

Queensland University of Technology

Creative Industries Faculty

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From Margins to Mainstream

**How screen and creative industries developed
in the Northern Rivers region of NSW: 2000 – 2010**

by

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Keywords

Screen Industries, Creative Industries, Northern Rivers NSW, regional development, screen producers, film, television, multimedia, digital technology, regional screen policy, regional mapping, margins to mainstream.

Abstract

This thesis explores the proposition that growth and development in the screen and creative industries is not confined to the major capital cities. Lifestyle considerations, combined with advances in digital technology, convergence and greater access to broadband are altering requirements for geographic location, and creative workers are being drawn away from the big metropolises to certain regional areas.

Regional screen industry enclaves are emerging outside of London, in the Highlands and Islands of Scotland, in Nova Scotia in Canada and in New Zealand. In the Australian context, the proposition is tested in an area regarded as a 'special case' in creative industry expansion: the Northern Rivers region of NSW. A key feature of the 'specialness' of this region is the large number of experienced, credited producers who live and operate their businesses within the region. The development of screen and creative industries in the Northern Rivers over the decade 2000 – 2010 has implications for regional regeneration and offers new insights into the rapidly changing screen industry landscape. This development also has implications for creative industry discourse, especially the dominance of the urban in creative industries thought.

The research is pioneering in a number of ways. Building on the work conducted for my Masters thesis in 2000, a second study was conducted during the research phase, adapting creative industries theory and mapping methods, which have been largely city and nation-centric, and applying them to a regional context. The study adopted an action research approach as an industry development strategy for screen industries, while at the same time developing fine-grained ground up methods for collecting primary quantitative data on the size and scope of the creative industries. In accordance with the action research framework, the researcher also acted in the dual roles of industry activist and screen industry producer in the region.

The central focus of the research has been both to document and contribute to the growth and development of screen and creative industries over the past decade in the Northern Rivers region. These interventions, along with policy developments at both a local and national level, and broader global shifts, have had the effect of

repositioning the sector from a marginal one to a priority area considered integral to the future economic and cultural life of the region.

The research includes a detailed mapping study undertaken in 2005 with comparisons to an earlier 2000 study and to ABS data for 2001 and 2006 to reveal growth trends. It also includes two case studies of projects that developed from idea to production and completion in the region during the decade in question. The studies reveal the drivers, impediments and policy implications for sustaining the development of screen industries in a regional area. A major finding of the research was the large and increasing number of experienced producers who operate within the region and the leadership role they play in driving the development of the emerging local industry. The two case studies demonstrate the impact of policy decisions on local screen industry producers and their enterprises. A brief overview of research in other regional areas is presented, including two international examples, and what they reveal about regional regeneration. Implications are drawn for creative industries discourse and regional development policy challenges for the future.

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Acronyms and Abbreviations

ABC	Australian Broadcasting Corporation
AAS	Area Assistance Scheme
ABR	Australian Business Register
ABS	Australian Bureau of Statistics
ACE	Adult and Community Education
ACLC	Australian Culture & Leisure Classification
AFC	Australian Film Commission
AFTRS	Australian Film Television and Radio School
AIDC	Australian International Documentary Conference
ANZSIC	Australian and New Zealand Standard Industrial Classification
APAI	Australian Postgraduate Award Industry
ARC	Australian Research Council
ASCO	Australian Standard Classification of Occupations
BASC	Byron All Screen Celebration
BFC	Byron Film Club
CAMRA	Cultural Asset Mapping in Regional Australia
CCI	ARC Centre of Excellence for <i>Creative Industries and Innovation</i> CD Compact Disk
CLIC	Community Learning & Innovation Centre
DCITA	Department of Communications, Information, Technology and the Arts
DCMS	Department for Culture, Media and Sport (UK)
DOTARS	Department of Transport and Regional Services
DSRD	Department of State and Regional Development
DVD	Digital Video Disc or Digital Versatile Disc
FAC	Film Artists Co-operative
FIAF	Film and Television Industry Attraction Fund
FTO	Film and Television Office


GDP	Gross Domestic Product
ICT	Information and Communication Technology
IMAX	A large-screen, high resolution film format
I & I NSW	Industry and Investment New South Wales
IP	Intellectual Property
IT	Information Technology
NCEIA	North Coast Entertainment & Industry Association
NDT	Northern Development Taskforce
NFG	Nimbin Film Industry Group
NMP	National Mapping Project
NORPA	Northern Rivers Performing Arts
NRIT	Northern Rivers IT (Information Technology)
NRACC	Northern Rivers Area Consultative Committee
NRRDB	Northern Rivers Regional Development Board
NSW	New South Wales
OECD	Organisation for Economic Cooperation and Development
PFTC	Pacific Film & Television Commission
QUT	Queensland University of Technology
RIEP	Regional Industry and Economic Plan
SAE	School of Sound and Audio Engineering
SBS	Special Broadcasting Service
SCU	Southern Cross University
SME	Small and medium enterprises
SPAA	Screen Producers Association of Australia
SPADA	Screen Production and Development Association, New Zealand
TAFE	Technical and Further Education
TVC	Television Commercial
UK	United Kingdom (England, Scotland, Ireland, Wales)
VAN	Visual Arts Network

Statement of Original Authorship

The work contained in this thesis has not been previously submitted to meet requirements for an award at this or any other higher education institution. To the best of my knowledge and belief, the thesis contains no material previously published or written by another person except where due reference is made.

I confirm that no more than 10% of the PHD text is taken directly from my Masters thesis and that such passages are explicitly cited.

Signature



A handwritten signature in dark ink, appearing to read 'J. Heide', is written over a horizontal line.

Date 13.10.2010

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Chapter 1

From margins to mainstream

The central proposition

This chapter outlines the main proposition of the thesis, defines the key concepts and examines the frameworks of this research in an international and local context. The proposition is tested in an area regarded as a 'special case' in creative industry expansion: the Northern Rivers region of NSW. The dominance of the urban in creative industries thought is discussed, followed by a brief history and profile of the region and the need for robust data on the growing number of practitioners migrating to the region.

The thesis proposition

This thesis explores the proposition that growth and development in the screen and creative industries is not confined to the major capital cities. Lifestyle considerations, combined with advances in digital technology, convergence and greater access to broadband, are altering requirements for geographic location and creative workers are being drawn away from the big metropolises to certain regional areas.

Examples of regional creative industry enclaves can be found in the Yorkshire and Humber regions in England, Nova Scotia in Canada, Canterbury and Taranaki in New Zealand and in the Highlands and Islands of Scotland (Taylor, 2006; Canterbury Development Corporation, 2002; Venture Taranaki, 2004; Highlands and Islands Enterprise, 2005; Film Nova Scotia, 2007). In the Australian context, the proposition is tested in an area regarded as a 'special case' in creative industry expansion: the Northern Rivers region of NSW. The development of the sub-sector of screen industries in this region over the past decade has implications for regional regeneration and offers new insights into the rapidly changing landscape of this sector.

The research for this thesis includes a detailed mapping study and industry survey undertaken in 2005, with comparisons made to an earlier study conducted in 2000 as

part of my Masters degree. Two regional case studies of projects that developed from idea to production and completion in the region during the decade in question are also included. The findings reveal the drivers, impediments and policy implications for sustaining the development of screen industries in a regional area. The case studies demonstrate the impacts of policy decisions on two local screen industry producers and their projects. A brief overview of research in other regional areas is presented, including two international examples and what they reveal about regional regeneration. Implications are drawn for creative industry discourse, the dominance of the urban in creative industries thought, and regional development policy challenges.

The research is pioneering in a number of ways. The mapping study and survey conducted in association with this research adapted creative industries theory and mapping methods, which have been largely city-centric, and applied them to a regional context. An action research approach was adopted as an industry development strategy for screen industries, while at the same time developing fine-grained 'ground up' methods for collecting primary quantitative data on the size and scope of creative industries.

A central focus of the research has been both documenting and contributing to the growth and development of screen and creative industries over the decade 2000 to 2010 in the Northern Rivers region. These interventions, along with policy developments at both a local and national level, and broader global shifts, have had the effect of repositioning the sector from a marginal, dispersed and under-resourced one to a priority area considered integral to the future economic and cultural life of the region.

Thesis structure

The research covered in this thesis began in 2000 as part of my Masters by Research work at Queensland University of Technology (QUT). In the role of action researcher, I undertook the first major study of audiovisual industries in the region and helped raise awareness and visibility of this sector. I was also a leading player in the formation of the first industry association, Northern Rivers Screenworks, and played an active role in implementing the strategies arising from the first study. In 2005, I undertook the second

study of screen and creative industries as a PhD candidate at QUT, supported by an Australian Research Council *Linkages* project. I produced two industry reports: *Imagining the Future* and *Imagining the Future 2*, which were the first published documents to quantify the sector and apply a creative industries framework in the region. Parallel to this work, I operated as a screen industry producer working in the region, contributing to and benefiting from the effects of the research and policy developments.

The issues surrounding measurement of creative industries and the action research approach I adopted are detailed in Chapter 2. The results of my work as a researcher, the first of three roles in the action research method, specifically the findings of the two major studies (2000 and 2005) and their implications, are presented in Chapters 3 and 4. In Chapter 5, I examine the production activity and economic impacts in the region, and the cumulative effects of the institution building and industry activity I contributed to in the second of my three roles in the action research method. Chapter 6 examines incoming productions and the implications of research in other regional areas, including two international examples: the Highlands and Islands of Scotland, and Taranaki in New Zealand. Chapter 7 provides an overview of local and national policy developments over the decade and their effects on two screen producers who were benefactors of the research and local industry developments, as I was in my third role as producer. Chapter 8 presents the conclusions of the research and the major policy challenges for the future.

Framework for the research: scoping of screen and creative industries

The research for this thesis was conducted within the framework of current screen and creative industries discourse and mapping activities. In reviewing the development of the screen and creative industries in the Northern Rivers region, it becomes clear that the region was influenced and shaped by shifting global trends, current academic thinking and cultural policy debates, including the rebranding of the arts and cultural industries as creative industries.

At the start of the decade in question, policy thinking and support for the cultural sector of the Northern Rivers region was clearly divided into separate portfolios of

interest. The 'arts' were largely reliant on state patronage, both as a way of promoting and protecting cultural heritage and addressing market failure. The commercial cultural sector or 'cultural industries', which included music, television and film, were driven by the demands of the market. Where government support was available for this sector, with certain exceptions, it was largely investment in cultural products with some expectation of return on investment.

Brief history of arts and cultural industries

Prior to the establishment of state funding for the arts, patronage had largely come from wealthy private individuals. In the new industrial cities, local authorities began to work with the patrons to build opera houses, libraries and theatres. After the Second World War, states across Europe began to increase funding for the arts in order to protect national heritage and open the arts to wider access.

The emergence of popular culture during the 1970s and 80s as the largest provider of cultural products – films, television and contemporary music – to the majority of the population had the effect of increasing the profile and influence of popular culture in arts policy debates (Taylor, 2007). In this context, the more traditional arts – visual arts, performing arts, opera and classical music – were viewed by some as a minority interest and even considered elitist. The 'cultural industries', as policy makers began to call popular culture, were brought into cultural policy thinking.

During the late 1990s and early 2000s, cultural Industries experienced rapid growth in most OECD economies, and demand for creative content was said to be increasing. In the US in 2000, the core copyright industries were estimated at \$US792 billion, representing 7.75% of GDP and employing eight million workers (Siwek, 2002). In the UK, creative industries, differently defined, were estimated to have generated revenues of £112.5 billion, employing 1.3 million people and over 5% of GDP (DCMS, 2001). In Australia they were valued at \$25 billion and the most dynamic areas, such as digital media content, were growing at twice the rate of the overall economy. Creative inputs into other service areas such as finance, health, government and tourism were also increasingly significant (NOIE, 2003; Hartley, 2005).

The term 'creative industries' entered the debate in the U.K. when Tony Blair and Chris Smith instructed the Department of Culture, Media and Sport to set up a Creative Industries Task Force and undertake the first major 'creative industries' mapping study in 1998. The new framework brought together the arts, media and cultural industries, and offered a way forward that responded to technological and global shifts and the political climate of the times. The Task Force defined creative industries as "activities which have their origin in individual creativity, skill and talent and which have the potential for wealth and job creation through the generation and exploitation of intellectual property" (DCMS, 2001). In this model, creativity was central to both social and economic advancement.

In Australia at this time, creative industries began to attract attention in academic and government circles. Leading the field was QUT, in partnership with the Queensland Department of State Development. They identified an emerging creative industries sector in South East Queensland and the state government invested \$15 million in developing a Brisbane-based Creative Industries Precinct. Professor Stuart Cunningham described the developments in Australia at this time as creative industries "trying to chart an historical shift from subsidised 'public arts' and broadcast era media, towards new and broader applications of creativity" (Cunningham, 2001).

The rebranding of the cultural industries as 'creative industries' by the DCMS heralded several changes to this sector. Not only were the cultural industries seen as providing new sources of employment and wealth creation, but the notion of creativity was seen as a driver of economic and social change, and a decisive source of competitive advantage (Florida, 2002).

This had the effect of raising the status of cultural workers and cultural policy thinking, particularly in regions with declining traditional industries (Taylor, 2000). The creative industries were seen as comprising workers with disposable incomes and high skill and education levels, as well as being part of the milieux of 'creative' cities, which, according to Richard Florida, attracted migrations of the broader 'creative class' (2002). Part of the promise of this new sector was "the end of the nine to five job and

the job for life employment” which was predicted to “release creativity, promote self-empowerment and generate economic growth” (Florida, 2002; Taylor, 2002). For Florida, the ‘creative class’ would come to dominate economic and cultural life in the century to come, just as the working class had predominated in the industrial era and the service class in the latter half of the 20th century. He described workers as evolving from blue- and white-collar environments to the ‘no-collar workplace’.

Artists, musicians, professors and scientists have always set their own hours, dressed in relaxed and casual clothes and worked in stimulating environments. They could never be forced to work, and yet they were never truly not at work. With the rise of the creative class, this way of working has moved from the margins to the economic mainstream. (Florida, 2002 12 -13).

The industrial restructuring of the 1980s had also led to an increase in outsourcing to specialised networks of small and medium sized enterprises. The changes in information technology and the increased speed of communication were enabling more global operations. Major changes were also occurring in the ways that consumers were accessing their cultural products. Dynamic and volatile niche markets emerged to feed these new consumer needs, and the cultural industries, which had always dealt in these unpredictable and diverse markets, began to be seen as a template for a new emerging economic order (Taylor, 2002).

Within the audiovisual production industry, advances in digital technology over the past twenty years had been sweeping across all levels of content production and distribution. According to Scott McQuire, the only comparable event that gripped the audiovisual industry and public alike was the introduction of synchronised sound in the 1920s (McQuire, 1997). The effects of these changes included proliferation and reduced costs of production and post-production equipment, improvements in sound reproduction and the development of digital special effects (OECD, 1998). Producers no longer needed to rely on expensive city-based production and post-production offices or services. Increasingly more of the stages of production could be performed on their own computers operating from home-based studios.

Technological advances were also having the effect of diversifying and increasing the number of available broadcasting channels, especially special interest channels such as news, sport and music. Australians could now access over 30 television channels if they choose to subscribe to multi-channel Pay TV services, and in America, subscribers to cable could have up to 500 channels. High capacity cable modems and wider access to broadband were also allowing delivery of multimedia content, including video, across the internet. The introduction of digital television and the emergence of broadband internet content services had the potential to lead to even further multi-channelling and new interactive television services (Jacka, 2001). New technologies were also contributing to the expansion of cinema multiplexes and digital cinemas as well as improvements in transmission and reception to home audiovisual experiences (OECD, 1998). All these new platforms were having the effect of vastly increasing the choice capability of consumers, and fuelling the demand for new high quality content.

The structure of the industry and the way businesses operated were also rapidly changing. The mapping of creative industries in the UK had revealed that the largest proportion of employment in this sector was in freelance, small and micro-businesses (DCMS, 2001). They had low entry barriers and could be footloose and geographically dispersed. This was seen as opening up new opportunities for young and emerging creative workers and marginalised social groups in the creative sector (Taylor, 2002). Creative workers were found to be operating in environments of "autonomy, risk-taking, project-based work patterns, partnerships and network relations with both clients and competitors" (Cunningham, 2001). The emphasis was on "locational geography and particularly the formation of creative industries clusters" (Flew, 2002). Distribution of content was no longer linked to the geographical site of production and with the liberating effects of email and broadband; these clusters could be located anywhere. Lifestyle factors and a 'creative milieu' became important elements in the selection of location for creative workers (Landry, 2000). Places like the Northern Rivers, which already had an established reputation as a thriving arts region (Wynn Moylan, 1991), and particularly Byron Bay, well known for its young, vibrant cultural scene, became increasingly attractive as locations for creative workers.

Changes in communication technologies, especially the internet and email, were acting as further enablers for creators of content wishing to operate their businesses in the regions. All kinds of communication data – voice, text, graphics, music and video – could be transmitted over the telecommunications network. Almost every telecommunication system in the world has been expanded or modernised to some extent since the 1980s through digitalisation (Barr, 2000).

In the Northern Rivers region, the essential elements of a cluster, as described by economist Michael Porter, were emerging around the growing number of creative practitioners. These included suppliers of equipment, maintenance and support services, legal and financial services, training infrastructure and specialists providing knowledge, information and technical support (Porter, 1998). The region was developing as a lifestyle and learning region and was demonstrating the potential to support a network of creative industries clusters (Henkel, 2000).

Northern Rivers' engagement with creative industries

During the course of the research described in this thesis, a number of Northern Rivers industry practitioners and community leaders began adopting the frameworks and branding of 'creative industries'. Primarily this emerged out of the need to survive outside the umbrella of sponsored or subsidised arts. With the notable exception of the flagship theatre company, NORPA, the region had a poor record of public support for its creative arts sector. The creative industries discourse and models were considered useful in bringing the arts conceptually into direct contact with industries such as new media, communications and entertainment, and giving prominence to the core function of creating content.

There was some initial resistance, fuelled by debates and controversies about creative industries being dangerous to the arts and culture by enforcing an untoward economism, which echoed wider international debates and controversies around the concept (Miller, 2004; Garnham, 2005; Oakley, 2009; O'Connor, 2009 and for a response, Cunningham, 2009). There were also concerns that the shift to 'cultural entrepreneurialism' could mark "the decline of 'the indies' (the independents) and the rise of the creative subcontractor and the downgrading of creativity" (McRobbie,

2002). Creative industries, like any other field of endeavour, entailed costs as well as benefits (Hartley, 2005). There were concerns that the 'digital divide' would leave in its wake displaced practices that had been highly valued by individuals and communities. Critique of the creative industries was most explicit and defiant from within the cultural industries tradition (Pratt, 2004; Miller, 2004).

For regional development agencies and industry practitioners in the Northern Rivers, the findings of numerous mapping studies on the growth of the sector, as well as arguments about the competitive advantage of creativity in the new knowledge economy, were compelling. The enthusiastic embrace of the new framework overshadowed the scepticism coming mainly from the arts and humanities communities within the education sector.

The creative industry research and mapping reports emerging from the UK and from QUT presented many interesting parallels with developments in the Northern Rivers region, and offered a new way forward for the screen industry sector. The 2000 Study identified a high concentration of talented individuals and entrepreneurial producers with skills in content creation and new media production moving to and operating from the region (Henkel, 2000). These practitioners were well schooled in the need to survive in the competitive market place of the new global economy. They operated as sole traders or in small businesses, and their work practices, global focus and understanding of the importance of networks were consistent with the models of creative industry clusters observed in many OECD countries (Leadbeater and Oakley, 1999).

Convergence

Another major trend observed in creative industries was the meeting and integrating of traditionally separate industry sectors. The formerly discrete functions of watching a television program, making a telephone call and using a computer were merging, and the divisions between media, telecommunications and computing were becoming blurred in what was called convergence (Barr, 2000). The traditional barriers between these sectors and some service industries, such as education and

health, were being eroded or restructured and new industry boundaries were emerging (DCITA, 2000).

A converged service industries model implied that content creation would become more important and the creative industries would be increasingly characterised by providing outputs into the services, manufacturing and even primary industries (Cunningham, 2001). The industries that were predicted to be most affected by convergence were those where digital technologies substituted for traditional modes of operating. As delivery of content became more prevalent over international digital networks, the full impact of these changes was starting to become evident (DCITA, 2000). The music industry was a clear example, and the film and television industries were also beginning to demonstrate major changes in structure, modes of production and distribution (McQuire, 1997; Gibson, 2000; Jacka, 2001). Creative industries research and discourse, which embraced the game-changing implications of convergence, offered screen content creators an agenda for understanding and meeting the challenges of this constantly shifting landscape (DCITA, 2000; McQuire, 1997).

Globalisation

In *The Rise of the Network Society*, Manuel Castells painted a picture of a new global economic order developing. He argued that globalisation was creating a place where our planet was organised around a common set of economic rules (Castells, 1996). For those nations who could trade widely and well, this was thought to bring new opportunities. However, he also argued that it was virtually impossible for any nation to remain economically autonomous. This brought into question the role of the nation state in contemporary society (Barr, 2000). International forums such as the World Trade Organisation and the International Monetary Fund were determining the rules for global economic activity. The nation state was losing its power, though importantly, not all of its influence (Castells, 1996).

These changes had important implications for Australia's media industries and content creators at the start of the 21st century. First, markets for products were becoming more international, and film and television producers were increasingly compelled to look at

international markets to ensure the viability and profitability of their products. However, this did not necessarily mean the emergence of more globalised cultural products. There were many indications that mass culture would not replace local culture, but could co-exist with it. Audiences were embracing international television coverage of major sporting and political events and a news service like CNN, but the demand for local culture and local product remained equally alive in most countries of the world (Barr, 2000). In a globalised world, producers of content needed to consider both the international and local appeal of their products and construct their businesses to accommodate this diversity. Australian feature films, serial dramas, children's programs, mini-series, tele-movies and documentaries had been performing solidly in international markets, particularly the UK and, increasingly, the USA (AFC, 2000). A taste for Australian content had been established internationally and producers were increasingly building this into their financial and production strategies (Cunningham and Turner, 2006).

Another effect of globalisation was that markets were becoming more dispersed from their geographical base of production (Barr, 2000). In the Australian context, it was no longer necessary for creators of content to be located in the capital cities of Sydney or Melbourne. A producer with effective contacts and networks, and a well equipped, digital, home-based studio in regional areas, could effectively produce products for international markets (Henkel, 2000). Award-winning IMAX producer, John Weiley, who operated a successful global enterprise from his home studio in Byron Bay, was an exemplar of this trend (Weiley interview, 2000). The changing telecommunications systems made it possible for producers like Weiley to have immediate access to broadcasters, colleagues and clients anywhere in the world. As information technologies and telecommunications converged and integrated, markets diversified and dispersed, and new forms of international communication became cheaper and more accessible. It was possible for the first time for the growing demand for innovative creative content to be met from newly developing clusters located in regional areas.

Cluster development

Another impact of globalisation was the increasingly important role of location in determining competitive advantage. Michael Porter argued that location choices

were fundamental to competition, and the concept of clusters represented a new way of thinking about location (Porter, 1998). In this model, the economic map of the world was characterised by clusters or critical masses in one place of interconnected firms, suppliers, related industries and specialised institutions. These firms no longer needed to locate near raw material sources or markets but could choose the best location for productivity and dynamism. According to Porter, "clusters bring producers, suppliers of related goods and services, local institutions and government entities together around a common agenda which is constructive and actionable" (Porter, 1998). In describing the significance of geographically-defined clusters, Terry Flew stressed the importance of "networked knowledge entrepreneurship" (Flew, 2001). Such entrepreneurs require location within and around sites that provide relatively low-cost, modern office space; access to high speed bandwidth and high-end facilities; and access to networks of individuals and companies with complementary skills.

In the cluster approach to industry development, companies are encouraged to work together to raise their competitiveness, increase productivity and take advantage of growing international markets. Clusters facilitate innovation by linking key industry and government players and allowing decisions to be made collectively and collaboratively, rather than serially. The location, ambience, networking potential and opportunities for personal interactions are key elements in cluster developments, and "happening places" with a "creative milieu" are likely locations for creative industry clusters (Flew, 2001). The cluster approach had particular relevance to the emerging audiovisual and creative industry sector in the Northern Rivers region in 2000, especially in relation to the vibrant coastal town of Byron Bay.

Innovation

Parallel to the central roles of creativity and clusters in creative industries discourse was the positioning of innovation as a key factor in a nation's job growth, export competitiveness, prosperity and ability to solve problems. It was held that a nation that excelled at innovation would thrive (Batterham, 2000). In moving from an industrial to a knowledge economy, the nature of innovation was also seen to be changing. Whereas in the past, the key factors of production had been capital, labour and materials, it was argued that knowledge and communication of information would

play a more significant role in the future. In this scenario, new ideas and creativity would be needed to feed the cycle of innovation. The generation and application of knowledge would become central to future prosperity and competitive pressures and collaboration possibilities within clusters were seen to enhance the potential for innovation (Porter, 1998; Batterham, 2000)

The study conducted in the Northern Rivers region in 2000 found that an active, significant and growing audiovisual sector was emerging within the creative milieu of a lively and growing arts and cultural sector with the potential to develop as a series of networked creative industries clusters (Henkel, 2000). The large number of experienced creative producers locating to the Byron Bay and Lismore areas, and their innovative, entrepreneurial approach to content creation, were features of this emerging sector. However, infrastructure and strategic support were urgently needed in order for these nascent clusters to develop into a viable and sustainable industry in the region (Henkel, 2000).

The role of the producer

In assessing the audiovisual or screen content industries, the key role of the producer in both the creative and commercial dimensions of the sector needs to be addressed. A study undertaken by the AFTRS Centre for Screen Business in 2009 found that research to date has been hampered by an inability to grapple with the “distinctive indistinctness of the producer” (Cameron et al, 2010). In the context of this study, the producer is defined, as in the AFTRS study, as the person directly responsible for the creative, commercial and logistical challenges of generating screen content, which includes content produced for cinema, television, video, DVD, online and interactive formats. The two studies undertaken in the Northern Rivers region found the producers in the region to be largely self-employed entrepreneurs rather than employees, and responsible for the broad spectrum of producer roles, including generating ideas, financing and hands-on production. A distinctive feature of the development of screen industries in the Northern Rivers region was the unusually large and steadily increasing number of producers who located there, and the engagement of these producers in the development of their industry. The pivotal role played by the senior producers in driving and shaping the screen industry sector is a key feature of this

study. The high value production, the economic inputs, the employment and, to a degree, the social and cultural impacts are largely a product of the entrepreneurial and business skills of the screen producers and the content they create.

Content as a new growth area

The need for quality content was assuming a central position in the new knowledge economy. It was becoming widely accepted that without creative inputs the infrastructure and connectivity of new economy enterprises would have little value. As Cunningham and Hartley observed at the time:

The great story-telling and image-making institutions are the 'content' industries, from Hollywood to 'garage' micro-industries in music and software applications, from the *Washington Post* to individual creative writers and web designers. New technologies work when they have good content (Cunningham and Hartley, 2001).

The OECD had identified content creation as a major growth area in the global economy at the end of the twentieth century. It argued that network-based delivery of content offered OECD member countries the possibility of developing a whole new range of content creation activities (OECD, 1998).

The OECD Report asserted that a radical restructuring of content production and distribution was taking place. Content creation for large media companies was being out-sourced to small and medium enterprises (SMEs) for a range of print and audiovisual products, as well as for CD-ROM and on-line multimedia services. These SMEs could potentially become the "seed-beds of innovative content creation in digital technologies" (OECD, 1998 p. 12). In addition, the report proposed that SMEs could increasingly deliver content to broad audiences via the internet as easily as large enterprises. The result would be a more internationally dispersed structure of production made up of strategically located clusters of small, networked companies and individual producers.

Creative Industries frameworks adopted for this research

As outlined above, the concept of creative industries emerged in the late 1990s as a new way of grouping traditional media, arts and cultural sectors with the new enterprises resulting from the convergence of these sectors. This emerging new sector was experiencing rapid growth worldwide, typically nearing double the rate of GDP growth in OECD countries (OEDC, 2001). This was a sector of the knowledge economy that few countries could afford to ignore (Rimmer, 2000).

The development of creative industries was not confined to Europe and the USA. In 2000, Singapore was positioning itself as a global arts city with an environment conducive to creative knowledge-based industries. In Taiwan, state development and commercial enterprises collaborated to identify appropriate technologies for local exploitation and commercialisation. The Hong Kong government approved a large-scale development for a Creative Media School at the City University of Hong Kong (CIRAC, 2000). As mentioned above, the Queensland government, in conjunction with QUT, made major investments into the development of creative industries. The potential of this sector was also being viewed with great interest by regional development agencies in the Northern Rivers region.

What counts as a creative industry tends to vary geographically depending on local heritage and circumstances (Hartley, 2005). In general terms, creative industries combine two older terms: creative arts and cultural industries. The change was important as it brought the arts into direct contact with the larger, more market-driven industries such as film and television.

For the 2000 Study reviewed as part of this thesis, the cultural industries framework was useful in structuring the data collection process. The report of the findings attempted to apply creative industries concepts and new thinking to the emerging audiovisual and cultural arts cluster, with a view to offering a new framework and agenda for collective action for the arts, the cultural industries, media and communications sectors. The 2005 Study adopted a model of creative industries incorporated into the region's Regional Industry and Economic Plan (RIEP). In this model, creative industries were defined as

visual arts, screen industries, music, design and architecture, writing and communication and performing arts.

Audiovisual vs Screen industries

At the time of the 2000 Study, the accepted collective term for film, television, video and multimedia producers and businesses was 'audiovisual industries'. The first study adopted this term and frame of reference.

An indication of the changes that took place between 2000 and 2005, including further advances in digital technology and the opening up of new platforms or screens for content distribution, was reflected in the increasingly widespread adoption of the term 'screen industries' rather than 'film industries' or 'audiovisual industries'. The 2005 Study adopted the term and definitions of screen industries in the classification, data collection and reporting of its findings.

Screen industries were defined as individuals or enterprises involved in creating content or providing services in the following sub-sectors: film, television, print media, all digital media, photography, video, radio, performance and visual arts delivered on CD, DVD, the internet or other digital platforms. In this model, the economic value of the screen industries originates in the intellectual property (IP) that underpins the end product or service: the idea, the script, the image, the design or the composition. In screen industries, the IP is enhanced and developed through a series of value added activities, including filming, editing, adding music and a wide variety of post-production effects.

The content developed through these mechanisms is delivered in one form or another onto a screen. These include cinema or television screens, video monitors, computer screens, mobile phones and a plethora of new hand-held devices entering the marketplace. Digital radio increasingly qualifies as a screen industry sub-sector as it conceivably allows listeners to select channels, read programs or get information via a screen. Commercial media outlets, including television, radio and print media, are included as distribution outlets. Video and DVD sales and rental outlets, libraries and cinemas are also included as distribution and exhibition outlets for screen industries. In producing content for the screen, producers and practitioners utilise the skills and

services of related creative workers such as writers, musicians, performers, photographers, visual artists and designers. Screen industries in this context are viewed as a sub-sector of the broader creative industries.

The widespread adoption of the term 'screen industries' in many discourses and debates played into the narrative of the development of this sector in the Northern Rivers region. When the first study was launched in 2000, the sector in question was widely referred to as the film industry. For example, when the Expo was held that year, and the first industry website launched, the name 'Filmworks' was used.

An indication that changes in perception were occurring was evident when the leading audiovisual producers decided to establish the first industry organisation at the end of 2000. They adopted the name Northern Rivers Screenworks and the inaugural board made the decision to change the name of the website to www.screenworks.com.au. The second study conducted in 2005 was framed from the start to examine 'screen and creative industries' in the region.

Subsequently, these changes have been reflected at both state and national levels by a series of institutional name changes. In 2009, the NSW state agency changed its name to Screen NSW, and in 2010 the Pacific Film and Television Commission in Queensland changed its name to Screen Queensland. . When the new federal agency was formed, comprising the joining together of Film Australia, the Australian Film Commission and Film Finances Corporation, it adopted the name Screen Australia.

These changes may be viewed as reflecting profound shifts within one decade in the way the sector viewed itself, its production and distribution modes and its reliance on government subsidy. . On the one hand, the name changes reveal a mature detachment from the almost nostalgic notion of being a 'film industry'. They also reflect awareness of the vastly expanded distribution outlets from the traditional 'cinema and television' preoccupation of the sector to a digital, multi-platform and multi-screen perspective. It may be argued that the name changes also reflect the transition from a largely 'cultural industry', subsidy-driven model, to a content creation, entrepreneurial, industry driven model.

In this shift in priorities, the question arises as to whether government support mechanisms should focus on the not-for-profit cultural aspects of the sector or the specifically commercial initiatives. However, the findings of the 2005 study indicate that the question itself may be misleading, and a more accurate picture is that of a continuum where each aspect feeds off and benefits the other. Support for the non-profit cultural sector creates a rich pool of raw talent and innovative practitioners with new ideas, which feeds into the commercial sector. The non-profit sector also increases demand for cultural and entertainment content and experiences, and builds audiences and potential markets. The commercial sector requires growing Australian markets and audiences in order to build self-reliance, but to a large degree it still relies on government subsidies to sustain its capacity to provide original Australian content to feed the local cultural appetite. The cultural and commercial components, therefore, are mutually reliant on each other, and if supported to work more closely together, to network and to collaborate, the sector as a whole will benefit and grow (Henkel, 2006).

In establishing the Producer Offset in 2007, the Australian Government anticipated that productions with a more commercial focus would be financed via this mechanism, leaving Screen Australia's funds (consequently reduced by Government) to be directed to more culturally significant and innovative programming (Screen Australia, 2010). However, the vexed question of sustainability for the commercial Australian screen industry sector remains a challenge at both the local and national level, and this issue is considered in more detail in the conclusion in Chapter 8.

City-centric focus of creative industries

Creative Industries discourse has taken a city focus from the start. Regional dimensions were absent from the first Creative Industries Mapping Document in the UK (DCMS, 1998). The second in 2000 explicitly identified the regional level as important, following a government report, which argued for its inclusion (DCMS, 2001; Ravenscroft, 2005). Despite this correction, the major theoretical frameworks and policy work on creative industries at the start of the decade were focused on city-based developments. Michael Porter's work on cluster development was primarily city-centric. Leadbeater and Oakley's *The Independents*, Charles Landry's *The Creative City* and Richard

Florida's *The Rise of the Creative Class* all focused on the development of networks and clusters around the 'creative milieu' that was assumed to be occurring only in the 'creative cities'. Such is the continuing dominance of the urban in creative industries thought, that a major compendium volume entitled *The New Wealth of Cities: City Dynamics and the Fifth Wave* by John Montgomery in 2007 did not at any stage consider the non-urban.

In the UK, development of a regional perspective on the creative industries began to emerge early in the 2000s in areas such as Leeds, Yorkshire and the Humber (Roodhouse and Taylor, 2000; Roodhouse, 2001, Taylor, 2002). The regional economic strategies developed by agencies in, for example, the North West, East Midlands and Yorkshire and the Humber, included detailed mapping exercises in their respective development plans (Taylor, C, 2005, 2006). Similar developments began taking place in Scotland (Highland & Islands Enterprise, 2005).

However, the term 'regional' has very different connotations in the UK and Australia. In the framing of UK policy, everything outside of London is considered regional. The majority of the UK studies were undertaken in large densely populated cities, or what have been described as 'city-regions' (Bell et al, 2007). In 2001, the city area of Leeds had a population of 770,800 (Office for National Statistics, Census 2001). This was almost equivalent to the population of Brisbane City, the capital of Queensland, which in 2001 had 896,649 people (Department of Infrastructure and Planning, 2007). The Northern Rivers region, which was the fastest growing region in NSW in 2001, only had a population of 271,056 (NSW Department of Infrastructure, Planning and Natural Resources, 2002). Comparisons between so-called regional developments in the UK and Australia are therefore not particularly useful.

Other regional studies

A scoping exercise was undertaken as part of this research to find comparable regions outside Australia with similar demographics and distance from capital cities, while evidencing some form of screen industry development. Two international regions were identified that fit this requirement: Taranaki on the west coast of New Zealand

and the Highlands & Islands of Scotland. Studies in these regions revealed different aspects of regional industry development and regeneration.

The Last Samurai, filmed in Taranaki and starring Tom Cruise, had a positive effect on many local businesses, increased the region's profile internationally and had a minor impact on tourism. However, the effect on the fledgling local production community of this large but short-lived injection of cash and local buzz was negligible. In contrast, *Monarch of the Glen*, which filmed in the Highlands and Islands of Scotland for seven years, created ongoing employment for local practitioners and helped build and maintain the local screen industry sector. It continues to have a significant impact on the local economy through its impact on tourism. Further discussion of these two case studies is included in Chapter 6.

In 1999, Chris Gibson began investigating the development of the music industry in the Northern Rivers region. He found that, although regional and rural areas historically developed as residual consumption arenas for music and creative industries in general, the North Coast region presented as a unique case, in that it was also developing as a nascent production area. His research revealed, for example, that Lismore was developing a reputation as "a nursery for exciting alternative and 'indie' bands". The range of local solo artists and bands identified as achieving success outside the region included Grinspoon, The Simpletons and The Mabels, and solo performers Diana Ah Naid and Troy Cassar-Daley (Gibson, 2000). Gibson also examined the digitisation of music production and links between music producers and those in information, desktop publishing and design industries, and the increasing amount of musical activity targeted at tourist markets, in particular in Byron Bay (Gibson, 2000).

Gibson's research continues to examine geographical methodologies and cultural theory in the study of creative industries and regional development in Australia (Gibson, 2004; Gibson and Klocker, 2005; Gibson et al, 2010). In 2005, Gibson and Klocker observed that regional economic policy-makers had become increasingly interested in the contribution of creativity to the economic performance of regions and, more generally, in its power to transform the images and identities of places.

They described this as a 'cultural turn', away from an emphasis on macro-scale projects and employment schemes, towards an interest in the creative industries, entrepreneurial culture and innovation. However, they were concerned about this trend, describing it as "subsuming creativity within a neoliberal regional economic development discourse" and linking creativity to the primacy of global markets in order to attract "footloose capital and 'creative class' migrants to struggling regions". They took issue with the notion of positioning creativity as a central determinant of regional 'success', and the idea of it being considered "a remedy for places, and subjects, that currently 'lack' innovation". Their view was that neoliberal discourses ignored the varied ways in which 'alternative creativities' might underpin other articulations of the future of Australia's regions (Gibson and Klocker, 2005).

A further development in regional creative industry research and discourse occurred in Australia with the launch in 2008 of CAMRA, a Cultural Asset Mapping in Regional Australia project. This initiative, funded by the Australian Research Council (ARC) and industry, aims to address the gap in data gathering and knowledge sharing between researchers and policy makers in regional, rural and remote settings, and promote debate and "an understanding of how a region's capacity for creativity and innovation can ensure its quality of life and economic viability" (CAMRA Project, 2008).

The project has established an online forum and network that will to operate from 2008 to 2013 as a partnership between seventeen organisations, including four universities. The online site (www.culturemap.org.au) provides an information bank of knowledge and research that allows it to be interrogated, analysed and used at local, regional and peak levels by a variety of users. It also seeks to enable interactions between national and international experts in cultural development through its online community forum (CAMRA Project, 2008). Initiatives such as this and the growing body of regional mapping projects, including the research in the Northern Rivers region outlined in this thesis, serve to counteract the urban bias that has dominated creative industry discourse to date.

The Northern Rivers region: a brief history of migration shifts

The Northern Rivers region of NSW encompasses the area from the Clarence Valley and Grafton in the south to the Queensland border and stretches west to the Great Divide. It consists of seven local council areas and three major river systems: the Clarence, Richmond and Tweed. The region has 21 national parks – some of which are world heritage listed – and is the most biologically diverse in NSW. The region is well known internationally for its two major icons: Mt Warning and its caldera and Cape Byron lighthouse at Australia's most easterly point. Tourism is a significant component of the region's economy and Byron Bay is its premiere international tourist destination.

The cultural history of the region is a rich tapestry of movements. The region has been home to the Bundjalung and Gumbaynggirr people for centuries and the Indigenous populations maintained their cultural life through story-telling, dance and painting. Part of the mythology of early white settlement of the region is the story of a woman who came up the river on a raft with a piano. Mrs Wilson brought music and her own Anglo cultural heritage when she arrived with her family in Lismore in the 1850s. The Lismore Music Festival, otherwise known as the Eisteddfod, has been going for 90 years. Another regional event with a long history is the annual Maclean Highland Gathering, a celebration of Scottish heritage that has endured for over 100 years.

Figure 1.1 Map showing seven local council regions in the Northern Rivers region.



The region has grown from a collection of settlement areas that historically emerged from different traditions and needs. Casino, Kyogle, Murwillumbah and Maclean were the traditional farming regions. Grafton, Yamba and Lismore were the in-land and sea ports (river and rail). Ballina and Tweed Heads began as retirement and lifestyle centres, while Nimbin, The Channon and Mullumbimby emerged as alternative lifestyle villages. Byron Bay and Lennox Heads are still the main beachside tourism centres, Brunswick Heads, Evans Heads and Iluka are primarily fishing villages and Bangalow, Clunes and Ulmarra promote themselves as heritage villages.

A major counter-cultural lifestyle event called the Aquarius Festival was held in Nimbin in 1973 and it heralded a new wave of settlers looking for alternatives to mainstream and city life. The student radicals and intellectuals who stayed on after the festival brought with them a rich tradition of community cultural development practice from the UK. They also brought Latin folk styles and eastern influences in spiritualism and music and experimentation in visual arts and bush crafts. They set up communal dwellings and a range of 'alternative lifestyle' practises, and their settlement in the hills around Nimbin, The Channon and surrounding areas undoubtedly expanded and diversified the creative arts in the region (Wilson, 2003).

A study conducted into this sector by Peter Wynn Moylan in 1991 identified 1,285 professional artists working in the region, which he described as "the liveliest and most exciting arts area in Australia with more artists and craft workers per head of population than anywhere else in Australia" (Wynn Moylan, 1991).

Another major impact on the region's cultural life was the opening of the Lismore Teachers College in 1970, which in 1973 became a multidisciplinary college called the Northern Rivers College of Advanced Education. This institution went through various incarnations and collaborations with the University of New England until, in January 1994, it became Southern Cross University. By 2005, the total student body of the university was 10,966 students, with an estimated 2,310 students engaged in creative industry study or practice at SCU.

Other training organisations and providers also emerged and flourished during this period, including North Coast TAFE, the Northern Rivers Conservatorium, the Clarence Valley Conservatorium and Adult and Community Education (ACE) North Coast. In 2004, the world's largest audiovisual training school, SAE, opened its world headquarters in Byron Bay. By March 2006, the total student body in the region engaged in creative industries study or practice was estimated to be 6,220 students (Henkel, 2006).

During the 1990s other migration shifts continued, driven in part by drought and the demise of the agricultural sector. Some of the leading visual artists left the region, driven away by lack of infrastructure and support, but the number of musicians, writers and performers steadily increased. There were several other influences at play affecting population shifts: improvements in transport, the increased popularity of coastal destinations, people becoming more mobile, baby boomers beginning to retire. The proximity to the Gold Coast and south east Queensland also created fluid traffic across the border in both directions. All these factors brought migration shifts and new arrivals to the region and the Northern Rivers began to define itself as a 'lifestyle region'. Some destinations, like Byron Bay, Ballina, Yamba and Kingscliff, became the focus of intense coastal development, bringing tourists, new migrants and new disposable income to the region.

The processes and impacts of internal migration within the region are largely under-explored and are significant in shaping both the physical and imagined landscapes of the place (Jo Kijas, 2003). Despite the unexpected population turnaround that occurred from the 1970s predicated by the alternative counter-culture movement, there have been other redistributions of populations from the hinterland to the coastal areas, and a relentless movement within regions. The level of migration of young people to the cities was considered high.

The reasons why people migrate into and out of places are critical to the ongoing perceptions of that place and the dynamics by which local communities operate amongst themselves within global networks (Kijas, 2003).

The changes in technology and telecommunications that took place during the 1990s,

particularly the use of email, the internet, broadband and mobile phones as forms of communication, brought another wave of new settlers to the region. Creative practitioners discovered that they could run their micro-businesses from the coastal towns or rural areas of the region with relative ease and far lower over-heads. In 1999, John Weiley held a party for local people working in screen industries and 120 people turned up. It was clear that a significant new sub-group was emerging in the region.

The need for the Northern Rivers research

In the twelve years since I moved to Byron Bay, the number of people working in screen industries here has reached some kind of critical mass. The networks have become stronger and I think it's because a lot of professionals like me are finally snipping the apron strings to urban centres and deciding to team up with colleagues here. It's up to us to make this place work professionally (Cox, 2010).

During the late 1990s, screen industry producers and writers like Deb Cox and John Weiley were responding to the global and technological shifts described earlier, and were taking advantage of the cultural and economic freedom they had earned to choose where they wanted to live and work. The innovations in digital technology and telecommunications, especially the internet and broadband, meant they no longer had to reside in the capital cities. As the number of practitioners and producers in the region increased, questions arose regarding the actual size and scope of this developing sector and the type of support and infrastructure needed to assist practitioners to operate as a viable and sustainable industry cluster.

In 2000, I was living and working as an emerging filmmaker based in the small village of Clunes, between Lismore and Byron Bay. My interest in finding out who else was working in the region and how we might support each other, led to a research interest and my enrolment in the Masters by Research course at QUT. My search for local, robust data on the number of practitioners and my interest in helping to develop a collaborative approach to the expansion of this sector, led me to adopt an action research approach. The reasons for the adoption of this approach and how it contributed to the research process and the development of the local screen and creative industry sectors are discussed in more detail in Chapter 2.

Chapter 2

A multi-method action research approach

This chapter locates the research covered in this thesis in a framework of action research. In this method, the researcher participates as an active invested party in the research process, and assumes multiple roles (including, in this project, regionally based screen producer, industry advocate and researcher). For the Northern Rivers research, I adopted a multi-method approach, which was participatory, iterative and reflective in both design and implementation. The method I developed for collecting quantitative data is also discussed along with the strengths and limitations of using Australian Bureau of Statistics (ABS) data and other available creative industries 'mapping' methodologies.

The action research framework

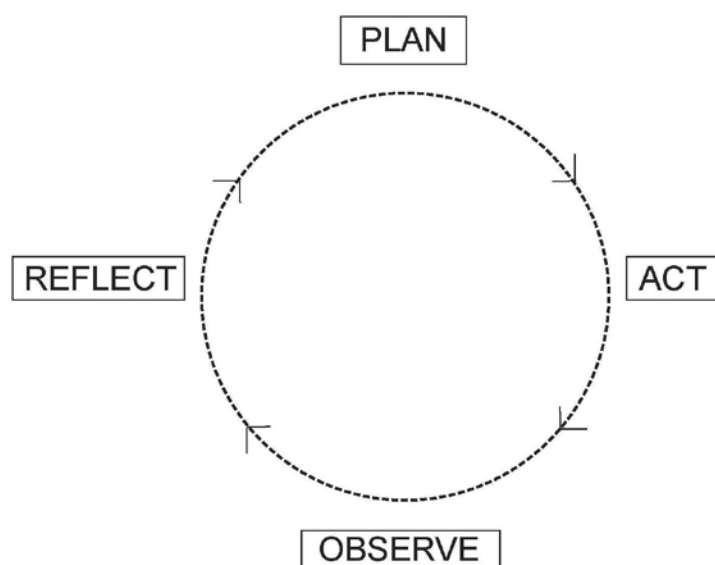
The governing methodology I adopted for this research is a version of action research, which brings together activism, research and community involvement, and is well documented (eg. Schuler, D, 2001, 2008; Reason & Bradbury, 2001; Dick, 2002; Hearn et al, 2009). It is a form of engaged research that appealed to me because it aligns investigative rigour with ideas and action that can instigate change within the community or location it is investigating. Reason and Bradbury have articulated the values shared by those of us who engage in action research:

A primary purpose of action research is to produce practical knowledge that is useful to people in the everyday conduct of their lives. A wider purpose of action research is to contribute through this practical knowledge to the increased well-being—economic, political, psychological, spiritual—of human persons and communities, and to a more equitable and sustainable relationship with the wider ecology of the planet of which we are an intrinsic part (2001).

In action research, practitioners are encouraged to reflect on their experiences and learn from them, and apply what they have learnt to improve their practice (Hearn et al, 2009). It presupposes a commitment to involving subjects actively in the research and requires responsiveness to the emerging needs of the situation (Dick, 2000).

The cycle in the action research process follows the pattern of planning → action → observation → reflection → planning and so on as the cycle continues. This process differs from other research methodologies in that action research seeks to develop actionable knowledge or knowledge that can provoke change or improvements of some kind. The process also seeks to integrate learning and research into the next phase of planning in a continuous process, as depicted in Figure 2.1.

Figure 2.1 The continuous action research cycle



Action research provides a framework for the researcher to play simultaneous roles of scholar and activist (Mary Brydon-Miller, 2002). During the course of the ten-year research period covered by this thesis, I played three roles simultaneously: regionally based screen producer, industry activist and researcher.

I began the decade as an emerging filmmaker operating my business from the region. In this role, I had a strong vested interest in knowing the outcomes of the research findings, and my professional career was enhanced and supported over the decade by the knowledge, networking and research skills acquired from the other two roles. The second role was as activist in the development of the local screen sector, initiating projects, setting up networks, serving on boards, and helping to implement strategies for the development of the sector. And the third was research scholar undertaking two regional studies and other research reported in this thesis. Over the course of the

decade, my own research capacity was advanced in parallel with the building of data gathering and research capacity occurring in the region. The three roles intersected and propelled a momentum that led to four sequential cycles of action research flows over the ten-year period.

