Tasmanian screen production industry are eligible for funding opportunities
- work with other government institutions to encourage the attraction of digital content and post—production businesses to the state to drive a creative community.

Below

Party Golf, Giant Margarita.



Work towards increased inclusiveness in the narrative and interactive screen production sector, by addressing gender, ethnic, geographic and Aboriginal imbalances and promoting the involvement of all Tasmanians in screen production.



Image

Image from documentary film kanalaritja: An Unbroken String, produced in partnership with Roar Film and the Tasmanian Museum and Art Gallery. In early 2016, Screen Tasmania commissioned a workforce profile of the Tasmanian screen industry. The profile revealed that 62 per cent of respondents were male, 90 per cent were from an English-speaking background, six per cent identified as having a disability and only three per cent identified as Aboriginal or Torres Strait Islander.¹⁵

Screen Tasmania considers that storytelling benefits from a multiplicity of voices from a variety of backgrounds and experiences. It is similarly vital that a variety of stories and faces are depicted on-screen, resonating with audiences of diverse backgrounds.

As part of this strategic aim, Screen Tasmania will:

- work towards a diverse construction of all panels and presentations involving more than one presenter
- address the underrepresentation of women in screen production in Tasmania
- work to identify emerging screen content makers of diverse backgrounds and encourage their inclusion in the industry

- provide specific mentorships and attachment programs targeted at those from diverse backgrounds
- link with Aboriginal organisations and representatives in Tasmania and leverage existing artistic and creative Aboriginal networks through TMAG and Arts Tasmania to identify and support young Aboriginal screen content makers
- actively work with organisations from the broader screen industry focussing on increasing diversity on and off screen
- report metrics regarding diversity to the relevant decision-maker on all assessments for applications for funding.

Continue to transform Screen Tasmania as an efficient, transparent arm of government that operates to the highest standards.

Screen Tasmania is a business unit of the Department of State Growth and is therefore an arm of the Tasmanian Government. Screen Tasmania's assessment processes are transparent; and decisions are based on objective and merit-based criteria. They are designed to assist unsuccessful applicants to learn from the assessment process and improve the quality of projects and applications.

As part of this strategic aim, Screen Tasmania will:

- implement back-end technological solutions to allow staff to focus on program delivery
- build communications between government and industry to increase transparency, and build linkages between the Tasmanian industry and the interstate industry
- increase service delivery to regional Tasmania and engage more directly with practitioners outside Hobart
- utilise resources identified from outside Screen Tasmania to complement program delivery such as the arts, events, tourism and hospitality sectors
- operate under the highest standards of governance and implement relevant outcomes of the governance review currently being conducted by the Department of State Growth
- provide professional and informed advice to the Tasmanian Government
- deliver transparent and accountable programs and, subject to relevant commercial requirements, provide increased levels of information to the public and industry.

Image

Rosehaven Series One Pty Ltd On location, Jonathan Brough – Director.



Image

Detail from Michael O'Neill, Australia's Best Street Racer that was developed as part of Screen Tasmania's short form comedy development program #ComedyConcentrate.



Through Screen Tasmania's **#ComedyConcentrate** Initiative, we have been given the chance to demonstrate that our uniquely Tasmanian brand of comedy has an audience beyond our state.



DYLAN HESP AND MICHAEL O'NEILL



The next five years

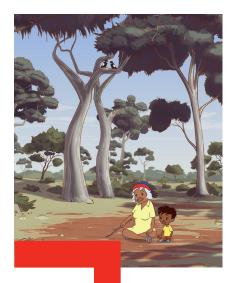


Image
Little J & Big Cuz,
animated for Ned
Lander Media and
NITV by Blue Rocket
Productions.

In a fast-changing Australian screen production environment, Screen Tasmania is focussed on increasing Tasmania's market share. Screen Tasmania does not produce content or commission content, but assists others to do so. This outcome will therefore be achieved through facilitation and support of, assistance to, and financing of Tasmanian screen production.

The Tasmanian Government, through Screen Tasmania, wants to develop a screen industry that is sustainable. One where young Tasmanians who aspire to work in the screen industry can not only find training opportunities in Tasmania to develop skills, but can also keep living and working here.

Tasmania will become a place where, thanks to the growing opportunities in screen production, talented and experienced screen industry practitioners are keen to build their careers, whether in narrative or interactive content.

To do this Tasmania needs not just a skilled production workforce, but also talented creative heads developing and producing quality content across a variety of formats and genres.

Screen Tasmania is the government's enabler in the industry. In enabling development, production and distribution of screen content, and the industry that makes it, Screen Tasmania drives both cultural, creative, economic and employment outcomes for the state.

This strategic plan provides a roadmap to make that goal achievable.

Simon Plowright filming *The Last Devil.* Photograph Nick Hayward.





Phone: +61 3 6165 5070

Email: info@screen.tas.gov.au

Web: www.screen.tas.gov.au

f fb.com/ScreenTasmania

@ScreenTasmania