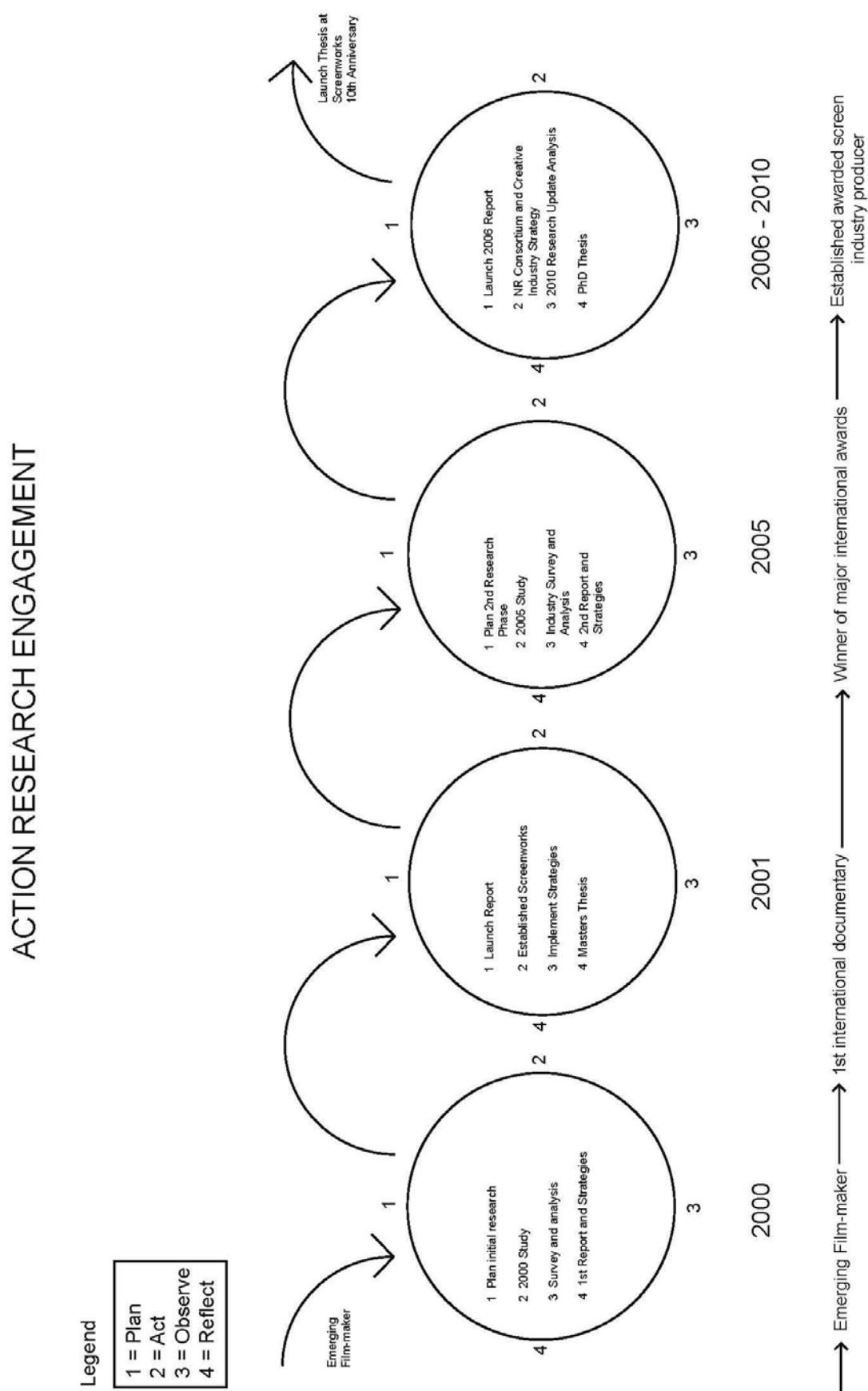
The first cycle began in 2000 with the planning and implementing of the first regional audiovisual industry study followed by observing and reflecting to produce the first report. The launch of this report, *Imagining the Future* became the planning stage of the second cycle, which included the establishment of Northern Rivers Screenworks, the implementation of the strategies and the release of the Masters thesis. This triggered the third cycle of planning and execution of the 2005 Study, followed by the observation and reflective stage and the release of the second report, *Imagining the Future 2*. The fourth cycle began with the launch of the report and the formation of the Consortium, leading to the Creative Industries Strategy. In 2010, I undertook an update and analysis of new developments in the sector, and the reflection process occurred during the writing of the PhD thesis. The release of this thesis may well provoke the commencement of a fifth cycle of action research in the region.

At the start of the decade, there was limited creative industry data gathering capacity in the region and by 2010 this had advanced considerably. My journey from local emerging filmmaker to experienced, award-winning screen producer by the end of the decade parallels the research stages. The whole process has been iterative, responsive and participatory, and is depicted in Figure 2.2.

Overview and analysis of the action research process

I arrived in the Northern Rivers region in 1994 and settled in Lismore with my husband, who was also my filmmaking partner, and our two-year-old daughter. At this time, Lismore was both the educational and artistic hub of the region, and was home to the only regional community television station in the country. There was, however, no recognised audiovisual or screen industry sector.

Figure 2.2: Action Research Engagement in the Northern Rivers region: 2000 - 2010



We knew there were several other high profile practitioners located across the region and 'in the hills' who operated from home studios. We considered finding them to be both a challenge and a necessity. My partner and I moved the following year to Clunes, a village of 450 people located 16km from Lismore, and set up a small video production company, Hatchling Productions, to produce educational, corporate and community videos, and to explore content creation for community television and emerging digital platforms. We subsidised our low income by running training and education classes for the local TAFE and the growing community broadcasting constituency. In 1998, Hatchling Productions produced its first documentary for national television, *Walking Through a Minefield*.

We found and identified with a small but disparate community of documentary filmmakers who were struggling to maintain viable businesses in the region. The threat of having to go back to the city hung over all of us as both a challenge and a source of stress. The question arose within this group: how many other people like us are working in this region and is it possible to operate sustainable businesses this far from a capital city? I enrolled in a Masters by Research course at QUT to find the answers to these questions and to quantify the emerging audiovisual sector of the region.

The Northern Rivers region at this time was already regarded as a 'special case' in terms of the number of artists and cultural practitioners living there. The area was characterised by natural beauty and attractive lifestyle attributes, but also high unemployment and low average incomes. Since the mid-1970s the region had been attracting cultural industries workers, mainly visual artists, musicians and theatre practitioners, and had been described as "the liveliest and most exciting arts area in Australia" (Wynn-Moylan, 1991).

The Wynn-Moylan study and a Labour Market Report in 1999 examining the capacity of the region to capture and respond to the advantages of globalisation and the digital revolution, both pointed to a major gap in existing knowledge about audiovisual industries in the region. No information or data existed beyond 1991 on the size and scope of local activity or the extent of recent growth. The Northern Rivers Regional

Development Board (NRRDB) recognised that the lack of verifiable data was holding back support for this emerging sector and risking its potential for future growth.

In early 2000, the NRRDB commissioned the first study to identify the size and scope of the local industry and I was appointed to undertake this study. As a local content producer, I was very interested to find out the answers to the questions posed by the study and the findings on the size and scope of the local sector.

The research questions for the study were defined as:

1. How many people are working in audiovisual industries in the Northern Rivers region in the year 2000, and what was the extent of growth since 1991?
2. Why are audiovisual professionals moving to the Northern Rivers?
3. Where are the major clusters of activity occurring?
4. What are the major assets in the region in the audiovisual sector and what are the major barriers to future growth?
5. Where does the activity and work originate and what are the sources of finance? What are the destination markets of locally produced work?
6. What are the prospects for this sector in the region?

The NRRDB specified three key requirements from the study: to host and conduct industry forums to explore issues faced by the sector; to develop a database to assist in the formation of regional networks; and to formulate a set of strategies for the development and future growth of the sector. All three of these requirements fed into the action research framework as the most useful approach to answering the research questions and fulfilling the objectives of the commissioning partner.

In collaboration with the various stakeholders, I devised a mixed-methods plan for the study, which aimed at addressing the knowledge gap in a number of ways. I began a ground up process of collecting and collating all existing data on the number of people operating in the region in an attempt to provide a 'snapshot' of the sector in the year 2000. I examined other subsets of cultural industries in the region using information from local networks and organisations representing these sectors. They included music, performing arts, writing and the newly emerging multimedia or digital content creators.

In structuring the focus of this data gathering process, the cultural industries framework was useful. I compared this data with the findings of the Wynn-Moylan study in 1991 and the ABS Census data for 1991 and 1996 to chart the growth graph of the sector. I also instigated an industry survey to obtain further quantitative and qualitative data on the opportunities and obstacles facing the growing sector. I used the industry forums and targeted interviews to gain qualitative data on the issues facing leading practitioners. I set up an online database and network site to help draw together the disparate players and provide a forum for feedback and ongoing discussion. In the action research model, these decisions constituted the first planning stage.

Following an ABC radio story about this study, another local industry group, the Northern Development Taskforce (NDT) contacted me to discuss ways that their organisation could be involved in the development of the sector. Out of these discussions, NDT decided to host an Expo of local film, video and multi-media projects and initiatives. The event adopted the title of The Northern Rivers Filmworks EXPO, and was managed by another local emerging filmmaker, Allison Kelly and North Coast CAMERA. This was a fledgling organisation that we had previously helped to establish as an audiovisual production spin-off from the regional community television station, LINC TV. This development had two impacts on the research project. It provided an ideal forum for the collection of data and information. It also expanded the community of interest and gave the project wide media coverage and an increased level of credibility in the nascent screen industries community.

The EXPO was the first time the general public, media and interested industry bodies had been given the opportunity to view a wide array of film, video and multi-media projects and meet some of the experienced practitioners who lived and worked in the region. This included award-winning IMAX producer John Weiley, animation features producer Wayne Young, screenwriter Deb Cox, and several leading documentary producers. The EXPO toured to Grafton, Tweed Heads, Murwillumbah, Byron Bay and Nimbin. It was, by any measure, a landmark event for the audiovisual sector as it brought together practitioners from across the region to meet each other and see each other's work for the first time. A sense of community and common goals and interests were established.

The Expo also contributed to the research process. Six hundred copies of the survey form were distributed, and 162 were completed and returned. Of these, 65 (40%) were completed during or as a result of the Expo. The remaining surveys were completed via a phone survey conducted by North Coast CAMERA and 20 (12%) of the respondents completed the survey online.

In response to the research brief, I set up the first industry website for audiovisual practitioners in the region at www.nrfilmworks.com to provide a range of services. These included an interactive database for practitioners, news and events pages for local groups such as North Coast CAMERA, and the data collection service for the survey questionnaire.

In order to assess the number of people who could be identified as working in the film, video and multimedia industries, I compiled a consolidated database from local industry databases, telephone directories, membership of North Coast CAMERA, a multimedia database provided by Mullumbimby Access Point (MAP), delegates at local industry forums, the Filmworks website, and people who attended the Expo or responded to media coverage about the survey. This bottom up method was time-consuming and required considerable local knowledge, but it did produce the first estimates of the number of practitioners in the region. Later in this chapter, I discuss the value of this method and its place in the mapping of screen and creative industries.

The first research phase spanned the period April to October 2000 and formed the action and observation stages in the action research model. I organised two industry forums: in Lismore in May and in Clunes in July. The Clunes forum was attended by 160 people and information collected at this forum played a key role in the development of the strategies for future development of the industry. The reflective stage followed, culminating in the writing and release in December 2000 of the industry's first substantial report entitled *Imagining the Future* (Henkel, 2000).

During 2000, I also worked as producer of a new documentary for television, *Losing Layla*, which won numerous awards, was widely sold in international markets and increased my profile as a documentary producer. The film told the tragic story of the death of a newborn infant and the mother's struggle with grief. The mother was local filmmaker Vanessa Gorman, who lived in the nearby village of Federal, in Byron Shire.

During 2001, as a student at QUT, I continued to monitor new developments in the audiovisual sector, and this information was used to speculate on the opportunities and inhibitors that existed for the future development of this sector in the region. This additional research consisted of a series of interviews and investigations conducted between July and October of 2001. The conclusions reached were that the Northern Rivers region had "an active, significant and growing audiovisual sector within the creative milieu of a lively and growing arts and cultural sector" (Henkel, 2000). The region was well placed to position itself as a lifestyle and learning region with the potential to develop a series of networked creative industry clusters, but that significant obstacles and barriers existed within the region and in national and international trends that needed to be overcome if this potential was to be realised. The report also concluded that further research was required into the nature of work in audiovisual and creative industries and a more detailed examination of the sources of income and expenditure by local practitioners (Henkel, 2000). In line with the action research approach, I addressed these needs in the second study undertaken in 2005.

By the end of 2001, the second cycle of the action research process was already underway. As a direct result of the Expo, the forums and events of 2000, and the networking effects of the website, a group of local producers, of which I was one, decided to form a regional industry network for people working in film, television and new media. The group adopted the name Northern Rivers Screenworks, and it was formally registered in December 2000.

Here I moved from researcher to community activist in the next rotation in the action research cycle. I joined the board of Screenworks and worked with other producers and local community stakeholders to implement the strategies proposed by the research report I had written. I worked with a small sub-group of the board on a major

application to a federal government initiative called Regional Solutions. After 15 months of hard work and several revised applications, the Screenworks application was rejected. It is important for the historical record to note that at this stage, the Screenworks board was on the verge of disbanding as it was not able to keep going without resources and staff. However, several of the board members, including myself, Lois Randall and Catherine Marciniak, refused to give up and when the Department of Transport and Regional Development announced a new fund in early 2002 called Sustainable Regions, we submitted a revised application using the *Imagining the Future* report as a key advocacy document in securing this funding. This application was successful and the grant enabled Screenworks to run a three-year Industry Development Program, which included implementing the ten strategies proposed in the report.

In 2005, I undertook an analysis of the extent to which the strategies proposed in the 2000 report had been implemented and found that success or major progress had been achieved on 78% of the strategies (Henkel, 2006). This analysis was useful for a number of reasons. The results served as an indicator of a robust industry, which at a local, grass-roots level was concerned with its own development and future. It also indicated a level of strong leadership and commitment at the senior practitioner level and the sector's ability to work collectively for the overall good (Henkel, 2006). This analysis also served as part of the reflective process in the action research framework. The success in implementing the strategies indicated that the articulation of the research outcomes in 2000 into a set of development strategies for the industry had been relevant and achievable. This informed the development of the plan for the next cycle of research.

The NRRDB began developing a Regional Industry and Economic Plan (RIEP) in 2004 as a basis for determining priorities for regional economic development and identified creative industries as one of ten priority areas for growth in the region. At this stage, NRRDB decided to collaborate with Screenworks, Hatchling Productions and QUT to address the need for further research into the growing creative industries sector in the region. These organisations were successful in obtaining Australian Research Council Linkages funding (an APAI) for a PhD research project to identify and explore drivers,

impediments and policy implications for sustainable development of screen industries in the Northern Rivers region. I was the researcher and PhD student identified in this ARC project.

The research method adopted for the PhD data gathering stage in 2005 was a refinement and expansion of the multi-method approach used in the 2000 Study and consisted of four major strands. The first strand was the compilation of a consolidated database of all practitioners operating in the region from all available sources. This data was compared with the findings of the earlier study and the ABS data sourced from the 2001 Census. Data from the Australian Business Register for the Tweed–Richmond area was also sourced and compared with the findings of both the 2000 and 2005 studies in order to produce a new growth graph for creative industries in the region.

The second strand, also adapted and expanded from the 2000 study, was an industry survey to source both quantitative and qualitative data. The survey asked questions about location, nature of work and sources of income, but also asked practitioners to comment on the opportunities and challenges they faced and to propose solutions.

The third strand consisted of interviews with 18 leading local producers in the region to obtain first-hand accounts and in-depth views on the development of the sector. These producers also completed data sheets on their project budgets, including regional spend and local employment. Discussions were held with industry leaders, policy stakeholders and representatives from leading agencies in the region. Several production projects were tracked as case studies over the period to provide qualitative data for a more detailed analysis of the nature of work, sources of funding, markets and potential for the region.

The fourth strand was the consultation and feedback strand. A series of Creative Industry Development Workshops was organised in conjunction with Arts Northern Rivers (Arts NR) in May 2005. These workshops were held in Kyogle, Grafton, Bangalow, Murwillumbah and Lismore and were attended by 155 creative industries professionals, business people, support bodies and enthusiasts drawn from across the region. The

workshops involved a process of assessing the state of the industry in each location, examining strengths and weaknesses and making recommendations for the future. Input on the new proposed strategies was obtained from attending practitioners. Each workshop was progressively able to comment on the input from the earlier workshops, and the new strategies evolved from this feedback loop.

The detailed findings on the size and scope of creative industries are presented in Chapter 3 and the results of the screen industry survey in Chapter 4. The extent of production activity in the region and its estimated economic value are detailed in Chapter 5 and two case studies of local producers are presented in Chapter 6.

These findings were released in the region in August 2006 in a report entitled *Imagining the Future 2*. The launch of the report was chosen as the occasion to announce the formation of a Northern Rivers Creative Industries Consortium to continue the work of developing the sector in the region. The Consortium's first major project was to commission a Regional Arts and Creative Industries strategy, undertaken by Brisbane-based Positive Solutions in 2008. The consultants took account of the findings and strategies included in *Imagining the Future 2* in developing their strategy. Meanwhile, the report was having other, unexpected impacts on the development of the screen industry sector in the region.

Byron Bay producer Deb Cox had been trying for almost ten years to locate a drama series in her home town. Cox was the writer and producer of the successful, high-rating drama series, *SeaChange*, which ran for three series on the ABC from 1998 to 2000. She had originally hoped to shoot the series in Byron Bay, but circumstances at the time and lack of infrastructure and information about local creative talent and crews precluded this. Deb, however, never gave up on the idea, and in 2006 she and fellow producers Fiona Eagger and Roger Monk were determined to locate their new television series *East of Everything* in Byron Bay. When they encountered resistance from the state agency and Byron Council, Cox and Eagger stated that it was *Imagining the Future 2* with its comprehensive data on the size and scope of screen industries in the region that finally convinced the FTO to support the production in Byron Bay (Eagger interview, 2010; Cox interview, 2010). The report also helped convince the

Byron Shire Council that the production would make a valuable contribution to the local economy and community. The production of *East of Everything* from its Byron Bay base was to have significant impact on the development of the sector, as outlined in further detail in Chapter 6.

Alongside my work as a researcher, I was also developing my career as a documentary director and producer. In 2004 Hatchling Productions released *The Man who Stole my Mother's Face*, which went on to win the Best Feature Documentary award at the Tribeca Film Festival in New York and the IF Award for Best Australian Documentary. The success of this film not only raised my professional profile, but also drew attention to the work being done by practitioners working in regional areas. In 2005, Hatchling Productions launched *I told you I was ill: the life and legacy of Spike Milligan* at the Adelaide Film Festival and this film also garnered awards and gained a global audience of over 5 million people. The website for this project was considered a pioneering and landmark work in the development of digital online documentaries.

Both these projects, and other screen enterprises in the region, contributed to increasing attention from industry leaders, funding agencies and broadcast commissioning editors in the work being developed in the Northern Rivers region. Screenworks began hosting a seminal event called "Life's a Pitch", which played a key role in getting numerous local projects into production. These and other developments in the local industry are discussed in greater detail in Chapter 5. In 2006, the Screen Producers Association of Australia (SPAA) opened a branch in the Northern Rivers region and I was elected to the national SPAA board as their documentary representative.

In 2008, I directed my fifth documentary for television, *The Burning Season*. This international project, funded by pre-sales from the UK, Canada and Australia and distributed by National Geographic International, was produced from our studio base in Clunes. The film won the Audience Choice award at the Brisbane Film Festival, was runner up at the Sydney Film Festival and secured our second IF award for Best Documentary. It was nominated for an Emmy Award and the Golden Panda, and won a Rising Star award at the Canada International Film Festival. In 2009, I re-edited a feature version of this film, which launched at the Tribeca Film Festival in New York and

had a theatrical season in Australia. An authored DVD of the film was released by Madman Entertainment in 2010, and the film is now part of the NSW secondary schools geography syllabus and is in wide release across Australia. The film continues to travel to international festivals and has been translated into Bahasa Indonesian, Mandarin and French. It will be launched in the USA in 2011, and I was invited to screen the film and conduct a masterclass at a documentary festival in Beijing in December 2010. My work as a screen producer has, without doubt, been enhanced by my research work, and my research has been informed by my work as a local producer.

In April 2009 the Australian Government announced the establishment of the National Broadband Network (NBN) to provide the infrastructure to deliver advanced digital services to the nation. In response to this, Southern Cross University (SCU), in collaboration with 14 local councils and IT businesses, prepared a submission identifying the benefits for early adoption of the NBN to the Eastern Regional Corridor, which included the Northern Rivers region. This submission was handed to the Federal Member for Page, Janelle Saffin, in January, 2010 along with a copy of *Imagining the Future 2* as a source of data on the strength of the creative industry sector. In a move that may be described as another turn in the cycle of action research, the committee behind the submission asked me to join their collaborative efforts to improve broadband services to the region.

At the state level, my research was used as a major source of data referenced under the section 'Regional Development' in the NSW Creative Industry Policy Background Paper (Arts NSW, forthcoming), demonstrating the relevance of the research at a broader level.

In 2010, I continued the action research process and conducted follow-up interviews with relevant screen and creative industry leaders in the region to gain a 'snapshot' view of current activities, new developments and attitudes to future prospects for the sector. I was invited to give a talk on my research work at a meeting of the Creative Industries Consortium in April 2010. I also recorded follow-up interviews with Cox and McQuillen to obtain up-dated information on the two case study projects. I obtained

information on total budgets, regional spend, number of local people employed, advantages and disadvantages of operating from the region and future prospects for their businesses. I also canvassed a number of industry stakeholders to assess the impact of these projects on the local industry. This information is summarised in Chapter 5 and the case studies presented in Chapter 6.

Reflecting on the methodology adopted for the research over the past decade, I believe that this method was well-suited to the nature of the research required and took advantage of my distinctive relationship with the region. The grounding of the research in the actual processes of change and the primacy it gave to both my experiences and those of other participants and producers were distinctly beneficial to the research outcomes. Its “flexible, open and eclectic process of enquiry” and “cyclic experimental character” suited my research interests and style (Hearn et al, 2009).

Another aspect of the methodology that aligned it with the research needs of the region and my aptitude as a researcher was the use of multiple methods. I was able to use my filmmaking skills to record interviews, film case studies and produce video clips of work being undertaken in the region. One of these clips formed the basis of the launch of New Creative, a project to promote the region’s strengths in creative industries talent in 2005. The open and responsive methodology helped affect change in a variety of ways across the decade, as described above. The challenges and down-sides of the method include the high level and relentless commitment required as a result of the three roles in the process, and the complexity and time demands of the ground up data collection method. However, as a locally based producer with a strong vested interest in the findings of the research, I was willing to commit the time and face the extended challenges of this type of research. This has paid off by increasing the research capacity and the data available to the region, while also advancing my capacity as a researcher and screen producer.

The four cycles of planning, action, observation and review, including the two major industry reports and the Masters thesis delivered to the community in the course of the decade, have all played a role in advancing the development of the local industry. When this thesis is delivered back to the community at the end of 2010, it is my hope that

the findings and methodology it presents will continue to play a role in activating change and improving the prospects for screen and creative industries in the Northern Rivers region.

Discussion of methods for collecting quantitative data

At the outset of the research phase, regional development agencies in the Northern Rivers region indicated that measuring, monitoring and reporting on the size of local industries and their economic impacts were areas of weakness for regional development agencies (NRACC, 1999). This study addressed this weakness in regard to the creative industries.

The lack of robust data in creative industries was not unique to regional areas. In 2008, there were continuing concerns at the state level that the creative industries generally were not well served by comparable and comprehensive data (DSRD, 2008b). The outcomes and findings of this research, and the methodology developed to attain the data, may be seen as helping to ameliorate this concern.

Major questions for both the 2000 and 2005 studies revolved around the visibility and growth of the sector. Detailed localised data was required on the size of screen and creative industries and indicators of the extent of growth. The issues influencing the selection of appropriate methods are reviewed here, including a discussion on the usefulness of ABS data, the strengths and limitations of the mapping methods adopted and the specific methods developed to estimate the economic activity of the sector.

The Australian government, via the Australian Bureau of Statistics (ABS), collects data on population, employment, industry activity and a wide range of other aspects of Australian life. The Census of Population and Housing, the largest statistical operation undertaken by the ABS, is conducted every 5 years. It aims to accurately measure the number of people in Australia on census night, their key characteristics, their work and where they live. The census includes all people in Australia on the designated night, other than foreign diplomats and their families. The most recent census was conducted on 8 August 2006.

In order to depict the size and scope of an industry sector, there are two possible measures: the number of people employed in that sector and the number of businesses. ABS can provide data on both these aspects. The advantages of using ABS data are clear. The census is a widely recognised standard that is considered reliable and the census methodology is relatively consistent, making it easier to track progress across specified occupations or industries. It is possible to source data by post-codes and by occupation. It is therefore feasible to use ABS data as an indicator of the number of people employed in a particular occupation or industry sector in a regional area over a set period of time.

The question therefore arises as to why this 'top down' method was not used in this study? For the 2000 study, the use of ABS data was not an option as the next census was more than a year away and the data from the 1996 census was considered out of date. The partners in the study wanted a 'snapshot' of the industry for the year 2000. Therefore, the alternative, ground up data collection method was developed involving the compilation of a broad, consolidated industry database from all existing records for audiovisual and creative practitioners in the region.

ABS figures for 1991 and 1996 were sourced for the study using a set of Australian Standard Classification of Occupations (ASCO) identified from the Australian Culture and Leisure Classifications (ACLC) for the postcodes 2460 to 2490. This data was compared with the findings from the ground up measure in 2000 in order to create a growth graph for the sector. In reviewing this methodology for the 2005 Study, it became clear to me that this was a flawed depiction of growth, as the ABS data and Northern Rivers data were derived from two quite different and distinct methodologies that cannot be meaningfully compared.

For the 2005 study, fresh consideration was given to the methodology, drawing on experience from the earlier work. Once again, current ABS data was not available. The previous census had been in 2001 and the next census would not be until August 2006. Furthermore, by this stage, the imprecision of using ABS data to depict the creative industry workforce had becoming apparent (Pratt, 1999, 2004; Higgs et al, 2005).

The primary limitation of official census data sources is that they only account for the respondent's main source of income at a given time. This is a particular limitation for the creative workforce as a great deal occurs through 'second' jobs, cash-in-hand, volunteer and amateur activities (Higgs et al. 2005,). When the Census is conducted, people are asked to identify their "main job held last week" (Census, 2006). When filling out the form on the designated night, many creative practitioners are as likely to nominate their secondary employment (such as working in hospitality, small scale farming or driving a taxi), rather than their industry practice, particularly if the former was their main source of cash flow that week. Furthermore, work in the creative industries is often cyclic and unpredictable, and frequently involves long periods of development or distribution, which may not yield income to the practitioner until a later date.

For these reasons, ABS data on employment is not likely to capture the complete picture of the complex eco-system of creative industries. A useful analogy may be a forest eco-system. If only the fruiting trees in the forest are counted, this method omits the many non-fruiting varieties and trees out of season that are vital to the eco-system as a whole. The new growth and emerging saplings will also not be captured by this measurement and they are essential to the health and continued growth of the eco-system as a whole.

That census data significantly underestimates the full amplitude of creative activity continues to be an endemic problem for creative industries mapping processes (Cunningham, 2010). When counting only industry sectors, previous studies have underestimated the employment impact of some creative sectors by up to 40%. The pre-2006 versions of some industry classification systems produced significant errors in sizing, possibly up to 25% (Cunningham, 2010). Furthermore, the ABS uses a national system of data gathering and there are issues regarding scale of aggregation and level of detail that create natural conflicts with data required at a local or regional level (Higgs and Cunningham, 2008).

For the 2005 study, the ground up method developed for the earlier study was refined and adapted. Again all existing databases were sourced from industry development agencies representing the sub-sectors of creative industries. The number of industry organisations had grown by 2005, and several had vastly improved data collection methods. The sourcing, assembling and cross-referencing of the various databases for duplication was a time-consuming and complex process, and was constrained by the available good will, time and resources of each agency. The process was further complicated by the fact that the various industry sub-sectors were at different stages of development at the commencement and completion dates of the research phase. In order to account for this complexity, an overview was compiled of each sub-sector examining the current status of each industry sector, its level of agency support and capacity for data collection and management. This overview looked at the status of each sub-sector when the consolidated database was first compiled in 2000 and at the time of the 2005 study. This provided important information regarding the value of comparisons between the 2000 and 2005 figures for each sub-sector. A summary of this overview is included in Appendix 1.

Although the consolidated databases served as the primary source of data for the size and scope of the industry in the region, ABS census data (for 1991, 1996, 2001 and 2006) was also sourced and is included in Chapter 3 with a short discussion about the disparity between the two sets of data. In one sense, ABS data may be regarded as the most conservative representation of the sector – the fruiting trees only. The ground up mapping method developed for this study provides the other end of the spectrum – a more complete picture of the ecology, including those in non-income yielding development or distribution phases, as well as aspirant and emerging practitioners. It also includes those who regard their creative practice as their ‘second job’ for the purposes of the census, and are therefore not counted in ABS data sets. It may be argued that in screen and creative industries, these creative workers are as vital to the continued growth, renewal and revitalisation of the eco-system as those earning regular income, or projects that were ‘in season’ at the time of the census.

Why screen industries were considered a subset of creative industries in the mapping methodologies developed for the 2005 Study?

During the course of the research, it became clear that audiovisual or screen industries could not be viewed in isolation from the broader creative industry sector. Screen industries operate within a complex eco-system generating inputs and outputs and significant flow-on effects between the broader creative industries and other services and business sectors, as identified in Figure 3.2 in Chapter 3. Furthermore, many creative practitioners operate across a number of sub-sectors. The overlap and cross-fertilisation is beneficial to all sectors and the region as a whole. This promotes a multi-skilled workforce, maintains diversity and innovation and is one of the vital ingredients in fostering multi platform and new media developments.

It therefore became clear that in order to understand the viability and prospects for the screen industries sub-sector, a measure of the broader creative industries ecology was necessary. In the model of creative industries adopted for the 2005 study, the creative industries were defined as visual arts, screen industries, music, design and architecture, writing and communication and performing arts. Libraries and museums were also included as they were regarded as distribution and exhibition outlets for creative industries.

Mechanisms for measuring economic activity

Measuring the economic impacts of screen and creative industries was one of the great challenges of this study. Two problems in particular had to be overcome. Firstly, in many cases practitioners operating as sole traders or micro-businesses kept very superficial records of their economic activity and often these were out of date or unreliable. Many practitioners were over-stretched as they juggled the challenges of producing projects, getting them funded, distributed and marketed while at the same time developing the next one. Some did not have the resources to pay for accountants or the time to engage with sophisticated accounting software. Financial and time pressures often resulted in a weakness regarding to the collection of data, and insufficient time spent analysing and understanding the context in which their industry was developing. This was a weakness for the sector at both a local and national level.

The second problem identified was that sole traders and micro businesses don't always have the capacity to engage with data gatherers in a meaningful way. When contacted by researchers, they often would not have the time to access their records, or were reluctant to share this information. Added to this was a commercial in confidentiality issue. This was particularly the case in the screen industries. Production companies often secured finance that required the signing of agreements that constrained them from sharing information about budgets and employment. Producers engaged in co-productions were most likely to be affected by legal requirements with regard to sharing production information. Overall, there was a reluctance to disclose financial records.

These problems were not unique to the Northern Rivers region. Many film offices in regional areas struggle to obtain and manage data on the economic value of incoming productions (Shorthouse interview, 2006). These productions may inject vast amounts of money into the local economy and stimulate employment and the flow-on effects to other sectors may be significant (Venture Taranaki, 2004; Voigt, 2006).

But collecting accurate data on their regional spend is a challenge for many regional film commissions and agencies and often only rough estimates are available, which film offices or local councils find difficult to confirm (Shorthouse interview, 2005; Beeton, 2001). In the 2006 study, data on incoming productions was collected and supplied by Screenworks. Some local council officers also kept records of revenue from incoming productions.

An important outcome in this regard for the Northern Rivers has been the decision by Screenworks to collect data each year from local producers on their production activity and regional spend. This is both a practical and high value outcome of the 2005 study and its recommendations, and an example of the value placed on improved data gathering mechanisms by the industry agency in the region. Screenworks reports that getting this data is still problematic, but producer responses to requests for data are becoming more positive and the level of statistics gathered improves each year (Moonie interview, 2010).

Another issue in relation to economic activity is the nature of employment in screen and creative industries. For sole traders and micro-businesses, work is more often project-based and cyclic rather than full-time employment, and income is often irregular. Employment is more accurately measured in terms of days or weeks worked or number of people employed per project rather than full-time jobs. In broad terms, total project budgets or regional spend provide a more accurate picture than the number of jobs created.

Two mechanisms were used in the 2005 study to estimate economic activity for the screen and creative industries in the region. One was derived from the industry survey and was calculated by multiplying the number of practitioners identified in the region by the average earnings of people in this sector.

A second measure was derived from project information supplied by a select group of credited screen producers. This figure was not intended to be indicative of the sector as a whole, but served as an estimate of the kind of revenue producers working at the 'top end of town' were generating. A telephone/email survey was conducted with 18 credited local producers who all had successful track records. Each producer was asked to supply information on their projects for the calendar year of 2005, including total budgets, regional spend, the number of people employed and the number of locals. They were also asked to estimate their projected expenditure and regional spend for the coming year, 2006. The data supplied were collated to produce estimates of economic activity reported in Chapter 5. Two of the producers included in this survey, Cox and McQuillen, are profiled in Chapter 6 and details of their productions and economic impact on the region are included.

The application of the action research methodology and details of the findings of the 2005 Study are provided in Chapters 3 and 4. Where possible this data is compared with the findings of the 2000 Study to reflect the level of growth and changes in the sector. Updates on industry activity and the progress on two significant local productions in 2010 are also provided in subsequent chapters.

Chapter 3

Size and Scope of Creative Industries: 2000 – 2005

In this chapter, the key findings of the detailed ground up research work undertaken as part of the action research method is presented. I conducted two major studies within the research period: the 2000 study (as part of the Masters degree) and the 2005 study. The chapter begins with the background and rationale for each study along with a summary and analysis of the findings. The second part of the chapter contains the findings of the 2005 study in more detail, comparisons with the 2000 study and a growth graph. The ABS findings for 1991, 1996, 2001 and 2006 are also presented. The chapter concludes with a discussion and summary of state and national mapping methods for creative industries, and the implications of these for the region.

The 2000 study

In December 2000, *Imagining the Future*, the first report documenting the film, video and multimedia industries in the region was launched. This report, based on my research work in 2000, provided government, and the region's development and cultural agencies, data for the first time on the size and scope of creative industries in the region. For local practitioners, the study provided the first opportunity to view themselves in a connected way as an industry sub-sector (Henkel, 2000).

The 2000 study began with the proposition that the Northern Rivers area was growing as a lifestyle and learning region with the potential for the audiovisual industry to develop as a series of networked industry clusters. The study involved a quantitative data gathering process, an industry survey of 162 people and extensive interviews and consultations (Henkel, 2000).

The use of ABS data was found to be inappropriate as the prime source of data for this study, largely because the previous census had been conducted in 1996, and the purpose of the study was to gain a picture of the sector in the year 2000. As described

in Chapter 2, I resolved this problem by devising an alternative ground up data collection method that involved the compilation of a consolidated industry database from all existing records.

The 2000 report revealed that 1,621 people were involved in audiovisual industries and a further 2,278 in related creative industries in the region bringing the total estimate for creative industries in the region to 3,500 or 4.1% of the local work force. This was above the national estimate of 3% for creative industries in that period (Henkel, 2000).

The sector had shown dramatic growth since the Wynn Moylan report released in 1991 and this growth was predicted to continue. For some, the findings were dramatic and unexpected. For others, they confirmed that the Northern Rivers region was a vibrant and growing creative hub and a 'special case' when it came to the arts and cultural industries (Henkel, 2000).

Impacts of the 2000 study

Following the release of the 2000 study, media and creative industries became priority areas for the first time in local industry and economic planning. Evidence of this can be found in the *Working Paper for the Regional Industry and Economic Plan* (NRRDB, 2003) and the *Northern Rivers Strategic Regional Plan* (NRACC, 2004). The Regional Industry and Economic Plan (RIEP) released in November 2005 included creative industries for the first time as a regional priority. A shift was beginning to take place in which creativity was moving from the fringes to centre stage when considering the region's competitive advantage.

In 2001, I was a founding member of the board of the newly formed local screen industry agency, Northern Rivers Screenworks, and helped secure \$322,000 in funding from the Department of Transport and Regional Services through its Sustainable Regions program. This funding was used to initiate a major three-year Industry Development Program, which included implementing the strategies from *Imagining the Future*. A remarkable 78% of these strategies have been implemented or were well underway by December 2005 (Henkel, 2006).

The 2005 study

In 2004, the Northern Rivers Regional Development Board (NRRDB), who had commissioned the original 2000 study and were keen to know how the sector was tracking, decided to collaborate with Screenworks, Hatchling Productions and QUT on a PhD project funded by the Australian Research Council which would include a new study of the growing screen and creative industry sectors. The 2005 Study sought to identify factors which contributed to sustainable screen industry development in the region and to test the proposition that high value activity and investment opportunities follow a critical mass of creative people actively engaged, in this instance, in screen industries. The study further sought to contribute to the debate on the application of creative industries in regional areas and the needs of individual practitioners, sole traders and micro businesses in this sector.

There were a number of major challenges confronting this study in relation to definition, methodology and scope. In order to reflect the depth and breadth of the local sector, I adopted the model of creative industries incorporated into the RIEP for this study. This model is depicted in Figure 3.1 Creative industries were seen to include visual arts, screen industries, music, design and architecture, writing and communication and performing arts. The model also recognised connections with other sectors including research and innovation, education and training, healing and lifestyle, business and financial services, regional cuisine and tourism. Libraries and museums, which were considered distribution and exhibition outlets for creative industries, were also included in the 2005 study.

The most dramatic finding of the study related to the size of creative industries in the region at December 2005. A total of 7,280 people were identified as working in creative industries, which was 6.1% of the regions' work force. This represented a growth of more than 100% since 2000. There were 2,543 individuals or sole traders operating in the creative sector and 458 businesses. In the screen industries, 151 people identified as producers or content creators, and at least 30 of these had significant experience and track records in the industry. The total eco-system of creative industries, including professional, aspirant, emerging and student, was estimated to be 16,000 people.

Figure 3.1 Model of Creative Industries adopted in the Northern Rivers 2005 study



Estimates of economic activity by this sector were also calculated using two measures. The first showed creative industries to be worth an estimated \$187.6 million and screen industries \$40 million, and the second showed that 18 local producers collectively generated projects in excess of \$7 million in 2005, with a projected income for 2006 in excess of \$27 million. The projected increase was largely due to four major projects in development, which were anticipated to move into production the following year. Three of these projects did subsequently move into production and had combined budgets of \$21.5 million. Details of the actual budgets, local spend and local employment for two of these projects are provided in Chapter 6.

As in the 2000 study, a survey of screen industry practitioners from around the region was conducted, and 223 completed surveys were collected. The form and content of the survey built on the experience of the 2000 study, and the administration and management of the survey was vastly improved by using an online survey mechanism, Survey Monkey. The findings of the survey shed light on a range of issues relating to the

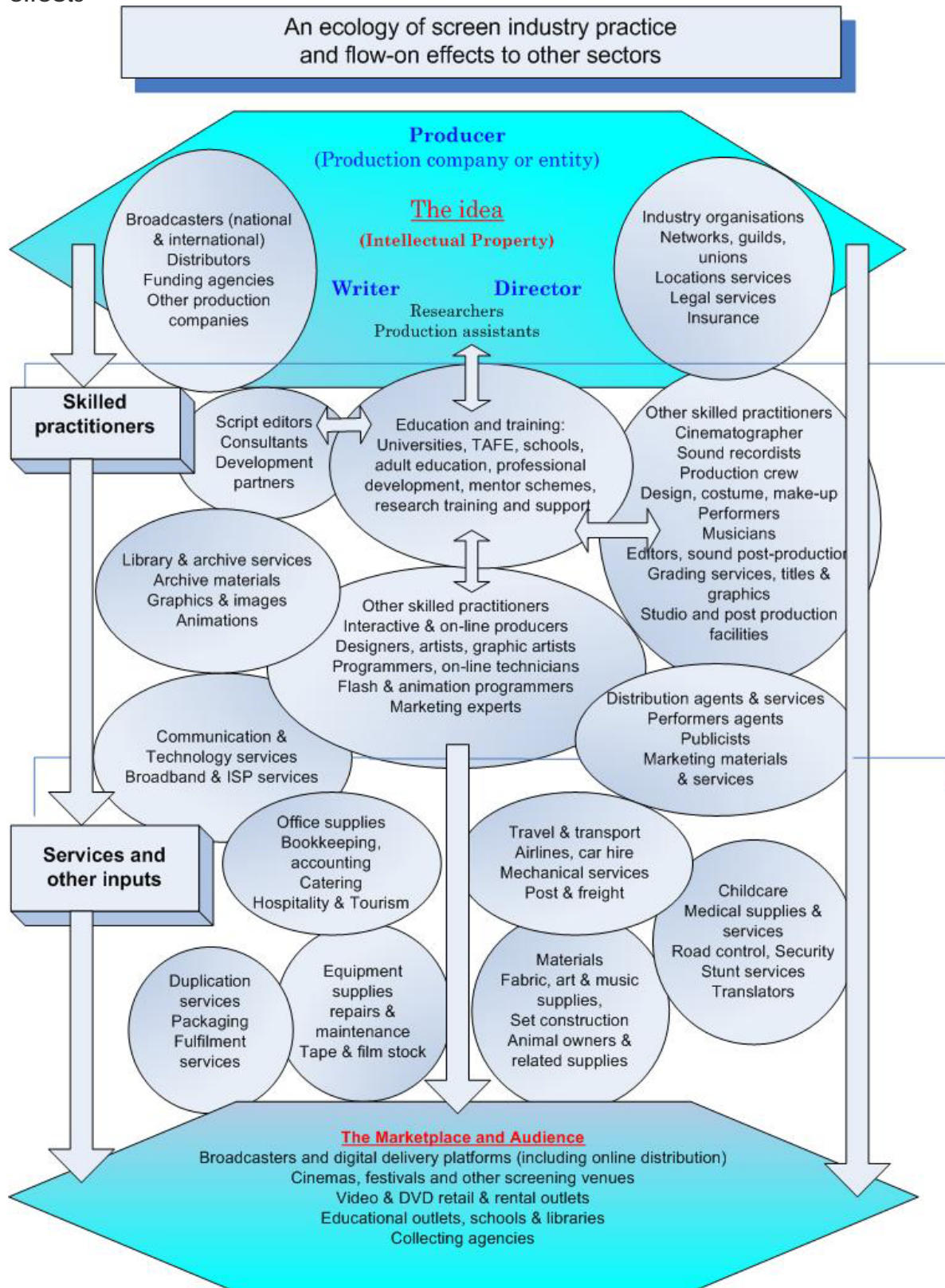
scope of the industry, including types of activity, geographical spread, business models, training, markets, distribution and economic value of the industry. These findings are detailed in Chapter 4.

Analysis of the findings of the 2005 Study revealed a picture of the complex web of relationships that made up the local screen industry sector. Between the initiation of an idea by a producer, writer or director and that idea reaching the marketplace and audience as screen content, there was a complex web of connections, interactions and inputs. The ecology of screen industry production was found to be both intricate and fluid and is depicted in graphic form in Figure 3.2 below.

In this model, the process begins with an idea, which is typically initiated and developed by a producer (or a writer or director), usually working within the framework of some type of production company or entity. They form teams and may engage researchers or production assistants to help with development of the idea. Very early in the process, contact is made with broadcasters, distributors, funding agencies and possibly other production partners. The services of industry agencies (such as Screenworks or SPAA), networks, guilds and location services may also be utilised at this early stage. Specialised services outside of screen industries are frequently engaged in the early stages of a project, including legal services and insurance. Other skilled practitioners are brought into the project at various stages. These include production crew, performers, musicians, interactive producers, graphic artists and marketing experts.

The education and training sector is included in the ecology as it is a vital component in providing training, professional development and mentoring that builds and maintains the skills, expertise and knowledge of individual practitioners. It also provides knowledge and research that informs production companies and the sector as a whole. Skilled practitioners also provide input into the education sector as training providers, mentors, consultants and suppliers of knowledge and expertise relating to the industry, so the flow is two-way.

Figure 3.2: Ecology of screen industries and flow-on effects



During the processes of production and post-production, the industry utilizes a wide range of services and inputs from other industries and sectors. These include business and equipment services, materials and supplies, travel, transport, hospitality, tourism, marketing, distribution, and even medical, safety, animal and childcare services.

The original idea, with the value-added creative elements and services described above, is transformed into a commodity ('content' or intellectual property) that can be commercialised and distributed in local or international markets, involving a range of marketing and distribution services.

The report on the 2005 Study argued that screen industry agencies and practitioners need to fully understand and utilise this complex eco-system to maximum advantage in order to achieve improved market reach and deliver high value, quality experiences and products to audiences worldwide. This is best achieved when the sector is viewed as a whole rather than in small parts. Networking and forming collaborative teams to focus on niche global markets and long-tail revenue streams were seen as keys to success in this industry (Henkel, 2006).

The picture that emerged of screen industries in the region in 2005 was of a large, growing and relatively optimistic sector. It consisted primarily of individuals, sole traders and micro businesses who created content for a range of outlets locally, nationally and internationally. There was a core group of highly experienced, credited producers generating big budget projects and employing local practitioners. I tracked two producers who exemplified this over the course of the decade, and their stories are detailed in Chapter 6. They are Deb Cox, writer and producer of *East of Everything*, and Cate McQuillen, writer and producer of *dirtgirlworld*.

Despite the optimism and level of growth, there were also considerable challenges and obstacles facing the sector. Greater access to broadband and mobile phone technology was widely regarded as an urgent issue, as was the need for more small business, marketing and promotion skills. The industry remained fragmented and needed further intervention in terms of networking, collaboration and professional development opportunities. There was a distinct gap between the experienced,

credited producers and the aspirant and emerging practitioners in terms of income generation, access to markets, networks and success in generating commissions, raising finance and producing content.

Findings of the 2005 study in more detail

Statistical overview of the region

The Northern Rivers region of NSW comprises seven local government areas: Tweed Shire, Byron Shire, Ballina, Lismore, Kyogle, Richmond Valley and Clarence Valley (see map of region, Figure 1.1). The population for the region in June 2005 was estimated to be 275,424, which was an increase of approximately 13,000 since 2001. The median age for the region was 41. The Northern Rivers work force was estimated to be 119,320 and the average unemployment rate for the region was 8.9% (DEWR, 2005).

Figure 3.3 Population estimates and median age for Northern Rivers: June 2005

Local government area:	Population estimates	Median age:
Ballina	39,953	42.6
Byron	30,827	39.8
Clarence Valley	49,538	42.4
Kyogle	9,630	41.8
Lismore	43,628	37.1
Richmond Valley	20,913	39.9
Tweed	80,935	43.6
Total for the NR region	275,424	41
Total NSW	6,774,249	36.7

The consolidated database: Size of the local industry

The 7,280 people identified in the study were engaged in a wide range of creative industry activities. Figure 3.4 lists the number of practitioners according to 19 selected categories, including content creation, production, distribution, retail, rental and support services, students, teachers and training providers. A key finding was that 151 people identified as screen producers, directors or content creators. These are the people responsible for generating ideas, financing, producing and distributing content. They are the drivers of the industry.

Figure 3.4 Number of practitioners in the Northern Rivers region by category

Category Number	CATEGORY	No. of practitioners
1A	Screen industries: producers, directors, content creators	151
1B	Screen industries: production crew (camera, sound, post-production)	173
1C	Screen & creative industries: (writers, musicians, actors, photographers)	947
1D	Screen industries: marketing, advertising, graphics, animation, sign writers, on-line multi-media, legal services	84
1E	Creative industries: visual arts, crafts, fashion, designers, screen printers	660
1F	Creative industries: architects	82
2A	Screen & Creative industries: distribution, dubbing services, festival & screening organisers, arts organisations, cinemas, screening venues, galleries, performing arts & music venues, museums	1672
2B	Screen & Creative industries: Retail and hire of equipment/services (retail outlets, hire & supplies)	207
2C	Screen industries: Repair and maintenance services	96
2D	Screen industries: video & DVD sales, book stores, music & art stores	166
2E	Screen industries: video & DVD rental outlets	260
2F	Screen industries: traditional Media – TV& radio stations, newspapers, community media	718
2G	Screen industries: new media – Pay TV, Telecentres, internet service providers and internet cafes.	45
2H	Screen & Creative industries: Libraries & library workers	207
2I	Screen & Creative industries: Ticket collectors, ushers, telemarketers	66
3A	Screen industry students in training courses	242
3B	Screen & Creative industries: Local Council, community, youth groups, emerging practitioners	280
3C	Screen & Creative industries: Teachers in creative industries – schools	481
3D	Screen & Creative industries: Teachers, tutors and training providers – Adult education	743
	TOTAL NUMBER OF PRACTITIONERS	7,280

The practitioners in the region were divided into three broad groups, with some inevitable overlap. The first category comprised practitioners who worked exclusively in screen industries. This included producers, directors, production crew, multi-media and digital content creators, repair and maintenance services, video and DVD outlets, traditional and new media companies. The second category comprised practitioners or businesses that contributed to screen industries but which also created or provided services within the broader creative industry sector. These included performers, writers, musicians, distributors and outlets such as entertainment venues, festivals, galleries and museums. It also included retail and hire of equipment, book and music stores, students and teachers of creative industries, ticket collectors, arts and community groups. The third category was all other creative industry workers, including visual artists and craftspeople, architects and library workers. In total there were 1,527 people who primarily worked in screen industries; 4,804 in screen and creative industries and 949 who were working in all other creative industry sub-sectors.

The data collection also captured an additional 1,069 people who were working as core volunteers in screen and creative industries. These people were mainly engaged in regular work on festivals and local creative arts events, or as library, museum and gallery volunteers or volunteers in community media. For many of these people, the work was full time and on-going but involved no payment. A further 1,525 volunteers were identified working on larger events such as the Blues Festival, Byron Writers Festival and other major events in the region. The total student body studying or engaged in creative industry practice in the region was estimated to be 6,220. This brought the estimated number of people involved in the total creative industries ecosystem in the region to in excess of 16,000 people.

Further analysis of the consolidated database was undertaken to provide a broader understanding of the business structures used by creative industry practitioners. Of the 7,280 people directly engaged in creative industries, there were 2,543 individuals or sole traders and 458 businesses. Of these, 297 were micro businesses employing less than 5 people, 82 employed 6 to 10 people and 67 between 11 and 50 people. There were 6 medium size businesses employing between 51 and 100 people and 6 businesses employing over 100 people.

Figure 3.5 shows the creative industry categories according to the size of the business. If individuals are counted as sole traders, the 7,280 individuals operated in a total of 3001 micro, small or medium sized business entities.

Figure 3.5 Geographic spread of individuals and sole traders across the region

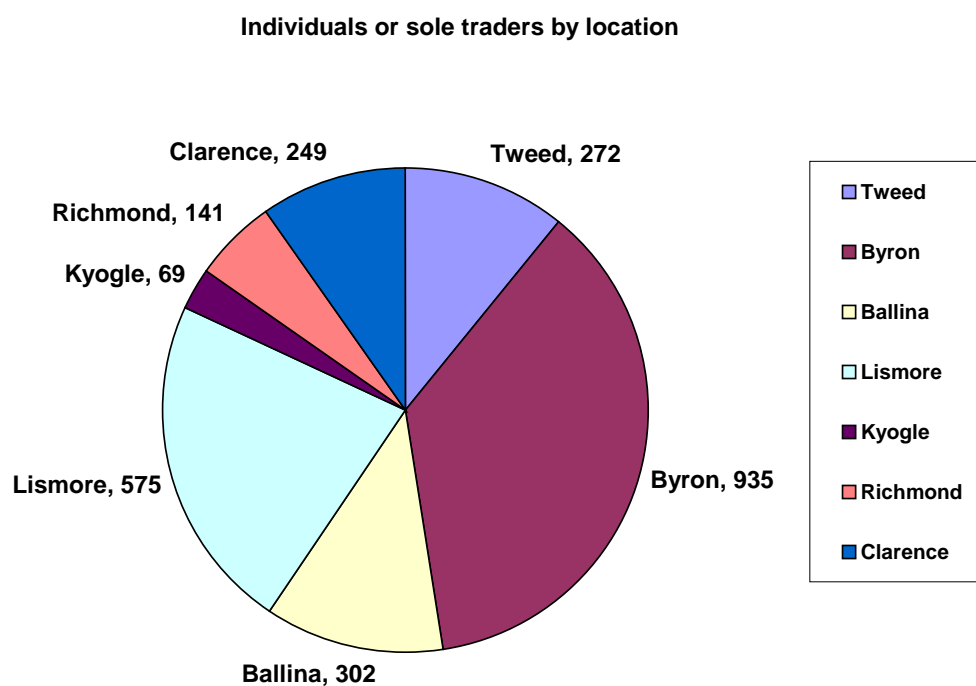
Type of business	Sole Traders	2-5 people	6-10 people	11-50 people	51-100 people	101+ people	Grand Total
1A Producers/content creators	132	10	0	0	0	0	142
1B Production crew	167	2	0	0	0	0	169
1C Other creatives	776	24	0	0	1	0	801
1D Adverting/marketing	74	5	0	0	0	0	79
1E Visual arts, crafts	627	8	0	0	0	0	635
1F Architects	8	13	3	1	0	0	25
2A Distribution and preservation	197	66	15	15	2	3	298
2B Equipment hire/retail	93	21	7	0	0	0	121
2C Repair	16	13	1	2	0	0	32
2D Media retail	11	28	3	2	0	0	44
2E Media rental	6	10	23	2	0	0	41
2F TV, radio newspaper	16	24	14	13	1	1	69
2G New media	6	8	7	0	0	0	21
2H Library	1	3	0	3	0	1	8
2I Ticket Collectors	1	5	1	2	0	0	9
3A Emerging practitioners	42	0	0	0	0	0	42
3B Community/ Local government	246	16	0	0	0	0	262
3C Education K-12	96	34	0	17	0	0	147
3D Education Tertiary	28	7	8	10	2	1	56
Grand Total	2543	297	82	67	6	6	3001

The size of businesses (including sole traders) across the region is depicted in Figure 3.6 and the geographical spread of the 2,543 individuals (or sole traders) who operate in the region is shown in Figure 3.7.

Figure 3.6 Size and location of creative industry businesses in the region

Size of business	Ballina	Byron	Clarence	Kyogle	Lismore	Richmond	Tweed	Grand Total
Sole Traders	302	935	249	69	575	141	272	2543
2-5 people	27	74	53	13	70	20	40	297
6-10 people	12	10	15	2	18	12	13	82
11-50 people	7	15	13	2	17	6	7	67
51-100 people	0	1	0	0	3	1	1	6
101+ people	1	0	0	0	3	0	2	6
Grand Total	349	1035	330	86	686	180	335	3001

Figure 3.7 Individuals or sole traders by location

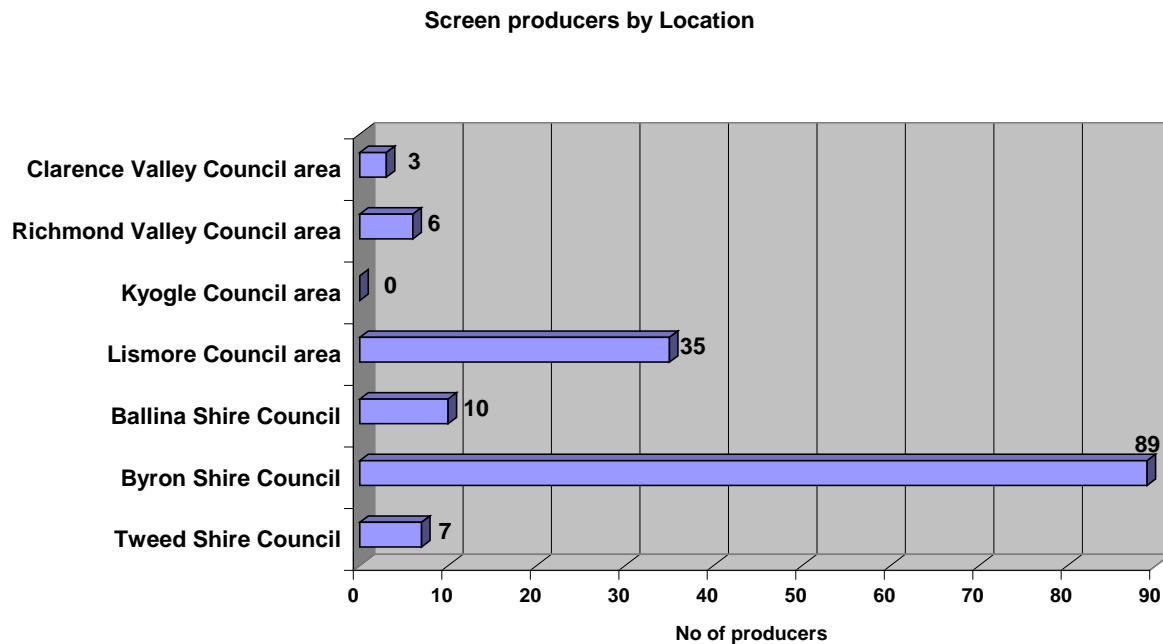


Information on size and scope of screen industries

A closer analysis of the data for screen industries was possible from the consolidated database and revealed a clearer picture of this sector. A total of 150 producers, directors or content creators (category 1A) were identified. Their geographic spread

across the region is shown in Figure 3.8. At least 30 of these people had track records and screen credits or were operating sustainable businesses in the region. Within this group there were 132 individuals or sole traders and 10 micro-businesses (employing between 2 and 5 people).

Figure 3.8 Geographical spread of screen producers in the region



Of the ten micro-businesses specialising in content creation for the screen industries, four were located in Byron Bay and three in Lismore. There was one in the Tweed, one in Ballina and one in the Richmond Valley.

The other categories relating to screen industries in the consolidated database were other production crew (1B), writers, musicians and performers (1C) and marketing, animation and multi-media practitioners (1D). The large majority of practitioners in these categories (1,017) operated as individuals or sole traders. There were 31 micro businesses (between 2 and 5 people) in these categories located across the region as follows:

Figure 3.9 Geographical spread of other screen businesses in the region

Tweed	Byron	Ballina	Lismore	Kyogle	Richmond	Clarence
3	12	3	8	2	2	1

The other categories examined in more detail were traditional media (2F) and new media (2G). New media companies comprised website and digital content creators, internet service providers, telecentres and internet cafes. There were 62 companies spread across the region covering traditional and new media. Two were large companies, one employing more than 100 people (The Northern Star, Lismore) and the other employing between 51 and 100 people (The Daily News, Murwillumbah). The remaining were micro, small or medium businesses located as follows:

Figure 3.10 Geographic spread of traditional and new media businesses

	Tweed	Byron	Ballina	Lismore	Kyogle	Richmond	Clarence
Micro business (2- 5)	3	5		6	4	3	3
Micro business (6 – 10)	3	3	6	4	1	1	5
Small business (11 – 50)	3	1		3	1	1	4
Large companies (50+)	1			1			
Totals	10	9	6	14	6	5	12

Comparisons with the 2000 study

Figure 3.11 depicts the change in the number of individuals and businesses identified in various sub-sectors of creative industries between 2000 (3,500 people) and 2005 (7,280 people).

Figure 3.11 Comparison of creative industry sub-sectors: 2000 and 2005

Comparison between 2000 and 2005	2000	2005
No. of people engaged in creative industries	3,500	7,280
No of individuals or sole traders	635	2,543
No of businesses associated with creative industries.	129	458
No of screen industry producers/directors (content creators)	36	151
No of production crew	144	173

No of writers, musicians, actors, photographers (other creative roles)	71	947
No working in multi-media/advertising/animation graphics(new media)	39	84
No in visual arts, crafts, fashion and design	10	660
No. of companies representing traditional media	33	53
No of new media companies	2	15
No. working in galleries, libraries, museums, festivals and performance venues, (distribution)	15	1,672
No. of businesses providing retail and hire services	19	28
No. of repair and maintenance services	26	33
No. of video & DVD rental stores (distribution)	27	47

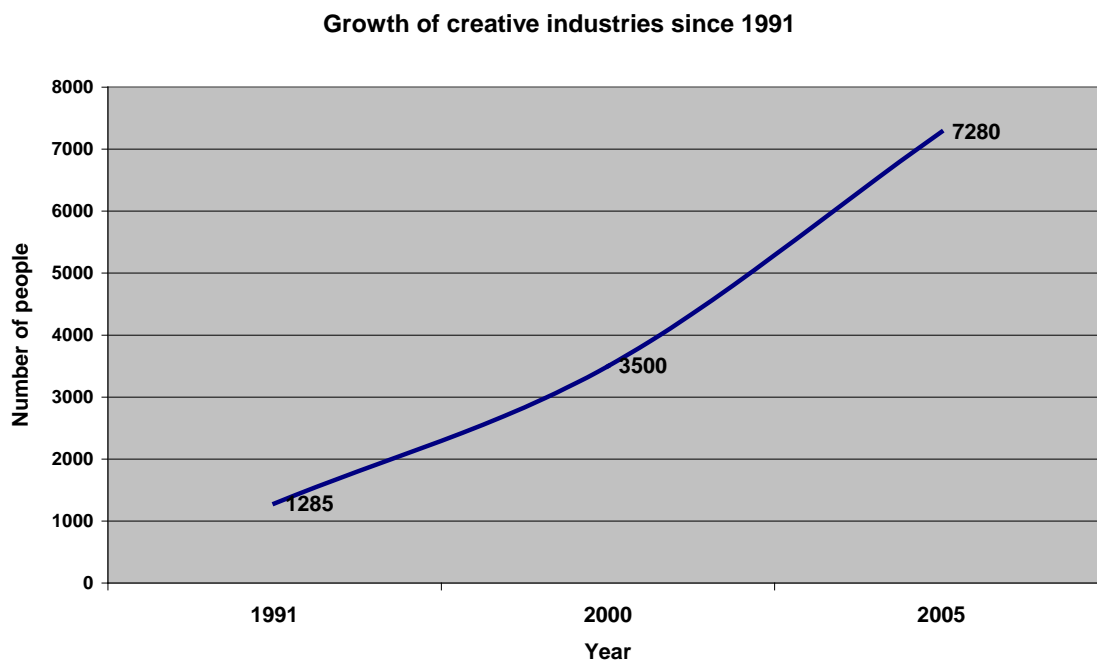
When making comparisons between the 2000 and 2005 data, a number of variables need to be considered. The availability and reliability of regional databases changed considerably between 2000 and 2005 as detailed in Appendix 1. The number of industry organisations had increased by 2005 and several had vastly improved data collection methods. This affected the extent to which data from each sub-sector could be compared. For example, there was no industry database for visual artists, fashion and design workers in 2000, and by 2005, Arts Northern Rivers had begun collecting data on this sector. Arts Northern Rivers had also done valuable work by 2005 in capturing more accurate records of people working as actors, musicians, photographers and in other key creative roles. The changes in the status of the regional agencies are outlined in Appendix 1.

A second factor was the variation in the definition of creative industries used in the 2000 and 2005 studies. For the 2000 study, the categories of creative industries included advertising, arts and crafts, film, television, radio, print media, performing arts, music, writing, publishing, multimedia and interactive media. The sub-sectors of architecture, design and heritage (libraries and museums) were not included. For the 2005 study, people working in galleries, museums, libraries and performance venues were included. Apart from these additions, the categories were maintained as far as possible to reflect the 2000 study.

Growth of creative industries

A 1991 study by Peter Wynn-Moylan entitled *Making Art Work* had identified 1,285 professional workers in the arts and related cultural industries. The data collection method used for this study was a sufficiently comparable ground up method to allow comparison with the 2000 and 2005 studies to depict the growth pattern. The Wynn-Moylan study focused largely on visual artists, but also included audiovisual practitioners, creative arts venues, festivals and people servicing the arts sector (Wynn-Moylan, 1991). When viewed together, the 1991, 2000 and 2005 studies demonstrate the overall growth trend for this sector (Figure 3.12).

Figure 3.12 Growth in creative industries from 1991 to 2005



Apart from the overall increase in the number of practitioners, it is worthwhile examining the findings of the 2000 and 2005 studies in more detail for what they revealed about the screen industries and other sub-sectors of creative industries.

The number of screen industry producers, directors and content creators rose from 36 in 2000 to 151 in 2005. This is a dramatic increase and an important one, as the producers are key drivers in the initiation and financing of projects and taking them to the market. Their contribution to the development of the sector is disproportionate to their number, as discussed in greater detail in Chapter 5.

The available production crew pool rose from 144 in 2000 to 173 in 2005, a far less dramatic increase. This can partly be accounted for by the number of practitioners who diversified their skill base and identified as producers or content creators in 2005, intent on initiating and producing their own projects rather than waiting for production work on other people's projects.

The number of people working as performers, musicians, photographers and writers, increased dramatically from 71 to 947. The number of writers listed as members of the Northern Rivers Writers Centre in 2000 was 268. By 2005, the membership had grown to 700 but some of these people were listed on other databases such as Arts Northern Rivers or Screenworks. When duplication was removed, the number of writers in 2005 was estimated at approximately 550.

Very little data was available on visual artists, crafts, fashion and designers in 2000 and the study identified only 10 practitioners. In 2005, there was a new, major database for this group, produced by Arts Northern Rivers, and the total number of practitioners in the region in this subset was found to be 660. This figure is, according to Arts Northern Rivers, a conservative figure. In 2005, a survey list of 1500 visual artists was compiled by Arts Northern Rivers from art gallery lists. Some of these people were counted in other sub-sectors, but it is probable that the figure for visual artists was still under-estimated in this study (Arts NR, 2009).

The 2000 study found a total of 129 businesses in the region associated with creative industries, whereas the 2005 study identified 458 businesses. Of these, 33 represented traditional media in 2000 and this had increased to 53 by 2005. The number of people working in the area of new media, including multimedia practitioners, advertising, animation and graphic artists, rose from 39 in 2000 to 84 in 2005. Some of this increase can be attributed to improved data collection methods.

The number of festivals, screening organisations and cinemas in the 2000 study was modestly estimated to be 15. This was a result of inadequate data collection mechanisms and records for this sub-sector at that time and the fact that music

venues, art galleries and museums were not counted. In 2005, the study found the distribution and exhibition of creative industries content to be the most vibrant sub-sector in the industry. This sector, comprising distribution, dubbing services, festival and screening events, venues and organisers, performing arts and music venues, galleries, libraries and museums, identified a total of 1,672 individuals.

There were 19 businesses in 2000 that provided retail and hire services to the creative industry sector (sound, lighting, tape stock, equipment hire and supplies). By 2005 this number had increased to 28 businesses. Altogether the number of practitioners in this sector was 207, and was made up of 93 individuals or sole traders and 28 micro businesses (employing less than 10 people). The number of repair and maintenance services for creative industries in 2000 was 26, mainly micro-businesses. In 2005 this number had risen to 33 and consisted of 17 sole traders, 14 micro businesses (under 10 people) and two small businesses (under 50 people) making a total of 96 individuals working in this sector. The number of video rental stores in 2000 was 27. In 2005 the category included DVD rental outlets and the number had increased to 47 businesses employing a total of 260 people.

Arts Northern Rivers database

In 2004, Arts Northern Rivers began compiling a database of creative workers and by December 2005 there were 1,542 entries comprising people working across all of the six industry sub-sectors. This database was counted in the 2005 study and cross-checked against all the other industry databases and duplication was eliminated. In future studies, the Arts Northern Rivers database may be the most reliable and comprehensive source of ground up data for the region in terms of the size and scope of creative industries.

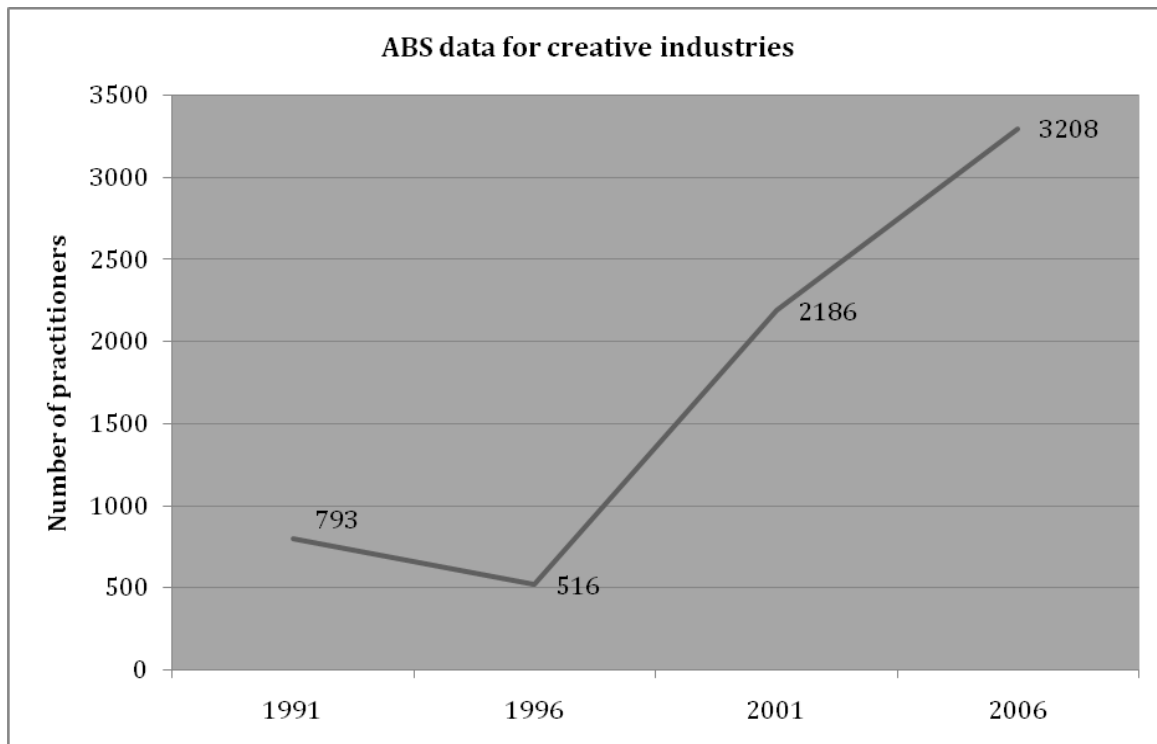
Federal government data on the size of creative industries

In addition to the data collected by the ground up method directly from local creative industry sources, two sets of top-down federal government data were obtained for this study: the Australian Bureau of Statistics (ABS) data from the Census of Population and Housing; and the Australian Business Registration (ABR) records.

ABS data for the region

During the 2000 study, two data sets were requested from the ABS: for 1991 and 1996. The parameters sought were the postcodes for the Northern Rivers region, 2460 – 2490, and a set of ASCO occupations (Australian Standard Classification of Occupations) that closely matched those used in the 2000 study. The 1991 list of occupations was shorter than the 1996 list because the ABS revised their occupation list during this period to accommodate new occupations such as 'media producer' and 'desktop publishing operator'. ABS data for 2001 and 2006 was later accessed matching the selected occupations in the 2000 and 2005 studies. Figure 3.13 depicts the growth in this sector from 1991 to 2006 as shown by ABS data.

Figure 3.13: Growth of creative industries as indicated by ABS data: 1991– 2006



In 1991, the ABS identified a total of 793 people working in creative industries. In 1996 this figure had reduced to 516. The reason for the decline was attributed to a movement away from the region by a number of professional visual artists during the period, due to lack of infrastructure, networks and work opportunities in the region (Wynn Moylan interview, 2000). The ABS data for 2001 showed 2,186 people employed

in creative industries. In 2006 this had increased to 3,208. Figure 3.14 shows the data from the 2001 Census for selected ACLC Occupations.

Figure 3.14 ABS data from 2001 Census for selected ACLC Occupations

ACLC code	ACLC Occupations	No of people
1296	Media Producers and Artistic Directors	37
2221	Marketing and Advertising Professionals	168
2292	Librarians	74
2491	Teachers (self-employed) of creative arts	340
2530	Artists and Related Professionals	60
2531	Visual Arts and Crafts Professionals	215
2532	Photographers	50
2533	Designers and Illustrators	202
2534	Journalists and Related Professionals	133
2535	Authors and Related Professionals	42
2536	Film, Television, Radio and Stage Directors	47
2537	Musicians and Related Professionals	146
2538	Actors, Dancers and Related Professionals	53
2539	Media Presenters	23
4422	Sign writers	63
4910	Printing Tradespersons	9
4911	Graphic Pre-Press Tradespersons	40
4912	Printing Machinists and Small Offset Printers	98
4913	Binders and Finishers	7
4914	Screen Printers	27
4992	Performing Arts Support Workers	74
4999	Other Miscellaneous Workers	141
5995	Desktop Publishing Operators	22
6192	Library Assistants	89
8312	Ticket Collector or Usher	26
	TOTAL	2,186

The limitations of using ABS data to gain an accurate picture of the number of people working in creative industries were discussed in some detail in Chapter 2. A comparison between the results from the ABS method and the local studies using the ground up method, reveals this disparity. However, when looking at the two data sets side by side, one interesting parallel was noted. The 2000 study found 36 people who identified as producers or directors and the ABS equivalent in 2001 was 37 people. The close match in this category, one that is more traditional and easier to define than other creative industries categories, is an indication of the reliability of the Northern Rivers 2000 estimates. Verification of the high number of experienced producers and content creators residing in the region is a key issue for the region, as the producers are a major source of revenue generated by this sector.

Data from Australian Business Registration (ABR) records for September 2005:

Data on the number of creative industry businesses in proportion to all industries in the Richmond-Tweed region was sourced from a customised extract of the Australian Business Register for September 2005 with analyses made available through the Creative Digital Industries National Mapping project (NMP) undertaken at QUT.

The data obtained was for the Richmond-Tweed area and comprised the following local government areas: Tweed Shire, Byron Shire, Ballina, Lismore, Kyogle and Richmond Valley. It did not include the Clarence Valley, which fell into the Mid North Coast region. However, it is worth examining this data as the findings very closely mirror the findings of the Northern Rivers 2005 study. This provides both a verification of the study and an alternative method for collecting data on creative industries business activity in regional areas in the future.

Figure 3.15 shows that the number of creative industry businesses registered in the region in 2000 was 1,861 which represented 5.3% of the total number of businesses in the region. The 2000 study had identified 2,246 sole traders and 129 micro-businesses operating in the region (Henkel, 2000). The ABR was established in 2000 and the figures for that year largely under-represented the number of micro-businesses.

The ABR data showed that by 2005, the number of creative industries businesses registered in the region had risen to 3,218, which represented 6% of all businesses. The 2005 study found a total of 3,001 businesses in the region, comprising 7,280 people and representing 6.1% of the local work force. As the ABR data does not include the Clarence Valley, these figures indicate that the Northern Rivers 2005 study very likely represents an underestimation of the true size of creative industries in the region.

Figure 3.15 Number of creative industry businesses in proportion to all industries in the Richmond Tweed region.

Source: Analysis by QUT of a customised extract of the Australian Business Register, 1st September 2005

All Industries:				
Richmond Tweed		No GST	GST Issued	Total
	YE 2000	11,787	23,256	35,043
	Sep 2005	24,450	28,494	52,944
Total creative industries				
Richmond Tweed		No GST	GST Issued	Total
	YE 2000	933	928	1,861
	Sep 2005	2,024	1,194	3,218
Creative Industries Proportion				
Richmond Tweed		No GST	GST Issued	Total
	YE 2000	7.92%	3.99%	5.31%
	Sep 2005	8.28%	4.19%	6.08%

Figure 3.16 below provides a more detailed breakdown of the types of businesses included in the Australian Business Register. The categories match the 2005 study more closely than the 2000 study. The 2000 study did not include Performing Arts Venues, Book and Other Publishing, Libraries, Architectural Services, Jewellery and Silverware Manufacturing and Museums (Henkel, 2000). All of these categories were included in the 2005 study with the exception of Jewellery and Silverware Manufacturing.

The growth in the number of businesses registered by the ABR in 2000 and 2005 across almost all sub-sectors of creative industries matches the large growth trends found in the Northern Rivers study.

Figure 3.16 Types of businesses registered in Tweed Richmond areas: 2000 and 2005

Source: Analysis by QUT of a customised extract of the Australian Business Register, September 2005

Total Entities by ABN registration	2000	2005
k_92510 Sound Recording Studios	20	33
k_24300 Recorded Media Manufacturing & Publishing	1	1
k_91210 Radio Services	13	16
k_91110 Film and Video Production	85	152
k_99030 Film and Videotape Royalties	1	3
k_91220 Television Services	18	41
k_78510 Advertising Services	136	291
k_78342 Software development services	39	114
k_78349 Computer consultancy services	112	186
k_24301 Computer software mfg or publishing	6	7
k_78340 Computer Consultancy Services	51	43
k_78341 Internet Development Services	78	195
k_24220 Other Periodical Publishing	18	22
k_92411 Actor (own account) live theatrical or musical	393	660
k_92520 Performing Arts Venues	22	38
k_24210 Newspaper Printing or Publishing	19	22
k_24230 Book and Other Publishing	38	52
k_92100 Libraries	6	11
k_78210 Architectural Services	144	217
k_78520 Commercial Art and Display Services	144	234
k_29410 Jewellery and Silverware Manufacturing	41	59
k_95230 Photographic Studios	61	145
k_92200 Museums	14	20
k_92420 Creative Arts	403	660
TOTAL NUMBER OF BUSINESSES	1863	3222

National studies of the size of screen and creative industries

In this section, a variety of national mapping studies of screen and creative industries are reviewed, with a summary of their findings. The purpose of this is to gain an overview of the size and scope of the sector at a national level. Two recent documents mapping the creative industries sector in NSW are also included (DSRD, 2008) and the contribution the ARC Centre of Excellence for Creative Industries and Innovation (CCI) to this work over the past decade is discussed.

Screen Australia data

Screen Australia, and previously the Australian Film Commission, collects and analyses data as one of its core functions. It provides regular snapshots of the Australian film, video, television and interactive digital media industries. This information is presented on *Get the Picture Online*, accessible on the Screen Australia website <http://www.screenaustralia.gov.au/gtp/> and is updated regularly.

Key information from *Get the Picture Online* has also been presented in two publications, *Australia's Audiovisual Markets* (2004) and *Audiovisual Production in Australia* (2007). Both publications present information on Australia's cinema, video, television and interactive media markets, ranging from industry structure and major players to box office results, DVD sales, top films and programs, viewing patterns, internet use and audience demographics (Screen Australia, 2010).

Get the Picture Online also provides employment data for the creative workforce in Australia. The most recent data on employment, sourced from ABS *Work in Selected Culture/Leisure Activities, 2007*, shows 540,600 people participated in what could be defined as audiovisual and interactive media activities (listed in Figure 3.17 below), with the highest proportion (47%) involved in designing websites, followed by film production (19%) and television (14%). Of all categories, people working in television were more likely to be paid; 56% of them received some payment in 2007.

Figure 3.17 National engagement(paid and unpaid) in screen industries: 2007

Source: Screen Australia, Get the Picture Online at <http://www.screenaustralia.gov.au/gtp/>

Work in Selected Culture and Leisure Activities Survey, 2007	
<u>Number with paid or unpaid involvement in audiovisual and interactive media activities</u>	531,400
Television	77,400
Film production	101,000
Cinema and video distribution	32,500
Interactive content creation	329,700
Paid	251,100
Unpaid	280,300

More people were involved in audiovisual and interactive media activities in 2007 than in 2004, with the strongest growth recorded in interactive content creation (up 54%) and film production (up 40%). Paid work was up by 45% in cinema and video distribution, 29% in interactive content creation and 8% in film production, but down by 10% in television. Since 2001, the total number of people involved in audiovisual activities had increased by 42% and those in paid work by 19%. This contrasts with an increase of 108% recorded in the Northern Rivers region from 2000 to 2005.

Figure 3.18 shows the number of people employed in the creative workforce by state in 2006. Screen Australia's creative workforce data was sourced from the ARC Centre of Excellence for Creative Industries and Innovation (CCI), which identified six creative workforce segments by grouping together several industry categories, as defined in the ANZSIC. These are advertising and marketing, design and visual arts, film, architecture, television and radio, software and interactive content, music and performing arts, writing and publishing and print media. Also considered as part of the creative workforce were people employed in specialist creative occupations either working in the industries listed below or employed in other sectors of the economy

Figure 3.18 Number of people employed in the creative workforce by state in 2006.

Source: Analysis by Centre of Excellence for Creative Industries and Innovation (CCI) using unpublished data from the Australian Bureau of Statistics (ABS), Census of Population and Housing, 2006.

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Australia
Number									
Film, TV & radio	14,917	7,637	4,973	1,818	1,981	590	367	743	33,026
Software & interactive content	67,300	48,418	21,961	9,222	12,231	1,569	636	8,325	169,662
Music & performing arts	11,817	8,322	5,651	2,100	2,511	493	289	564	31,747
Advertising & marketing	24,850	17,286	8,980	3,122	3,884	630	247	782	59,781
Writing, publishing & print media	27,324	18,846	11,395	5,038	7,031	1,695	594	2,654	74,577
Architecture, design & visual arts	40,075	33,147	20,983	7,202	10,732	2,147	833	2,878	117,997
<i>Total</i>	<i>186,283</i>	<i>133,656</i>	<i>73,943</i>	<i>28,502</i>	<i>38,370</i>	<i>7,124</i>	<i>2,966</i>	<i>15,946</i>	486,790
Proportion									
Film, TV & radio	45%	23%	15%	6%	6%	2%	1%	2%	100%
Software & interactive content	40%	29%	13%	5%	7%	1%	0%	5%	100%
Music & performing arts	37%	26%	18%	7%	8%	2%	1%	2%	100%
Advertising & marketing	42%	29%	15%	5%	6%	1%	0%	1%	100%
Writing, publishing & print media	37%	25%	15%	7%	9%	2%	1%	4%	100%
Architecture, design & visual arts	34%	28%	18%	6%	9%	2%	1%	2%	100%
<i>Total</i>	<i>38%</i>	<i>27%</i>	<i>15%</i>	<i>6%</i>	<i>8%</i>	<i>1%</i>	<i>1%</i>	<i>3%</i>	100%

Around two-thirds of all people employed in the creative workforce in 2006 were located in NSW and Victoria. The largest industry segment was software and interactive content, with 68% of its workforce employed in these two states. This pattern was replicated across the remaining segments, with NSW and Victoria combined accounting for 62–70% of each segment's workforce. Screen Australia data does not include information on people employed in regional areas. This data is useful in providing an overall snapshot of the industry at a national level. As the data gathering mechanisms and categories differed significantly, a direct comparison with the findings in the Northern Rivers region was not possible.

Australia Council data

In November 2005, the Australia Council released a report entitled *Artwork 2: A Report on Australians Working in the Arts* (ABS, 2005). This report was a follow-up to the *Artwork* report released in 1997, which related to arts workers in the early 1990s. *Artwork 2* was compiled by the ABS and used three primary sources of data for calculating the number of artists in Australia and produced three sets of findings. The Australia Council study did not include people working in the film, television or media sectors.

Two of the data sets in *Artwork 2* showed some parallels with the Northern Rivers Study. The first data set was derived from the ABS, 2001, and found 259,909 people working in cultural occupations, which was 3.1% of the work force. This may be compared with the Northern Rivers study in 2000, which identified 3,500 people involved in creative industries, which was 4.1% of the local work force (Henkel, 2000).

The second relevant data set was from an ABS Survey of Work in Selected Culture and Leisure Activities conducted in April 2004, which allowed for people's involvement on both a paid and unpaid basis. This study included people such as a volunteer art gallery guide or a novelist who also works as a taxi driver. This study found approximately 2.9 million people or 18% of the Australian population aged 15 and over, were involved in some form of paid or unpaid work relating to the selected culture and leisure activities. Of the people being paid, the largest number worked as writers and designers followed by visual artists and people working in computer art. More than half a million people reported work in event organising and a further half a million in visual arts activities (ABS, 2005). This may be compared with the Northern Rivers 2005 study which found 16,000 people involved in paid and unpaid capacities in the larger eco-system of creative industries, including writers, designers, visual artists, students and people working in event management and festivals, representing 13.4% of the total workforce.

The Creative Industries Cluster Study

In 2004, DCITA released a three-volume report entitled the *Creative Industries Cluster Study*, which provided information on the scope, scale and dynamics of the digital content industries in Australia. A summary of the findings of this study, which used ABS data, is presented in Figure 3.19. In this study, creative industries represented 4% of

national employment, which may be compared to 6.1% of the work force identified in the 2005 Northern Rivers study.

Figure 3.19 Data from Creative Industries Cluster Study 2004.

	Creative Industries Cluster Study
No of people employed	300,000 people
No. of businesses	Approx 7,000 firms
Percentage of national employment	4%
Contribution to the economy: per annum	\$21 billion
Gross value add multiplier	1.58
Percentage of GDP	3.5%
Average annual growth rate	4.8%
Annual trade deficit	\$1 billion

The report highlighted the importance of the digital content industries to other industries and the economy as a whole. This was indicated by a measure called the gross value added multiplier, defined by the ABS as “the proportionate increase in the total ‘value add’ across the economy from an increase in the level of demand for goods and services in a specific sector” (DCITA, 2005). In other words, the higher the multiplier, the more substantial the impact on other sectors. The DCITA study found that the creative digital industry had a significantly higher multiplier than almost all other sectors at 1.58. The only sector with a higher multiplier was education and both sectors were key drivers of the knowledge economy and were strongly interconnected (DCITA, 2005).

In many regards, the *Creative Industries Cluster Study* reached similar conclusions as the Northern Rivers 2005 study. The national study found that the large majority of firms were small micro-businesses, with the exception of a few large production and distribution entities, and that the sector was fragmented, which limited the scope for collaboration. It generally had poorly developed business models and high levels of risk, and the project-by-project basis of the industry made it a particularly difficult environment for raising money. The need for more effective investment frameworks,

improved skills and training and more accurate data collection methods were also advocated.

Following the release of the Cluster Study, a follow-up report entitled *Unlocking the Potential, a Digital Content Industry Action Agenda* was released in November 2005. This report represented a commitment by the industry to taking action to advance the sector and foster leadership and drive from within. It also represented a case to government for assistance in implementing the various recommendations and proposed solutions. The federal government never committed to this agenda and the report has lain dormant ever since.

NSW Creative Industry Insights

In December 2008, the NSW Department of State and Regional Development's Innovation Unit released *NSW Creative Industry Insights* and its companion document, *NSW Creative Industry Fundamentals*. These reports provided the first audit of the creative industries in NSW and identified challenges and opportunities for the sector (DSRD, 2008a). *The Creative Industry Fundamentals* reported that creative industries employed 5% of the NSW workforce and employment had grown at twice the rate of other industries. Wages in the creative industries were 18% higher than average, and NSW dominated employment in 10 of 11 sectors. In 2006, a total of \$7.6 billion was earned through salaries and wages in the creative industry, which accounted for 5.4 per cent of all earnings in the state. Judged against its share of the national economy and population, NSW had a very high share of creative industry employment in television, film, music, and advertising and marketing.

The majority of businesses in the creative industry were found to be small, typically non-employing businesses (those that did not pay income tax on behalf of employees). Most self-employed people qualified as non-employing businesses. Across the state, 61% of the sector comprised non-employing businesses, compared with 70% of creative workers in the Northern Rivers region who classified themselves as self-employed (DSRD, 2008a, Henkel, 2006).

Sydney still had the lion's share of creative industry employment at 82%, but the Northern Rivers had the highest employment growth at 5.1%, more than double the growth rate of Sydney. The Northern Rivers also had the highest density of creative workers per capita in regional NSW (DSRD, 2008a).

CCI mapping projects and implications for the creative industry sector

Research continues and debate is robust on the most reliable and suitable methods for measuring the creative industry sector. One of the major contributions made by the ARC Centre of Excellence for Creative Industries and Innovation (CCI) in Queensland to this debate over the past decade has been to explore the policy implications of the differences between emphasising industry and occupation or workforce in defining and measuring the 'creative workforce' (Cunningham, 2010).

The CCI has focused on the development and application of the 'creative trident' methodology. This method presupposes three parts of an employment quadrant. The first is the total of creative occupations within the core creative industries (specialists). The second comprises the creative occupations employed in other industries (embedded) and the third is the business and support occupations employed in creative industries, such as managing, accounting for, and technically supporting creative activity (support). In this scenario, the number of people employed in the 'creative economy' is the total of creative industries employment plus embedded employment (Higgs, Cunningham, Pagan, 2007).

The method was first applied to Australian census data for 2006. Results included much larger totals for the creative workforce (5.4%) and significantly higher estimates of income (almost \$28 billion, 7% of the earnings of the total workforce) than had been previously estimated based on standard classification categories. A consistent finding from repeated applications of the financial creative trident has been that creative workers have incomes above, and in some cases, considerably above national averages. The exceptions were music and performing arts, which typically aggregated below national averages.

When applied to the arts sector, the trident analysis showed that, in 2006, there were 109,160 people employed in the arts, representing some 1.2% of Australian employment. An interesting aspect of arts employment revealed by applying the trident method was that only one in five people employed in the arts industries were in an artist occupation. This meant that for every artist employed in the arts industries, there were four people employed in other occupations: two in arts-related occupations and two in non-arts occupations. More people in artist and arts-related occupations were employed outside the arts industries (51,120) than were employed within the arts industries (33,870)(Cunningham, 2010).

The headline finding that there are more creatives working outside the creative industries than inside them ('embedded') as well as the dynamics of business-to-business activity between the creative industries and the rest of the economy, have significant implications for creative industry policy and the development of future mapping mechanisms.

Conclusions

A review of the various mapping studies reveals a wide diversity of approaches taken in measuring the creative workforce, usually with very different results. The discrepancies resulting from differentiating between industry and occupation or workforce are further complicated by the notion of 'embedded' and 'support' workers. However, certain distinctive features of the creative industries do emerge from this analysis.

The creative industries have a higher than average percentage of self-employed or sole practitioners compared to other industries. In the industry classification for Creative Artists, Musicians, Writers & Performers, 60% were self-employed. Another interesting feature of the sector was that, compared with other employment, more creatively trained people are likely to be working outside their specialist creative industry sectors than inside them. For example a digital artist may be working in the business sector or a trained performer may be working in the hospital or education sector. One conclusion to draw from this may be that many creatives are managing

the issues of uncertainty and precarity associated with creative industries, by working outside the sector (Cunningham, 2010).

Another consistent feature noted across most measures of the sector was the ongoing trend towards growth in the creative industries. Over the eleven years to 2007-08, the creative industries nationally expanded at an average annual rate of 5.8 per cent, compared to an average GDP growth of 3.6 per cent over that period (CIE, 2009). Growth was spread across most industry sectors, and may be higher than previously thought, given the finding that there are more creatives employed outside the creative industries than inside them.

The broad trends in national growth and the increases in percentage of the workforce were consistent with those identified in the Northern Rivers. In general, though, the Northern Rivers showed higher employment growth and greater density of creative workers per capita than state or national averages. The reasons why the region was attracting this notably high number of creative practitioners needed to be examined in greater detail. The dramatic growth figures, the nature of the work being undertaken and the high number of experienced creative producers also required further investigation. This was done by devising, distributing and analysing an industry survey conducted as part of the 2005 study. The findings of the survey, and what they revealed about the way businesses were operating, types of content being produced, variety of distribution models and the training and professional development of practitioners are detailed in Chapter 4.

Chapter 4

Screen Industries Survey 2005

In this chapter, the findings of the screen industry survey conducted in 2004/05 are presented and analysed. A total of 223 people responded to the survey and the results are summarised under sub-headings, including information about respondents, occupation and business information, distribution, training, professional development, importance of place, skills services and facilities. In order to track the changes in the sector, the survey findings are compared with the results of the 2000 survey and conclusions are drawn about the drivers and impediments for sustaining screen industries in a regional area.

In addition to the quantitative ground up data gathering described in the previous chapter, I also conducted an industry survey, which commenced in 2004 and continued through early 2005. The purpose of the survey was to discover new information about the scope and nature of screen industry activity and the problems and opportunities arising from working in the region.

The survey was delivered on-line on the Screenworks website, and 500 printed copies were distributed throughout the region. Of the 223 people who completed the survey, 210 (94%) filled out the survey on-line using the survey mechanism, Survey Monkey. An additional 13 surveys (6%) were returned by post. The survey contained 32 questions, most of which required respondents to select and tick a box. Some questions included a category of "other" and asked respondents to specify. A copy of the survey form is included in Appendix 5.

It should be noted that in most cases, respondents were offered the opportunity to list more than one category. For this reason, the percentages supplied in many of the tables below do not add up to 100. So for example, one practitioner may work in more than one council area which results in the finding that 55% of people worked in Byron Shire area, 22% in the Tweed, and 40% in Lismore and so on. The figures listed

represent the percentage of people who selected that option as a proportion of the total sample of 223 respondents.

In summary, the survey revealed that the majority of screen industry practitioners lived and worked in Byron Shire (55%), followed by Lismore (40%), Ballina (24%) and Tweed Shire (22%). Almost 40% of respondents arrived in the area between 1991 and 2000 and a further 23%, almost a quarter of all respondents, moved into the area between 2000 and 2004. This finding confirmed the locally held belief that the number of screen and creative industry practitioners migrating to the region had more than doubled in the past decade.

The survey found that 70% of people working in screen industries classified themselves as self-employed. Their work was portfolio and CV driven, heavily reliant on networks, high risk and flexible. Their profiles closely aligned with descriptions of the 'new independents' or 'creative workers' depicted by some sectors of the academic and creative industries community (Leadbeater and Oakley, 1999; Florida, 2002) and critiqued by others (McRobbie, 2002).

Most respondents reported a mix of work from locally initiated work with commissioned work from outside the region and around 20% sourced work from overseas. The type of content being produced included short films, which rated the highest, followed by the production of commercial media content, including television, radio and press, educational programs, documentaries and content for newspapers, magazines and websites. The most utilised markets for content were festivals, followed by the ABC and the internet, which were more widely used than commercial media, cinema or DVD. Generally, local and national markets were more utilised than international markets.

When asked why they had moved to the region, most people nominated lifestyle reasons (physical beauty, better climate and less pollution), followed closely by a sense of community and like-minded people. The next most valued attribute was the idea that living in the region enhanced personal health and provided a sense of peace, freedom and tranquillity. Other important attributes included the creative

potential and developing industry of the region, and appreciation of a culturally diverse community.

Of the disadvantages nominated, product and service gaps rated the highest. These included lack of equipment, customer service, support and skill gaps especially in the area of producing. Limited paid work opportunities rated the second highest. Other disadvantages that rated highly included distance from cities and events, lack of skilled and professional people, lack of funding and investment and lack of training opportunities and support. Screenworks has subsequently been addressing the skills gaps and continues to provide professional development and training opportunities to both emerging and experienced producers.

Despite the disadvantages, the majority of practitioners (78%) indicated that they were positive or extremely positive about the future. A significant proportion (42%) said that they expected their businesses or career prospects to grow in the next five years. A further 22% said their businesses were sustainable, and 14% said they were commencing. Only 7% said their businesses were in decline and 4% were ceasing operations.

Survey findings in detail.

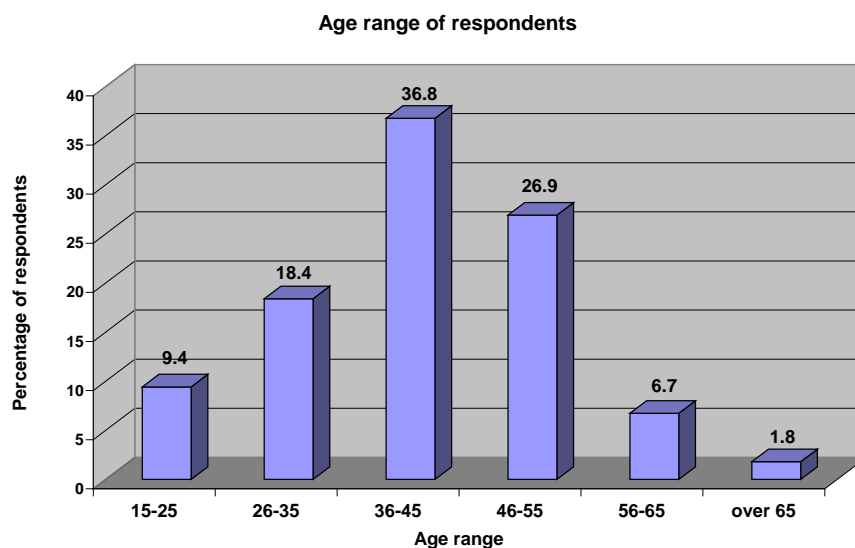
Information about respondents: Gender and Age

The first two questions of the survey related to the age and gender of respondents. 51% were female and 49% were male. The majority of respondents were aged between 36 and 55. Only 9.4% were aged between 15 - 25 and 1.8% were over the age of 65 as depicted in Figure 4.1 below.

Where practitioners lived, worked and conducted business

The next three survey questions provided information on the local government area where people lived and worked and the major locations for conducting their business. The survey found that the majority of respondents lived in Byron Shire (43.5%), followed by Lismore Council area (22.9%) and Tweed Shire (11.2%). Ballina Shire was home to 10.3% of respondents and Clarence Valley 6.7%. The least number of respondents live in Richmond Valley (2.7%) and Kyogle Council area (2.2%).

Figure 4.1 Respondent overview



When comparing the figures on where people lived with the data collected during the 2000 survey, the effects of two council amalgamations were taken into account. In 2000, Richmond and Casino joined to form the Richmond Valley Shire Council and Nymboida and Ulmarra combined to form Pristine Waters. A further amalgamation was undertaken by the State Government in February 2004 which saw the formation of the Clarence Valley Council (comprising Grafton City Council, Copmanhurst Shire Council, Maclean Shire Council and Pristine Waters Council). The figures for the 2000 study were, therefore, assigned to the new council areas for the purposes of comparison with the 2005 figures, as depicted in Figure 4.2.

Figure 4.2 Local government area where respondents live: comparison between 2000 and 2005 surveys.

	Tweed Shire	Byron Shire	Ballina Shire	Lismore Council area	Richmond Valley	Kyogle Council area	Clarence Valley
Percentage in 2005 survey	11.2	43.5	10.3	22.9	2.7	2.2	6.7
Percentage in 2000 survey	3.1	49.4	6.8	30.2	3.7	1.2	5.5

This table shows a changing pattern in relation to where screen industry practitioners choose to live. These changes were a result of some internal migration, but also represented greater visibility of screen industry practitioners and more active participation in the survey by people outside of Byron Shire. There were more respondents in Tweed Shire, Ballina Shire, Kyogle and Clarence Valley in 2005, which reflected more practitioners moving to these regions and more connection and interaction with regional industry initiatives. In 2005 the beginning of a migration away from Byron Shire and Lismore was being noticed. The reasons for this are explored in more detail in Chapter 5. The percentage of respondents working in each region also changed noticeably since 2000. Most respondents worked in more than one council area.

Figure 4.3 Local government area where respondents work: 2000 and 2005 surveys.

	Tweed Shire	Byron Shire	Ballina Shire	Lismore Council	Kyogle Council	Richmond Valley	Clarence Valley
Percentage in 2005 survey	22.0	55.2	24.2	40.4	8.5	8.5	9.4
Percentage in 2000 survey	6.3	53.2	12	36.1	2.5	8.2	9.5

By 2005, there were more people working in the Tweed Shire (22%) as opposed to 2000 (6.3%), and twice as many in Ballina Shire (24.2% up from 12% in 2000). The numbers in Kyogle also increased to 8.5% from 2.5% in 2000. In Richmond Valley and Clarence Valley the numbers remained virtually the same. The majority of practitioners in the region still worked in the Byron Shire area (55.2%), followed by Lismore (40.4%), Ballina (24.2%) and Tweed (22%). The spread of practitioners through the remaining three regions was fairly even at around 9%.

Nearest Centre

The purpose of this question was to examine the spread of creative industry practitioners within each council area in order to understand where the clusters of practitioners were occurring. In the Tweed Shire, the majority of practitioners used Tweed Heads and Murwillumbah as their major business and shopping centre. Lismore business district and shopping centres attracted 26% of all respondents, which was

higher than the percentage of people who lived in Lismore City Council area (22.9%). Lismore was being used as a major centre for people who lived in other local council areas. Kyogle Council residents did their business in either Kyogle or Casino, and Ballina Council residents mainly used the town of Ballina for business and shopping. Richmond Valley and Clarence Valley residents commuted to Grafton or Yamba.

The most interesting result from this question was in relation to Byron Shire residents. Of the 43.5% of people living in Byron Shire, only half (22.6%) used the town of Byron Bay as their centre for business. 6.3% of respondents went to Mullumbimby and 5% to Ocean Shores and Brunswick Heads while others commuted to either Bangalow or Lennox Heads. A further 7% used shopping and business centres outside of Byron Shire. The significance of this finding was echoed elsewhere in the study. Byron Shire may have been the major location for screen industry practitioners to live, but only half of these used the town of Byron Bay as their major business and shopping centre. Other areas within the shire that were emerging as locations for screen industry practitioners were Mullumbimby, Bangalow, Ocean Shores and Brunswick Heads.

Figure 4.4 Access to business centre

What is your nearest shopping or business centre?

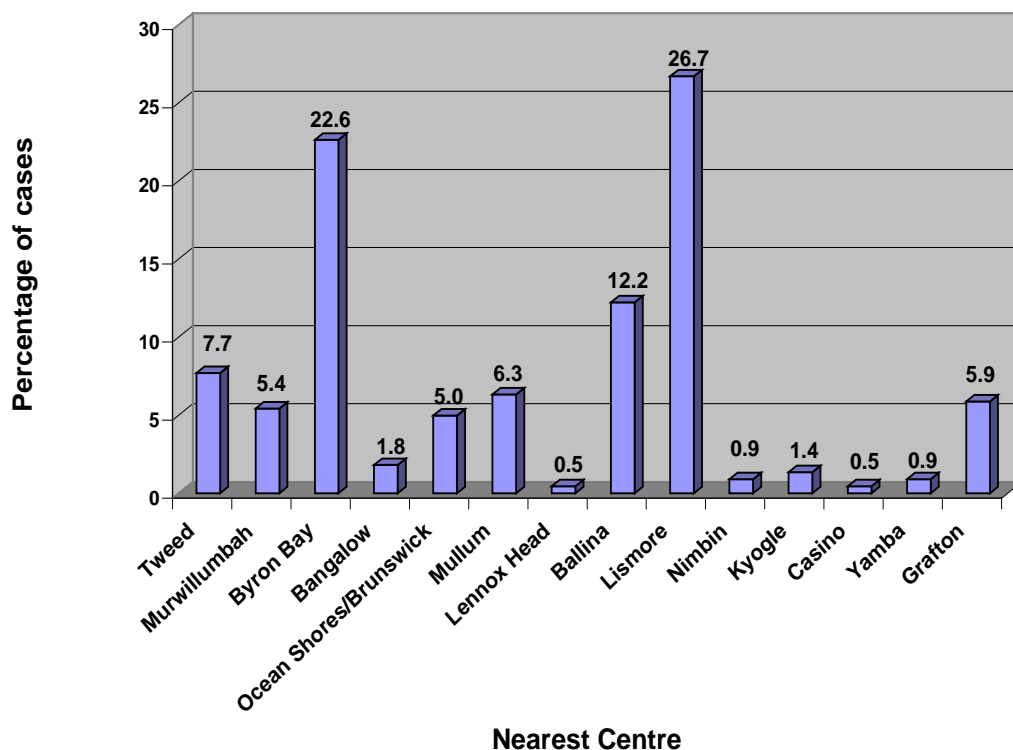


Figure 4.5 Location of screen practitioners in relation to population and mean age

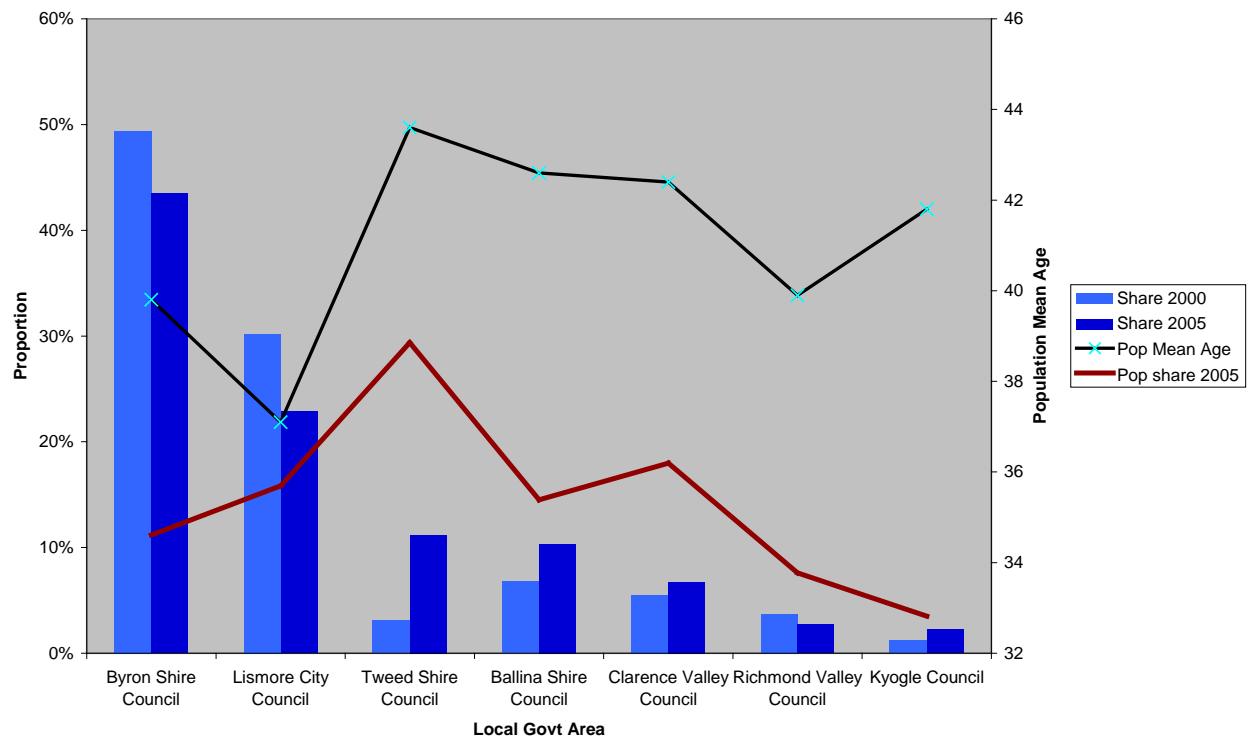


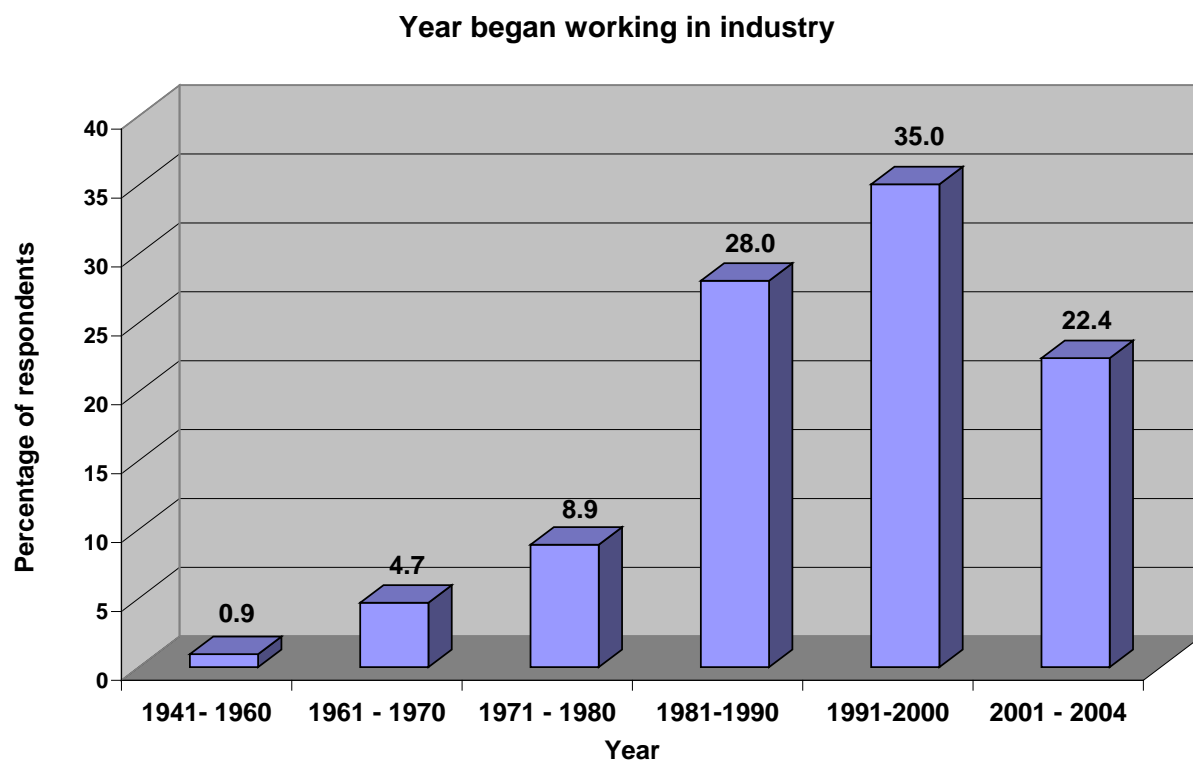
Figure 4.5 compares the location of screen industry practitioners with the overall population distribution of all residents across the region. This revealed that, for example, 43% of screen industry practitioners lived in Byron shire in 2005 compared to only 10% of the region's overall population. This table also included a third variable: the average age of the region's population, which showed that the majority of screen industry practitioners lived in areas with low age averages. The average age of people living in Byron Shire was 40 and in Lismore Council area was 37. This finding is linked to the notion of creative practitioners being drawn to areas that offered a vibrant creative milieu generally consistent with a younger population base, an active nightlife, a lively arts and music scene and ample "hard and soft infrastructure" (Landry, 2000). Lismore certainly was strong in hard infrastructure, including Southern Cross University, other training organisations and facilities for community TV and radio. Byron was renowned for its youth and tourism focus, street markets and 'happenings', diverse social gathering places and the vibrant coffee shops and cultural venues in the town. The many outlets for creative expression and soft infrastructure that

“underpins and encourages the flow of ideas between individuals and institutions” (Landry 2000) served as added attractions to creative workers.

Background information on screen industry practitioners

Section Two of the survey asked questions about how long respondents had been working in screen industries and the length of time they had lived in the region. The answers provided information about recent migration into the region and depth of experience of the local industry.

Figure 4.6 Experience levels of screen industry practitioners

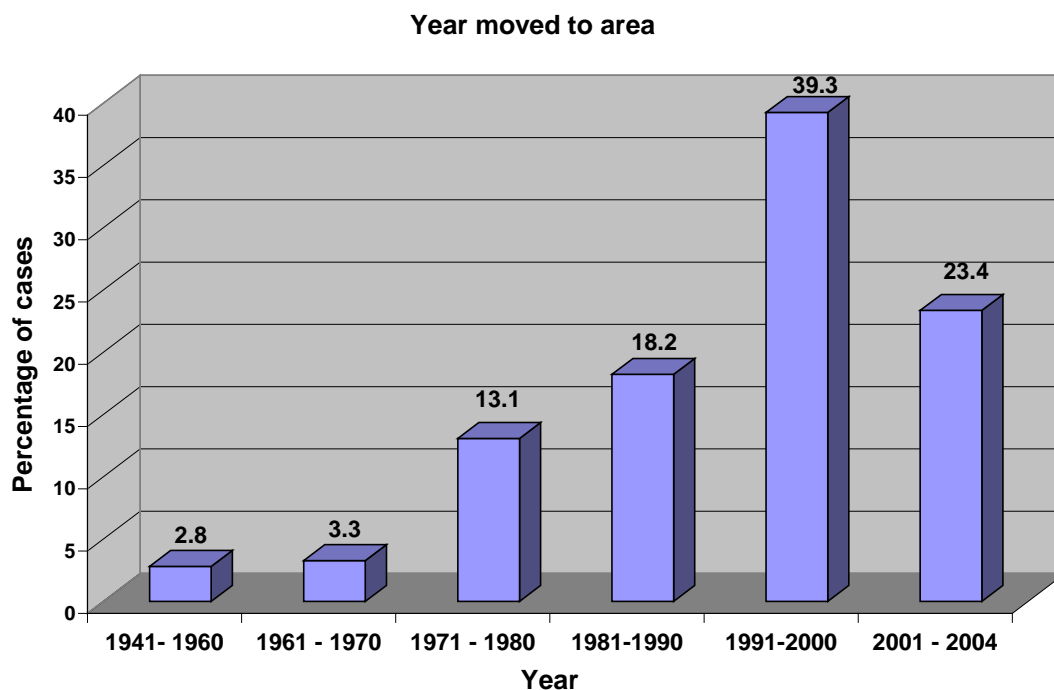


Almost 15% of respondents had been working in the industry for over 25 years. A further 28% had been working in the industry for over 15 years. This represented a significant proportion (43%) of experienced practitioners living in the region. A further 35% became involved in screen industries in the decade 1991 to 2000. Since 2000, a further 22.4% had entered the sector. The number of people registering for courses at Screenworks and joining the database had been increasing steadily over the past four years and continued to rise. Participants for these courses were drawn from both the

professional experienced practitioner base and emerging practitioners and enthusiasts.

The second question in this section asked respondents to identify the year they came to the Northern Rivers region. The answers provided useful information about the new migration of screen industry practitioners to the region and the pace at which it was occurring. The survey found that 19.2% of respondents moved to the region prior to 1980 or were born in the region. 18.2% arrived between 1981 and 1990. Migration into the region then began to increase dramatically. Almost 40% of respondents arrived between 1991 and 2000 and a further 23.4%, almost a quarter of all respondents, moved into the area between 2000 and 2005.

Figure 4.7 Length of residence in the Northern Rivers region?



Occupation and business information

Section Three of the survey asked questions about the nature of work undertaken, business models and incomes for local practitioners and the sources of both work and revenue. The answers shed light on the scope, skill base and diversity of the local screen industry sector and the amount of work and income generated from within the region. Figure 4.8 reveals the primary occupations selected by respondents and Figure 4.9 the secondary occupations.

Figure 4.8 Occupation

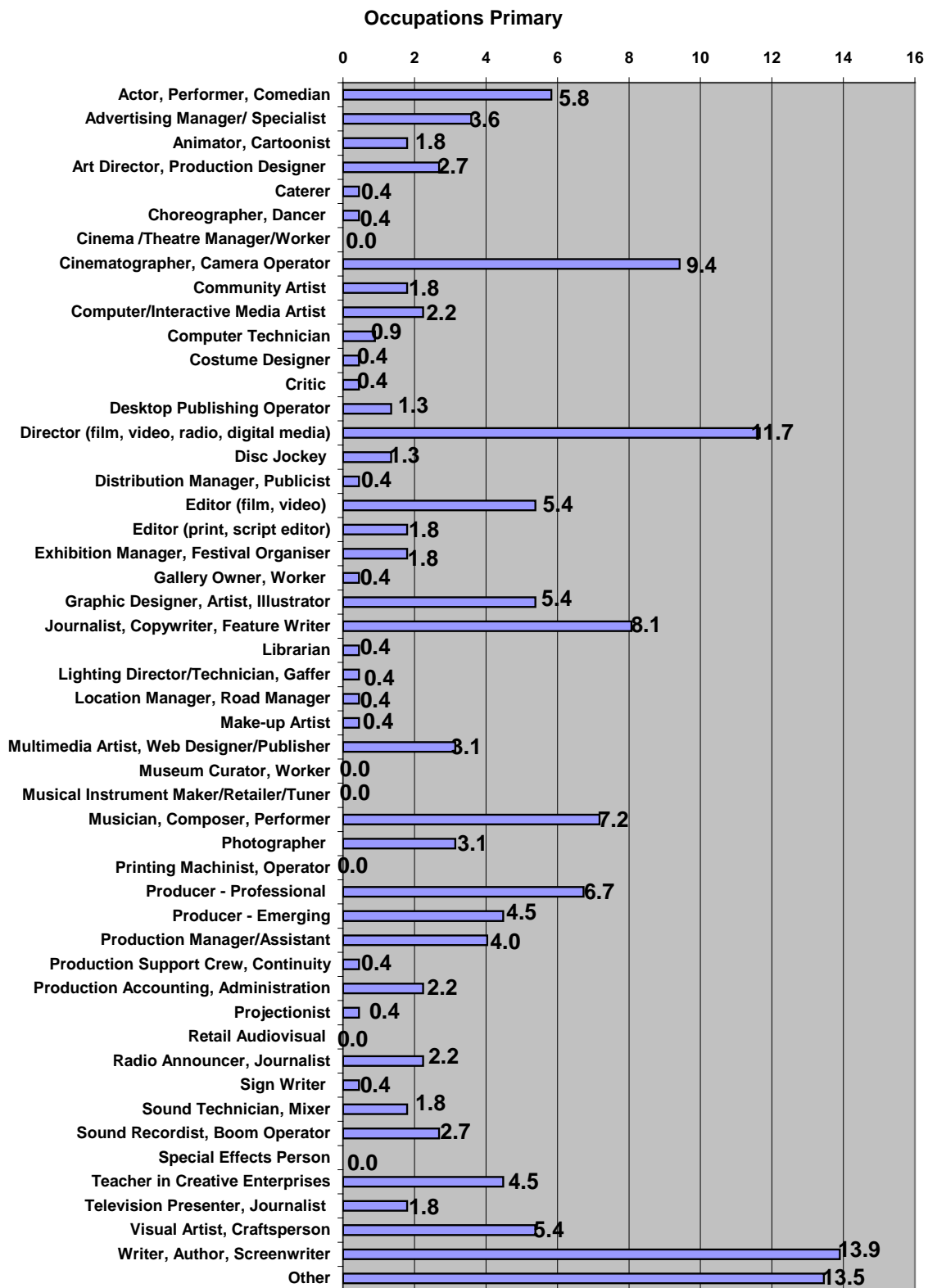
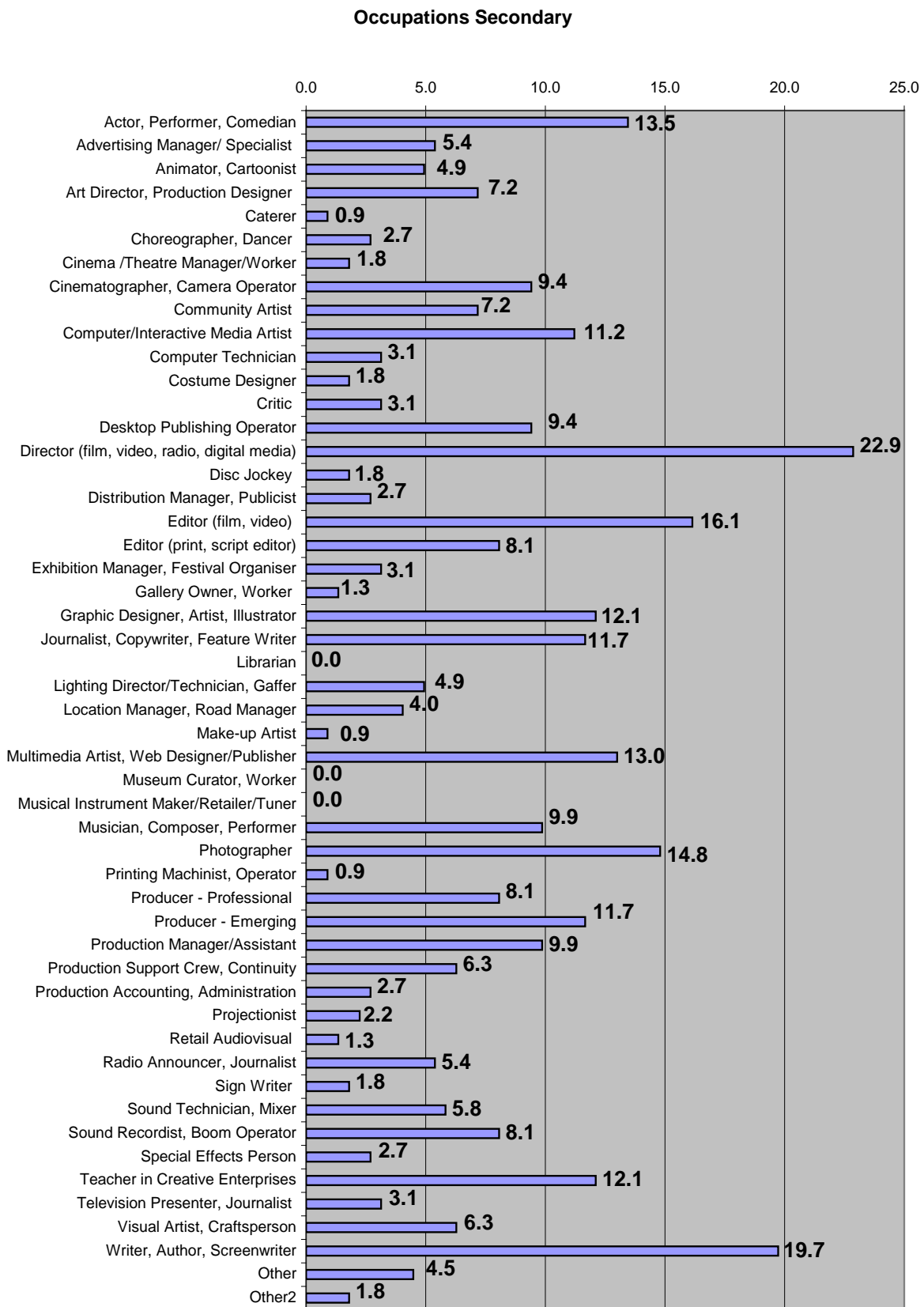


Figure 4.9 Occupation 2



The issue of classification of creative industries is problematic in studies of this type for a number of reasons. Practitioners are generally multi-skilled and often see themselves working across several categories. New types of work were also emerging and the way practitioners defined themselves was also changing. This survey confronted this problem by asking practitioners to list one primary occupation and as many secondary occupations as applied. The significantly high percentage (13.5%) of people who listed 'other' as their primary occupation revealed this difficulty of both definition and new emerging categories of work.

For their primary occupation, the largest percentage of people (13.9%) listed writer, (author or screenwriter). The second highest preference (11.7%) was for director (film, video, radio or digital media), followed by cinematographer (9.4%), journalist (8.1%) and musician (7.2%). The category of producer/professional was selected as a primary occupation by 6.7% and producer/emerging by 4.5%. When combined, producers registered as the third highest proportion of primary occupations in the region.

In the secondary occupations, the highest percentage of respondents selected director (22.9%), followed by writer (19.7%), editor (16.1%), photographer (14.8%), actor (13.5%) and multi-media designer/web publisher (13%). A significant percentage (12.1%) listed teacher in creative enterprises as their secondary occupation, an indication of the number of practitioners and artists who teach as a way of earning additional income to support their primary practice.

Comparisons with the findings from 2000 revealed that the strengths of the region had not changed substantially. The occupations that featured most in the region in both 2000 and 2005 were director, writer, producer (emerging and professional), actor, cinematographer (camera operator), journalist and editor.

The occupations most utilised by practitioners in the region in the previous twelve months are depicted in Figures 4.10, 4.11 and 4.12. These are divided into those utilised within the region, from outside the region and overseas. They provide useful data on the available skill sets and services available within the region and point to where the gaps in these services occurred.

The skill set and services most in demand within the region were those of writers, authors or screenwriters (20.1%) followed closely by directors (film, video, radio, digital media) and editors, (both at 18.4%). There was also demand for graphic designers and cinematographers (17.9%), performers (17.4%), journalists and feature writers (16.1%). The services of experienced producers was sought by 9.4% of respondents and 11.2% sought the services of emerging producers. Combined, this placed the demand for producers' skills at the top of the list.

The data for occupations used from outside the region and overseas provided useful information about where the gaps occurred in the skills and services available within the Northern Rivers and indeed within Australia. The largest demand from outside the region was for actors or performers (11.7%), followed by cinematographers and photographers (7.6%), directors (6.7%) and professional producers (6.3%). There was not much demand from outside the region for multimedia designers/web publishers (5.8%) or musicians/composers (5.4%).

Of equal interest from Figures 4.11 and 4.12 was the number of occupations not sought from outside the region or overseas. This may be considered an indicator of the region's capacity to meet the demands for skills and services such as art direction, lighting technicians, costume designers, caterers, sound recordists and technicians, production managers and assistants, location managers, computer technicians, and even editors. Local practitioners were mainly looking outside the region and overseas for key creative collaborators such as actors, experienced producers, writers, musicians, cinematographers and directors.

Figure 4.10 Occupation – within region

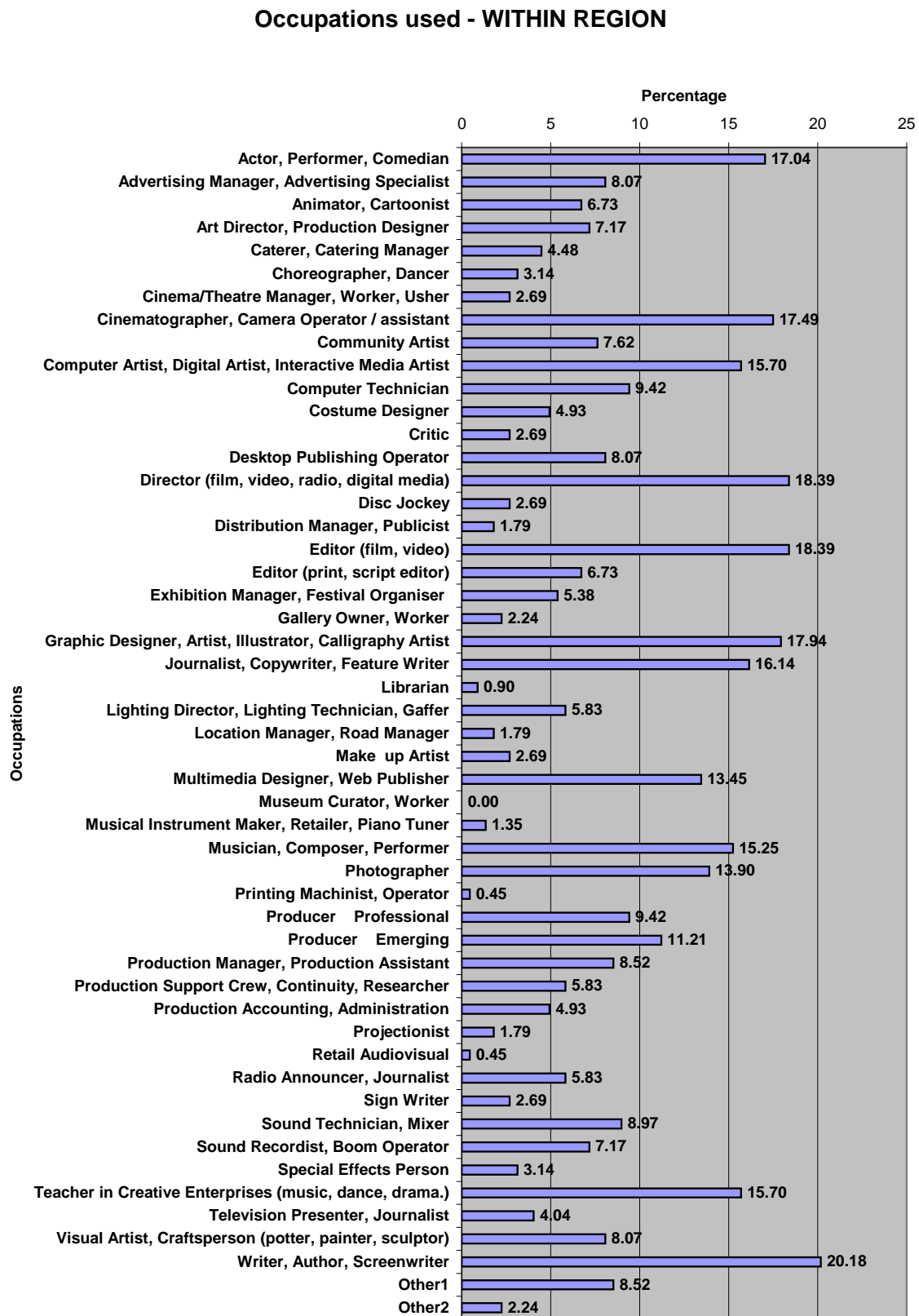


Figure 4.11 Occupation – outside region

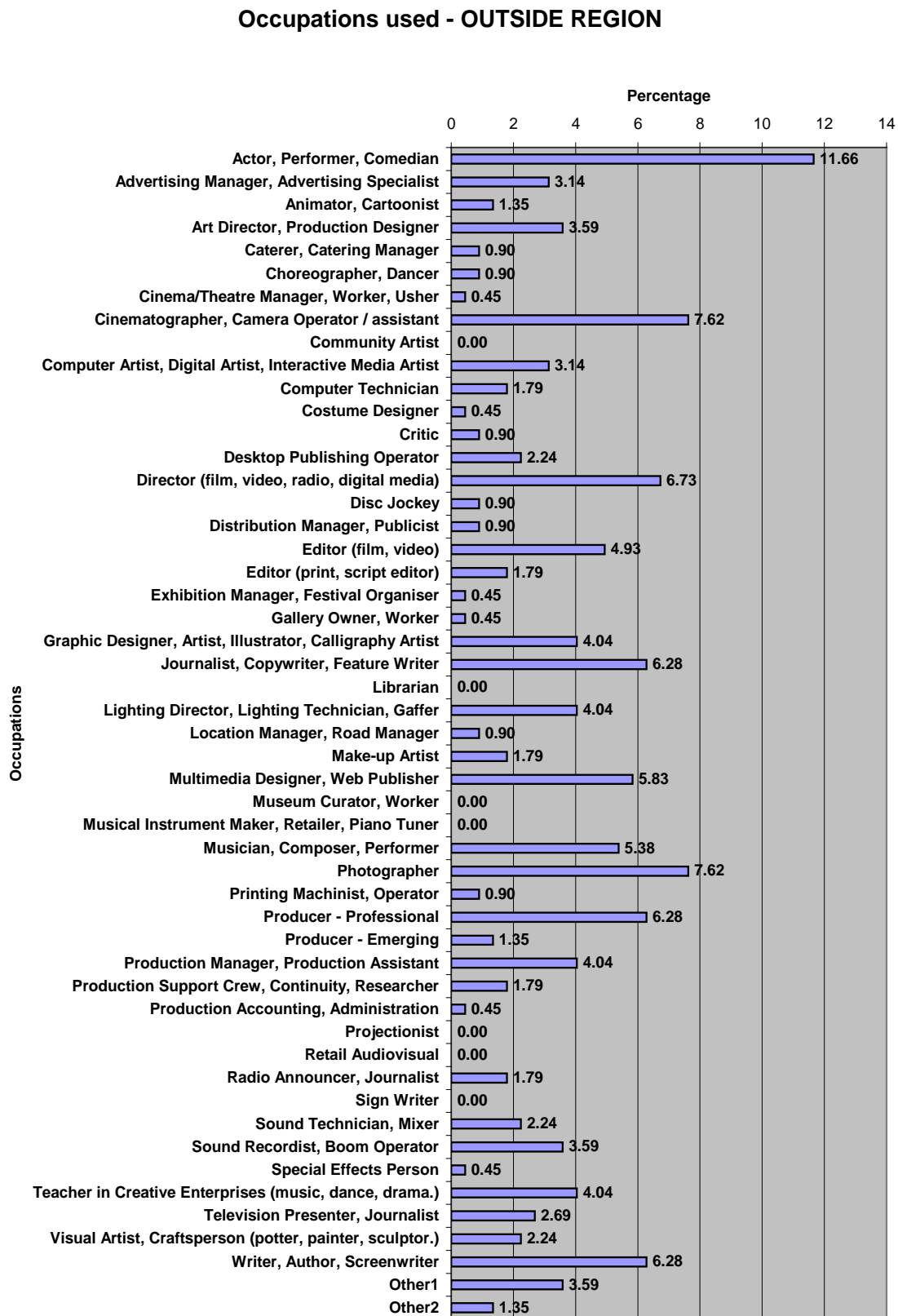
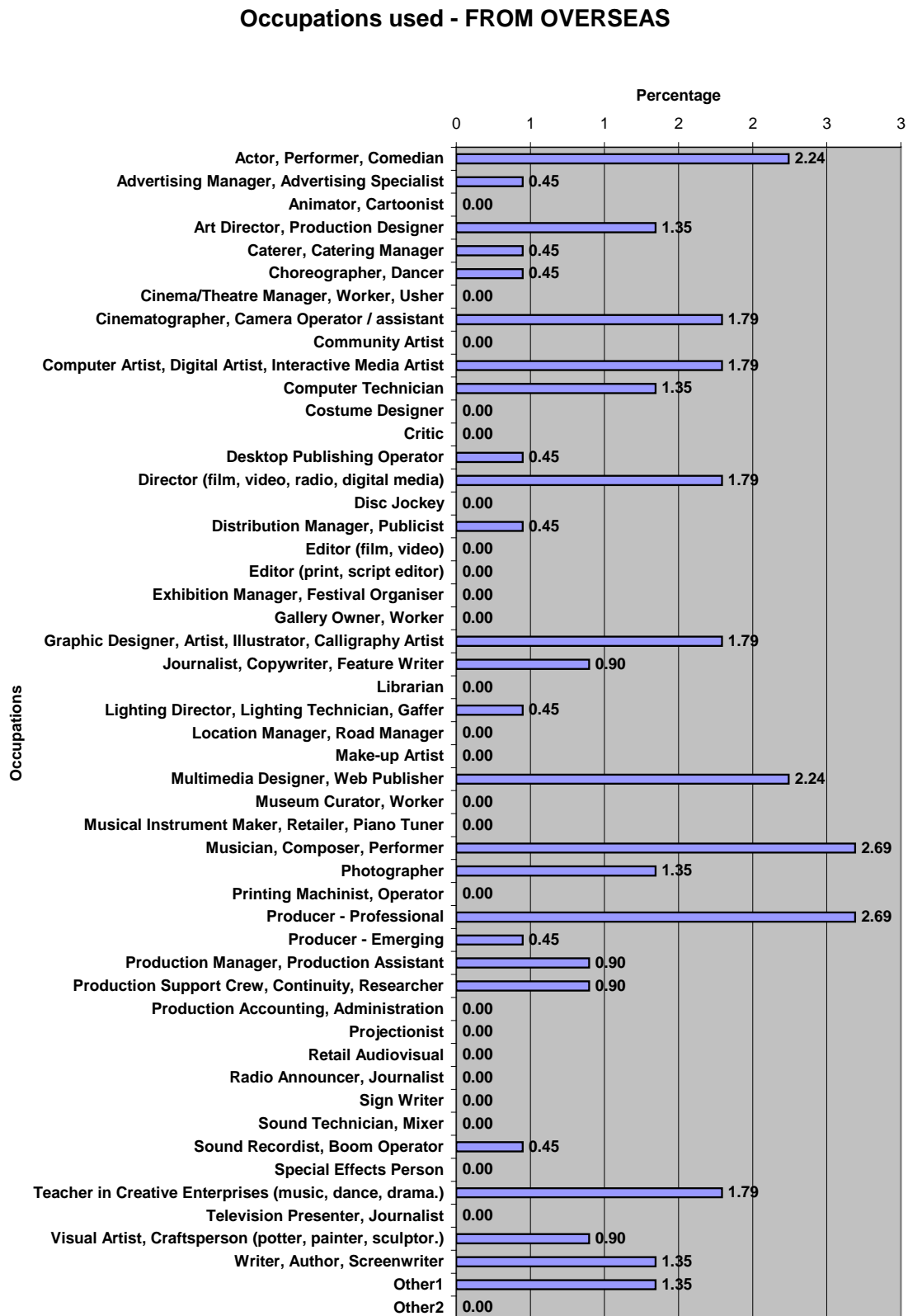


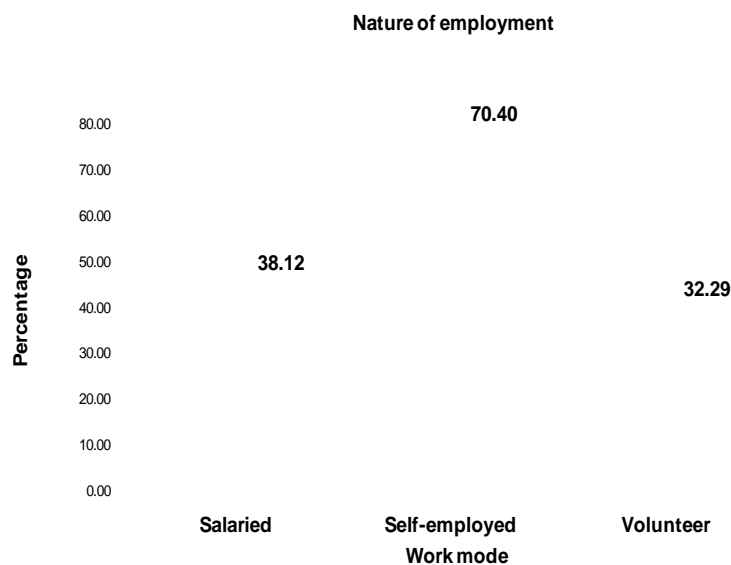
Figure 4.12 Occupation – overseas



Nature of employment

A significant feature of creative industries employment that emerged from this survey related to the nature of employment. As Figure 4.13 shows, more than two thirds of respondents (70.4%) classified themselves as self-employed. Only 38% categorised themselves as salaried and one third (33%) as volunteers.

Figure 4.13 Nature of employment in screen industries

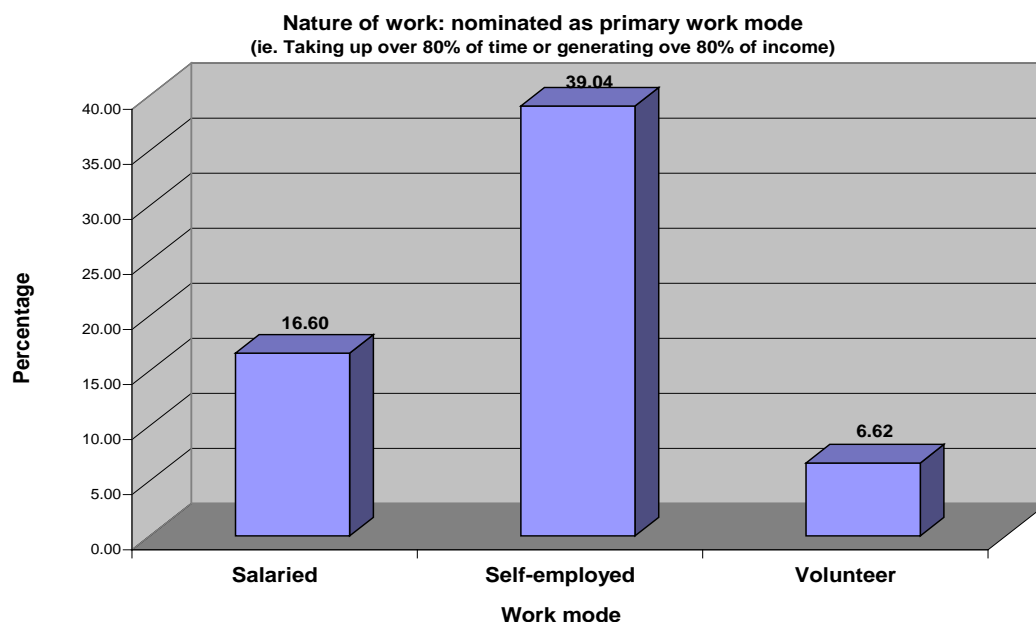


However, for most practitioners, these were not considered discrete categories. Most respondents marked more than one category in this question, indicating a mix of work modes. The picture becomes more complex when examining the percentage of time invested or percentage of income generated by each work mode. The results show that most practitioners operated within an overlapping mix of salaried employment, self-employment and some voluntary work.

Figure 4.14 shows the primary work mode of respondents. Respondents were asked to nominate the work mode that consumed over 80% of their work time or generated more than 80% of their income. The majority of respondents (39%) classified themselves as self-employed, with 16.6% almost exclusively salaried and 6.6% had worked primarily in a voluntary capacity.

The remainder of respondents (38%) nominated a mix of salaried, self employed and volunteer work that was complex and changeable. These findings indicated the challenges facing attempts to classify the work mode of this sector. The 38% who nominated mixed work modes are not included in Figure 4.14 below, but most were primarily self-employed with some salaried and volunteer work included. The percentage of people operating as self-employed in the region was therefore close to 70%. When compared with national figures taken from the 2006 Census, 60% were found to be self-employed in the industry classification for creative artists, musicians, writers and performers (Cunningham, 2010). If self-employment is associated with risk and uncertainty, then practitioners in the Northern Rivers are more willing to embrace precarious work modes than their city cousins.

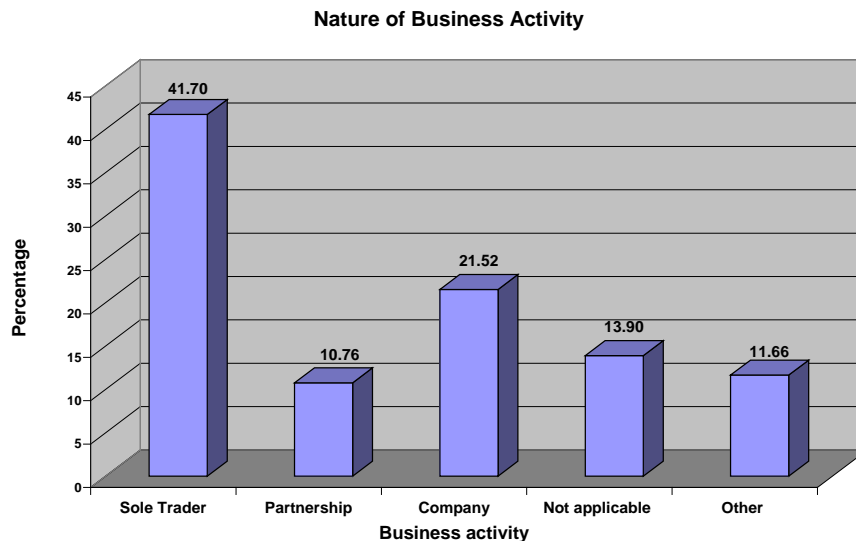
Figure 4.14 Work modes that comprise over 80% of time and income



Type of business activity

Given that approximately 70% of respondents classified themselves as self-employed, it is therefore not surprising that a large percentage of respondents (41.7%) operated as sole traders, 21.5% operated as small businesses and 10.7% as partnerships. Only 14% were salaried employees (the 'not applicable' category), as shown in Figure 4.15 below.

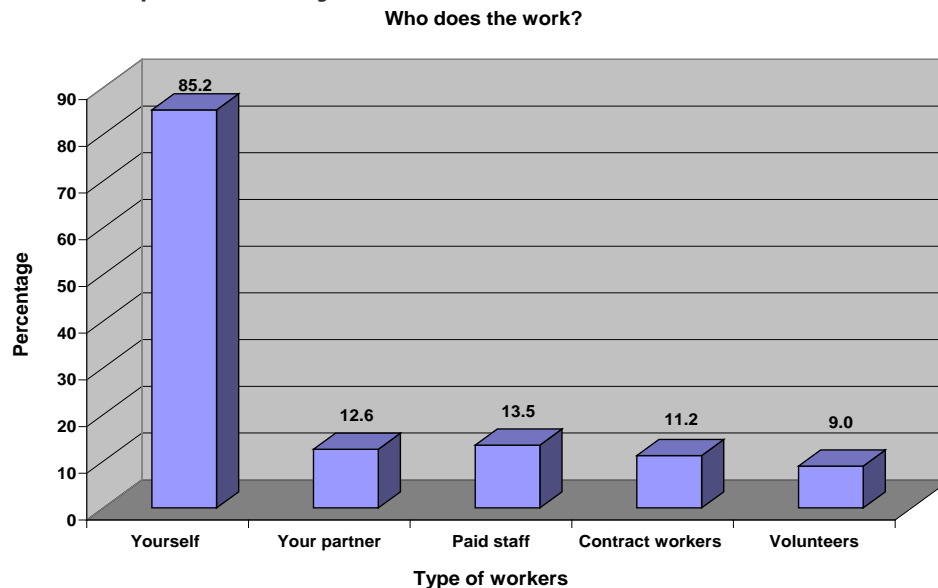
Figure 4.15 Type of business



Analysis of workplace

In response to the question “who performs the main work of your business?” respondents overwhelmingly nominated themselves (85.2%). Figure 4.16 supports the findings above that the majority of respondents are sole traders or operate in micro-businesses where they are likely to have the full responsibility for the work undertaken. Most respondents nominated more than one category, and only a small percentage relied on a partner (12.6%), paid staff (13.5%), contract workers (11.2%) or volunteers (9%) for the major work of their business.

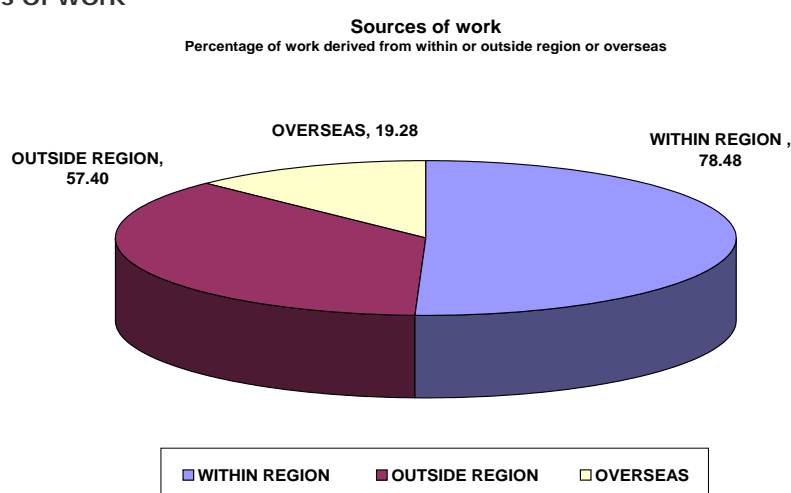
Figure 4.16 Workplace activity



Sources of work

When asked to nominate the sources of work undertaken in the past four years, 78% of respondents nominated that their work was initiated or commissioned from within the region. A further 57% said that their work came from outside the region and 19% nominated overseas. Many respondents listed a mix of work from within and outside the region, but in all cases over two thirds of respondents identified the major portion of their work as being derived from within the region.

Figure 4.17 Sources of work



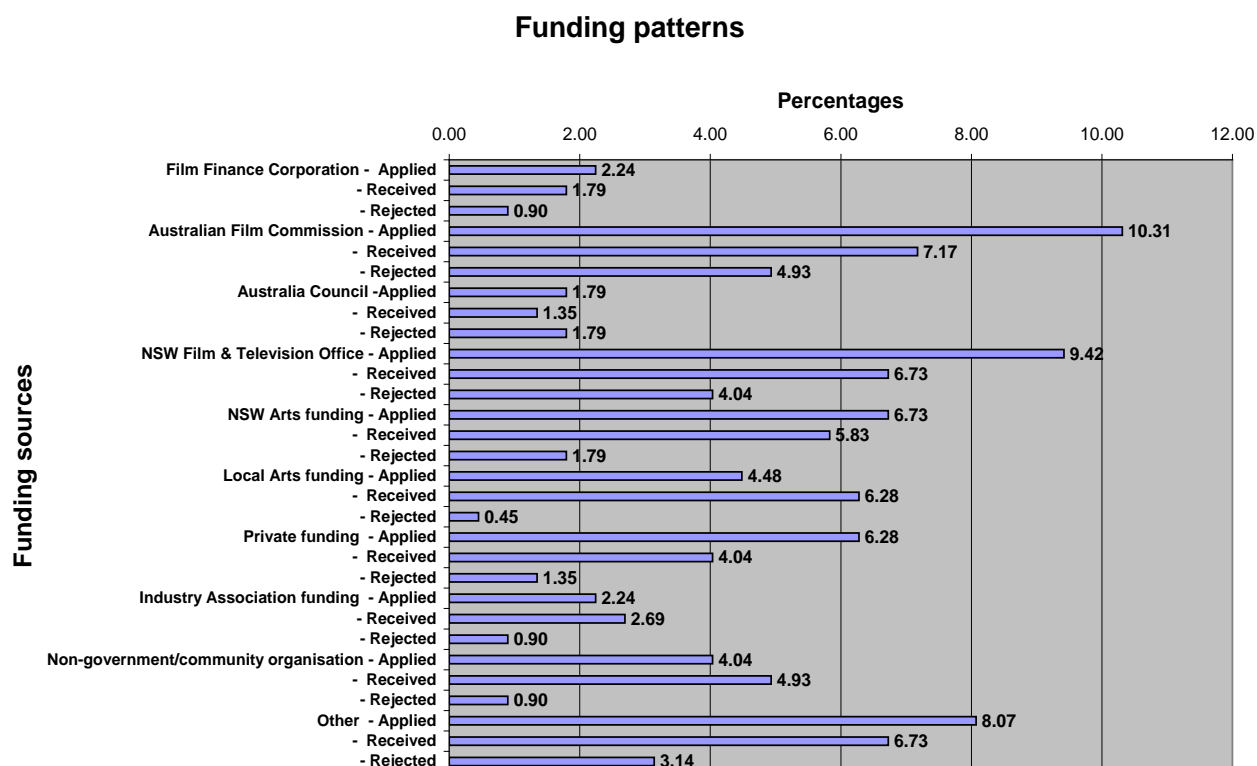
Comparisons with the findings on this question in 2000 are difficult as the question was posed in a different way. However, it is clear that, as in 2000, the large majority of practitioners survive on a mix of work and income derived from both within and outside the region. In 2000, 57% said the majority of their income came from within the region and in 2005 this figure had risen to 78.5%, which may indicate that clients, services and sources of income within the region were increasing.

Funding and investment patterns

The question relating to funding sources and investment patterns revealed that practitioners in the Northern Rivers utilised a wide variety of mainly government funding sources for projects. The largest percentage applied to the Australian Film Commission for funding (10.3%). More than half of these reported that their applications were successful. The second most utilised funding source was the NSW

Film and TV Office. Only 6% applied for private funding and 4% for non-government or community funding. Overall, the local industry was heavily reliant on government funding to sustain its projects. Figure 4.18 below, includes details of funding sources and percentages of those that were successful or rejected.

Figure 4.18 Sources of funding and investment for screen industries



Estimated income

For the question relating to gross annual income, 25.1% estimated their income to be under \$5,000, and 30% estimated their income to be between \$5,000 and \$30,000. Only 3% of respondents estimated their income to be over \$100,000. Figure 4.19 shows income estimates for screen industry practitioners. These estimates are compared with estimates for 2000 in Figure 4.20, indicating that on average, incomes had increased over the five-year period. The percentage of people in the very low income bracket (under \$5000) had decreased from 33% to 25% and the number of people in the higher income bracket (\$50,000 to \$100,000) had increased from 3.1% to 13.5%.

Figure 4.19 General income estimates

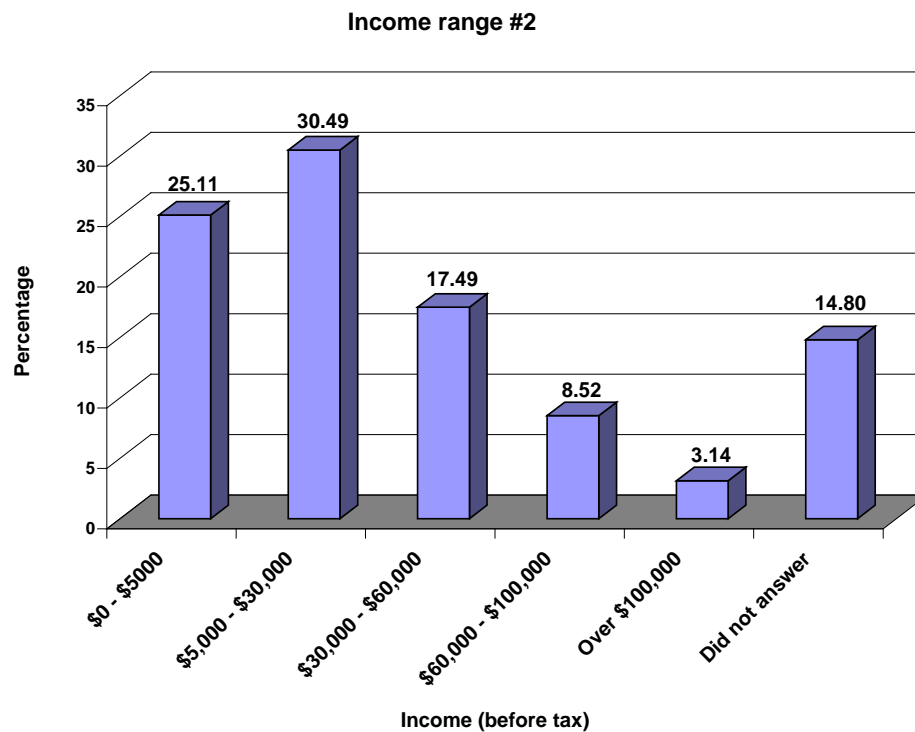


Figure 4.20 income range

Income range	2000	2005
\$0 – \$5000	33.3%	25.1%
\$5,000 – \$10,000	5.5%	7.2%
\$10,000 – \$15,000	2.5%	4.9%
\$15,000 – \$20,000	6.1%	4%
\$20,000 – \$25,000	1.8%	8%
\$25,000 – \$30,000	4.3%	6.3%
\$30,000 – \$35,000	2.5%	4%
\$35,000 – \$40,000	1.8%	1.8%
\$40,000 – \$45,000	1.8%	1.8%
\$45,000 – \$50,000	3.1%	4.9%
\$50,000 – \$100,000	3.1%	13.5%
Over \$100,000	0.6%	3.1%
Didn't answer	33.3%	14.8%

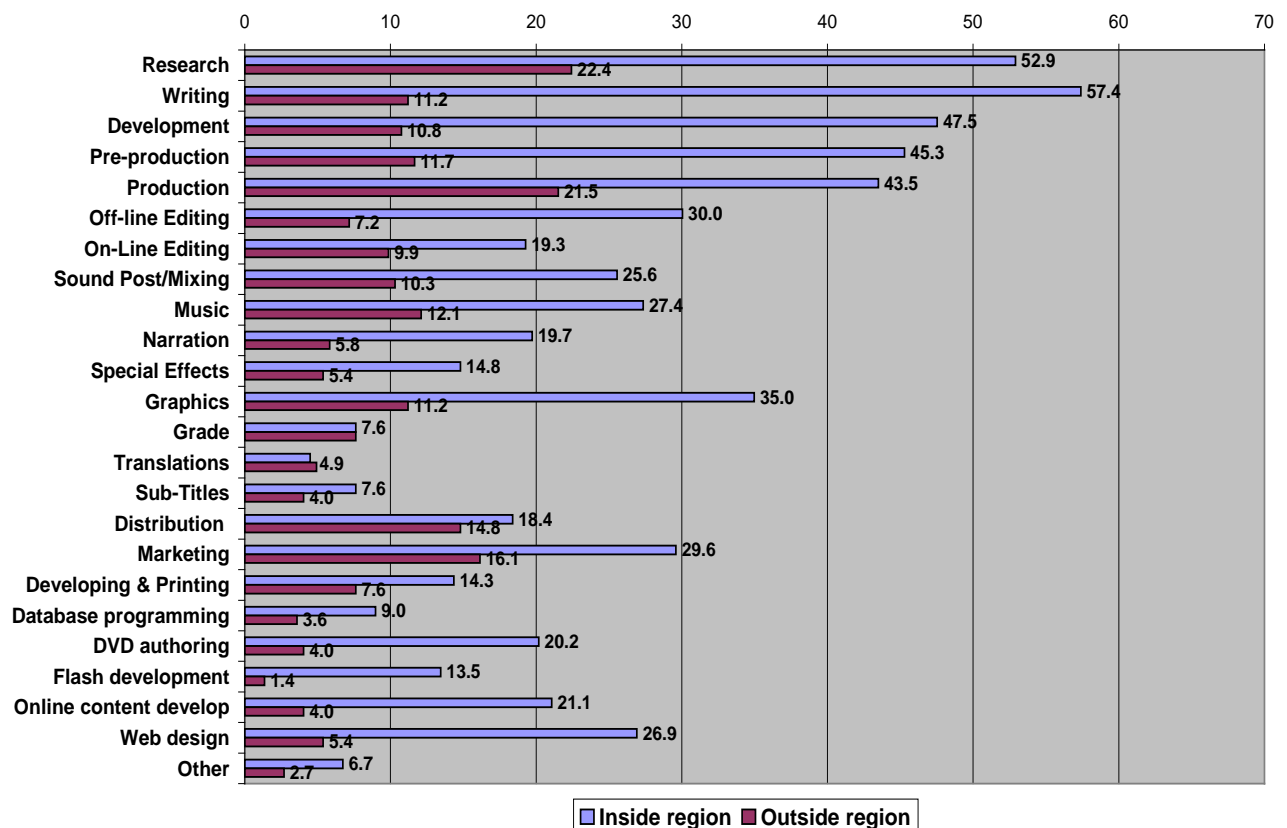
One of the difficulties in calculating average incomes for screen practitioners continues to be the reluctance to answer the question. Some indicated that this was because their income varied so much that they were unable to estimate. Others said they were not as yet earning any substantial income from their creative work and others were unwilling to divulge this information. There were 33 respondents (14.8%) who did not answer this question. However, this was a far smaller percentage than in 2000 (33%), perhaps indicating an increase in understanding or trust in the data gathering process.

When asked to estimate where they source their income, almost 30% estimated between 90% and 100% comes from within the region. By contrast, almost 25% estimated that less than 10% was derived from within the region. These results support the findings in Figure 4.17 which showed that there were different levels of producer activity taking place in the region: those working from income and work sourced from within the region and those sourcing work and income flows outside the region.

Work conducted within or outside the region

Figure 4.21 below shows the percentage of work conducted within the region compared with work undertaken outside the region, comprising the various aspects of the production and post-production stages. These findings show that across almost all stages of screen industry production, more of the work was conducted within the region than outside the region. For example, 52% of respondents said that their research was conducted in the region compared with 22% outside the region. Only two aspects of work were nominated where more of the work took place outside the region: picture grading (7.62%) and translations (4.93%). Both these activities require specialised skills and equipment not widely available in the Northern Rivers region. Both the 2000 and 2005 studies revealed that the major aspects of work being undertaken outside the region were research, production, distribution and marketing.

Figure 4.21 Comparison of % of work conducted within and outside the region



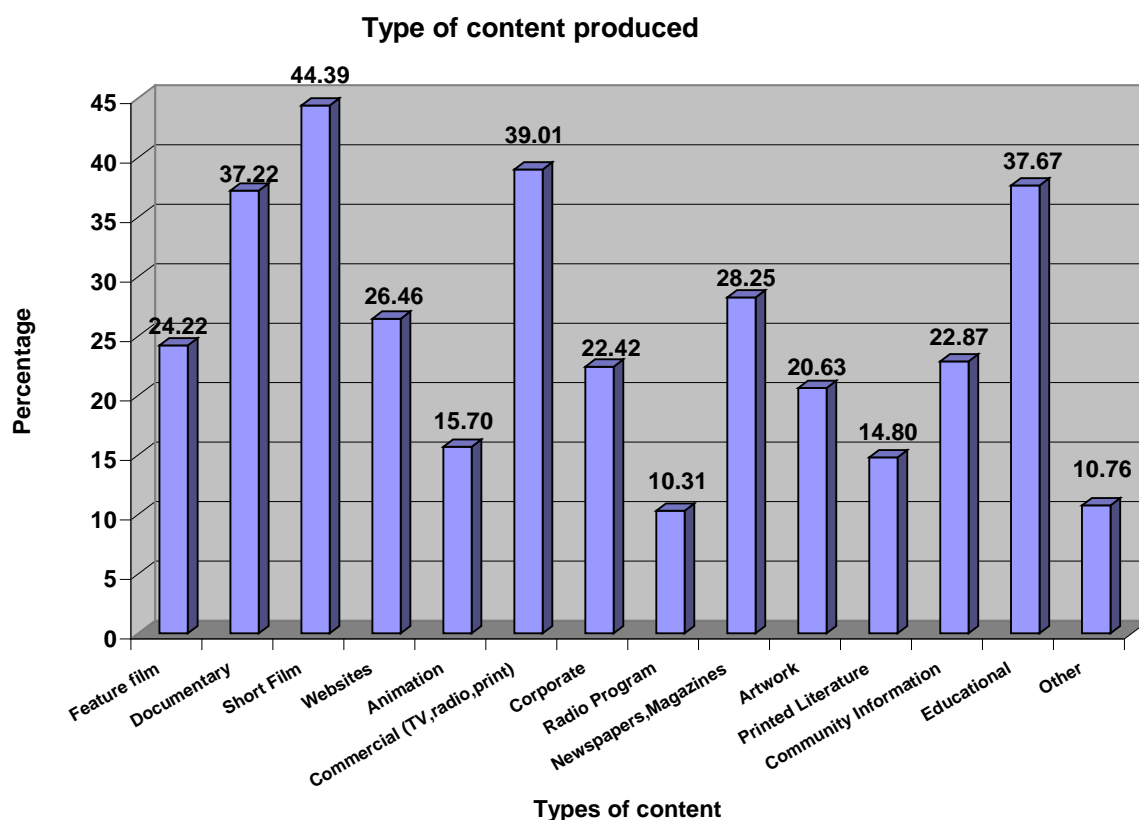
Content and Distribution

Types of content being produced

Respondents were asked to list the types of content that they were involved in producing. Most listed more than one category, indicating a diversity of content types and delivery platforms not only across the region, but within the production slates of individual practitioners.

Figure 4.22 shows that the largest percentage of respondents were involved in the production of short films (44.4%). This was followed by commercial media content, including TV, radio and press, (39%), education programs (37.6%) documentaries (37.2%), newspapers and magazines (28.2%) and websites (26.4%). It is also interesting to note that despite the largest percentage of people listing writer as their primary occupation, the output of printed literature was fairly low at 14.8%. Practitioners were clearly writing for a broader range of delivery platforms, including short films, documentaries, commercial media and websites.

Figure 4.22 Types of content being produced in the Northern Rivers region



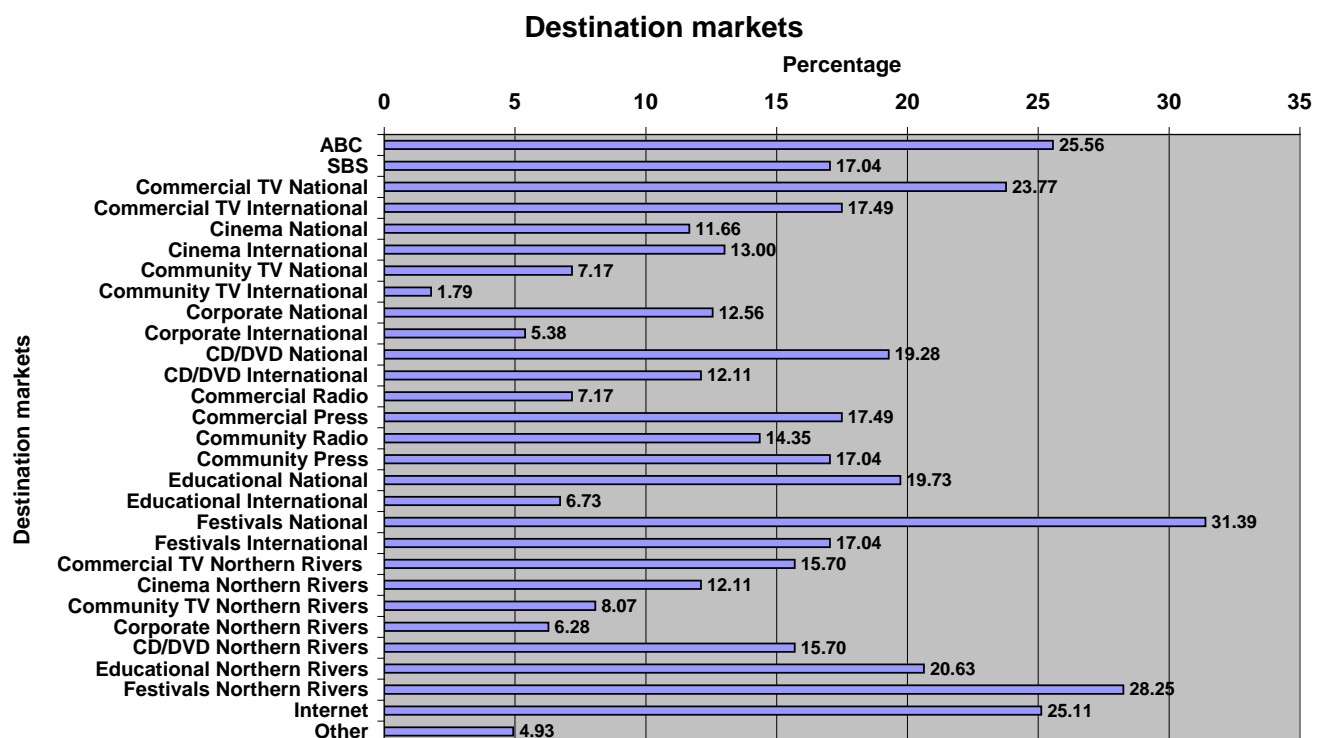
Destination markets

When asked to identify destination markets for the content they were producing, most respondents listed more than one market and many listed more than five. The most utilised was the national festival circuit (31.4%) followed by festivals in the Northern Rivers (28.2%). ABC was the most utilised broadcast outlet (25.5%) and the internet (25.1%) was more widely used than commercial media, cinema or DVD. Local and national markets were more utilised than international markets generally, and CD and DVD outlets were used more than cinema but less than television markets.

The types of destination markets listed by respondents in 2005 showed very similar trends to the findings of the 2000 Study. In 2000, the public broadcasters (ABC and SBS) were listed together and were the most utilised market for 46% of respondents. This was followed by national festivals (41.4%), Northern Rivers festivals (38.2%), commercial TV national (34.9%), and national educational markets (30.3%). A major oversight in 2000 was not listing the internet as a destination market. Even so, 11%

listed it under 'other'. By 2005, the internet was used as a destination market by 25% of respondents. These findings depict a sector that is producing a mix of content for diverse local, national and international markets. The export focus of the sector was lower in percentage terms than the 2000 figures, but there was a more diverse spread of markets across more platforms.

Figure 4.23 Destination markets for content created in the Northern Rivers region

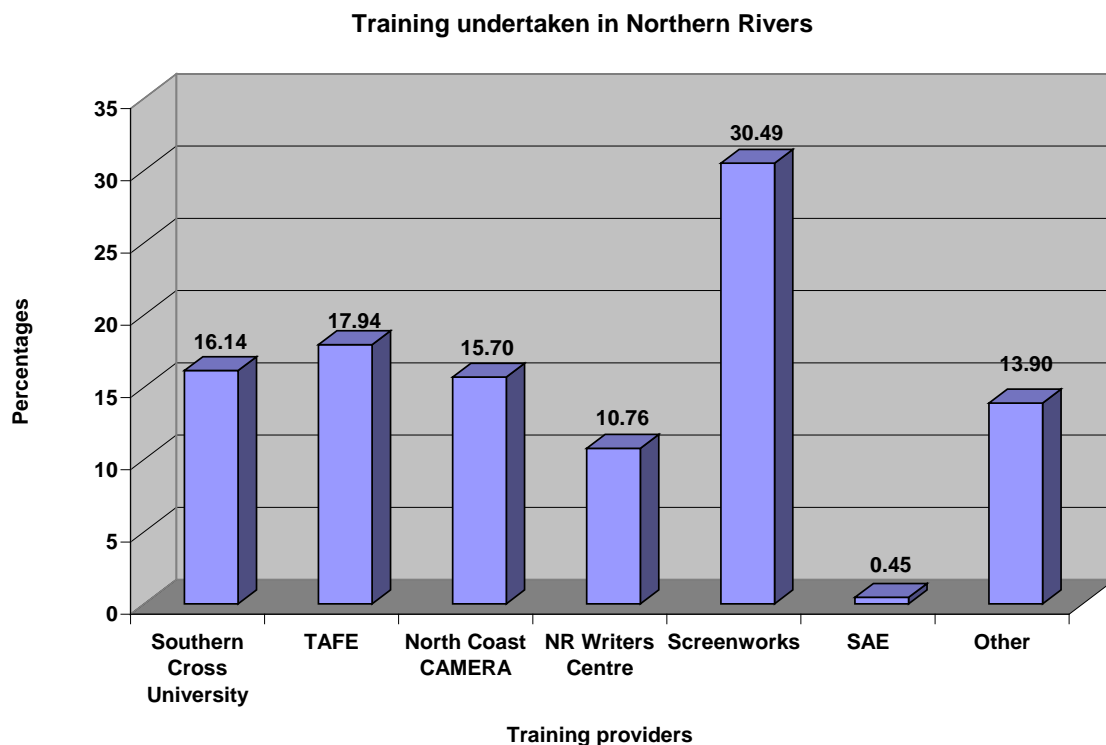


Training and Professional Development

The availability, take-up rate and quality of training and professional development are key components in assessing the viability and future prospects of an industry sector. When asked to nominate training providers who had provided professional development or training in the Northern Rivers, the largest percentage of respondents named Screenworks (30.5%). The second largest training provider was TAFE (17.9%) followed by Southern Cross University (16.1%), North Coast CAMERA (which ceased operations in 2005) and the Northern Rivers Writers Centre (10.8%). Only one person nominated SAE (Sound and Audio Engineering School based in Byron Bay) as the source of their training. In the category of 'other', 10 people (4.5%) nominated ACE (Adult Community Education), and others nominated the Byron Film Artist Co-operative (a privately run film-makers collective), NCEIA (the music industry

association), LINC TV (community television association), the Lismore Conservatorium of Arts, personal mentors, private workshops and self-training.

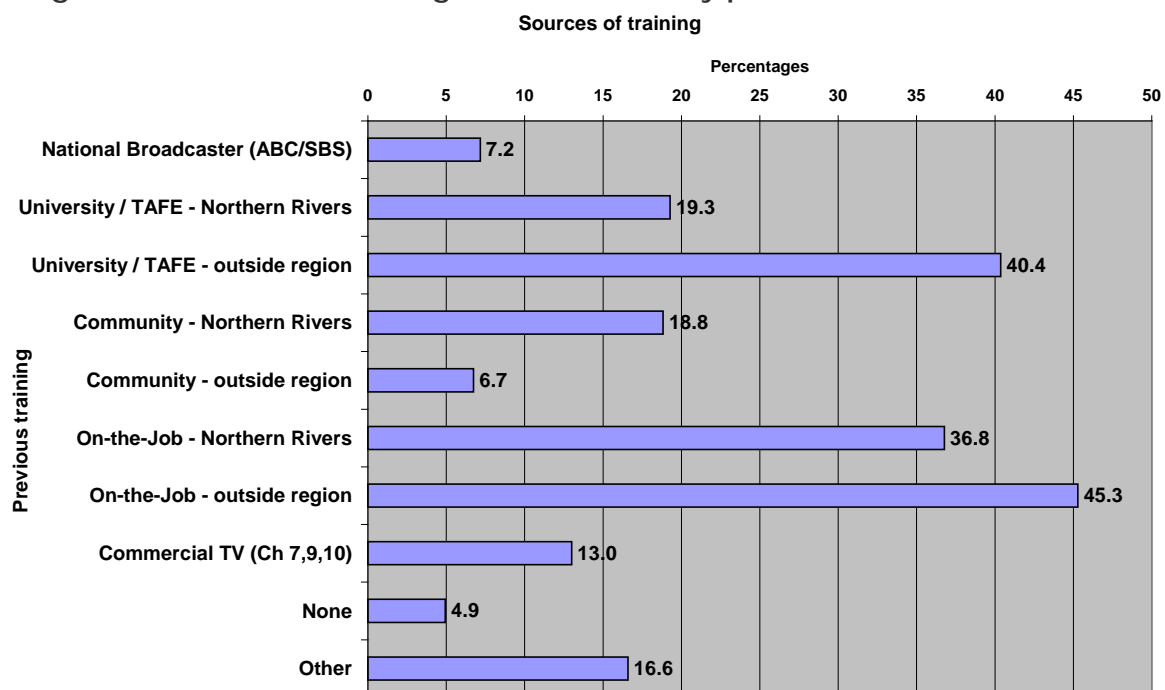
Figure 4.24 Sources of training for Northern Rivers screen industry practitioners



The question regarding previous training provided information about background training and career pathways for practitioners now living in the Northern Rivers region. Figure 4.25 shows that the largest majority of respondents (45.3%) received on-the-job training outside the region and brought their experiences into the region. A further 36.8% received their training on-the-job within the Northern Rivers region. Together this provided a massive 82% of respondents who said they received on-the-job training.

The second highest percentage of respondents (40.4%) said they received training at a University or TAFE outside the region, and 19.3% within the region. This correlates with the high number of practitioners who had migrated to the region from elsewhere, bringing the benefits of their previous training and expertise into the region. Over 62% of respondents had moved to the region since 1990, and many of these (over 40%) had more than 15 years experience and some form of prior training in the industry.

Figure 4.25 Sources of training for screen industry practitioners



When comparing these findings with the 2000 Study (Figure 4.26), major changes included the decrease in the number of people receiving community training within the Northern Rivers. This is possibly due to the demise of North Coast CAMERA, a major source of training for local practitioners in 2000. There was an increase in on-the-job training both within and outside the region and an increase in the number of people trained at the commercial networks, possibly a result of new arrivals to the region, who had worked at the commercial networks before coming to the region.

Figure 4.26 Comparison of sources of previous training

	2000	2005
National Broadcaster (ABC/SBS)	5.2%	7.1%
University / TAFE - Northern Rivers	27.4%	19.3%
University / TAFE - outside region	40%	40.4%
Community - Northern Rivers	31.9%	18.8%
Community - outside region	14.8%	6.7%
On-the-Job - Northern Rivers	34.8%	36.7%
On-the-Job - outside region	23.7%	45.3%
Commercial TV (Ch 7,9,10)	1.5%	13.0%
None/Other	6.7%	21.5%

Training required

The questions regarding type of training required, formal or on-the-job, were designed to shed light on the training needs of the region and training providers required. The results are presented in Figure 4.27 and Figure 4.28.

Figure 4.27 Formal training required by Northern Rivers practitioners

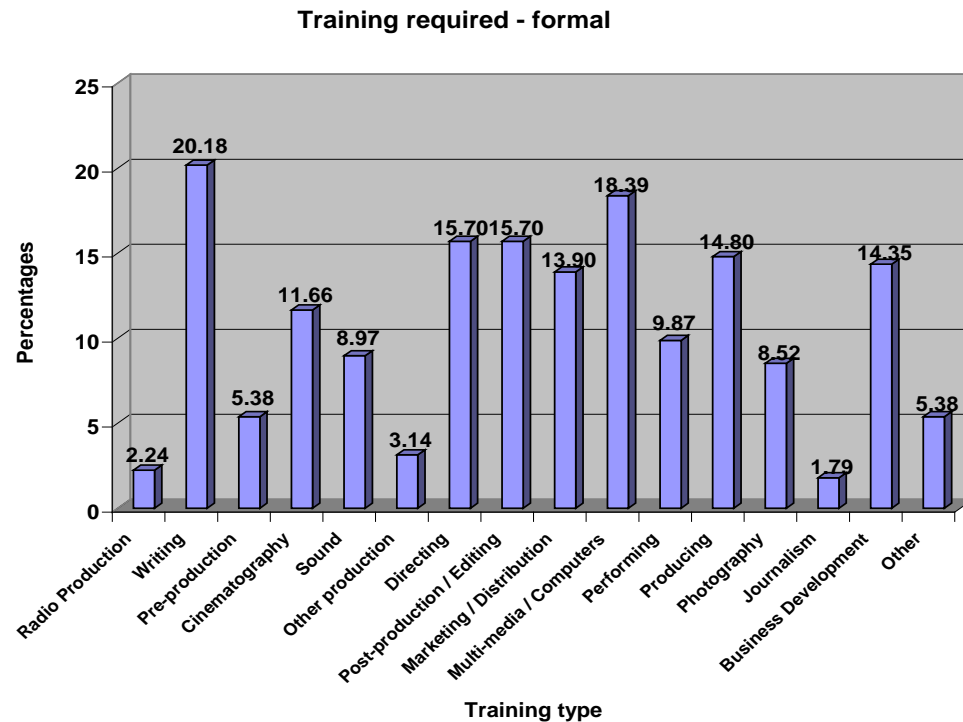
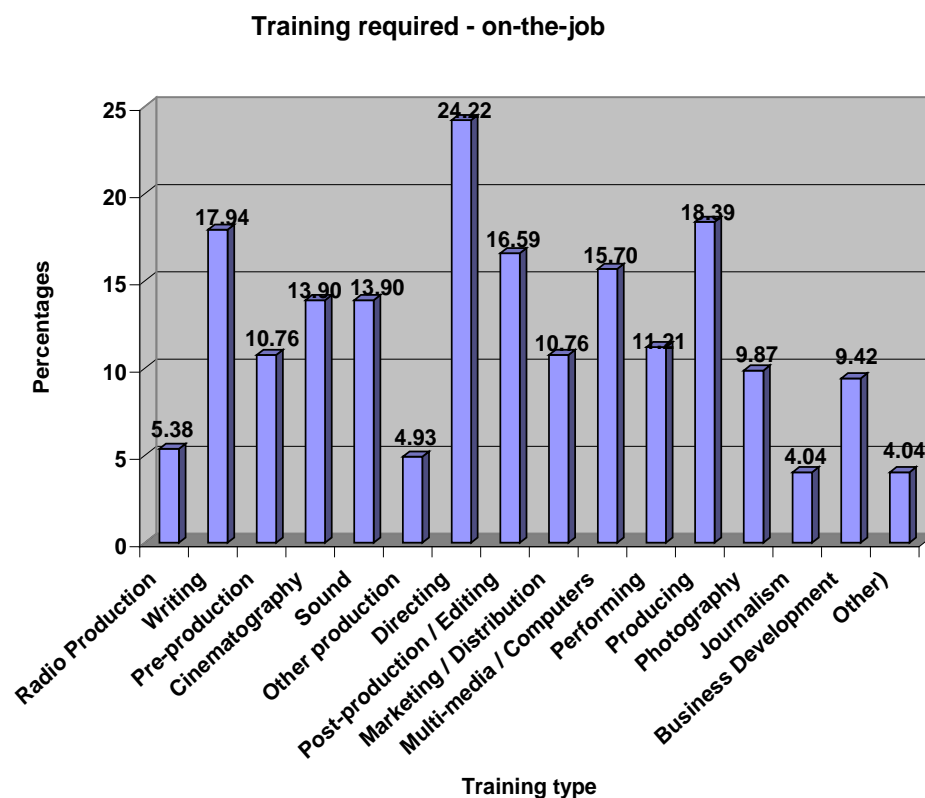


Figure 4.28 On-the-job training required by Northern Rivers practitioners



The findings show that many practitioners were seeking formal training in writing (20.1%) and multi-media/computer training (18.4%) as well as directing, post-production/editing (15.7%) and producing (14.8%). There was also significant need for business development training (14.3%).

The highest demand for on-the-job training was in the area of directing (24.2%) followed by producing (18.4%). This echoed the demand identified by Screenworks for more mentorship programs and requests for work experience placements. On-the-job training was also sought for writing (17.9%), post-production/editing (16.6%) and multi-media/ computer training (15.7%). When combined, the greatest demand for training was in directing (39.9%), writing (38.1%), multi-media/computers (34.1%), post-production/editing (32.3%) and producing (33.2%).

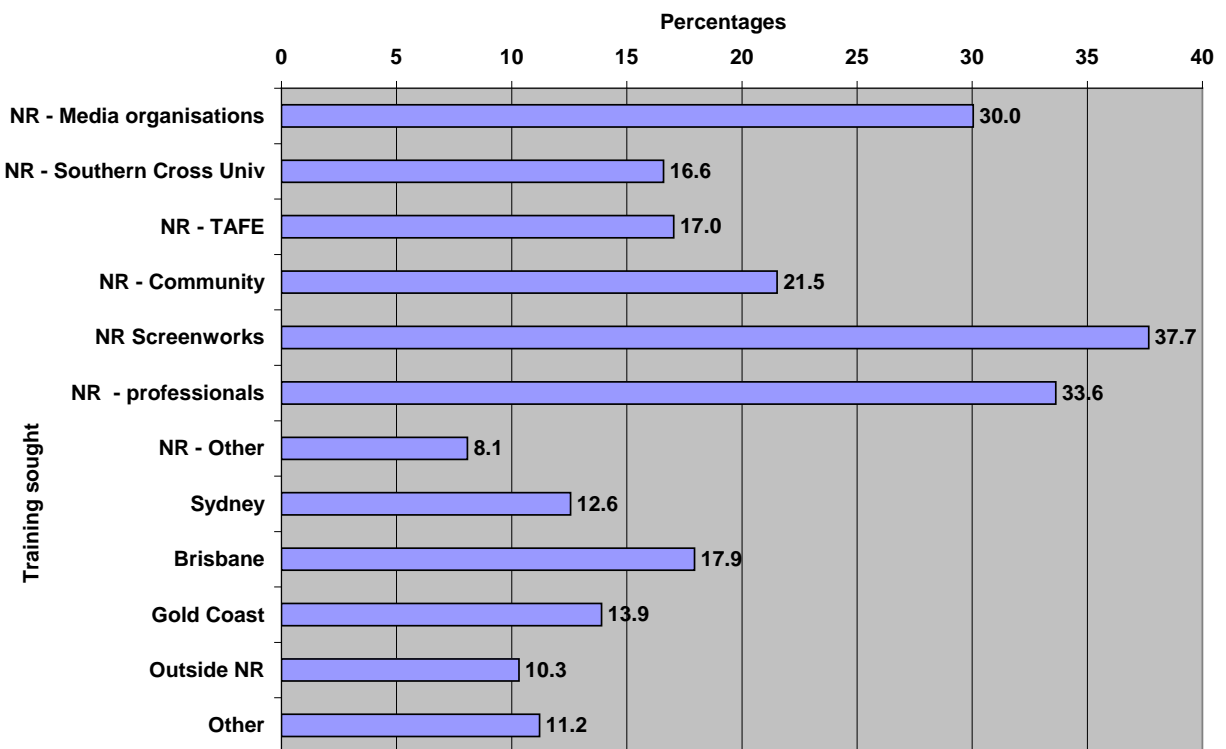
Figure 4.29 shows the location and training providers preferred by respondents in answer to the question: where would you like to pursue future training? The largest number of respondents answered that they would like to undertake their future training in the Northern Rivers and of these, the highest percentage nominated Screenworks (37.6%). This was followed by Northern Rivers professionals (33.6%) and media organisations (30%). There was also a relatively high demand for training at Northern River's community organisations (21.5%), TAFE (17%) and Southern Cross University (16.6%). Community organisations nominated under 'other' included ACE (Adult and Community Education) and Northern Rivers Writers' Centre.

When looking outside the region for their training, more practitioners nominated Brisbane (17.9%) and the Gold Coast (13.9%) than Sydney (12.9%). Melbourne was nominated by 6 respondents (2.7%) and overseas by 3 respondents (1.3%). More practitioners nominated Brisbane (17.9%) than Southern Cross University (16.6%).

When comparing these findings to the 2000 Study, the major changes were the increase in the number of people seeking training in Northern River's media and professional organisations (from 15% in 2000 to 30% in 2005). This category includes local experienced professionals and emerging screen industry businesses. There was also a major decrease in the number seeking training in Sydney from 40% in 2000 to only 12.5% in 2005. By contrast, the number seeking their training in Brisbane and the

Gold Coast increased from 15% in 2000 to 31% in 2005. The number seeking training at SCU also declined from 22% to 16.6% in 2005 whereas demand for TAFE training increased from 7.6% to 17%. Some of the market share for training in other locations was taken over by Screenworks, which did not exist in 2000.

Figure 4.29 Training providers by location sought by Northern Rivers practitioners



Importance of Place

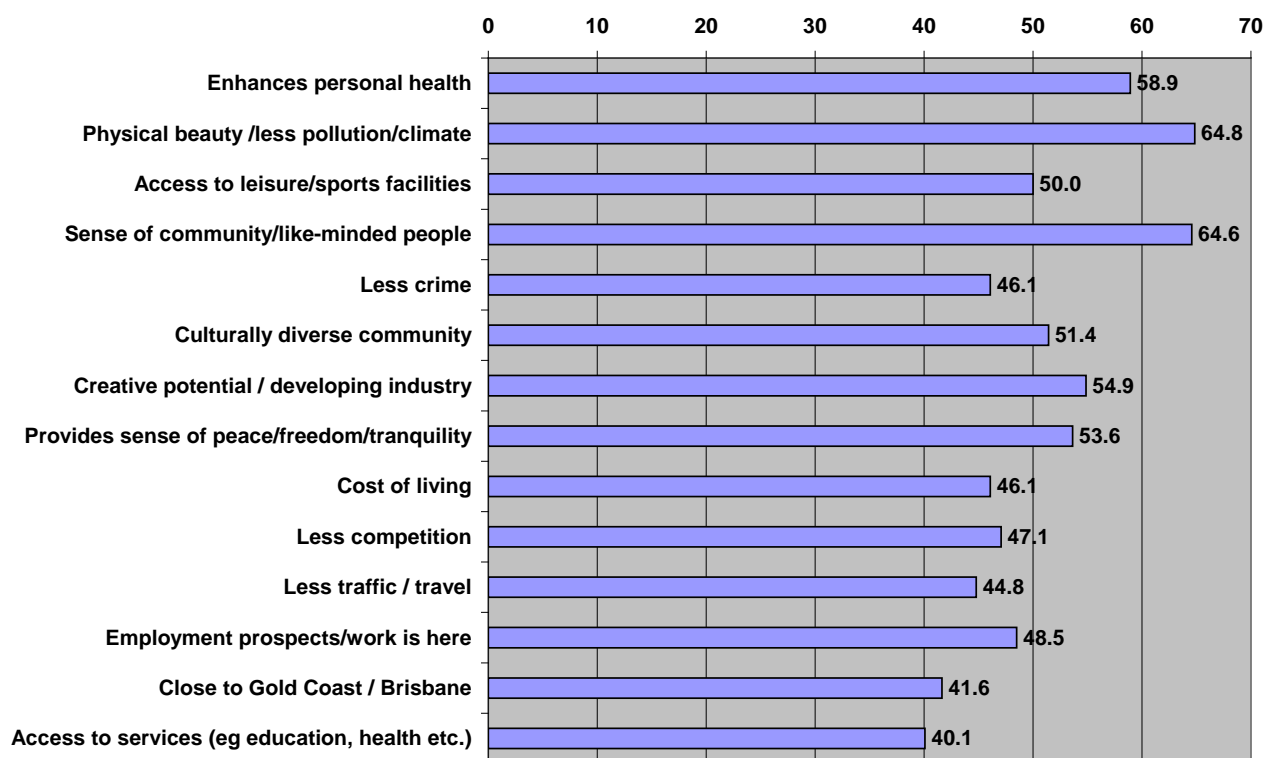
Advantages of living in Northern Rivers region

Practitioners were asked to consider the advantages of living in the region and to rate the listed attributes in order of priority between 1 and 14, with 1 being the most important. They also had the opportunity to list other advantages not included in the list. The results depicted in Figure 4.30 show the average rating by respondents on each attribute. The results have been inverted so that the highest number represents the most highly rated attributes. The numbers in the table represent an average rating out of 14 and indicate the priorities that respondents placed on the various attributes.

The most highly rated attribute was the physical beauty/less pollution/climate of the region (64.8) followed closely by a sense of community and like-minded people

(64.6). The next most valued attributes were the notion that living in the region enhanced personal health (58.9), the creative potential/developing industry of the region (54.9), the idea that the region provided a sense of peace/freedom and tranquillity (53.6) and the appreciation of a culturally diverse community (51.4). Other aspects of place that rated less highly were access to leisure and sports facilities (50.0), employment prospects (48.50), the cost of living (46.1) and less traffic or need to travel (44.8). Access to services and proximity to Brisbane and the Gold Coast rated the lowest in this question.

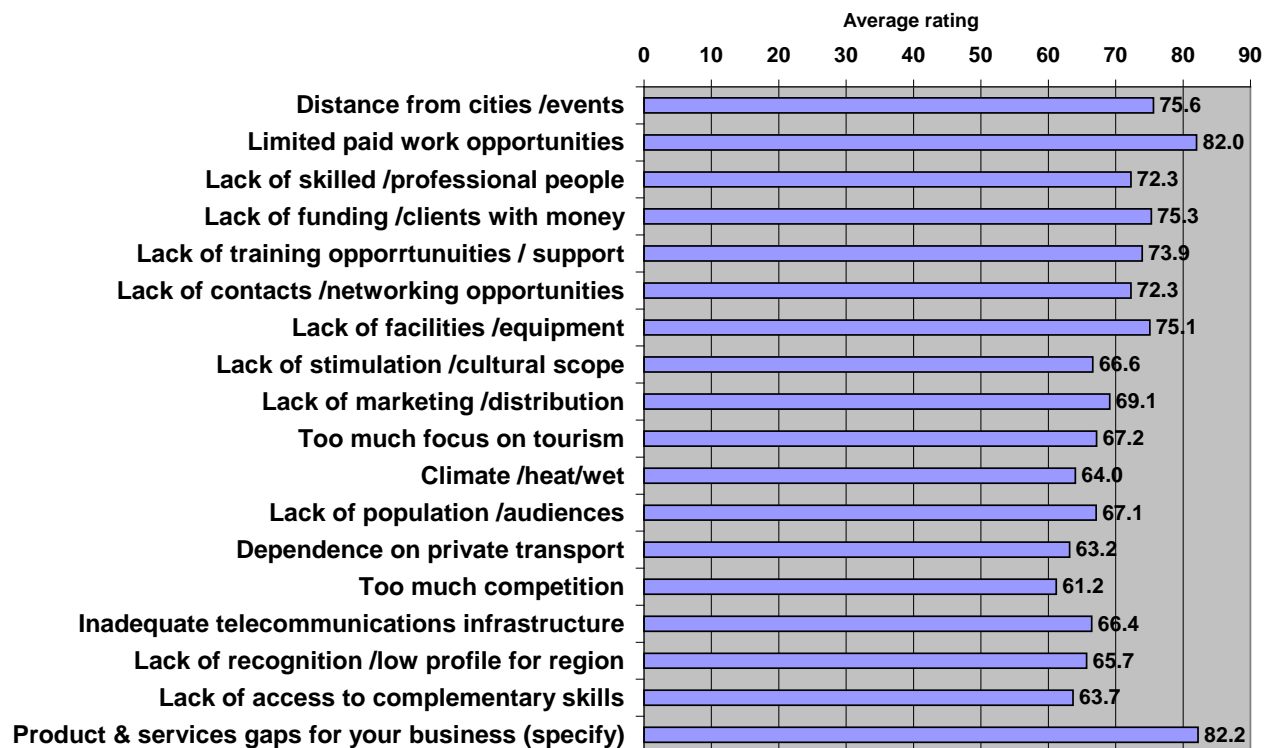
Figure 4.30 Advantages of living in the Northern Rivers region



Disadvantages of living in the Northern Rivers region

Again the average rating for each attribute was calculated and then inverted so that the highest number represented the highest rated disadvantage. These findings are shown in Figure 4.31.

Figure 4.31 Disadvantages of living in the Northern Rivers region

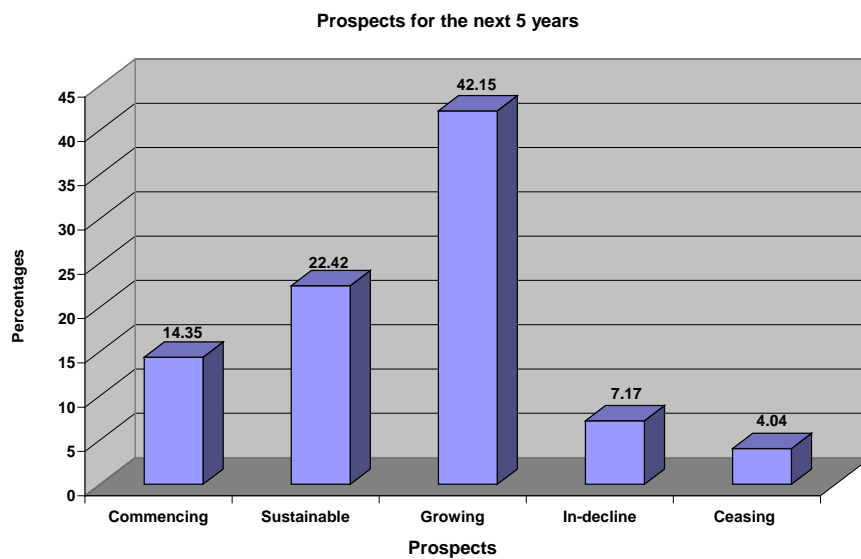


Of the disadvantages nominated, product and service gaps rated the highest (82.2). These gaps included not enough paid professional work, lack of equipment, customer service and support and skill gaps especially in the area of producing. Limited paid work opportunities rated the second highest (82.0). Other disadvantages that rated highly were: distance from cities/events (75.6); lack of skilled/professional people (72.3); lack of funding/clients with money (75.3); lack of training opportunities/support (73.9); and lack of facilities and equipment (75.1).

Prospects for business/career

Practitioners were asked to describe the prospects for their business or career over the next five years and the results are detailed in Figure 4.32. Most practitioners (78%) were positive in their outlook, indicating that their businesses were growing, were sustainable or were just commencing. The largest majority of respondents (42.1%) said that they expected their businesses or career prospects to grow in the next five years. Only 7.1% said their businesses were in decline and 4% were ceasing operations.

Figure 4.32 Prospects for screen industries over the next five years



Respondents were asked to provide reasons for the selection of their response to this question. Of the 121 answers, 58% of respondents described 'general growth' in screen or creative industries as their reason for predicting growth in their business or career. Of these, 20% identified general growth in the industry and 80% provided further explanation for the cause of growth. The three main reasons almost evenly weighted within this theme were: increased global recognition of the region, more professionals moving to the area and new or developing products/ businesses. Only 2.8% suggested growth in the industry would be reliant on increased government funding. These findings suggest that local practitioners identified national and international recognition as vital to growth in their sector. It also indicates that, despite the heavy reliance on government funding noted earlier, practitioners did not view government subsidy as essential to the growth of their businesses.

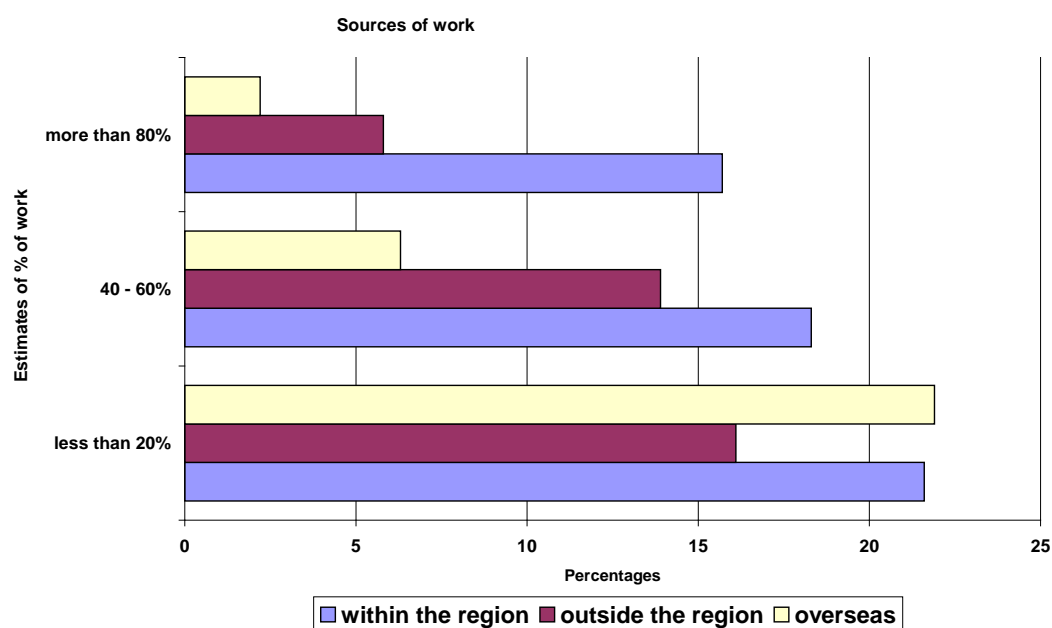
The second major theme (selected by 24% of respondents) was 'personal reasons'. This theme, like the growth theme, was divided into four subsections. 58.6% described a positive attitude as well as the enjoyment they got from their work as the prime reason for projected growth. 31% suggested that increases in their skills and experience would most improve their career prospects over the next five years. 7% described having more time to invest in their work, as the prime contributing factor, and 3.4% suggested that a willingness to be mobile to gain work enhanced their employment and career development prospects.

'Networking' was the third major theme (9.1%) suggested by respondents as the main driver of their career prospects. The fourth theme was 'location and the environment of the Northern Rivers' (as opposed to the metropolitan area) suggested by 4.1% of respondents as drivers of their business prospects or careers over the next five years.

Prospects for sources of work

In this question, respondents were asked to estimate the market share of their work coming from either within or outside the region or overseas in the next five years. These findings show that practitioners projected a continued mix of sources of work, with the largest percentage still coming from within the region. Figure 4.33 provides a summary of these findings comparing the projected sources of work.

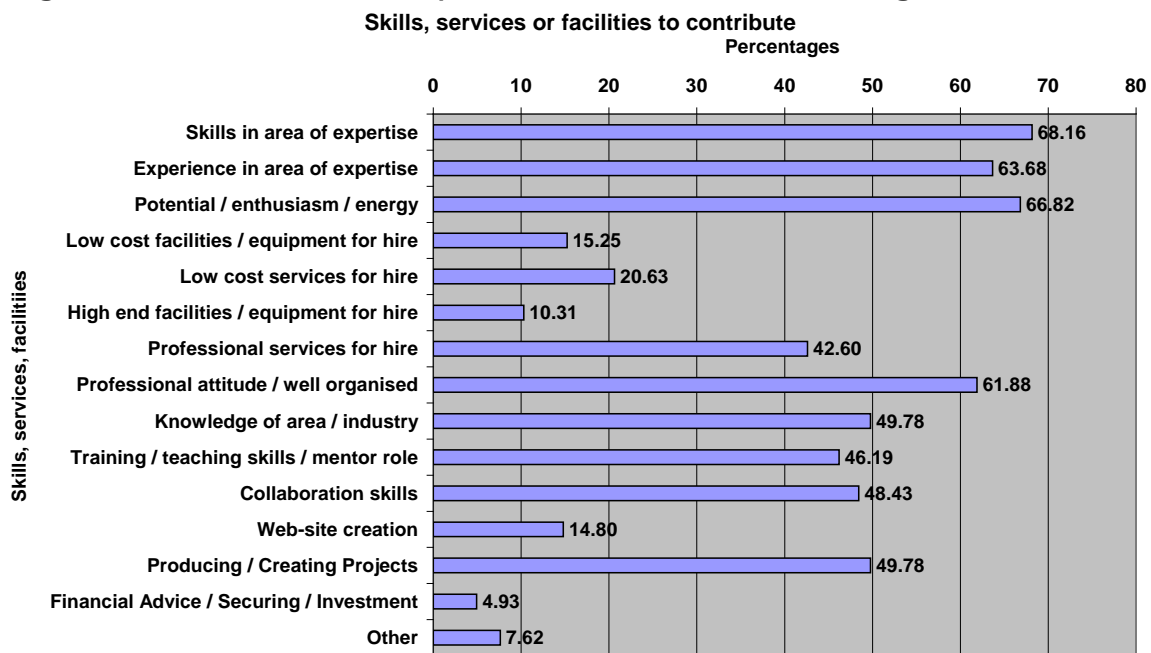
Figure 4.33 Summary of projected sources of work



Skills, services and facilities to contribute

When asked what they could contribute to the region, the largest percentage nominated their skills (68.1%) and experience (63.7%) and their enthusiasm and energy (66.8%). A large percentage also nominated their professional attitude and organisation skills (61.8%). Given that the largest percentage of respondents operated as writers, directors and producers, this finding indicates a high level of skills and expertise in these areas in the region.

Figure 4.34 Contribution local practitioners can make to the region

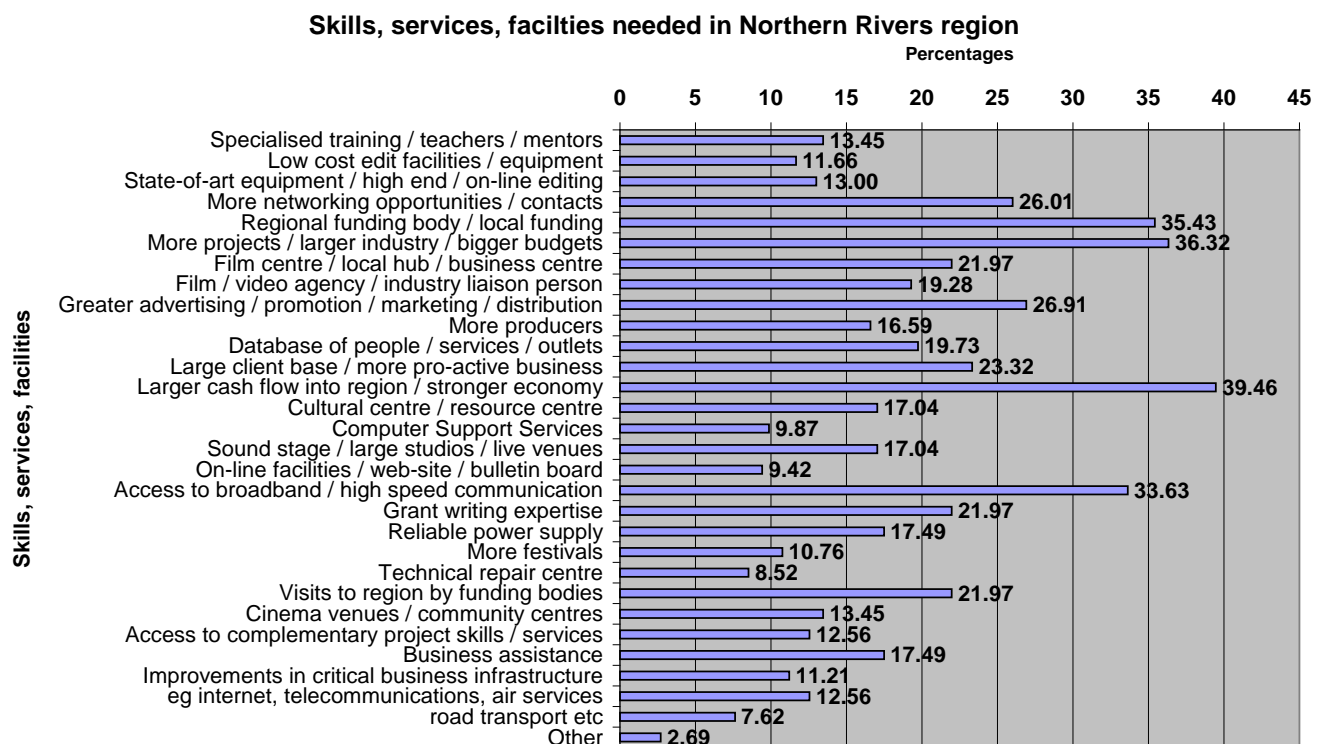


Skill, services and facilities required in the region

Figure 4.35 shows how respondents rated the skills, services or facilities most needed in the region in terms of priorities. The largest percentage (39.4%) said they needed a larger cash flow into the region and a stronger local economy. The second and third greatest needs were variations of this theme: more projects/larger industry/bigger budgets (36.3%) and a regional funding body or some form of local funding (35.4%). These findings were echoed elsewhere in the survey and highlighted during the regional creative industries workshops tour in May 2005. Producers and practitioners in this region collectively possessed a high level of skills, experience, training, professional attitudes, creative ideas and even equipment and facilities. What they lacked or needed more of was investment capital and funding to bring their ideas to production and to the market place.

After finance, 33.6% of respondents said they needed better access to broadband and high-speed communication services. Broadband was identified in the study as both a means of transport and a communication mechanism for creative industries and the need for more efficient and high-speed broadband echoed throughout the study. It was also a priority expressed by practitioners who attended the regional creative industries workshops.

Figure 4.35 Skill, services and facilities required in the region



The need for more networking opportunities and contacts rated high in this question (26%). This was also considered a high priority during the regional workshops tour and emerged strongly in the interviews with producers. Producers and practitioners were very aware of the importance of collaboration and networking in order to survive and prosper in this sector.

Utilising the services, facilities and activities of Northern Rivers Screenworks

The study found that 71% of respondents had heard of Screenworks and only 14% had not heard of the organisation at all. 13% did not answer this question.

Figure 4.36 Percentage of people who had heard of Northern Rivers Screenworks

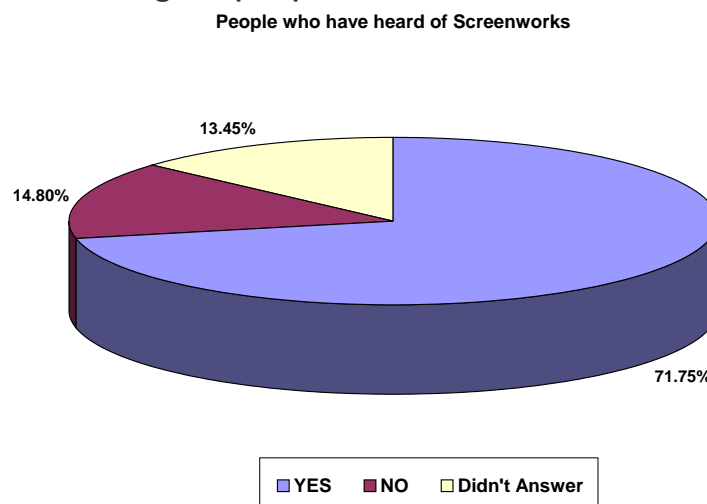
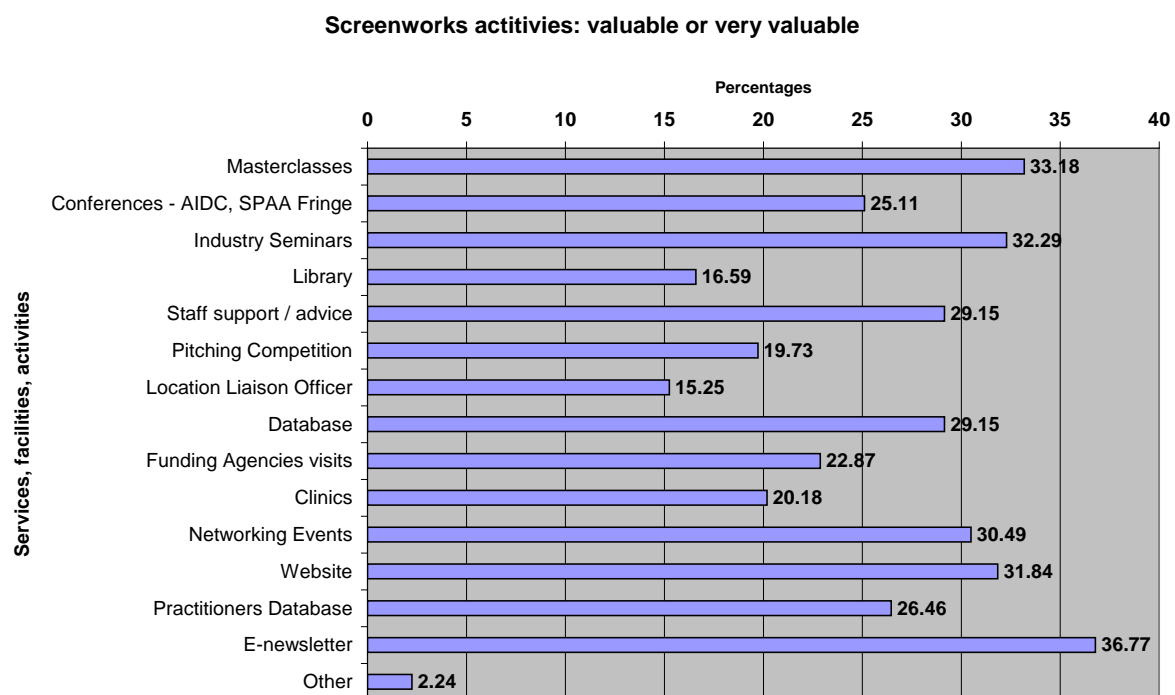


Figure 4.37 depicts the Screenworks activities that respondents found to be valuable or very valuable. The most valued service provided by Screenworks was the e-newsletter (36.7%), followed by masterclasses (33.1%), industry seminars (32.2%), the website (31.8%) and the networking events (30.5%). The staff support and advice and industry database were also highly valued by 29% of respondents. These findings corroborate the more detailed assessment of Screenworks' activities and contribution to the local screen industry sector reported in Chapter 5.

Figure 4.37 Value of Screenworks activities to local screen industry practitioners



Other ideas or suggestions

The final survey question was an open ended one that invited respondents to contribute further ideas or suggestions in relation to the development of screen industries in the region. These responses yielded valuable insights into the needs of practitioners and their views on the growth and sustainability of the sector.

The strongest need expressed was for increased mentoring and sharing of skills between experienced and emerging practitioners, more on-the-job training and opportunities for emerging practitioners to work more closely with experienced producers. The second highest rating need was for better access to broadband. Many respondents argued for more support for Screenworks, and more support for

community based organisations, particularly North Coast CAMERA (which ceased operations after the survey was conducted) and LINC TV. There was a consistent need for more networking and building collaboration between writers, film-makers, artists, musicians and actors. A number of respondents expressed the need for a major creative industries festival or Expo to bring people together and showcase local work. There was also a strong need for an annual short film festival and increased opportunities for distributing work nationally and internationally.

Policy recommendations mainly related to Australia's content rules, which were under discussion at the time due to the Free Trade Agreement being debated nationally. Respondents also called for more measures to encourage increased local independent production and hold off the onslaught of US screen content into Australia. Some suggested greater collaboration between Northern Rivers and the Gold Coast/Brisbane industries and practitioners. Local policy issues related largely to a campaign to reduce location fees by local councils to encourage more incoming productions. Better access to community production facilities, equipment and promotion was also expressed, as was the suggestion that Screenworks move away from Byron Bay and focus on more of a whole-of-region approach to screen industry development.

Other suggestions for development of the sector included more conferences like SPAA Fringe in the region; support for a local independent digital features initiative; more training and workshops to develop skills; the need for a central hub or office space in Tweed Heads for practitioners; and some form of discussion forum or web-based meeting place on the Screenworks website.

Overall, respondents were positive about recent developments in the industry and the future of the sector. The most urgent needs were for more interaction and collaboration between emerging and experienced professionals, increased networking opportunities and improved high-speed broadband. Further support for Screenworks was a recurrent theme, as was appreciation for the role and function of the organisation and its professional development program. Chapter 5 includes a closer analysis of the work of Screenworks over the period 2002 to 2005 and what this revealed about the nature of screen industry activity in the region.

Chapter 5

Production activity and economic impacts in the Northern Rivers

In this chapter, my role as industry advocate in the action research method is highlighted. In seeking evidence of the levels of production activity and economic impacts of screen industries in the Northern Rivers, I examine the dynamics of local industry development and its role in building the data gathering and research capacity of the region.

The previous two chapters focused on the size and scope of the creative workforce in the Northern Rivers, their location, skills and training, the nature of work and the drivers for, and impediments to, sustaining screen industries in a regional area. This chapter outlines the level of production activity in the region as evidenced by locally initiated and managed projects. In 2000, the region had limited data gathering and research capacity, and over the course of a decade, a number of measures have been taken and infrastructure has been established to address this problem. The formation of Northern Rivers Screenworks and the building of the data collection capacity of the organisation has been a key factor in correcting this deficit. Screenworks was the core source of evidence for production activity, supplemented by the survey work I undertook in 2005 to ascertain the economic impacts of the sector.

Measuring the level of activity in screen and creative industries is problematic from the start. As Cunningham points out in relation to creative enterprises:

If garage rock bands and weekend craft stalls through to some of the world's biggest content multinationals – AOL, Time Warner, News Limited etc – equally fit the creative enterprise bill, any examination of the way their modes of activity and enterprise work is bound by necessity to be nimble, while needing at the same time to set out the ranges and types of enterprises across the sector. (Cunningham, *Creative Enterprises*, in Hartley, 2005 p282).

In seeking measures of production activity in the Northern Rivers, I identified two distinct types of activity. The first is locally initiated, produced and managed projects, and they are examined in detail in this chapter. The second is incoming productions, which have a different set of economic, social and industry effects on a region. Incoming productions, also referred to as ‘footloose productions’, may originate in other regions, in the capital cities or from overseas and are generally managed by large production companies not based in the region. If they use local practitioners or services, they do so in varying degrees. The impact of this type of activity in the Northern Rivers is discussed in Chapter 6, along with two other Australian and two international examples that have had a noticeable impact on the cultural and social life of regions, and on tourism also. (NSW FTO, 2000; Beeton, 2001; McDonnell, 2001; Venture Taranaki, 2004; Highlands and Islands Enterprise, 2005). These projects are assessed in the light of what they reveal about economic impacts, regional rejuvenation and the data gathering capacity in regional areas.

Review of local screen industry activity: 2005

In examining the impacts of locally initiated screen industry activity in the Northern Rivers region, a brief overview of the local ecology is helpful. As detailed in Chapter 3, the screen industry sector in 2005 was made up of 151 producers, directors or content creators. Of these, 132 operated as sole traders with 10 micro-businesses, employing between 2 and 5 people. Of the 151 producers, directors or content creators, at least 30 were experienced producers with track records and screen credits. The total talent pool, production crew, support and distribution services around them that made up the larger ecology comprised 7,280 people, operating as 3001 mainly small or local micro-businesses (Henkel, 2006).

In order to assess and evaluate the level of activity being generated by the local screen industry sector, I undertook a review of the history, activities and programs of Northern Rivers Screenworks. At the start of 2000, screen industry activity in the region was taking place in an ad hoc manner with no industry networks or sense of a local identity. Experienced, credited producers such as John Welley and Deb Cox lived and worked in the region, but related directly to the industry centres globally or in Sydney and Melbourne. During the 2000 Study, I joined them and a group of senior producers to form Screenworks, a networking company for the production sector.

Screenworks is still active in 2010, thereby providing a useful prism through which to view and measure local screen industry activity over a decade. The development of Screenworks is in itself a product of this research in the way it emerged and developed as a component of the action research undertaken. The history of Screenworks and its achievements draws the connections between the research, the industry development and the leadership shown by the producers in the region who primarily drove the process.

Brief history of Screenworks

Following a landmark meeting of screen industry practitioners held in Clunes in July 2000, attended by 160 people, I joined a group of industry professionals imbued with the enthusiasm generated by the gathering, to form a not-for-profit company limited by guarantee called Northern Rivers Screenworks Ltd. The company became the host organisation for the *Filmworks* website and the new board invested its own time and funds in developing the website with a new name: www.screenworks.com.au. Screenworks began promoting itself as an information and networking group and launched a series of professional masterclasses. The first major achievement of the inaugural board was to secure significant funding to establish a three-year Industry Development Program.

Screenworks positioned itself as “the screen industry gateway for the Northern Rivers region of NSW, serving creative practitioners in the film, television, video, and digital media sectors”. The aims of the organisation in 2010 are to “foster, drive and promote the development of an innovative, sustainable and vibrant screen industry culture in the Northern Rivers” (Screenworks, 2010).

In order to depict the extent of locally initiated and produced work, an overview of Screenworks initiatives and projects is provided and the increasing efforts to improve data collection were charted. Screen culture and audience engagement are also discussed in the context of the social and cultural impacts of the screen industries in the region.

Screenworks data collection: 2000 to 2010

As previously described, the Screenworks website began as a research tool developed in 2000 for the first screen industry study. The site was taken over by the Screenworks board and received further development and considerable upgrades from several local web development companies, which included Next Wave Media (2001 – 2003), Evolve Media (2003 – 2006) and The Friendly Web Guy (2007 – 2008). It is now self-managed by Screenworks staff. The site provides a range of services to local practitioners, including e-news and information about upcoming and recent events. There are links to two related screen culture organisations in the region: Byron Film Club and the Film Artists Cooperative, both of which have been active for eight years. The site has searchable databases for locations and related services, including accommodation, catering, travel and transport, indigenous services, office supplies, childcare, medical and emergency services.

Figure 5.1 Screenworks website usage for period July 2004 to June 2006

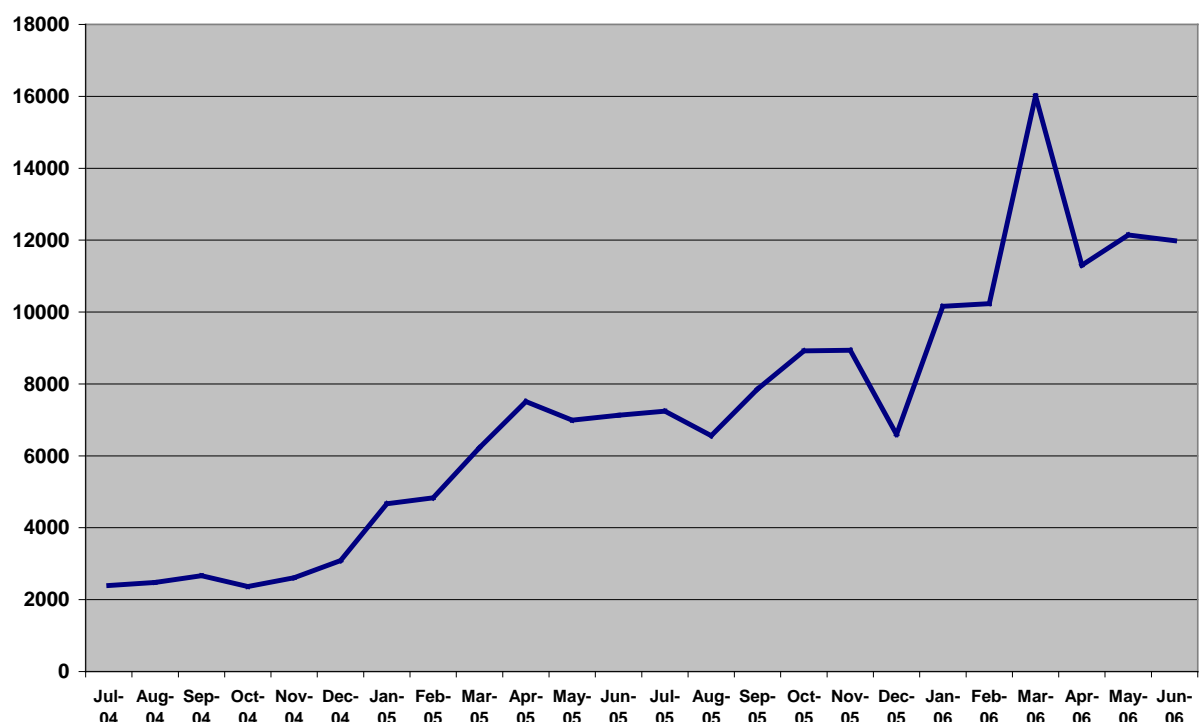


Figure 5.1 shows the number of unique visitors over a two-year period to the Screenworks website, and the increase in the number of people accessing the site during the time of the 2005/06 study. In July 2004, there were 2,394 visitors and by

June 2006, this had increased to 11,987. In one year, (July 2005 to June 2006), there were 117,762 unique visits to the website and 353,199 pages were accessed.

Importantly for this study, the Screenworks website became a tool for data collection. From its inception, Screenworks maintained a searchable database of local practitioners. This began as an interest group, and later became a members' list. A subscriber's list for the Screenworks e-news service was also established and is still maintained. Each of these lists provides a representation of the number of people in the area engaged at some level in the screen industries. Screenworks also maintains records of the number of participants enrolled in masterclasses and industry events and visitors to the website.

The number of practitioners registered on the Screenworks database provides a useful indicator of industry growth and engagement. From zero in 2000, this number rose to 350 in 2006, indicating significant growth in the number of practitioners who wished to be actively part of the growing industry network. During the three years of the Industry Development Program, membership was offered initially for free and then a small, nominal membership fee was introduced. When the Sustainable Regions funding expired in 2005, Screenworks had to commence charging for all its services, including membership. In 2007, Screenworks moved to an Incorporated Association status, which required all previous 'members' to apply for and pay a fee for Screenworks membership. This once again reduced the membership to zero, but the numbers steadily increased again and by May 2010 there were 252 paid up members. Of these, 86 were professional practitioners making their living from screen industries, and the remaining 166 were emerging and associate members or students.

Alongside the members list, Screenworks maintains a subscriber list of recipients of the regular Screenworks e-newsletter. In 2010 this list comprised 650 addresses. For Screenworks manager, Jill Moonie, these are strong indicators of an engaged and active membership.

The value of Screenworks' membership is acknowledged by individual members every time they pay to renew or when new members sign up. We aimed to have 200 paid members by 2009, and this was achieved (Moonie interview, 2010).

In Oct 2009, Screenworks began managing its website internally, and figures for website traffic were only available for the 7 months from Nov 2009 to May 2010. In this period, there were 4,800 unique visits to the Screenworks website and 34,381 pages were accessed. According to Moonie, the period July to December was the most active period for Screenworks events, and web traffic increased substantially during that time (Moonie interview, 2010).

Professional development and training activities: 2003 – 2005

As part of its Industry Development Program (2003 to 2005), Screenworks employed two industry development officers, Kate Ingham and Deb McBride, and a locations manager, Dallas Nock. These staff, along with a range of volunteers, played vital roles in the implementation of the program and in the achievements of the organisation.

Over the three-year period, Screenworks undertook diverse professional development activities, which included attracting three major conferences to the Northern Rivers region. The Australian International Documentary Conference was held in 2003 and brought 800 delegates, including over 30 international guests, commissioning editors and distributors, to Byron Bay. The Screen Producers Association (SPAA) held its SPAA Fringe Conference in Byron Bay in 2003 and brought 300 delegates and a large number of leading industry professionals to the region. In 2005, the *OzeCulture* Conference came to Byron Bay bringing 200 delegates, including a visiting delegation from New Zealand.

Other professional development activities organised by Screenworks included an extensive program of masterclasses, seminars, clinics, mentor and incubator programs. Some of these were fee-paying events but most were provided free of charge. Screenworks hosted many opportunities for local practitioners to meet funding decision-makers, and provided individual career training and project advisory services. One of Screenworks' most effective programs was its annual pitch training and public pitching competition, *Life's a Pitch*. Two winners of the Screenworks competition went on to win the national pitch competition at the SPAA Conference. One of these, Cate McQuillan, who won in 2003, went on to *KidsScreen* in New York where she won the audience choice for best pitch. This ultimately led to a \$10 million series, *dirtgirlworld*, being produced from her home base near Grafton.

The series was launched on ABC 3 and internationally in early 2010. The story of this project is told in Chapter 7 as one of the local case studies.

Screenworks' data collection also provided evidence of the increasing profile and acceptance of the local industry by city-based government agencies. In addition to the \$322,000 from Sustainable Regions, the organisation attracted funding from various other government sources, including the AFC (\$51,000), NSW FTO (\$29,000), DSRD (\$135,000) and the Area Assistance Scheme (\$23,000). The amount of support increased each year, and in total over the three years amounted to an additional \$238,000 injected into the region for industry and professional development, training and special events.

A further indication of the increasing profile and standing of this new sector was seen in the large number and high calibre of industry professionals who came to the region to run seminars, masterclasses, workshops or act as mentors. Representatives from key state and federal agencies visited and ran workshops or clinics. Screenworks attracted significant business support in the form of both cash and in-kind contributions from local sponsors.

Two Screenworks initiatives with significant impact on industry development were the Producers' Incubator Scheme and the digital, cross-platform program, *MediaWorks*. The Incubator Scheme enabled first-time producer Noelene Hayes to team up with a Queensland director to produce a documentary, *Elvis Lives in Parkes*, and producer Cynthia Connop teamed with a Sydney based producer to fast-track the financing and production of a documentary *Bloodlines*, which aired on ABC Compass. *MediaWorks* ran for three years and attracted 42 experienced participants. It built confidence and skills in local producers, particularly in cross-platform production and delivery across television, theatrical, on-line, DVD and mobile phones. The lab environment and access to experienced practitioners in this field assisted local producers with skills development and networks. Cate McQuillen was a beneficiary of this initiative, as were two Hatchling Productions web projects: *The Life and legacy of Spike Milligan* and *The Man who Stole my Mother's Face*.

MediaWorks is a shake-up. It challenges filmmakers to grow up and get savvy with the new technologies and new markets (Dickinson, 2005).

A summary of Screenworks' activities and participation over the period 2003 to 2005 is included in Figures 5.2, 5.3 and 5.4.

Figure 5.2 Screenworks' projects and participants: 2003

Project	No of participants	No of presenters
AIDC – February	750	50
SPAA Fringe – July	300	30
Master classes x 6 (nominal fee)	122	6
Seminars and clinics x 11 (free): including visits from AFC, FTO and FFC	211	11
<i>MediaLab</i> – November	15	3
Pitching competition and training	13	1
Film Financing seminar featuring Brian Rosen and Geoff Brown	60	3
Strategic planning day – March	30	3
Total no. of participants at Screenworks events	451	
Total no. of Screenworks presenters		27
Total no. of events	23	

Figure 5.3 Screenworks' projects and participants: 2004

Project	No of participants	No of presenters
Master classes x 4 (fee charged)	82	4
Seminars and clinics (free) x 18: including visits from AFC and FFC	229	17
<i>MediaWorks</i> – November	15	3
Pitching competition and training	15	1
Producer Incubator	4	4
Script Incubator	4	4
Total no. of participants	349	
Total no. of presenters		33
Total no. of events	26	

Figure 5.4 Screenworks' projects and participants: 2005

Project	No of participants	No of presenters
<i>OzeCulture</i> Conference – April	200	20
Master classes x 4 (fee charged)	126	4
Seminars and clinics x 14 (free): including visits from AFC, FTO and FFC	137	14
<i>MediaWorks</i> – December	12	3
Pitching competition and training - July	6	1
Script Program: Zoom (x 6 weeks)	15	1
<i>Heart to Heart</i> – early 2006	5	3
Creative Industry Dev. Workshops	160	6
Total no. of participants at Screenworks events	301	
Total no. of presenters		26
Total no. of events	23	

Over the three-year period, Screenworks' activities attracted 1,101 participants to 72 events with 86 presenters. Conferences and events supported by Screenworks attracted an additional 1,410 practitioners to the region. Kate Ingham, the Screenworks Industry Development Officer, summed this activity up as:

The major strengths of screen industries in the region are that it's a large and diverse sector and people are multi-skilled. Screenworks has played a major role in encouraging this, and practitioners have responded by doing workshops and seminars to diversify their skill base. Local practitioners have become more nimble and versatile and tenacious, and I think we can be one of the cutting edge providers of content in the country in terms of coming up with innovative ways of approaching projects(Ingham interview, 2005).

Assessment of Screenworks' three-year program

As part of the 2005 study, I undertook an evaluation of Screenworks' Industry Development Program in order to assess the effectiveness of the organisation and how it was meeting its objectives. Both the staff and board of Screenworks adopted a number of the recommendations from this evaluation, in another of the feed-back

loops in the action research process. The improvement in local data gathering mechanisms was one of the beneficiaries of this process.

One of the first major achievements for Screenworks was in establishing an office and a prominent presence for screen industries in the region. This provided both a physical focus to the sector and a location for events and networking. It also served as the location office for incoming productions. One of the responsive actions taken by the board following the 2005 Study and feedback from practitioners was to move the office from Byron Bay to Bangalow. This served both to lower Screenworks' costs and to help address the Byron-centric focus of the industry, which had been a feature of the first three years of the organisation.

The quantity, range and depth of Screenworks' activities in its formative years were indicative of a lively and forward-thinking sector and, in particular, the large number of experienced producers with initiative and a willingness to engage in industry development at a local level. There was a significant level of local volunteer support in managing the various programs and activities across the region. A major priority for Screenworks in the early years was providing support and professional development for its large and growing community of screen producers. This group was identified by the board as vital to the future development of the sector.

Screenworks maintained valuable records of attendance at events. One of the recommendations following the 2005 Study was for improved records of participant responses to these events and tracking outcomes and impacts on the careers of individual practitioners. Some examples of these, such as the Producer Incubator Scheme and *MediaWorks*, were discussed earlier.

A key issue in the evaluation of Screenworks in its early years related to revenue generated from membership and events. In the first year of operation, membership and most activities were provided free of charge. This was justified as building up a client base and establishing the organisation. However, this trend continued into the second year resulting in very little financial contribution from participants. This had the effect of creating and maintaining a subsidy mentality in local practitioners, and an expectation of 'free lunches'. The recommendation to begin charging a nominal

membership fee and payment for events was adopted by the board in the third year of the program. However, the number of free events in the third year still dominated, and when the program's funding was expended by the end of 2005, the new board faced the problem of having to wean local practitioners off the subsidy mentality. Charging for events during Screenworks' subsidised period might have enabled the organisation to build a revenue bank and finance stream to place Screenworks in a stronger financial position in early 2006. Instead the organisation was financially depleted at the end of the program and had not adequately prepared the local industry for the next phase of operations without Sustainable Regions funding.

Furthermore, the seminars and workshops organised by Screenworks cast a very wide net in terms of content, and it is arguable that there was more quantity than quality in the nature of support offered to practitioners. Very few follow-up mechanisms and ways of assessing the support were offered or built into the programs. A major gap emerged in practitioner support for those who had attended events but needed help to go to the next level. Focus had been on getting as many participants through the door as possible and increasing the pool of entry-level players rather than developing the expertise of mid-level producers and fostering success. For example, follow-up mechanisms were not provided for participants of the two schemes with the most impact in generating new projects: *MediaWorks* and the Producer Incubator Scheme.

This gap in follow-up support was rectified by the Screenworks board from 2007 through the ongoing provision of producer clinics for mid-level and experienced practitioners. In 2008, Screenworks established the Producers Group, an invitation-only group of senior producers who are highly valued by the staff and board. Specific programs and events are developed for this group and they are consulted regarding the ongoing focus and direction of the organisation. This group also provides valuable key data on production activity and economic impacts as described below.

Another major area of underperformance during the Industry Development Project was in the effective collection, management, assessment and dissemination of data, from both the locations and the industry development components of the project.

Some data was collected but it was generally not presented in an accessible or meaningful way. Reliable software programs, such as Excel, were available but were not used effectively either in reporting to the board or in advocating to the funding agencies for further support. There was also a lack of efficient and well-presented data to assist the staff and board in future planning for the organisation. The reasons for this were a combination of lack of expertise and time and a low priority given to the importance of data in both advocacy and management.

One of the outcomes of the second industry report, *Imagining the Future 2* (Henkel, 2006), was an increased appreciation by both the Screenworks board and local practitioners of the value of effective data collection and dissemination. As a result, the Screenworks board resolved to improve its data collection and management systems and place a higher value on this function of the organisation. Evidence of the advancement in data gathering and research capacity that has occurred in the region since 2006 can be found in a now regular mechanism coordinated by Screenworks on behalf of Industry and Investment NSW (I&I NSW). Every six months, Screenworks circulates a commercial-in-confidence data collection form to all leading producers in the region requesting data on production income, regional spend and local employment (see Appendix 4). This provides both Screenworks and I&I NSW with valuable data on the growing industry. Only accumulated data is published, thereby maintaining confidentiality for individual producers. Screenworks manager, Jill Moonie, reports that since she started the process in 2007 the responses have been more forthcoming and the goodwill and willingness to provide production data is increasing.

Producers understand the value of this data, not just for advocacy and increased funding, which they benefit from, but also for the picture it gives us of the local industry. I send out the form to between 40 and 60 producers every 6 months and some I have to chase up a few times, but mainly because they are so frantic with their projects. Since we started the Producers Group two years ago, the goodwill and understanding about the value of this data has increased exponentially. (Moonie interview, 2010)

Picture of the industry in 2010

By 2010, Screenworks had 252 active members, and the number of engaged and experienced producers had grown to 86. These included Deb Cox and Fiona Eagger (*East of Everything*), Cate McQuillen (*dirtgirlworld*), Mark Lewis (*Cane Toads*, *The Conquest 3D*), David Bradbury (*My Asian Heart*, *A Hard Rain*), John Weiley (*Solamax*, *Antarctica*), Robert Raymond (*Going Vertical*), Andy Bambach (*The Gathering*, *Byron Underwater*), Catherine Marciniak (*The Life Series*), Cynthia Connop (*Sacred Sex*, *Bloodlines*), Russel Burton (*Water Rats*), Jan Mallis (*This Modern World*, *dirtgirlworld* online), Richard Mordaunt (*The Dolphin People*) and David Warth (*Rainforest*, *The Secret of Life*). Screenworks reported that when functions were held for the Producers Group, more than 50% of its members regularly attended, indicating strong interest by producers in interacting with each other and the local industry. The fragmentation and isolation of producers reported in the early 2000s was no longer evident and there was a tangible sense of cohesion and collaboration amongst this group. The importance of providing ongoing support for experienced producers, who are regarded as essential to the growth and maturing of the industry, is recognised by the board and management of Screenworks (Jill Moonie, interview 2010).

Screenworks also reported a high level of activity and engagement with its broader membership by the end of the decade. There was less of a subsidy-based, 'free lunch' mentality amongst members, who were demonstrating a willingness to pay for workshops, events and an annual membership fee. During 2009, Screenworks' activities generated \$17,926 in ticket sales and the number of practitioners involved in events continued to exceed predictions. Screenworks hosted 20 separate events attended by 1,468 people from across the region. The Screenworks e-news had a subscriber list of 650 and continues to rise steadily with each edition.

The extent of locally produced work also continued to increase in both number and scale. The combined budgets for just two projects, *East of Everything* and *dirtgirlworld* were in excess of \$20 million, with approximately \$5.8 million in regional spend. *Dirtgirlworld* was a \$10.6 million project and employed 171 people. Its regional spend was \$1.5 million. *East of Everything's* total budget was \$10.3 million and it injected \$4.3 million into the local economy, with a strong flow on effect to other businesses. Over 300 local businesses saw an economic benefit from the series, and 546 local people

were employed in some capacity, as crew, cast or extras. The number and diversity of screen industry and screen culture events and programs continued to increase across the region.

Screenworks' annual signature event, *Life's a Pitch*, continued to attract growing interest within the region and high profile judges from leading agencies in Sydney and Melbourne, including ABC, SBS, Screen Australia, SPAA and Madman Entertainment. During 2009, Screenworks hosted its own screening program, *ReelTalk*, which featured experienced producers and key creative speakers. Screenworks also partnered with a range of organisations to support screenings, including Dendy Cinemas, Mullum Flicks, Federal Films, Bangalow Film Fiesta, Sydney Travelling Film Festival and Women on Women (WOW). The Byron Bay International Film Festival continued to increase its profile, audience size and number of entries.

The broader creative industry sector was also thriving. The 2009 Arts Northern Rivers reported that thirty five professional development forums were held and attended by over 900 people that year. Six Aboriginal art exhibitions were held and visited by 3,160 people and twenty-three museum exhibitions were held and visited by over 18,000 people. Arts Northern Rivers had 3,332 subscribers and the Visual Arts Network on-line gallery was visited by over 33,000 people from 53 countries. Triennial funding for 3 Rivers Aboriginal Arts Space was secured and twelve oral history mini documentaries were produced and uploaded to the Arts NR website. A book on contemporary indigenous art from the region entitled *A Special kind of Vision* was launched and 197 young people attended *Artstart* projects across the region (Arts NR, 2009b).

Screen culture, social and cultural impacts

In addition to the economic and industry development effects, Screenworks and the local screen sector play a significant role in developing the social and cultural life of the region. For example, since 2003, Screenworks has supported two important local initiatives, the Film Artists Co-operative and the Byron Film Club, including provision of office space, equipment and facilities as well as advice and promotion.

Byron Film Club (BFC) was established in 2003 to screen short films, documentaries and features produced in the region on a bi-monthly basis at various venues within

the region. In 2005, the BFC expanded its website to include an online library and the functionality for streaming video. In 2010, the BFC had 200 members, with over 100 being contributing filmmakers. The Club's website included a chat room for members and a growing library of locally produced content.

The Film Artists Co-operative (FAC), also formed in 2003 as a monthly meeting group and network to pitch ideas, discuss scripts and form collaborations. Comprising filmmakers, actors, writers, composers and producers from the Northern Rivers community, the group developed around the idea of helping one another to connect with local talent and resources to achieve their individual film-making goals. FAC activities to date have included the production of short dramas, experimental films and comedy sketches and have provided services to local and incoming productions (Screenworks, 2010).

Another strand of screen industry activity identified was pursuits associated directly with the development of the social and cultural life of the region. Screenworks supported a number of projects and practitioners assisting community groups, organisations, schools and individuals to tell their own stories and articulate their concerns and aspirations. An example of this was *Heart 2 Heart*, which provided an outlet for six young people aged 15 – 25 to explore historical stories within the region and to turn them into short films. The Tweed Council's *Homegrown Filmworks* was an initiative undertaken as part of their City of the Arts program, and resulted in five short films depicting various aspects of cultural life in the Tweed area.

The Northern Rivers region is rich in diverse cultural events and festivals. In 2005, there were 57 major community events hosted across the region. Of these, 28 were in Tweed Shire, 9 in Byron Shire, 6 in Lismore, 4 in Ballina, 2 in Kyogle, 1 in Richmond Valley and 7 in the Clarence Valley. A full list of these festivals and cultural events is included in Appendix 1. Festivals are well documented as outward representations of the cultural and social life of the communities that host them (Derrett, 2008; Gibson et al, 2010). They contribute to the economic life of the region and provide greater understanding of significant social and cultural agendas. They have also been found to foster resilience and unleash deeper relationships within the communities themselves and between the many stakeholders who host them (Derrett, 2008).

Screen industries contribute to festivals and community events in a range of ways from documentation and promotion services to the inclusion of industry speakers, workshops and film screenings. Three examples are outlined below which illustrate aspects of the diverse connections between screen industries and the cultural life of the region. All three demonstrate, in some small way, the feed-back loop into my development as a local screen producer, one of the three roles in the action research process.

Inspired by the industry workshops held across the region during the 2005 study, a group of enthusiasts from Nimbin formed the Nimbin Film Industry Group (NFG). Launched in September 2005, the NFG had the intention of increasing film expertise in the Nimbin Valley. Its first major event, *Nimbin's 39 Hours Short Film Competition & Festival*, was held the following January at the Nimbin Community Technology Centre. It included editing and camera workshops under the guidance of Paul Tait, Nimbin's local award-winning cinematographer. *Nimbin's 39 Hours* attracted considerable local sponsorship, a band of first-time filmmakers and a standing-room-only audience on the awards/screening night. The NFG continued to run local workshops and events and in 2007 launched the inaugural Nimbin Independent Film Festival. Hatchling Productions won the award for Best Documentary at the 2008 Nimbin Film Festival for *The Burning Season*.

The extent of cultural engagement by people in the Northern Rivers region is also exemplified by the local branch of The *Friends of the ABC*. This organisation emerged out of a perceived need "to defend and promote the ABC in its vital role as Australia's independent national broadcaster" (Friends of the ABC, 2010). The Northern Rivers branch re-formed in 2001 and continues to be reliant entirely on local volunteer energy and interest to maintain its activities. Between 2001 and 2006 the branch experienced rapid growth in membership, leading to the formation of two active sub-branches in Byron Bay and Tweed Heads. By 2006, the combined branches had a membership of over 100 paid-up members. The sub-branches, each with their own coordinators, initiated a wide range of activities, including screenings of local work, seminars on the future of the screen industry and guest speakers. In 2006, the Byron Bay branch used its networks to extensively promote and organise

screenings of the Hatchling Productions documentary *The Life and legacy of Spike Milligan*.

In February 2006, the inaugural Byron Bay Film Festival was launched in response to the growing awareness that Byron Bay and the northern NSW region were home to a substantial number of filmmakers (BBFF, 2010). The first festival focused on screening the back catalogue of local filmmakers' works, plus other Australian films, but the immediate and enthusiastic audience feedback motivated the management team to expand the screenings to include international films. In 2007, the festival featured 100 films from 24 different countries, and, in 2008, 150 films from 34 countries.

Filmmakers attended from China, Sri Lanka, the USA and the UK. In 2010, the festival screened 176 films selected from 850 submissions from as far afield as Kazakhstan and Mongolia. There were 105 international films from 35 countries, 15 international guests and a festival audience of 4,096 people. I have attended the festival both as a filmmaker and as an audience member. In 2010, the NSW Minister for the Arts presented me with the Byron Bay Film Festival inaugural Honorary Award for my achievements as a producer and for leadership in the Creative Industries of the Northern Rivers of NSW.

In interviews conducted with leading screen industry producers across the region, the growing sense of community spirit and social cohesion was an important factor. For local producer John Weiley, the fact that a real community exists within the region is a key factor in his decision to live and work in Byron Bay.

It's not an illusion. People, when pressed, do hang together, and are prepared to work together. I find it moving and inspiring and a source of hope that people are still interested and able to protect and preserve their community and work together to create something for the collective good (Weiley interview, 2005).

The contribution of screen industries to the region's cultural life and to the "collective good" is an aspect of Northern Rivers' development worthy of further study.

Economic impacts of local production activity

In addition to the social and cultural impacts, the creative sector also has the potential to contribute to the economic regeneration of regions in ways beyond job

creation (Taylor, 2002). Measuring the economic impact does, however, present a number of challenges and problems, as has been described in Chapter 2.

As detailed in Chapter 4, the majority of the screen industry workforce comprises sole traders and content creators who usually operate in environments of high risk and erratic production cycles. They often work from home or small studios, usually very long hours, and during development and/or distribution stage, they can have periods of time when they have little or no income. They are often preoccupied with getting one project funded, distributed or marketed while developing the next and trying to prevent their business from 'falling over'. This completely engaging process can leave little or no time or energy for collecting and analysing data on their production activity. If they do keep adequate records, their capacity or willingness to share this data with researchers may also be a problem, due to commercial-in-confidence issues or investors and partners who preclude them from sharing production data.

Taking account of these difficulties, two mechanisms were used in this study to estimate the economic impact on the sector. The first was a survey of local producers and projects to determine total production revenues and regional spend of a sample of projects in the region. The second mechanism involved calculating producers' incomes based on data obtained from the 2005 industry survey.

Survey of local producers and projects

A telephone and email survey was conducted involving 18 credited producers from the region who all had at least one production credit or successful track record. Each producer was asked to supply estimates of their project budgets, the regional spend for the previous 12 months (2005), the number of people employed and how many were locals. They were also asked to estimate their projected expenditure for the coming 12 months (2006) including projected regional spend, and local employment. The results of this survey are detailed in Figure 5.5

Figure 5.5 Estimates of economic activity by 18 local producers: 2005 and 2006

Total project budgets for 2005	\$7,036,950
Estimated NR spend	3,600,000
Total number of people employed	223
Number employed from within NR	110
Estimated budgets for 2006	\$27,810,000
Projected local spend	\$13,880,000
Projected total employment	267
Projected employment within NR	120

The amalgamated data from the 18 producers revealed economic activity in excess of \$7 million in one year, with \$3.6 million of local spend. These producers anticipated a turnover of \$27.8 million for the following year, sourced from outside the region, with a regional spend of \$13.8 million and employment of approximately 120 people from the region. These findings reflect a vibrant and financially healthy sector at the mid point in the decade, and a spirit of optimism about the immediate future. They are by their nature conservative, in that they represent only a small group of producers selected from a potential pool of 151 content creators. However, in extrapolating these estimates, it should be noted that the producers selected for this survey were the experienced 'top end of town' with the strongest track records and, therefore, the ones most likely to succeed in generating high budget, high value projects. It would be inaccurate to attribute these estimates to the remaining 133 producers and content creators in the region. In the 2005 survey, when asked to estimate their gross annual incomes, 25% of respondents estimated their income to be less than \$5,000 and only 3% estimated incomes of more than \$100,000. Many of the region's producers and content creators reported at the industry workshops that they were struggling to get their projects financed, and many would work for long periods with little or no income (Henkel, 2006). This gap between the economic output and the prospects for the experienced producers compared to the aspirant and emerging producers is a key finding of the 2005 study. The vexed issue of sustainability of this industry is discussed in further detail in Chapter 8.

Estimates based on projected incomes derived from industry survey

A second mechanism used to estimate the economic value of screen and creative industries was to multiply the number of practitioners by the average earnings of people in this sector. The industry survey in 2005 found that 55% of practitioners earned less than \$30,000 per year and 45% earned more than \$30,000. The following estimates of average annual income were applied: 55% earned approx \$10,000 per year, and 45% earned approx \$45,000 per year. The results are depicted in Figure 5.6

Figure 5.6: Estimated economic impacts of screen and creative industries

	Creative Industries	Screen industries
Total number of practitioners	7,280	1,527
55% (4,000) with average annual earnings of \$10,000	40,000,000	8,400,000
45% (3,280) with average annual earnings of \$45,000	147,600,000	31,602,000
Total estimated annual earnings	\$187.6 million	\$40 million

Other aspects of economic activity

What has been termed 'the black economy' is also a factor within screen and creative industries in the region. This term refers to income derived from trading between practitioners and micro-businesses and not reported through the normal transaction processes. Trading of services and skills occurs frequently at the emerging and entry level of the sector, but less so at the more experienced level. Some products are also traded, including equipment, materials and sometimes end products such as DVDs. Reporting of these exchanges is problematic as records are generally not kept of this type of activity.

It is reasonable to conclude that the data reported above is an underestimation of the true economic value of screen and creative industries in the region. Furthermore, the economic value of the sector consists of more than production budgets and incomes. There are flow-on effects resulting from disposable income being spent in the region, as well as from generation of employment and skills development. The situation was summarised in 2005 by the then business manager for DSRD in Lismore, Sue Ryan.

The screen industries are experiencing enormous growth in this region and new businesses are establishing here all the time. But more importantly for the local economy, the screen industries consist of a large number of producers who raise finance and investment outside the region and bring those budgets into the region. In some cases, considerable percentages of those budgets are spent within the region and local people are employed. That has the advantage of enabling us to balance our economic trade sheet. The screen industries also create export activity, which further increases disposable income within the region. Sometimes the practitioners may in fact work elsewhere, but they spend their disposable incomes here. The producers and creative entrepreneurs being attracted into the region generally have high disposable incomes. One of the difficulties we face as a traditional agricultural economy is that, as a general rule, we have low levels of income and therefore low levels of disposable income. It's the disposable income that creates a region's wealth. Lots of flow on employment occurs out of that as well, and the synergies that can be created within the broader creative industry sector result in further economic activity (Ryan interview, 2005).

In summary, the level of local production activity and the estimated revenue generated by this activity indicate a dynamic and vibrant emerging local industry sector with evidence of further growth in coming years. However, the gap between the experienced producers and those struggling to survive remains a serious threat for the sector; even those at the 'top end of town' are still reliant to a large degree on government subsidy. Through its contribution to the economic, social and cultural life of the region, the sector may be said to be moving from the margins to a more prominent and influential position within the region, but the issue of long-term sustainability is still in doubt.

Chapter 6 examines the second type of production activity – incoming productions – and assesses their impact on the local industry and community. Two international case studies of regional screen industry activity are also presented for what they reveal about regional rejuvenation and industry development.

Chapter 6

Incoming productions and implications for regional development

The findings for the second type of production activity in the Northern Rivers region, that of incoming productions, are detailed in this chapter along with the broader implications of production activity for regional development. Two other Australian and two international examples of regional screen industry activity are assessed for what they reveal about the development of this sector, regional rejuvenation and data gathering in regional areas.

In addition to locally produced work and regional events, the other major strand of screen industry activity is the level of incoming productions that utilise the region as a locations base for filming. The impact on a region from incoming productions, including economic input, social and cultural affects and impact on tourism, have been well documented, both in terms of opportunities and costs (Beeton, 2001,2005; McDonnell, 2001; Bolan and O'Connor, 2006; Scottish Screen, 2009).

Over the past 20 years, tourism has increasingly been considered a means for regenerating declining communities, and building tourism has becoming a significant development strategy for many regional development agencies (NRRDB, 2005). When a movie or popular television series is filmed on-site in an existing town or region, increased visitation to those sites often follows (Riley et al, 1998; Beeton, 2001, 2005; McDonnell, 2001). Film-induced tourism has the potential to increase the pace of change, but has "an incidental/accidental outcome", which is different to more conscious forms of tourism development (Beeton, 2005). Film directors and producers are primarily concerned with getting their movie or series filmed not how this will translate into tourism. Not all films leave a positive legacy for tourism. Stuart Trundel, manager of Venture Taranaki Trust in New Zealand, is familiar with this type of activity.

I often use the analogy that it's a bit like a circus coming to town. They take over a paddock and for a few days before they arrive it's great fun, you have the parades, you have the elephants but then the circus leaves and you're left with a bit of a muddy paddock and then a month after that you've actually forgotten

the circus was even there (Trundel interview, 2006).

In the case of a long-running TV series, however, the necessity for goodwill and support from local communities and regional stakeholders can change the dynamic. *Monarch of the Glen*, shot in the Highlands of Scotland, is one such example, as detailed below. In the Northern Rivers example of *East of Everything*, a long-running locally produced television series, considerable goodwill and long term relationships were generated within the Byron Bay community.

Community attitudes to having incoming productions in their region are not always harmonious or predictable (Beeton, 2000; McDonnell, 2001). An interesting example of this occurred in the town of Avalon, on the northern peninsula of Sydney. With rising production costs in Los Angeles, the producers of the American soap opera *Baywatch* decided to move the show to Australia and launch *Baywatch Down Under*. However, the residents put forward strong objections, including potential damage to the ecosystem, and the local council responded by putting a stop to filming. *Baywatch* was subsequently lured to Hawaii, and Pittwater Council commissioned a study from the University of Technology on the effects of filming in the region (McDonnell, 2001).

The study looked at local attitudes to incoming productions and the economic impacts resulting from filming of a long running Australian series, *Home and Away*, also shot in the same region. This series involved a crew of between 25 to 45 people and a cast varying between 5 and 20 people filming at Palm Beach one day per week for 40 weeks of the year, as they had been doing for the past 12 years. The study found that, despite the *Baywatch* experience, 80 – 90% of the Pittwater community favoured filming in their region and welcomed the flow-on benefits in tourism, particularly from *Home and Away*. It also found that residents believed there was no loss of amenity as a result of film and television production, that it was not harmful to the natural environment, and that it was sustainable and created a positive impact on tourism. The study estimated that over 40% of the visitors to Palm Beach came because of the long running serial, contributing around \$500,000 per year to the local economy (McDonnell, 2001).

Another interesting example of television-induced tourism and its impact on a region occurred with the Australian television series *Sea Change*, shot in Barwon Heads in Victoria. Over a two-year period from 1998 to 2000, three series of *Sea Change* were broadcast on ABC, each consisting of 13 episodes. The series became one of Australia's highest rating and most popular drama series and won multiple awards. Sue Beeton from La Trobe University in Melbourne conducted a three-year study at Barwon Heads and found that the series left a complex legacy on the town, comprising both positive and conflicting attitudes (Beeton, 2001). Certain clear physical signs of rejuvenation of the town were evident. Vacant retail outlets and businesses that were declining in 1998 were occupied and thriving by January 2000. The prominent signage (Home of *Sea Change*) at the entrance to the caravan park was a strong indicator of the value placed on identification with the series, as was the directional signage on the main road. New surf shops, coffee shops, gift shops, bars and restaurants opened within 12 months of the television series broadcast. Real estate values in the area also dramatically increased.

Beeton's study outlined the methodological problems in attaining reliable, verifiable evidence on the impact of incoming productions on regions and communities. As she notes in relation to her discussion of Barwon Heads:

Film-induced tourism has significant effects, but they are not easy to isolate due to their integrative nature. Many of the changes seen in Barwon Heads may have occurred without *Sea Change* – the region was experiencing economic recovery after a severe downturn, and buyers who could no longer afford other seaside areas were moving in. However, *Sea Change* certainly accelerated the pace of change; a point agreed to by tourism and community leaders (Beeton, 2001).

The challenges of locating evidence and collecting data on the regional impact of incoming productions in the Northern Rivers are dealt with in some detail below.

In addition to tourism, another major impact from incoming productions is the stimulation of local employment opportunities and the effects on local businesses. This can be measured in two ways: the increase in employment within the professional screen industry community and the flow-on employment effects to other

industry sectors such as retail, hospitality and transport. The investment by incoming production companies on these elements is called 'regional spend'.

Two international case studies are briefly outlined below, evidencing two quite distinct impacts of incoming productions on the areas where they were filmed. The high budget international feature *The Last Samurai* shot in the Taranaki region in New Zealand is an example of a large-scale, one-off project, which differed in its regional impact from the long running series *Monarch of the Glen*, shot in the Highlands and Islands of Scotland.

An economic impact assessment report was commissioned by Venture Taranaki in partnership with Investment Zealand and New Zealand Trade and Enterprise to evaluate the impact of *The Last Samurai* on the Taranaki region. No such study or assessment was undertaken on *Monarch of the Glen*. I visited both these regions during the research stage in order to investigate first hand the impacts of these productions on their regions.

The Last Samurai: Taranaki, New Zealand

Taranaki is on the west coast of the North Island, about four hours drive from Wellington or Auckland, the nearest large cities. Its natural resources are mountains, ocean and lush countryside. Although smaller in population (102,000 in 2006) and land mass than the Northern Rivers, the two regions share many similarities. The traditional industries of Taranaki are dairy and energy, but these are in decline. The region claims to have more artists per capita than any other region in New Zealand (Taranaki Careers, 2010). Distinguishing features include Mount Taranaki, the lighthouse and vibrant surfing culture and the region's search for an alternative sustainable future to traditional industries and tourism. And creative producers located in the area are battling to improve broadband services in the region as a key to business development (Trundel interview, 2006).

Warner Bros brought *The Last Samurai*, starring A-list Hollywood actor Tom Cruise, to Taranaki because it had the look of Japan without the power lines, train tracks or other evidence of modern development, or the cost of shooting in Japan. And Mount Taranaki bore an uncanny resemblance to Mount Fuji. I undertook my

investigation of Taranaki in September 2006.

The Venture Taranaki Economic Impact Assessment report found that the total budget for the film was \$170 million, with a regional spend of \$50 million. With the multiplier effect, the flow-on activity accounted for an additional \$23 million. According to 75% of businesses surveyed, the film had a positive financial impact on their business. The breadth of spend was impressive, with 13 of the 14 local industry groupings having received at least some direct expenditure. Businesses that were affected ranged from a small bakery to mid-size engineering firms and a major transport company. Some of the unexpected beneficiaries were outdoor clothing retailers, a horse dentist and a spa bath operator who consequently established valuable export contacts.

A total of 484 full-time jobs were created and indirect employment for 130 people. Employment gains came mainly from the accommodation industry (179 people), property and real estate (71 people) and the screen industry sector (93 people).

Businesses in the region experienced an increase in turnover from 40% - 800%. This enabled them to expand operations, retire debt, adopt new systems, recruit more staff and/or implement new projects. The presence of the visiting cast and production crew also enabled many locals and businesses to establish new networks and enhance their service levels, and it created a noticeable optimism and buzz in the region. News media coverage, both national and international, was extensive, driven to a large extent by interest in the movie's star, Tom Cruise. This level of interest would not occur in other industries, such as oil, gas or even a multi-national company setting up in the region.

I conducted an interview with Stuart Trundel, manager of Venture Taranaki Trust, and the man responsible for managing and overseeing the logistics of the Warner Brothers visit. The Trust had been set up in 1997, at a time when the region had the highest level of unemployment in New Zealand and the slowest economic growth rate. Trundel described his experience of arriving in the region:

I was asked to come over from the UK and help set up New Zealand's first private sector regional development agency. When we first arrived, I think it's fair to say I

was working out of a broom cupboard. Since then we've evolved to become the largest development agency in New Zealand. We're now responsible for regional tourism promotion, regional economic development, the Film Commission and district marketing and event strategies for the region (Trundel interview, 2006).

The Trust began by focussing on capacity building, establishing clusters for engineering, the oil and gas sector, education and a food technology cluster.

Trundel observed that creative industries really came along by accident.

We have a spectacular light here in Taranaki, especially at sunsets and sunrises, and as a result many of New Zealand's leading photographers are based here. The region is also home to many award winning designers and writers and is well known for the number of artists. So the creatives were already here, but it was really when the major movies started to look at the Taranaki region as part of the embryonic New Zealand film industry that the confidence and change of psyche were kick-started in the regional community (Trundel interview, 2006).

What the Warners team needed when they arrived in town was a range of services "from the mundane to the exotic", including very unusual sets to recreate Japan in the 19th century, all sourced within New Zealand, and Taranaki wherever possible. Trundel's mission was very clear: to maximise local content, mobilise the community and position the region as the most film-friendly community that the production crew had ever engaged with (Trundel interview, 2006).

Getting local media attention for the project was not difficult in a remote region where the sight of five very large black helicopters flying over provincial areas sent a very clear message to the community that something was happening.

Because we insisted that it was totally confidential and we wouldn't talk to the media, it meant we guaranteed ourselves front-page coverage for weeks on end. So that's a comparatively positive strength of a provincial area (Trundel interview, 2006).

The star factor also helped get media attention. Apart from Tom Cruise, many of the production team were Academy Award winners. Billy Connolly was involved for a period, and Danny DeVito visited, as did Penelope Cruz.

The short-term economic impacts are very much about the amount of money spent in the region and the number of people employed. But, according to Trundel, that masks a whole change of culture that occurred nationally about the perceptions of the Taranaki region.

Historically it had been seen as a back-water location. It certainly wasn't a destination on tourism routes. It was a community that was quite inward looking. *The Last Samurai* created a tremendous sense of regional pride (Trundel interview 2006).

Two years after the filming, Taranaki had the fastest growing economy in New Zealand. Real estate prices had doubled and the "Hollywood experience" had helped Taranaki diversify its traditional industrial base (Venture Taranaki, 2006). The downside of these developments was that the region became less affordable for young people, and the very low level of unemployment (below 3 percent) meant some employers experienced serious skill shortages. There was also a cost in becoming "attractive", which included "the challenge of keeping up the momentum and keeping the province moving forward" (Trundel interview, 2006).

The effect of *The Last Samurai* on local tourism was negligible. Unlike the gigantic Peter Jackson trilogy, *Lord of the Rings* and *The Chronicles of Narnia*, both shot in diverse locations right across New Zealand, and which spawned many tourism opportunities, there is only one *Last Samurai* tour. Most of the filming was carried out in a specially constructed Samurai village built on a property about two hours from Taranaki. The owners of the land maintained the village after filming ended and created the Samurai Village Tours. The family take visitors through the set and tell stories of their experiences during the making of the film. *The Last Samurai* was, however, not a New Zealand film in the same sense as *The Chronicles of Narnia*, which featured New Zealand landscapes so vividly in the film, and *Lord of the Rings*, which became the New Zealand brand for a time ("New Zealand is Middle Earth"). *The Last Samurai* disguised its New Zealand locations and was presented as a film located in 19th century Japan. As a result, there was initial interest from Japanese tourists, but by 2006 that interest had already begun to wane.

For the Venture Taranaki Trust, the lifespan of most incoming films is limited, and two

years after *The Last Samurai* experience, interest had shifted to building the skills set and the capacity of the local industry.

I think it's fair to say we've maximised our yield with *Samurai* and we're in the decline phase and close to the end of the life cycle of positive impacts. I think what *Last Samurai* clearly did here was the 'buzz' thing that helps to make a lot of other things take off. No-one else has had a Warner production. Other regions may have major Peter Jackson productions and New Zealand indigenous productions but we're still the region that was able to blow Warners away. We don't have big local productions on any scale yet, but we do have a huge amount of creative talent and we're developing the local sector so that what can come out of our region are international producers. We are still looking at attracting other big films, and struggling because, like Australia, the New Zealand economy is incredibly susceptible to the US dollar. In the meantime, we are getting smaller projects, especially television commercials, which don't have the same sex appeal as the big Hollywood productions, but can bring in as much money for the local community (Trundel interview, 2006).

The large, international incoming productions can have effects beyond the region where they are filmed and these are not always positive. According to Penelope Borland, chief officer of SPADA, the danger with films like *The Last Samurai* and *Narnia* is that many people, especially within government, think the industry is doing so well that it doesn't need other support measures such as investment in the domestic industry.

It's the over inflationary effect that we've struggled with behind the scenes for a few years now. Support for incoming productions increases, but the willingness to listen to the case for the domestic industry is not so prevalent, mainly because they don't see the domestic productions having the same secondary economic spill over effects. It becomes very much a treasury argument, and the local industry does not benefit (Boreland interview, 2006).

Wellington based technician Hamish McIntyre describes another effect of incoming productions, which he calls "an inflationary effect that impacts on both crew and local producers and directors". The big Hollywood productions, with their large budgets, can inflate crew rates, so that when a technician works on a New Zealand production and is offered a much lower rate, they feel like they are subsidising the

project to a degree.

Since "The Rings", our industry has been punctuated by large commercial products coming through, which pay the bills, and then we get back to our quaint, often excellent indigenous stories, which cost us money, go nowhere and are seen by no-one, and we wait for the next huge project to turn up to dig us out of the hole (McIntyre interview, 2006).

It is difficult to discuss New Zealand without mentioning Peter Jackson and the *The Lord of the Rings* phenomenon. For Venture Taranaki, the benefit of the Jackson juggernaut was positive, in the sense that when Stuart Trundel was in LA telling producers about the advantages of shooting in Taranaki, "they now at least know where New Zealand is. Anything that raises the profile of New Zealand creativity and our region as a location for filming is good for us" (Trundel interview, 2006).

SPADA also sees many positives in the Jackson factor. His legacy goes beyond the impacts on tourism and the New Zealand brand.

It's in the extensive production and post-production facilities he has set up, and his commitment to stay and continue to work from here. And beside Jackson himself, there are all those other New Zealanders who won Oscars for their work on *Lord of the Rings*. So he has lifted the status of so many of our professionals (Borland interview, 2006).

Lord of the Rings is undoubtedly a project in a category all of its own in the New Zealand screen industry landscape. The trilogy had a budget of \$US320 million, employed 22,000 people directly or indirectly and catapulted tourism to a \$US3.8 billion industry. Pete Hodgson, New Zealand's energy minister, who was thrust into the specially created role of *The Lord of the Rings* Minister, told ABC news that "ten per cent of visitors in 2003 credited *Lord of the Rings* as a factor in coming to New Zealand. Even if it was only 1%, that's \$NZ60 million a year" (ABC News, 2003).

The many impacts of *Lord of the Rings* on the New Zealand screen industries, tourism and regional regeneration warrant a study of its own. Paul Voigt of Investment New Zealand, in his Case Study on the film, summed up its legacy and achievements.

The Economic impacts are difficult to measure in totality, the global media

coverage was unparalleled, tourism growth continues to accelerate with the film being the largest contributing factor, and the legacy will endure for many years to come. At the 76th Academy Awards in February 2004, Billy Crystal had this to say: 'Do you know that people are moving to New Zealand just to be thanked' (Voigt, 2006).

According to Judith McCann from Film New Zealand, incoming productions have been very positive for some sectors of the industry, but less so for the domestic creative side. Line producers and location managers in particular, can build up their reputations and show their skills in handling the large budget international productions. Although *Lord of the Rings* was essentially a local production with offshore finance, it stands so far apart from other local productions that it is in a category all of its own.

For Film New Zealand, the "New Zealand is Middle Earth" phrase has been very useful and is still popular, although getting a bit jaded; a little passé. We like to look to the future and build on the profile Peter helped to create (McCann interview, 2006).

Sue Ward from Film New Zealand sees a diluted benefit for the entire sector from incoming productions that will continue for some time.

It's probably easier to raise money as a New Zealander now than if you come from Namibia. We call it the "Frodo economy" which is a buoyant economy creating jobs and reaching all sectors of the economy. Another thing that incoming productions do, is that they ramp everything up enormously. The sheer logistical numbers of people on the production, the time frame and the scale of it, raises the stakes for everyone. There was a lot of up-skilling, a lot of fast learning and we found out what locals can do when a whole lot of really brilliant people are here cracking the whip. Everybody just had to go like a bat out of hell (Ward interview, 2006).

On the other hand, the television series, *Monarch of the Glen*, which was filmed in the Highlands and Islands of Scotland over seven years, provides an example of the impact of a long-running television series on a regional area. The series was inspired by stories written by Compton Mckenzie and revolved around a young laird recalled

to the ancestral family home of Glenbogle to turn its fortunes around. The production company, Ecosse Films, chose Ardverikie House on Loch Laggan, the same house used for the film *Mrs Brown*, which starred Billy Connolly, as the featured home in the series. They also made extensive use of sites and towns in the regions of Badenoch and Strathspey, including the town of Laggan as Glenbogle. These regions became rebranded as 'Monarch Country' by Cairngorm Chamber of Commerce and the Highlands of Scotland Tourist Board for tourism purposes (Cairngorm Chamber of Commerce, 2001). The television series sold widely internationally and played to an estimated 50 million people during its seven-year run.

No official studies or reports have been done on the impacts of *Monarch of the Glen* on the Highlands and Islands of Scotland. In 2005, I conducted my own study of effects of the series and other local production activity on the burgeoning screen industry sector, the local community, tourism and the impact on the region's economy.

The Scottish Highlands and Islands Film Commission operates in a large geographical area in the north of Scotland that covers five local authorities: the Highland Council, Argyll and Bute Council, Moray Council, Orkney Islands Council and Shetland Islands Council. Recent projects shot in the area include two *Harry Potter* films, *Incident at Loch Ness*, *Heartless* and *Made of Honour*. In addition to the long running *Monarch of the Glen*, television has included *Sea of Souls*, *Winter Solstice*, *Back to my Roots* and *Top Gear*, plus numerous commercials.

In 2001, the production spend in the Highlands and Islands was £3 million which included the second *Harry Potter* film and *Monarch of the Glen*. Between 2004 and 2008, the Commission brought £15 million into the region in feature films, TV and commercial films. Overall, Scotland brought in £24 million from incoming productions during 2008.

The impact of large feature films and major television series on tourism in Scotland is broadly evident from online promotions and tourist brochures (eg. Monarch Country, www.scotlandistheplace.com; www.luxuryscotland.co.uk). The *Da Vinci Code* generated more than £6 million worth of publicity for Scotland's tourism agency, Visit

Scotland, which joined forces with Sony Pictures in what was billed as a unique deal to promote the locations used in the film to 40 countries across the world (BBC News, 16 Oct 2006). Although only in the Highlands for a relatively short time, the Harry Potter films left a significant mark on local tourism. The steam train used to depict the Hogwart's Express crossing the viaduct, has become a major tourist attraction in Glenfinnan near Fort William. The Scottish Tourist Board conducted a survey in 1996 on the impact of *Braveheart*. It found that 18% of US visitors said that the film had been a factor in their decision to come to Scotland. Visitor figures for the Wallace Monument more than doubled after *Braveheart* was released, and reached a million in 2000 which was largely credited to the impact of the film (Simpson, 2000).

As in New Zealand, the economic value of incoming productions is significant. The production of *Rob Roy* in the Highlands injected £7 million into the local economy and continues to serve as a major international promotion for Scotland's scenic beauty. *Hamish Macbeth* made the town of Plockton world famous and made a significant contribution to the local economy. The £3.2 million Viking epic *Valhalla Rising* was filmed in 2008, and is expected to bring £2.7 million into the Scottish economy.

As outlined by Sue Beeton earlier in this chapter, the methodological problems associated with sourcing verifiable evidence on the impact of incoming productions on regions and communities are significant. For a series like *Monarch of the Glen*, which ran for seven years, attitudes can fluctuate from year to year, and, depending on who you talk to and their mood on the day, from person to person. The anecdotal reports I received from people in the village of Laggan, depicted as Glenbogle in the series, varied from extremely positive to noncommittal and dismissive. The local attitude was best summed up by hotelier Jim Coyle who was also chairperson of the steering group for the Monarch Country campaign: "It's certainly having a positive effect on the area, but it's difficult to quantify" (Coyle interview, 2005). Trish Shortland, from the Scottish Highlands and Islands Film Commission, was equally uncertain of the effect.

I'm not sure how many people come to the Highlands because of a film or television program, or whether they just visit a film site because they are here. But

with more than eight million viewers in the UK, and sold in 21 countries, *Monarch of the Glen* must be making an impact (Shortland interview, 2005).

Unlike the owners of the property where *The Last Samurai* was shot, who are happy to benefit from tourism on their land, the owners of Ardverikie House, two elderly women, do not want tourists on their property, and only open the house to the public one day a year. There are no other direct measures of the impact of tourism, other than the wide distribution of the Monarch Country brochure.

Patricia Eccles, director of the Cairngorms Chamber of Commerce, was the person who led the initiative to market the area as *Monarch Country*. The first brochure was launched at Ardverikie House, and in four months, 90,000 had been distributed. This in itself became a press story and led to the second launch in Dover House in the Scottish office in London at the Houses of Parliament. Most of the cast attended the launch, generating further press, including the travel press. Eccles estimates that the media coverage produced the equivalent of £1.25 million worth of advertising. She regards this as exceptional value considering the local committee spent only £1,000 of its own money on promotion. She acknowledges that with tourism, evidence is largely anecdotal, but the Chamber of Commerce did conduct two local surveys, which found that 40% of visitors claimed they came to the area because of *Monarch of the Glen* and 70% had heard of the series and realised it was filmed in the region.

What we wanted to do is just add another hook for visitors who were already coming to the region and perhaps encourage them to stay a little bit longer. Some of the local people were concerned about too large an influx of visitors, but we have been able to reassure them. And in general, our members report that the campaign has been good for business (Eccles interview, 2005).

Apart from tourism, a long-running series can have a significant impact on local employment and industry development. As my visit took place during the last week of filming of the seven-year series, most of the key crew and cast had left, and the ones who remained were in a conflicted state of sadness and relief that it was finally over. Two local residents, who had worked on an earlier series in a voluntary capacity, secured paid work on subsequent series and valuable contacts and networks into the industry (Monarch crew interview, 2006).

Norrie McLaren, chairman of the local industry association, *AimHi*, reported that the series was well regarded within the industry as a valuable source of local employment and skills building.

They are employing locals and training them in a useful way. They're giving them professional experience, which is so important in this industry, and the chance to make connections. Now it's up to them to use them. The film industry is very much like a big club. I always remember the first feature I worked on, and the production manager at the end said, "See you on the next," and that's how it works. It's about networks and who you know. Monarch got lots of people networked, so I'd say it has helped the local industry, and it's done an enormous amount for promoting Scotland (McLaren interview, 2005).

The series also provided opportunities for students graduating in the region to gain work experience and build skills. According to Shorthouse, this can have the effect of reversing the creative 'brain-drain' from the region. It can also attract more skilled and experienced practitioners and producers into the region, who bring expertise, industry connections, projects and new investment. A long-running series creates a demand for further services and infrastructure, which can result in high value companies being attracted into the region (Shorthouse interview, 2005).

Jeremy Sim, the manager of the industry association, *AimHi*, was my host for the visit, and a source of interesting insights and introductions to local screen professionals working in the Highlands. *AimHi* was established as a trade association to represent the media and creative industries in the Highlands of Scotland. The organisation had 130 members in 2005, spread out across the region. Like the Northern Rivers, the region comprised a widely dispersed, relatively small population, spectacular landscapes and a high proportion of creative practitioners operating largely from home studios or micro-businesses in the towns and villages. Unlike the Northern Rivers, there was no clear clustering of people in one specific area, although Inverness and Fort William had the largest number of members.

For Sim, his main job was to connect and support these dispersed creatives and to help build the sense of an industry.

The 'creative industries' as a term was coined by Blair in 1998, but now it's

become associated with Richard Florida's creative class. This has created the expectation that if you make a place cool, hip and buzzing, you can draw people, creative people, to the region and these people create jobs and make the place economically and socially vibrant. So *AimHi* has emerged to help that process and provide a network, forum and a voice for this new grouping of creative people. We're pretty well unique in Scotland and even in Europe. Actually Screenworks, in the Northern Rivers, is probably the closest twin we have. And like them, we had three years of guaranteed funding that has almost expired and we need to find some sort of self-sustaining model for the future (Sim interview, 2010).

Sim introduced me to a range of creative practitioners located in widely dispersed and sometime very remote parts of the Highlands. Like the practitioners in the Northern Rivers region, their reason for being in the region was largely the improved technology that no longer required them to be in the cities, low overheads, lifestyle and a love of the landscape, and the all important factor: high-speed access to broadband, the internet and email (McLaren, Sim and Ross interviews, 2005).

In Fort William, I met Gordie Ross, chief officer of Genuine Games, a games developer and distributor. The company employed seven full-time staff and outsourced all requirements beyond that. They also had an office outside Cardiff, so they were used to managing their work remotely. According to Ross, a significant component of their creative activity was research and online marketing, and their main tools of trade were laptops, phones and the internet. They were targeting niche markets, primarily casual gamers and women.

Their latest project in development in 2005 was *Girlzz*, a fashion and lifestyle game for teenage girls. The purpose of the game was to gain entry to 'the clique' and become part of 'the scene', which required paying attention to a range of status symbols, including clothes, jewellery and mobile phones. But the most important aspect of the game was to pay attention to status – the key to becoming an opinion leader. The goal of the company was to sell 250,000 units in Europe and 250,000 in the US. Ross however, believed that "it's not inconceivable we could do a million units" (Ross interview, 2005).

Ross and his colleagues had previously worked in London and decided the massive overheads were unnecessary. Glasgow, Edinburgh and Dundee also involved high overheads, so as soon as Fort William got broadband, his company moved there. He rates the presence of *AimHi* very highly. "It's kind of another layer that unites people in the region, and it's independent and a little bit informal, which is very cool" (Interview, 2005). He and his team are trying to create a cluster in Fort William to encourage like-minded people to move to the area "principally because I don't want to have a massive payroll, and with a cluster you can contract and outsource to people around you" (Interview, 2005). The company was planning to build a small, contained but expandable film studio, and within that were looking to create office space as the basis of a cluster.

The creative industries are really the only way to invigorate young people and let them understand that they can be entrepreneurs; they can be Bill Gates, they can be the next Richard Branson. We are the people who understand how things are going to work in the future and the brand of creative industries is the most suitable way to convey that message and organise how we work" (Ross interview, 2005).

The examples of Taranaki and the Highlands of Scotland reveal different aspects of the complex impact and effect process from large-scale screen productions in regional areas. More refined and tested mechanisms are needed to effectively measure these impacts on the community, tourism and the local screen industry. The regional spend and local employment effects are easily measured and can be significant. If a production stays in a region long enough, or makes the effort to connect with the local community, positive and long-lasting development impacts can result that are more difficult to quantify but show up in anecdotal and interview evidence from local practitioners and screen industry agencies.

Impact of incoming productions in the Northern Rivers

Apart from its diversity of locations and physical beauty, the Northern Rivers region is distinctive as a filming location because of the significantly large number and high level of expertise available in the creative talent pool living in the region. Visiting productions can employ local crew and support services, resulting in reduced travel costs, accommodation and per diems for cast and crew. There is also a wide range of production facilities and support services in the region, and a full complement of

hire equipment available in the region or nearby on the Gold Coast. All of these factors, combined with reasonable transport and accommodation infrastructure, including airport, roads and hotels, make the Northern Rivers an attractive proposition for 'footloose' productions (Screenworks, 2005).

Sources of data on incoming productions in the Northern Rivers region

A major challenge for all film offices around the world is that of collecting and managing data on the number of incoming productions, the local spend and level of local employment (Shorthouse interview, 2005). How the Northern Rivers region faced this challenge formed part of the 2005 study.

Prior to 2003 and the opening of the Screenworks office, the Northern Rivers region did not have a local film office. Enquiries about filming in the region were handled by individual councils in an ad hoc way. There was no unified application process and in many cases, council workers lacked knowledge of how the film industry worked or were too busy to deal with the requirements of incoming production companies. This often served as a deterrent to companies, who would then look to other regions with dedicated film offices staffed by people with the relevant expertise.

All seven councils were contacted during the 2005 Study to access their records on incoming productions. A summary of the findings for each council area is provided as evidence of the data collection capacity of councils prior to the establishment of the Screenworks locations office.

Tweed Council had records of film activity in the Tweed area dating back to 2000 but did not request economic or employment data. Council staff supplied a list of 53 productions shot between 2001 and 2005 and a copy of the Development Assessment for filming by Granada Television Productions of *I'm a Celebrity ... Get Me Out of Here*, which went through the planning department.

Byron Council kept records for 2004 and 2005, which were only available on application through Freedom of Information. They did not ask productions for data on local spend and projected employment.

Lismore Council reported that no permits for filming in the Lismore local area had been applied for in the last 5 years. They also reported that, depending on the magnitude of the production, two types of application forms would be applied: a development application or, if smaller, a section 68 certificate (activity approval). Neither of these documents asked film-specific questions or required the production company to provide information on local spend or employment.

Ballina Council had no records of filming activity available and did not ask for economic or employment data. Kyogle Council reported receiving no formal applications for filming, but their staff were aware that activity went on in the region. There were reports of TV commercials and lifestyle programs filming in the surrounding forest and mountain ranges. Kyogle Council was the only council that reported that it would request information on the expected local spend and employment if they received a formal application for filming in the region. Richmond Valley Council reported that they had not received any applications for filming in the past five years. Clarence Valley Council was a recent amalgamation of six local councils and the new council had no records of previous filming permits or activity in their region that could be readily accessed.

Six of the seven local councils did not ask production companies for information about their local spend or projected local employment. Some did not see this information as important and others believed that it was beyond the provisions of the Local Government Act to ask for this information.

The Screenworks Locations office and advances in data collection

The Screenworks office opened in Byron Bay in early 2003 and a Screenworks locations manager was appointed. The aims of the office were to attract incoming productions, both national and international, into the region, and to develop a regional protocol for filming that had the support of all seven local councils. The idea of the uniform protocol was to simplify the application process for incoming producers and promote the region as film friendly. In 2000, the NSW government had introduced the Local Government Amendment (Filming) Act to facilitate council approval processes for filming activities and to provide a single application system for councils to adopt. Screenworks modelled its regional protocol on the NSW

government prototype, adapting it to local circumstances. Screenworks saw this as an opportunity to simplify the process for incoming productions and improve the data collection capacity in the region (Ingham interview, 2005).

Two meetings were convened by Screenworks for all local councils to discuss the filming protocol. The first, entitled 'Planning Local Government Filming Policies', was held in Lismore Council chambers in November 2002 and attended by representatives of nine of the then ten local council areas (prior to amalgamations). There was in-principle agreement from all councils that filming in the region had potential cultural and economic significance and the concept of a unified protocol was supported. The second meeting, entitled 'When the Circus Comes to Town', was held in May 2005, again in Lismore, and five of the seven councils were represented. The Screenworks Filming Protocol was discussed and adopted by all those present.

In 2008, the NSW Government announced a new package of measures to slash red-tape and stream-line approvals from local councils. Called *Film Friendly NSW*, these measures rendered all previous filming protocols redundant as it created the presumption that filming activities would be allowed on community land, crown reserves and national parks, provided heritage and environmental values were preserved. The new measures required local councils to approve filming-related applications unless exceptional circumstances existed, and in those circumstances they were required to give written reasons for refusing any film applications. The new policy also aimed to ensure that fees associated with filming were limited to a transparent cost-recovery basis.

The Screenworks Filming Protocol (2006) had incorporated an inbuilt data gathering mechanism, but since it was replaced by the Film Friendly NSW policy, there is no formalised mechanism for data collection. According to Jill Moonie, manager of Screenworks, local film liaison officers based in the councils generally refer incoming productions to Screenworks and she has made up a form modelled on the producers data collection form especially for these productions. "Most production companies agree to fill them out, but sometimes I have to chase them. I regularly make contact with the relevant officers at all the local councils and we are gradually building

awareness and understanding about the importance and value of good data” (Moonie interview, 2010).

Following the opening of the Screenworks office in 2003, information on locations and production services in the region began to be collected and disseminated. The locations manager developed an online collection of over 1000 images and 22 virtual tours of the region, as well as a comprehensive database of local practitioners. Screenworks also produced a CD entitled *Filming in Paradise*, which contained 400 images and information about filming in the region. 1000 copies of the CD were distributed around Australia (via the SPAA conference) and internationally in 2005. Screenworks also worked in collaboration with the NSW FTO and AusFilm to pitch for projects and promote the region.

In early 2005, the NSW FTO and Department of State and Regional Development (DSRD) released a colour promotional booklet entitled *Filming in Regional NSW*, which featured the Screenworks locations office as one of seven regional offices. Establishment funding and support was provided to these offices by DSRD, which in 2009 became part of Industry and Investment NSW. This department continues to support four of the seven regional offices: NR Screenworks, ScreenLinks (Mid-North Coast and Armidale), Screen Hunter Central Coast and Screen South-East. Film Broken Hill continues to be supported by its local council, and the other two offices, Film Illawarra and Film Central, had, by 2010, ceased operations.

The NSW FTO, which was renamed Screen NSW in 2009, has two major programs to assist producers who wished to film in regional NSW. The Regional Filming Fund encourages Australian productions to film in regional areas by providing a proportion of budgeted costs of filming outside Sydney. The Film and Television Industry Attraction Fund (FIAT) provides a payroll tax rebate to approved productions filming in NSW. Both these funds require production companies to provide data on regional production spend and local employment.

In 2003, the FTO led a delegation of 25 producers to the Northern Rivers region to look at locations, meet local practitioners and make connections. This enabled the visiting producers to see first hand the advantages of filming in the region and may have

played a role in attracting the levels of incoming production reported below in 2005, which included two feature films, two TV series and nine major television commercials.

Incoming production activity in the Northern Rivers

By 2005, the effects of the Screenworks office and the work of the locations manager were beginning to pay off. The Screenworks database, promotional CD and *Filming in Regional NSW* booklet were being widely promoted and the number of enquiries rose dramatically. Data collection also improved and it became possible to provide a reasonably accurate picture of filming activity in a twelve-month period. Figure 5.5 below provides a summary of incoming production activity in the region in 2005, compiled from data supplied by the Screenworks locations office. An estimated \$8.1 million was injected into the region's economy by these productions, which filmed over 252 days and employed 233 local practitioners and 262 extras.

Figure 6.1: Summary by category of major incoming production activity in 2005

Category	Regional spend	Days of shooting	Crew employed	Extras employed
Feature films	470,000	20 days	19	260
TV series	6,900,000	203 days	80	0
TVC	770,000	24 days	102	0
Educational and other	38,000	5 days	32	2
	8,178,000	252 days	233	262

I'm a Celebrity ... Get Me Out of Here

During the 2005 Study, an assessment of the large Granada TV lifestyle series, *I'm a Celebrity ... Get Me Out of Here*, filmed in the Tweed region over five years, was undertaken to assess its impact on the region in terms of revenue, employment and other effects on the local community. Tweed Council approved the first Development Application from Granada Film Productions in December 2002 for the construction of a set and filming on a site located at Dungay, near Murwillumbah. Over the course of the next three years, the company filmed four series of the show (15 episodes per series) at the site, and in August 2005, requested an extension of the

DA to cover further filming of the series at the same location until June 2008. The application was approved, and by March 2006, four series had been completed with the fifth in early pre-production.

Data on the project spend and local employment was accessed for this study from the DA applications submitted to Tweed Council by Granada Productions, as well as interviews with two local crew members. The total estimated spend per series (15 x 1 commercial hour) was between \$10 million and \$20 million, and most of this was spent in Australia. All production and post-production took place on location in the Tweed Council area. Each series spent an average of \$4.5 million on Australian service providers. This involved employing Australian technicians and developing sophisticated technical expertise for the Australian television industry. All the shows involved live broadcasts. The company estimated that almost \$4 million per series was spent in the Tweed Shire area as detailed in Table 6.2.

Figure 6.2: Summary of Granada Production spend in Tweed Shire

Tweed Shire Spend	A\$
Art Dept. Materials bought locally	230,000
Taylor's Garage- account for petrol/services	30,000
Motor Inn	155,000
Estimation of spend in local bars/rest/supermarkets	30,000
Local crew employed	3,000,000
Unit hardware and consumables spend	325,000
Crew gifts/alcohol and incidentals	10,000
Year round spend during hibernation	100,000
Total	\$3,880,000
Note: The above estimates were based on 1 x UK show. If there were a German, American or French show as well the local spend would be more like \$6m per series	

Each series employed approximately 450 – 500 people. Over 300 were Australians and the estimated local employment was 20% of Australian employment, or approximately 60 people. In order to verify these estimates, phone interviews were undertaken with both the locations manager for the project and a local props buyer

and resident of Murwillumbah who worked on the project for approximately ten months over two years. The locations manager confirmed that the 60 local people employed per series were largely drivers, art department assistants, builders, runners, gardeners and numerous contract workers for a variety of services. As the program comprised live broadcasts, the production company required a crew experienced in the demands of live broadcast and most of the senior staff were brought in from Sydney or the UK. However, locals were employed in support roles and assistants, which would have both increased their experience and added to their professional portfolios. Most of the materials and services were sourced from the local community in the form of contractors and accounts with local businesses. An editing department was created on site and fifteen edit systems brought into the region.

The props buyer who worked on the project for ten months confirmed she used local suppliers and contractors for almost all materials and services she required for making and supplying props for the show. Accounts were in place with a local bulk hardware store and at Taylor's Garage, and the company spent thousands of dollars at a local camping store on camping equipment and in hardware and plumbing supplies. The company sealed the road to the location using local contractors and sealed many of the driveways of local residents. They also maintained the road and installed signs and paid substantial location fees to the owners of the properties. Catering was provided by locals and so was accommodation. Of the average 500 people employed per series, some were housed over the border in Queensland but all the art department, riggers and construction crew were accommodated in Murwillumbah. The crew received a daily spending allowance (per diems), and considerable money was spent in Murwillumbah on meals, transport, entertainment and personal needs.

In summary, the Granada Production produced four series in the region between 2003 and 2005 and contributed approximately \$4.5 million per series or a total of \$18 million into the local economy. Approximately sixty local people were employed on each of four series, resulting in a total of 240 people employed for an average of three months per series over a three-year period. Two subsequent series were shot in 2006 and 2007, injecting a further \$9 million into the region and employing a further 120 people.

Other local data sources

In addition to the productions calculated by the Screenworks locations office, Tweed Council recorded a further 12 productions shooting in the Tweed area for a total of 18 days during 2005. Table 6.3 below shows the increase in filming in the Tweed area between 2001 and 2005. The decline in 2005 is attributed to the loss of one major filming area, which resulted in restrictions at what used to be a popular filming spot. The only data collected by Tweed Council was the name of the project, the name of the production company, locations used and the number of days of shooting, so no data is available on economic or employment impacts.

Figure 6.3 Incoming productions in Tweed Council area: 2001 – 2005

Year	2001	2002	2003	2004	2005
No of productions	6	7	10	17	13
No of days filming	6	11	14	22	13

In summary, the Screenworks Regional Filming Protocol stipulated a request for data from incoming productions, but the NSW government's Film Friendly Policy, which has since superseded it, makes no mention of data collection. Screenworks has addressed this gap to a degree by adapting the producers' data sheets for incoming production, and building networks with local councils and other agencies to track local productions. The NSW Regional Film Fund stipulates the provision of key data on local spend and employment, and this data is on the public record.

The Production Picture in the Northern Rivers by 2010

Screenworks continues to collect production activity information from local and incoming producers, and reports that production activity in the region continues to increase each year. Since 2008 it has included two series of *East of Everything*, with a budget of \$10.3 million; a Network 9 reality series, *Australia's Favourite Couple*; production of 52 episodes of the children's television series *dirtgirlworld*, with a budget of \$10.6 million; and *Lou*, a feature film written and directed by Murwillumbah resident Belinda Chayko, and starring John Hurt, which had a total budget of \$3.3 million, a regional spend of \$720,000 and employed 40 locals. Incoming productions, particularly television commercials, continue to use Northern Rivers locations, and the documentary production sector remains vibrant. Mark Lewis produced Australia's first

3D feature film, a sequel to his cult classic *Cane Toads: An Unnatural History* from his studio base in Mullumbimby, and launched it at the Sundance Film Festival in 2010. ABC television's *Life* series director Catherine Marciniak produced four episodes of the series and the expanded website from her home studio in the village of Clunes.

Numerous other documentaries for national television have been produced in the region, including *Bloodlines*, *My Asian Heart*, *A Camel Odyssey* and *The Burning Season*. Local multi platform productions included online content for *Saddle Club*, *Skuff TV* (a weekly production), *The Burning Season* and *dirtgirlworld*. A French television series, *Foudre*, began filming in Brunswick Heads in May 2010, using the same casting agency, facilities and local data acquired by the *East of Everything* team. The show employed eleven local actors, 50 extras and 16 technical crew members. The producers claim the series will inject at least \$230,000 into the local economy (Northern Star 2010).

Conclusions

The two international case studies reveal the mixed and somewhat diluted benefits of incoming productions to a region's economy and tourism. A single film, even on the scale of *The Last Samurai*, will have a limited benefit beyond an injection of funds (which can be substantial), the creation of a 'buzz' and the generation of local employment. The presence of the visiting production can create the impression of an active industry, but once the 'circus' has left town, there is often little left but to clean up the mess. The really large productions can also have the effect of inflating crew costs, which can negatively affect future productions in the region. The many and varied impacts of the New Zealand phenomenon, *Lord of the Rings* is in a category all of its own due to its sheer scale, size and audience reach. Projects like *The Last Samurai* in Taranaki and *Celebrity Get me Out of Here* in Tweed Heads are more typical examples of in-coming productions with substantial short-term economic and employment benefits, some tourism effects, but with long-term local industry impacts that are negligible. Of the 60 local people employed on the *Celebrity Get Me Out of Here* series, most were contract workers for services, drivers, assistants, builders, runners and gardeners. There was very little employment in key creative roles and the impact on the local screen industry was minimal.

In the case of a long running series such as *Monarch of the Glen* in Scotland, or a series created by local producers in the Northern Rivers and featuring largely local crews such as *East of Everything*, there are more significant and far more lasting industry, social and cultural benefits. The effects on local tourism were significant in the case of *Monarch of the Glen*, with the entire region being branded as “Monarch Country”. The seven-season series created long-term employment for some, and attracted experienced and skilled practitioners to the region who brought expertise, industry connections, projects and new investment. Both *Monarch of the Glen* and *East of Everything* created a demand for related services and infrastructure. The impact of *East of Everything* on the Northern Rivers region is discussed in more detail in the next chapter, along with policy developments and their effects on production activity in the region.

Chapter 7

Policy developments and two case studies

This chapter provides an overview of policy developments at local, national and international levels between 2000 and 2010 and the implications of these for the development of screen and creative industries in the Northern Rivers region. The chapter concludes with two case studies of local screen industry producers and how the policy developments and shifts over the past decade have affected their engagement with the region and their ability to create substantial projects from locations outside the capital cities.

Ten years ago Deb Cox had a dream to shoot *Sea Change* in Byron Bay and at that point she was told that it wasn't possible. But she didn't give up on that vision, and [in 2007] she succeeded in locating the production of a major television series, *East of Everything*, in the regional area where she has chosen to live (Fiona Eagger, producer, *East of Everything*).

Every day we pinch ourselves at what we've done. We've been musicians most of our lives, but we got to be in Rolling Stone Magazine because we wrote and produced a kids TV series. And we did it while living on a farm with chooks and frogs and trees and a veggie garden! (Cate McQuillen, producer, *dirtgirlworld*).

Deb Cox and Cate McQuillen are creative practitioners who migrated from Sydney to the Northern Rivers region in the 1990s, bringing a range of skills, networks, experience and a willingness to take risks. Both have succeeded in creating dynamic and successful enterprises from the locations where they live. Their stories reveal different facets of the growth of screen and creative industries in regional areas and highlight certain drivers and barriers to the further development of this sector. The effects of policy changes and developments in the local creative sector on the capacity of these practitioners to operate from a regional area are also assessed. Their stories are included at the end of this chapter.

Urban analysts of the 1990s were noting a “counter-urbanisation” trend with people moving out of the cities in reaction to relentless growth of population and intensifying urban problems (Stilwell, 1992). The trend of “escaping from the stresses of the cities” had certainly been witnessed in the Northern Rivers region and, in particular, in semi-urban environments like Byron Bay and Lismore (NRACC, 1999). Issues such as equity, environmental awareness and quality of life had become significant in location options for individuals, and a lifestyle choice like the Northern Rivers region became increasingly attractive. Rising rental and housing costs in the city also provided a potentially major impetus to decentralisation (Stilwell 1991). Since the 1970s, the Northern Rivers region had been attracting cultural industry workers, and it had become one of the “the liveliest and most exciting arts areas in Australia” with a notably high density of visual artists and craft workers (Wynn-Moylan, 1991).

The migration of experienced practitioners to the Northern Rivers region was occurring at a time when Australia's audiovisual industries more generally were experiencing the effects of globalisation and the onset of the new convergent communications era. As described in Chapter 1, changes were occurring on an unprecedented scale in digital technology and communications, and were dramatically altering the way the film, video and multimedia industries were operating (McQuire, 1997). New digital formats and more affordable equipment and software applications were enabling a wider sector of the community to have access to audiovisual production and post-production facilities, and these facilities no longer needed to be located in the capital cities. The markets and outlets for product were also changing and so was the way programs were made, funded and distributed (Jacka, 2001). Telecommuting, specifically the internet and email, were enabling practitioners to operate their businesses outside the cities in regional centres. Added into this mix was the expanding digital frontier, which was increasingly demanding a high turn-over of quality creative content. The question arose as to whether the growing number of creative producers and cultural industry practitioners relocating in the Northern Rivers region were well placed to meet this demand.

A Labour Market Information and Analysis Report published in 1999 found that a major determinant of employment growth in the Northern Rivers over the coming ten years would be the capacity of the region to capture and respond to the advantages of

globalisation and the digital revolution. This report emphasised the need to change perceptions and practices in the Northern Rivers region and transform it from its agricultural base into a lifestyle and learning region. In this scenario, knowledge and skills formation become the central element of the economic development strategy for the region (NRACC, 1999).

This report represented a major shift from the traditional focus on agriculture, tourism and the services sector and brought with it a willingness to examine the implications of advances in digital technology for local industry and employment growth in the region. However, regional development agencies had no idea how many people were engaged in work in the creative or digital sectors or the nature of the work being undertaken. Creative practitioners living in the region were disconnected and had little awareness of the number of people with similar skills and pursuits operating from the hills, the small villages or towns around them. This situation was exacerbated by dispersed populations and the distances between regional centres. People in Byron Bay were reluctant to travel to Lismore, and people in Lismore hardly ever went to Murwillumbah or Grafton. This issue of disconnectedness was a primary barrier to the visibility of the local audiovisual industry or any real sense of a shared identity for the creative sector. This situation was, however, not unique to the Northern Rivers region.

In his Hector Crawford Memorial lecture delivered at the 2001 SPAA Conference, Malcolm Long described the Australian screen industry sector as “fragmented, sectarian and un-integrated” (Long, 2001). He proposed the establishment of a new industry body to provide a centre for the industry and argued that the Australian industry needed to work more collaboratively to secure its place in the “Information Age” (Long, 2001). The fragmentation of the industry in the Northern Rivers was part of a larger national issue and a result of silo thinking and a historical divide between film, video, music, visual arts, design and other sub-sectors of the cultural industries.

In early 2000, the Northern Rivers Regional Development Board (NRRDB) recognised the major gap in existing knowledge about cultural industries and the new digital media sector and commissioned the first study of the audiovisual industries in the region. When I was engaged to undertake the study as an adjunct to my Masters by Research work at QUT, the first cycle in the action research process began. The 2000

Study and release of the first industry report played a key role in the formation of Northern Rivers Screenworks, which triggered the three year Industry Development Program and the implementing of most of the strategies in the report.

Two major national policy initiatives followed soon after the formation of Screenworks. In September 2001, the federal Minister for Communications, Information Technology and the Arts, Senator Richard Alston, announced the terms of reference for a Creative Industry Cluster Study (Alston, 2001). The study focused on the areas of the creative industries expected to be affected by the rapidly developing digital media sector. They included website creation, digital video arts, film and television production, computer games, special effects, design, music and animation. Although the government never committed to the content digital strategy, this report was widely discussed by development agencies and practitioners in the Northern Rivers and put the focus on the emerging areas of website creation, digital media and related fields. These areas of content creation were gaining increasing attention by practitioners in the region.

At the same time, Senator Alston announced the launch of a \$2.1 million Broadband Content Fund to provide seed funding for innovative Australian content producers to pursue opportunities in broadband applications. This investment, compared with the Canadian government's \$108 million fund, was modest to say the least. In her report entitled *Broadband Media in Australia*, Marion Jacka pointed out that lack of development funding in Australia for new online and interactive content was one of the major difficulties facing Australian content creators in securing a place in the global marketplace (Jacka, 2001).

The significance for the Northern Rivers region of Senator Alston's announcements regarding broadband and the Cluster Study was that it heralded the federal government's somewhat tentative embrace of new digital platforms and the demand for new media content. The NRIT database of the multimedia and IT sector in the region had 410 listings in mid 2000 and Screenworks experienced a rapid increase in the number of digital content creators registering on their database or attending events (Henkel, 2001). Much discussion by the board and amongst local practitioners was around the opportunities presented by broadband and the demand for digital

content. These discussions highlighted the urgent need for improved broadband in the region, especially for content creators who wished to operate far from the cities.

Commentators of this period were both enthusiastic and cautious about the new opportunities that the development of high-speed, high capacity digital networks would create. "With the communications super-highways there is a notable lack of ideas about where all of the new content is going to come from to travel on these expensive new highways to support their existence" (Barr 2000, p228).

Terry Flew acknowledged that there were both serious challenges and new opportunities opening up for content creators as a result of convergence and changes in the global economy. The development of the internet as a global content distribution network meant that, subject to available bandwidth capacity, "content creators can be promiscuous and footloose in where they sell or distribute their content, just as content distributors can source material from any points of the globe. Outcomes are far more likely to be driven by identifying profitable niches in the global market rather than contributing to national culture" (Flew, 2002).

In the Northern Rivers, this opening up of demand for new content was widely perceived as a challenge and an opportunity rather than a threat. Some practitioners began to move into the digital space themselves, setting up new businesses for mobile phone and online content creation (Zachariou interview, 2004) Others began seeking new partnerships in the region and setting up relationships or informal collaborations to explore the development of online and digital content (Weiley interview, 2005; Sunderland interview, 2005).

Several other developments occurred in the region at the start of the new decade that raised the profile, broadened the capacity for audience building and nurtured local screen culture. In 2001, two screen industry practitioners launched BASC (Byron All Screen Celebration) film festival in the small town of Bangalow, inland from Byron Bay. This was the first major international film festival for the region and was to run successfully for three years. It served as an important outlet and focal point for local filmmakers and attracted many national and international guests to the region.

In 2003, a group of local documentary makers made a successful bid to host the Australian International Documentary Conference (AIDC) in Byron Bay, which brought 800 screen industry practitioners to the area, including many high profile international guests. The conference gave a significant boost to the local documentary sector and several producers in the region secured pre-sales or business deals which later translated into productions and further economic benefits to the region. During its three-year Industry Development Program, Screenworks brought many leading industry experts to the region to hold seminars and masterclasses.

Policy developments at the state level were also having an impact on the region's aspirations to become a centre for screen industry production. In 2001, the NSW government announced the introduction of the NSW Regional Film Fund, which provided financial incentives to projects filming in regional Australia. With assistance from DSRD, Screenworks set up a locations office in Byron Bay and its database of local practitioners advanced the region's capacity for hosting large-scale productions.

A landmark event in terms of policy development in the region was the formation in 2004 of Arts Northern Rivers as the peak body supporting arts and creative industries in the region. It was set up as part of the regional NSW network of arts boards and is supported by all seven local councils of the region and Arts NSW. A key feature of the new organisation in terms of policy has been the leadership and drive shown by its executive officer, Lois Randall, who, in collaboration with her staff and board, initiated a vast array of events and professional development programs for local practitioners across the region. The organisation has also provided leadership, infrastructure and skill development support to the visual arts, indigenous arts, music youth arts and museums, festivals and education training providers in the region. Another key feature of Arts Northern Rivers was the development of its broad industry database, which has advanced the data gathering capacity of the region and helped to create closer collaboration between the various industry sub-sectors. By 2009 Arts Northern Rivers had 3,332 subscribers to its database and 900 people had directly participated in its 35 professional development forums held during 2009.

A third cycle of action research began in 2004 with the decision by NRRDB to

commission further research into the growing creative industry sector in the region. I was again appointed to undertake this study in conjunction with my PhD research at QUT. The 2005 study and the release of the second Industry report in 2006 helped advance the data gathering and research capacity of the region and provided new information for use by local practitioners and industry agencies on the growing industry sector in the region.

The regional consortium: branding and network development

A priority recommendation in *Imagining the Future 2* for creative industry development was the notion of forming a more consolidated collective identity for the various industry sub-sectors and a consortium of leading regional organisations (Henkel, 2006). The seeds of this idea were initially sewn during consultation meetings organised by Arts Northern Rivers for its strategic plan in 2004. These meetings were convened in response to the need by the new Regional Arts Board to consider how best to work with and support the regional organisations. The first meeting in 2004 between representatives of Arts Northern Rivers, Northern Rivers Writers Centre, Screenworks, NCEIA and NORPA was the first time these regional organisations had met together. The focus of the meeting was common sustainability challenges faced by each organisation and the potential for future collaboration both professionally and creatively. There was a resounding resolution from this meeting that the four sector organisations agreed to work with Arts Northern Rivers to develop strategies to promote creative collaboration across art forms.

The momentum was accelerated when CLIC (Community Learning and Innovation Centre) Network brought a proposal for a Creative Industries Expo to each of these organisations, as well as Southern Cross University, NRRDB and DSRD. While the Expo was never realised, the proposal, under the title of *New Creative*, led to a series of creative industry workshops around the region initiated by Ken McLeod, and a well staged launch and promotion of the Northern Rivers creative industries at the national OzeCulture conference in 2005. The re-branding of the cultural industries as creative industries gained greater acceptance during this process. The various meetings and forums convened under this initiative assisted in the development of strategies for the creative industries section of the Regional Industry and Economic Plan (RIEP). There were also numerous meetings and moves to develop a regional

branding campaign for the creative industries and to develop collaborative marketing.

A common identity amongst creative industry organisations and practitioners was forged, and the consolidation and recognition of an informal creative industries consortium were important outcomes of these initiatives.

The artists of the Northern Rivers have a history of working together to develop and promote their work. There are regional organisations to support music, writing, screen industries and a regional professional theatre company. There is no other region in Australia with the equivalent in regional arts organisations. Arts Northern Rivers was established to support both community cultural development and creative industry development. I think it is vital to the sector that we continue to share resources and develop a regional strategy (Randall interview, 2006).

In August 2006, the second research report, *Imagining the Future 2*, was launched. This occasion was chosen by the creative industries community to announce the formation of a Northern Rivers Creative Industries Consortium. Eleven cultural industry, education and training organisations signed a Memorandum of Understanding and committed to working together to collectively develop creative industries in the region. The Consortium's first major project was to commission a Regional Arts and Creative Industries strategy undertaken by Brisbane-based Positive Solutions in 2008.

The issue of the sustainability of these organisations has been a major challenge for the sector for some time. The questions of revenue streams and alternative forms of funding continue to challenge those charged with maintaining these agencies. In relation to the boards of NCEIA, Screenworks, Arts Northern Rivers, the Visual Arts Network and Northern Rivers Writers Centre, there was also discussion of possible duplication of resources, the need for improved communication between the sectors and the best way to support their constituents.

I think that it's essential that industry associations like Screenworks, NCEIA and Arts Northern Rivers continue to thrive and be supported, because the collaborative input by these particular organisations is vital for the future growth of the industry. Several of those organisations have quite tenuous funding regimes and that is problematic in terms of them providing ongoing support. So

one of the challenges of the industry is finding ways to sustain these industry bodies to a point where industry and individual businesses can contribute and afford to keep those sorts of industry associations operating in their own right (Ryan interview, 2005).

Support for the burgeoning industry by the NSW Department of State and Regional Development (DSRD) was substantial during this period. It provided assistance through its business development and research initiatives, including funding for the 2005 study and report, *Imagining the Future 2*. DSRD also provided support for the Australian International Documentary Conference in 2003, the Screenworks Locations Office and the *MediaWorks* labs, and it supported Arts Northern Rivers in the development of the music and visual arts sectors. Other state and federal support for the sector came from the NSW Film and Television Office, the Australian Film Commission, and the Area Assistance Scheme. Details of support from state and federal agencies during this formative period are provided in Appendix 3.

All seven local councils in the Northern Rivers region made major investments in the arts, cultural events and creative industries in the period 2000 to 2005. These included investment in infrastructure and services such as art galleries, libraries, museums, festivals and performing spaces. They also partnered to support Arts Northern Rivers, and invested in specific arts and creative industry projects over the five-year period. Details of their support for the local sector are provided in Appendix 2. One of the recommendations of *Imagining the Future 2* was for a full audit of the value of local government investment in the arts and creative industries, as support from this level of government is often under-estimated (Henkel, 2006).

The issue of clustering and shared communal spaces in the development of creative industries remains an open question. In Lismore, a project focusing on regeneration of the central business district has been underway since 2001. Called *Art in the Heart*, the project aims to provide a creative hub for artists and their work in the heart of Lismore, but it has stalled and started sporadically over the decade. In early 2010, a forum was held in Lismore to discuss new ideas for *Art in the Heart* and how to progress the project. Marcus Westbury, the founder of Renew Newcastle, which enabled artists, cultural workers and community groups to access empty buildings in

the heart of the Newcastle CBD, was invited to the forum to share his experiences. Kim Spinks, who is responsible for the state government's new Creative Enterprise Hubs program through Arts NSW, also came to the forum. Arts Northern Rivers' then Chief Officer Lois Randall argued that Lismore, with its high concentration of artists and numerous vacant shop fronts, could be named the first Creative Hub region in NSW. Tracking this project in the future will provide a useful indicator of the value placed by community and local government leaders on clustering and the issue of communal spaces for creative industries in the heart of Lismore.

Lismore is the perfect place to do it. It has a lovely old CBD that has lost a lot of business to the Lismore Shopping Square, and there is a high concentration of really amazing artists, so it's a perfect fit. I can really visualise people in all fields of the arts working away in those shopfronts and attracting people to see how they create their works. The Northern Rivers Arts and Creative Industries Strategy 2009 identified the lack of affordable work-spaces for creative practitioners as a major inhibitor for creative industries development in the region. Allowing artists to use the empty shop fronts in the CBD of Lismore as studio and retail spaces is an innovative solution to this problem, which will benefit Lismore businesses and the community, as well as the growing creative industries sector in the region. (Randall, in Parks, 2010)

State policy and regional developments: 2006 – 2010

In December 2008, the NSW Department of State and Regional Development released two major reports: *NSW Creative Industry Insights* and its companion document, *NSW Creative Industry Fundamentals*. These reports provided the first audit of the creative industries in NSW and identified challenges and opportunities for the sector. The reports also recommended the development of a NSW Creative Industries Strategy.

The *Creative Industry Insights* reported that creative industries employed 5% of the NSW workforce and employment had grown at twice the rate of other industries. Sydney still maintained the disproportionate share of employment in the sector with 82% of those employed living there. However, the growth in employment in the Northern Rivers region was the highest in NSW, more than double the growth rate of

Sydney. The Northern Rivers also had the highest density of creative workers per capita in regional NSW.

The significance of the findings of this report for the profile and positioning of creative industries in the broader policy framework of the state government cannot be underestimated. There was a tone of surprise and a flamboyancy of both design and language in the presentation of the *Creative Industries Insights* report.

Traditionally, government has valued the creative industry for its cultural and social contribution to society. Reflecting this, government policy has been focussed on enhancing the industries cultural and social outcomes rather than the industry's economic contribution. Now, for the first time, the economic characteristics of the NSW creative industries have been mapped... A vibrant creative industry is a key public policy focus in Australia and across the world (DSRD, 2008a).

Another interesting policy implication identified in *the Creative Industry Fundamentals* report related to various state governments' share of total expenditure on the creative industries sector. The report found important differences in where the states directed that expenditure. Funding for 'institutions and venues' was a substantial proportion of expenditure in the creative industry. For NSW, this expenditure was 83% of total creative industry government support because of the number and expense of maintaining performing arts venues such as the Sydney Opera House. Also, being the oldest state, and thus home to more collections, artifacts and historic houses, NSW has proportionally less to spend than other states on support to encourage artists, businesses and the broader development of the industry.

The average state expenditure on creative industries for purposes other than institutions and venues was 16% for NSW, 26% for Queensland and around 28% for Victoria (as a proportion of total expenditure on creative industries). NSW spent 2.5% of its budget (\$10.3m) on film and video, while Queensland spent 5.7% of its budget (\$9.8m). Queensland also had fewer production companies and practitioners, so the per capita spend was greater in Queensland than in NSW (DSRD, 2008b). These findings have implications for producers located in the regional areas of NSW. State funding from Queensland is less competitive and more substantial, which may lead

producers to consider moving their businesses across the border to Brisbane. Access to high-speed broadband services is also superior in the capital cities and this may become another incentive for producers to consider moving back to the cities. The high dependency by local enterprises on broadband is well articulated in Cate McQuillen's story. The capacity, speed and reliability of broadband in Whiporie was inadequate for the production demands of the *dirtgirlworld* series, particularly the need to download large files from Canada every day for viewing and editing segments. Cate and her team paid a premium price for the best available service and it was still not fast or reliable enough. If this situation cannot be rectified, Cate and her team will consider moving the second series of *dirtgirlworld* to Sydney (McQuillen interview, 2010).

The key role of broadband in promoting growth in the sector received significant attention in *Imagining the Future 2*, but was largely ignored in the state government's creative industries reports. The federal government, however, has demonstrated a conviction that "broadband will drive Australia's productivity, improve education and health services and connect our big cities and regional centres" (Conroy, 2009). In April 2009, Senator Conroy launched the National Broadband Network, which he described as "the single largest nation building infrastructure project in Australian history" (Conroy, 2009). NBN Co, the company tasked with providing the infrastructure to allow wholesale and retail service providers to deliver advanced digital services to the nation, will invest up to \$43 billion over 8 years to build the national broadband network. In 2009, Southern Cross University prepared a submission in collaboration with 14 local councils and IT businesses identifying the benefits for early adoption of the NBN in the Eastern Regional Corridor, which included the Northern Rivers region.

The Creative industries Consortium continues to provide an ongoing forum for sharing information and ideas and implementing the actions recommended in the Creative Industries Strategy. During 2009, several major objectives were implemented, including the development of an Indigenous Arts Business Centre and the launch of the 3 Rivers Aboriginal Arts Space. A multi-stakeholder creative industries Education and Training Round Table was established and one of the first actions of this group

was to compile a mapping of local training providers and pathways in order to identify gaps and ensure collaboration across all the training providers in the region. Katrina Luckie, who heads the Northern Rivers branch of Regional Development Australia, has been active in the development of creative industries in the region since 2004. As manager of the NRRDB, she commissioned *Imagining the Future 2* and remains a key player in the development of creative industries in the region. She regards the Consortium as vital in advocating for, and maintaining momentum in, building the sector.

It positions creative industries as a strong, unified, dynamic industry group and affords government a more meaningful way to work with the whole sector. The Consortium has been able to approach government in a cohesive manner on key proposals and plans and is appreciated for this 'single voice' (Luckie interview, 2010).

During 2010, the Consortium is focussing on developing a creative industries' Marketing Consortium and an arts portal to enhance the arts and creative industry web presence. The Consortium has appointed three industry 'broker' positions to facilitate linkages to markets and provide sub-sector support in areas that were targeted for further development. These are Design, Music and Digital Content, particularly Electronic Games. The Digital Content development initiative will be undertaken by Screenworks, and is aimed at supporting digital and electronic games industry practitioners and facilitating linkages to markets.

Dr. Ros Derrett, the then manager of Southern Cross University's Office of Regional Engagement, viewed the coordinated approach of the Consortium as delivering benefits far beyond those envisaged when it was formed.

It allows the various stakeholders, including Southern Cross University and other education providers, to work closely with industry to develop the sector as a whole. One example of this is the work experience program for students with local creative industry businesses. The Consortium also creates a framework for the creative sector to be more significantly involved in the innovation developments occurring at both a regional and national level (Derrett interview, 2010).

These policy developments at the local and national level had direct implications for the developing industry as a whole and for practitioners working in the region. Two examples of the way policy developments affected local producers and their projects are outlined below.

The Deb Cox Story: *East of Everything*

Deb Cox was the writer and producer of the acclaimed television drama series *SeaChange* in the late 1990s. She drew inspiration for the series from her own experiences of migrating from the city to the Northern Rivers and originally wanted to shoot the series in Byron Bay. However, at the time, the region lacked the capacity, or was perceived to lack the capacity, for this enterprise. Deb's story is of a ten-year battle to locate a new television series, *East of Everything*, in her home town. Key policy changes had a direct impact on her efforts, as did the existence of local screen industry data. Her story also reveals the benefits to both the creative sector and the local economy of a major television series being located in a region and how this led to the establishment of a new company with a long-term commitment to the region.

Deb moved to the Northern Rivers in 1997 with her partner because they wanted to get out of the city and thought Byron Bay would be a great place to raise their children. Deb had begun her career writing and editing for television in the 1980s at Crawford Productions in Melbourne. She had worked as a Project Officer for the Australian Film Commission and later as Head of Drama for Artist Services. There she developed a range of feature film and television projects, including the ABC miniseries *Simone de Beauvoir's Babies* and the feature film *Dead Letter Office*.

Although she brought her successful screen writing credits with her, Deb had doubts about whether she could keep her career going from the Northern Rivers (Cox interview, 2005). For the first five years, she remained committed professionally to working out of Melbourne, and travelled back and forth. From 1998 to 2000 she collaborated with Andrew Knight and Andrea Denholm on *Sea Change*.

Not long after I arrived in the region, around 1998, I went to a gathering of local film-makers and screen industry people and was astounded to find out how many people working in the film and TV industry were living in this region. But

there were few alliances and no networks. People were mostly working independently in the region or commuting to the urban centres. When I realised what the situation was, I thought it would be a long haul before there could be a properly constituted industry here and at least ten years before we could envisage producing a television series up here. And that was about right. It took ten years (Cox interview, 2005).

Deb decided to join the inaugural board of Screenworks in order to become more involved in the local industry. In 2000, she conducted her own feasibility study on mounting a large-scale production in the region, and came to the same conclusion that her city colleagues had three years earlier: it was not economically or logistically viable. The lack of hard infrastructure and data on the local skill base meant the project would need to rely on Gold Coast studios and crew, and access production funding from two states. Even then it would have been too great a gamble and very complicated, so she shelved the idea and waited (Cox interview, 2006).

After being on the board of Screenworks for several years, and seeing her career potential in the region expanding, Deb made the leap of faith in 2004 to become permanently based in Byron. For five years she had been commuting to Melbourne and working with Andrew Knight, and together they had written and produced a new 13 part drama series for Ten Network called *CrashBurn*, which aired in 2003.

The decision to give up the Melbourne office and work exclusively from Byron Bay was a high risk one for Deb. It required her to focus all her efforts on generating work in the region, and think inventively about how to structure a business model that made this sustainable. For some time in the early stages, this meant being under-employed, but she now feels the risk was worth it and truly paid off. At first her Melbourne colleagues thought she had 'opted out' but they have subsequently regard her move as a smart one, and one that some even envy. Their perception of the Northern Rivers undoubtedly changed after she was able to locate the full production of *East of Everything* to Byron Bay (Cox interview, 2010).

In 2005, Deb decided to look for collaborative partners closer to home, and teamed up with Hoodlum Entertainment in Brisbane to co-write one of Australia's first on-line narrative dramas, *PS Trixi*. Deb had never written an online narrative before, but was

interested in exploring the writing potential of this new platform. The desire to explore and innovate was very much part of the creative direction she wished to take.

PS Trixi was commissioned by Yahoo! 7 and Toyota and positioned as a cross between an online drama and an interactive game. Deb wrote the major elements in the script, including webcam monologues, podcasts, longer emails and update blogs, while her co-writer, Marissa Cooke, broke the story into its multi-platform delivery for the site and wrote the text for the games and other extras. The site comprised over 2,000 pages of content, 140 webcam videos, 22 games, 1,000 emails and 30 podcasts. Average users spent over 16 minutes per session on the site, which was considered a significant measure of success at that stage.

When I started to look at other online projects ... I realised some were quite impressive technically without being particularly gripping storywise. I don't think any of us realised quite how complex [this project] was going to be. There was a small army involved and it was a steep learning curve for all of us ... we were actually coming up with the way of doing this as we worked because there were no precedents (Cox, 2006).

Still in pursuit of a locally based drama series, Deb began talking to screen writer and fellow Screenworks board member Roger Monk about her long held vision of writing and producing a series in the region. The ideas for *East of Everything* emerged out of these discussions. The story centred around the small coastal town of Broken Bay, and it was no secret that it was based on Byron Bay and that Deb would find a way to locate and shoot the entire series in Byron (Cox interview, 2010).

Deb credits Screenworks with having a major impact on the development of the series. It was through her involvement on the board that she met Roger and they decide to co-write the series. Being on the board also gave both Roger and Deb a sense of the size of the local talent pool and helped them to build local support for the series (Cox interview, 2010).

Deb speculates that another reason the series was commissioned in 2007 was a particular set of circumstances at the ABC. Drama production had been in decline for some years, and the commissioning editors were looking for new and fresh

approaches and ideas. They wanted inventiveness not only in content, but also in ways of conceiving production. In that climate, the idea of mounting a regional production had novelty and therefore enhanced the pitch. However, the city-based decision makers still needed to be convinced that it was viable (Cox interview, 2010).

The NSW FTO was concerned that a production of this scale would not be feasible in a regional location. Both Deb and fellow Melbourne-based producer, Fiona Eagger, claim that it was when they presented a copy of *Imagining the Future2*, with its substantial data on screen industries in the region, to the FTO that their view changed regarding support for the location of the series in Byron Bay (Eagger interview, 2010).

East of Everything went into production in March 2007 and the first series screened on ABC the following year. The second series filmed from May to August 2008 and screened in July 2009. The production budget was \$10.3 million and injected \$4.3 million into the local economy. Over 300 local businesses saw an economic benefit from the series and 546 local people were employed, of which 143 were crew members, 56 were key cast and 347 were extras (Eagger interview, 2010).

The impact of the series on the local economy included accommodation, catering and food outlets. The building sector benefited from sale of materials and the building of sets and props. Over 100 people attended auditions for cast and extras. The local high school became involved in a musical number, and the production provided training opportunities for emerging local practitioners and work experience placements.

In addition to stimulating income flows and employment in the region, the two series contributed in many ways to the social and cultural life in the region. The producers screened excerpts of the series as works-in-progress at four special events organised for the local community. The writers and members of the cast presented a forum on writing characters at the Byron Bay Writers Festival in 2007. Deb gave a presentation and screening to the Women In Business forum and two special professional masterclasses were organised in partnership with Screenworks, featuring cinematography and design for the series.

The producers also encountered some unexpected social benefits from having the series in the region. One example, Deb recalls, occurred when Anthony LaPaglia, the partner of cast member Gia Carides, joined the local soccer club while they were filming in Byron. Deb remembers one day in particular.

They had their biggest crowd ever at last Saturday's match, and they won 5:0. The word was that having Anthony as a team member had helped them to win. So who would have predicted that bringing a drama series to town would help the local soccer team achieve a spectacular victory? (Cox interview, 2010).

The impact of the series on local tourism is more difficult to measure and has been met with mixed reactions. For Deb, this is an important part of the legacy of the series that she wants to ensure is handled with care.

When we shot *SeaChange* in Bowen Heads, tourism in that town definitely increased because of the series. And most people were pleased about that. But in Byron, the attitude to increased tourism is mixed, and the local infrastructure is already over-stretched. There are many people in the community who don't want an increase in tourism. The themes of the series in fact touch on this issue. The main character returns to a town where his parents built their dreams and hoped to find paradise. The series references the sense of place very overtly, and how things have changed in that place over the past 30 years. It explores the sense of belonging, valuing not just the environment, but the history of the place, and the threats of tourism. The place in the series is very clearly Byron Bay (Cox interview 2006).

When the ABC commissioned the second series of *East of Everything*, Deb had many reasons for wanting the production base to remain in Byron Bay. The main reason was a desire for some consistency of work, not only for herself but for others who had worked on the first series. She was concerned that many of the professionals who came up for the first series would go back to the cities unless she could offer them ongoing work. She felt that staying for a second series might just be enough for them to organise their lives around staying permanently (Cox interview, 2010). This certainly proved to be the case for fellow producer Fiona Eagger. Fiona moved to Byron for Series One and was considering going back to Melbourne. When Series Two was commissioned, she decided to make the commitment to leave Melbourne and

move her family and business permanently to the region. She and Deb have since formed a new company, Every Cloud Productions (Eagger interview, 2010).

For Fiona, a major advantage of being based in Byron Bay came from the feeling that they were embedded in the local community. Locals knew that the series' writers and creators, most of the crew and many of the cast were from the region. Its identity was local and, as a result, locals treated the production very differently to other incoming projects in the region. Screenworks served as a valuable ally in locating crew for the project and as a contact point for the hundreds of enquiries about the production from both within and outside the region (Eagger interview, 2010). There was considerable good-will in the town towards the series, and Fiona is convinced this translated onto the screen. The cast members from the cities felt welcome and appreciated, and that improved morale and the quality of the work.

The Mayor of Byron Bay Jan Barham provided moral support and practical assistance to the producers and facilitated contact with the traditional indigenous owners, the Arakwal People. The producers came to an agreement with the Arakwal Corporation not to show actual sites of spiritual significance in the series, and in return the Arakwal sisters and Corporation provided a 'Welcome to Country' for the cast and crew. Several local indigenous people secured key performance roles in the series.

Screenworks manager Jill Moonie attests to the fact that both series of *East of Everything* provided a great boost to the local industry. This was largely achieved through obvious professional development and training opportunities as well as the skills development afforded to the cast and crew by working on a series of this scale. It also allowed many local professionals to return to, or stay in, the region to work. More professionals joined Screenworks and the profile of the local industry was significantly raised as a result of the presence of the cast and crew in the region for a substantial period of time (Moonie interview, 2010).

The absolute highlight of filming in the Northern Rivers region for producer Fiona Eagger was the stunning and diverse locations, from ridge top mansions overlooking the Bay to forests and beaches. She remembers with great joy one morning when the

crew was out filming a surf scene and suddenly a group of whales swam into shot and breached right next to the actors.

The beauty and majesty of the local landscape had a profound effect on many of us working here. When the second series ended, we didn't just pack up and go away. We have formed a new production company based in the region. We are mentoring many emerging producers here and creating job opportunities and forming creative partnerships with local youth and theatre organisations. We keep putting back into the local creative industry (Eagger interview, 2010).

Every Cloud Productions, located in Byron Bay, is developing a slate of new television, film and online screen projects to commence production in 2011. These include a new series, *The Phryne Fisher Murder Mystery*, a 13-part series set in Melbourne in the 1920s, and a range of corporate work that will provide further employment for local practitioners (Eagger interview, 2010).

For Deb Cox, the production of 13 hours of prime-time television drama from her base in Byron Bay is a landmark on several levels. It reflects the depth and breadth of creative talent in the region and is indicative of the increasing maturity of the local industry and the mainstreaming of its profile and respect by city-based decision-makers. It is also a personal achievement of a ten-year vision and a pay-off to the risk she and her partner took in moving their family and business away from a major city to a regional area. The decision by her producing partner, Fiona Eagger, to join her and co-form a new production company in Byron was a further vote of confidence in the region as a viable centre for screen industry production (Cox interview, 2010). The levels of productivity, and the achievements and challenges of Every Cloud Productions, will provide valuable evidence for future investigations of screen and creative industries and their ability to survive and thrive outside of the capital cities.

The Cate McQuillen Story: *dirtgirlworld*

Cate McQuillen is a local musician who, with her partner and co-producer Hewey Eustice, developed an international multi-platform children's television series, *dirtgirlworld* from a remote farm in Whiporie, a town with one general store and a petrol pump and located thirty minutes north of Grafton in the Clarence Valley. Her

story reveals the high value of local, national and international networks and their role in project development. It also highlights the benefits of a commitment to an innovative approach to content development and the pivotal role of broadband in the development of regional enterprises.

Before moving to the Northern Rivers region, Cate McQuillen and Hewey Eustice both had successful music and performing careers. Hewey had toured internationally and Cate had worked in children's entertainment and mainstream theatre, including a leading role in the musical *Hair*. After the first Gulf War in 1991, they decided to completely drop out and bought a hundred acre property between Grafton and Casino in the Northern Rivers region of NSW. They had no computer and no internet connection and mobile phones were still an idea of the future. This was before such terms as 'seachange' or 'treechange' had become popularised, and they did not see themselves as part of either. They just wanted to get away from the city and live a more holistic life. For the first six months they grew vegetables and planted fruit trees and then they went looking for work.

They formed a musical duo and secured a number of local gigs, earning a basic income from their performances. Cate supplemented this income with a job teaching drama at the Conservatorium in Grafton and Hewey decided to write a kid's album of music. To do this, they bought a computer and software programs and began exploring the virtual world. Cate remembers well the frustration and anguish of teaching themselves how to use the new technology on their own using a dial-up internet service (McQuillen interview, 2010). They were oblivious to other screen industry practitioners also working in the region. It was the year 2000 and there were no local industry networks, or even social networks, for people working in the field of film or television. Everyone worked in isolation, from their garages, living rooms or home built studios. Landline phones and fax machines were the main forms of communication and producers commuted regularly to the cities to conduct business. Demand for internet connection was increasing, as available services were limited to certain areas and were generally very slow.

In 2002, Cate and Hewey's children's album, *Dirtgirlworld*, won the Dolphin Award "Album of the Year" and was nominated for an Aria Award. Inspired by the idea of

turning the album into a children's TV show, but lacking producing expertise, they decided to seek professional advice. They had heard through the grapevine about a new organisation called Screenworks and decided to enrol in a producer workshop in Byron Bay. There they met a local emerging producer, Allison Kelly, who became the first member of what was to become a very large, international creative team. They also conceived an idea for a teen music series called *unda.ragers*, which was to evolve into a complex multi-platform project for making and celebrating music. At this stage, Cate and Hewey hadn't heard terms such as 'multi-platform' or 'trans-media' or 360 degree projects. They were "making it up as we went along", evolving their idea and pushing the boundaries (McQuillen interview, 2010). Their ideas were ground-breaking and innovative and very quickly positioned them at the forefront of the development of multi-platform, interactive digital content for children.

In 2003, they won the Screenworks "Life's a Pitch" competition with the prize of a trip to Melbourne to pitch at the SPAA national conference. This was the team's first introduction to the world of film and television outside the region, and sparked a remarkable sequence of events. They won the SPAA pitching competition, which led them to another successful pitch at the Kidscreen Conference in New York. Their success at these events gave an international focus to the project and introduced the team to key national and global broadcasters, distributors and producers. The show changed its name to *Hit it*, and was a cross-media interactive project for 9 to 12 year olds, comprising a children's television drama, an online interactive space, a webcast show and a touring production.

During their travels, Cate and Hewey began meeting and assembling a highly experienced team of people who were attracted to their idea and the energy, passion and innovative thinking they were applying to their concept. They secured support from Burberry Productions, international web guru Mark Pesce, producer and legal advisor Jenny Lalor and New York interactive designer Katie Salen. They also attracted interest from several skilled practitioners within the Northern Rivers region, including Deb Cox. They secured funding from the Australian Children's Television Foundation, NSW FTO and the AFC. They began travelling extensively in search of new partners, including visits to Cannes and further trips to *KidsScreen* in New York.

In 2006, Cate and Hewey made a radical, and now historic, decision. They decided to put *Hit It* on the back-burner and pursue their idea for a pre-school series built around their award-winning children's album *dirtgirlworld*. They established a company called Mememe Productions and poured all their existing resources into producing an extremely high quality and very engaging short teaser showing the innovative style they wished to adopt for the animation series. They once again travelled to world markets for children's television and made good use of the networks and relationships they had built up over the previous three years. Within twelve months they had financed a \$10.6 million project to produce 52 episodes of eleven minutes each.

The project attracted partners in six locations across the world, and employed 171 people. Of these, 25 were from the Northern Rivers region, and their regional spend was over \$1.5 million. The project is a co-production with Decode Entertainment in Toronto, Canada and BBC Worldwide in London is their distributor. They have a sales agent in Canada and broadcast commissions from ABC and CBC and an acquisition from Cbeebies, the BBC pre-school channel. They financed the film through their sales partners and pre-sales, Canadian tax credits, the Australian producer's offset and a private investor, Daniel Besen, who contributed \$1million to the project (McQuillen interview, 2010). Besen doesn't normally get involved in start-ups but he fell in love with "the big-headed, doe-eyed little kid called dirtgirl and loved the passion and innovative, entrepreneurial vision of Cate and Hewey, her two creators" (Williams, 2010).

The NSW Regional Film Fund provides 35% of local spend on projects that film in regional NSW, capped at \$100,000. This fund serves to encourage producers to consider more regional filming than they might otherwise have done. As a result, the entire live action "green thumbs" segment of *dirtgirlworld* was shot in the region, at Woolli School near Grafton. This proved to be a beneficial decision for both the school and the production. Woolli School is a sustainability-focussed school with a very committed, entrepreneurial head teacher. The school has 51 students and this allowed a whole-of-school involvement in the project, with a high level of motivation and enthusiasm from both students and teachers. The Regional Film Fund also enabled the producers to hire a local director and cinematographer to work on this segment.

The project has an extensive online presence financed by the Canadian Bell Media Fund, CBC, Decode, ABC, Screen Australia and Cate and Hewey's own company Mememe Productions. The online director, Jan Mallis, is a Northern Rivers resident with a home office in Ballina. Cate and Hewey have considerable equity in the project, as a result of the producer's offset and their own investment, and have generated revenue for their company from the first dollar of international sales.

In all her international dealings, Cate consistently reminds people that the home of *dirtgirlworld* is the Clarence Valley. "We really do live on a farm, and loyalty and local support are major keys to our success" (McQuillen interview, 2010). Both lead actors in the series grew up in Grafton and have known each other since pre-school. The make-up artist was from the region and Cate chose a local primary school for the live action school scenes. They hired six local artists and bought materials from local outlets to make all the props on the farm, including the tractor. The connection of the show to the Clarence Valley is important to Cate (McQuillen interview, 2010).

The benefits of the series to the region include local employment and significant regional spend into the local economy. There is an increased sense of pride and achievement associated with the series being produced from the Clarence Valley. Local skill development has been enhanced and there is a spill-over effect from the innovative approach adopted for the series. This includes both artistic innovation and new models for the structure of a small business. Mememe Productions uses a team rather than a hierarchical approach and encourages diversification of skills and cross-sector collaboration. The series also has the spin-off effect of creating greater environmental awareness in the region and setting an example of a low carbon footprint company and project. The success of *dirtgirlworld* also contributes to the regional brand for the Clarence Valley as a centre for creative industries.

There was one major disadvantage for Cate and Hewey in being based in Whiporie, and that concerned the availability of high speed broadband. Every day during the production stage, Cate needed to download and view large files from her co-production partner in Canada for review and editing. The average file size for each segment was 238mb, and she needed to download eight of these per episode. The broadband available at Whiporie was insufficient for the task, and what they did

have was very expensive. In Sydney the speed and capacity of broadband was available at half the price. Decode in Canada could download a 238mb file in three minutes. At Whiporie, on a good day, it would take 23 mins to download, more often 70 minutes. Cate recalls one instance when the service was so slow that she drove 30 minutes to Casino and found a place under a bridge where she had a good enough signal to download the files she needed for that day. The situation became so serious and debilitating that Cate is genuine in her claim that if it cannot be rectified she and her team will need to move the next series to Sydney.

Mememe Productions is in negotiations about a second series for 2011, and international sales for the first series are increasing. The series has sold to the USA, UK, Canada, Israel, Korea, France and Australia and they are in discussions with seven other territories. Cate and Hewey are reinvesting their revenue in continuing to build the company, the brand and the new series. They recognise that they will generate far more income from this series than they ever would as performers in a musical duo touring the clubs of Northern NSW (McQuillen interview, 2010).

According to Cate, the keys to their success are numerous. Winning the Screenworks pitching competition got them started, and they made the most of this success by winning both the SPAA and *KidsScreen* pitches. They learnt about the importance of having a strong concept, a dynamic presentation and plenty of enthusiasm. They also listened to advice and refined the pitch as they progressed. They learnt how to sell themselves and how to position their idea at the forefront of innovative content creation in global markets. Furthermore, they backed their innovative ideas with considerable personal resources and a high level of risk. They took a gamble on transferring all the knowledge, expertise and connections they had attained in their travels with *Hit it* to develop *dirtgirlworld*. They invested a considerable sum of own money in producing the short teaser that would arrest the attention of children's television buyers around the world. The idea for their animation style was bold, innovative and very engaging and the music was infectious. They listened to the advice of the experienced team they had assembled, and never stopped innovating and experimenting with the idea as they went along. The entire package proved irresistible to commissioning editors and sales agents looking for 'the next big thing' and the funding process snowballed (McQuillen interview, 2010).

In May 2010, the question for Cate was not how many territories they had sold, or how they financed the series. For her, the real question was whether what they have made from “the middle of nowhere” in the Northern Rivers region has resonated with their intended audience (McQuillen interview, 2010). Ozta ratings for April 2010 showed *dirtgirlworld* was the highest rating Australian-made children’s television show on Australian networks, and in the UK the show rated fourth in children’s television. It was nominated for a LOGIE award and was the only Australian title nominated for a Prix Jeunesse Award in Munich, the premium international children’s TV awards. The online version of the show has received over one million page hits with 172,000 dedicated pre-school users and a bag full of fan mail.

Children love *dirtgirlworld* and they are actively participating online and in the real world. This is what I call moving from viewing to doing (McQuilllen interview, 2010).

Cate and Hewey’s journey with *dirtgirlworld* parallels the journey of the screen industries in the Northern Rivers. In the space of one decade they moved from a largely invisible, isolated, but highly inventive, creative team operating on the margins, to producing significant quantities of innovative, globally recognised work that was attracting the attention of mainstream audiences and industry players. The revenue generated from this creative work is now recognised as making a significant contribution to the region’s economic growth as well as its social and cultural life. Whether they remain in the Northern Rivers and how their company fares in the next decade will also provide a measure of the capacity of the Northern Rivers to sustain a viable and healthy screen and creative industry sector.

Conclusions

The two case studies provide detailed examples of how the decentralisation trend of the 1990s brought creative practitioners to the Northern Rivers region, and how, with determination, innovation and perseverance, and support from policy developments, local networks and data gathering initiatives, they have succeeded in creating successful businesses. Whether these businesses are sustainable in the long-term and can thrive without the need for government subsidy, is a useful question for subsequent research.

The implications drawn from the two local case studies also parallel the findings of the two international case studies in Scotland and New Zealand. The *East of Everything* experience mirrors, to a degree, the long-running series *Monarch of the Glen*, in that both series were able to create a sense of local identity, loyalty and pride within the region and both provided local skills development, training, long-term employment opportunities and a positive high profile for the local industry. They took a different approach to other incoming productions in that they truly located themselves within the local industry and community. Productions like *The Last Samurai* in Taranaki, New Zealand, flew in their stars and key creative crew for a short period, created a buzz, economic inputs and some local services employment, and then left with hardly a trace. *East of Everything* has left a long-term legacy on the town of Byron Bay, both because of the way it was reflected on the screen in the series and because of the impact on the local industry, in particular bringing new creative talent to the region and forming Every Cloud Productions, a new production company in the region. A valuable focus for future research would be to further examine the developments of this new company and its producers to see whether they have continued to make a substantial impact on the industry in the Northern Rivers over the long-term.

The *dirtgirlworld* experience in the Clarence Valley reveals the benefits to both producers and the local region of a truly local approach to a global concept. The producers, lead actors, key creative crew and inspiration for the series were all based in the Clarence Valley. Like *Monarch of the Glen*, the connection and identification with the local region were keys to its success. The need for faster, more affordable broadband may, however, prove to be too great a challenge and the second series may move to a capital city. Future research would benefit from examining the ongoing fortunes and activities of Mememe Productions and the location of their next creative enterprises.

The question of what constitutes 'success' and 'sustainability' in screen industries is an ongoing conundrum and a challenge, not just for these two production companies, but for the industry as a whole. These questions are explored further in the concluding chapter.

Chapter 8

Future directions for research policy and industry development in the region

The major findings of the ten-year study are summarised and conclusions are drawn for both policy and industry development. The issues of what constitutes 'success' and 'sustainability' in screen industries are analysed in relation to the Northern Rivers experience and the local case studies. The advances in data gathering mechanisms and research capacity in the Northern Rivers region across the decade and the implications of the action research methodology are also evaluated.

Outcomes and evaluation of the ten-year research project

This thesis reports and evaluates a ten-year investigation (2000 to 2010) of screen and creative industries in a regional area. The central finding of the study is that growth and development in these sectors are not confined to the major capital cities and can occur in regions such as the Northern Rivers of NSW, where certain conditions and attributes are present. The most important of these is a strong base of experienced, creative producers operating from within the region. The Northern Rivers presents as a 'special case' in creative industry development, largely due to the significantly high and growing number of producers located in the region. Other key indicators for regional growth in these sectors, as evidenced by this study, are the engagement by the local industry in ground up development of their sector and the formation of industry-driven associations and networks. Physical attributes of the region, lifestyle factors and a large and connected community of creative practitioners were also identified as key indicators of regional development. Other key attributes for developing regional creative industries were the existence of some kind of holistic and collaborative approach to education, training or professional development; an ongoing program of strategic professional development, mentoring and skill sharing between experienced and emerging practitioners; access to production and project investment; and access to high speed broadband.

The study involved four cycles of action research spanning the decade 2000 – 2010. The research was incremental across the decade and each milestone played into the next planning and action stage, and contributed to the larger development of the industry in the region.

Over the course of the decade, certain policy initiatives and government interventions directly influenced the development and positioning of creative and screen industries in the Northern Rivers region. At the start of the decade, the cultural industries, globally, were undergoing significant shifts, underpinned by the “big three” – convergence, globalisation and digitisation (Cunningham, 2005). The rebranding of the cultural industries as creative industries by the DCMS in the late 1990s, and the mapping studies undertaken in the UK, played key influencing roles on the development of creative industries in Australia. Queensland University of Technology took a lead role in the early application of these models in the Australian context and this discourse and analysis influenced my framing of the research and my perspective of the emerging screen and creative industry sector in the Northern Rivers.

At the same time, the OECD identified content creation as a major growth area in the global economy, and provided evidence that this emerging new sector was experiencing rapid growth worldwide, typically nearing double the rate of GDP growth in OECD countries (OECD, 1998, 2001). In the Northern Rivers, the decline of the agricultural sector was accompanied by a shift in focus toward the possible advantages of globalisation and the digital revolution (NRACC, 1999). This report played a role in changing perceptions and practices in the Northern Rivers region amongst policy makers and regional development agencies and led to the reframing of the region from its traditional agricultural focus to a lifestyle and learning region.

The mapping of creative industries in the UK had also revealed that the largest proportion of employment in this sector was in freelance, small and micro-businesses, which had low entry barriers and could be footloose and geographically dispersed (DCMS, 2001). This was seen as opening up new opportunities for emerging creative workers and people operating from regional areas (Taylor, 2002). At the same time, globalisation was reshaping markets, making them more dispersed from their

geographical base of production (Barr, 2000). In the Australian context, this meant it was no longer necessary for creators of content to be located in the capital cities of Sydney or Melbourne. Added to this were the liberating effects of email and broadband, which meant content creators could be located anywhere, so long as they had adequate and reasonable fast internet access. Lifestyle factors and a creative milieu also became important elements in the selection of location for creative workers (Landry, 2000). The migration of creative workers from the cities to lifestyle and culturally rich regions such as the Northern Rivers was a direct reflection of these trends. Richard Florida's work helped to raise the status of the "creative class" and highlighted the value to a region of attracting creative workers with networks and skills, disposable incomes and high education levels (Florida, 2002).

The 2004 release of DCITA's *Creative Industries Cluster Study* and *Unlocking the Potential* heralded much discussion in the Northern Rivers, particularly amongst leading screen producers, of the opportunities presented by broadband and the demand for digital content. It also highlighted the urgent need for improved broadband services in the region. Even though the Cluster Study recommendations were not directly taken up by the federal government of the time, the effect of the study in the Northern Rivers region was that it informed and motivated several of the leading screen industry producers, myself included, to explore and engage digital and online content creation in a proactive way. Projects such as *dirtgirlworld*, *Spike Milligan* and *The Burning Season* online, and the 2010 online project *Journey beyond Road Trauma*, were all influenced in some way by these policy discussions.

In 2008, the NSW Department of State and Regional Development released two major reports: *NSW Creative Industry Insights* and *NSW Creative Industry Fundamentals*, which provided the first state-wide audit of the creative industries in NSW. They identified the challenges and opportunities for the sector and recommended the development of a NSW Creative Industries Strategy. The reports showed that creative industries employed 5% of the NSW workforce and that employment in this sector was growing at twice the rate of other industries. Sydney still maintained a disproportionate share of employment in the sector but the Northern Rivers had the highest density of creative workers per capita in regional NSW, and growth in the region was more than double the growth rate of Sydney

(DSRD, 2008a, 2008b). These reports mirrored the findings of the 2000 study which identified 4.1% of the workforce engaged in creative industries (Henkel, 2000) and the 2005 study which revealed that this number had increased to 6.1% (Henkel, 2006). Clearly, the Northern Rivers region was emerging as a 'special case' in creative industries development.

The role of producers in regional industry development

Central to the story of screen industry development in the Northern Rivers region is the migration and settlement within the region of a significantly large number of experienced, credited screen producers, bringing with them a wealth of skills, networks and entrepreneurial capacities. In 2000, 36 people identified as audiovisual producers and by 2005 this number had grown to 151. Of these, at least 30 were experienced producers with screen credits and track records (Henkel, 2000; Henkel, 2006). By 2010, Screenworks had established a 'by invitation' Producers Group of 60 experienced and emerging producers. Screenworks' General Manager, Jill Moonie, reports that on average at least 50% of this group attend Screenworks functions or events, signifying a high level of support and engagement by these producers (Moonie interview, 2010).

Throughout the decade it has primarily been the leading producers who have initiated major developments, served on the Screenworks board and shaped its direction. Some of the most successful initiatives, such as the masterclasses, the Producers' Incubator Scheme, *Mediaworks* and *Life's a Pitch* were initiated and driven by local producers. The significantly high economic inputs, locally generated employment and flow-on benefits to other sectors of the community are primarily a product of the work initiated, financed and managed by local producers. In short, the important role of screen producers in driving, shaping and positively contributing to the local screen industry sector cannot be underestimated. This is undoubtedly the key feature in determining the Northern Rivers as a 'special case' in regional screen industry development.

The profile of screen producers that emerges from this study also makes a contribution to the current national interest in advancing understanding of the role of the producer in Australian screen industries (Cameron et al, 2010). The nationwide

survey of Australian screen producers conducted by AFTRS Centre for Screen Business in 2009 identified the core issue facing Australia's production industry as sustainability. The issue of sustainability has been a core preoccupation of Northern Rivers producers over the past decade and, despite the optimism and continued growth of the sector, remains the key threat to the future of the local industry. Screen producers operate largely as micro-businesses or sole traders, often with precarious business models operating on a project-by-project basis in a high risk, volatile industry with little financial certainty. Most are driven by vision, passion and other non-monetary incentives, and despite the uncertainty and lack of financial gain, most remain optimistic and positive about the future. Producers in the Northern Rivers region have enjoyed a significantly high level of success proportionate to their number. Some of these have been highlighted in this thesis, but, overall, they have generated a perception of high value production and have achieved both critical and financial success while making a positive contribution to the economic, social and cultural life of the region. However, the gap between the successful, high profile producers and the large number of aspirant, emerging and struggling producers remains an issue for the sector as a whole.

Screenworks continues to provide a valuable and widely appreciated professional development networking and support service to the screen production sector, but some practitioners and producers remain isolated and disconnected. Mechanisms for improving business, entrepreneurial and marketing skills and other measures to improve sustainability are urgently required. Further research into the demands of operating micro-businesses and the complex challenges facing screen producers are also needed, at both the local and national levels. Defining and understanding what it means to be a producer is an ongoing challenge. Damien Parer captures the elusive nature of the producer very succinctly in the following quote:

Producers need to have skills and dexterity far beyond those of mere mortals. Producers are required to be tactful, witty at lunch, compassionate, charming to actors, clever with money, patient at the fifteenth meeting, mechanically able to fix the photocopier and able to remember thousands of details and their significance (Parer, 2006).

The screen industries framework

A key feature of the research period was the re-framing of the arts and cultural sector as screen and creative industries. Lively and contentious policy debates and discussions accompanied this process in the region. A significant response to this debate was the adoption by the board of Screenworks of the notion of re-branding the 'audiovisual sector' as 'screen industries'. Although this implied a re-positioning of the film, television and new media sectors within the market-driven end of the cultural industries rather than within the subsidised creative arts sector, the ability of the screen and creative industries to operate outside of the government subsidy model remains a challenge for the sector as a whole.

Not everyone agreed in principle with this shift in focus and debates within the community were vigorous. There was deep concern by some that screen practitioners would be less concerned with producing films that deserved patronage because of their contribution to Australian culture. A resistance emerged to the notion of moving from 'filmmaker' to 'content creator' as it implied an over-emphasis on economic imperatives rather than the 'art' of producing films. For others, the shift in focus was a positive move, fuelled by the fact that their location so far from Sydney made it difficult to attract subsidy and government support for their projects. The prevailing belief was that their distance from funding sources restricted their influence on decision-makers and gate-keepers of the public purse. A kind of frontier mentality emerged that spoke with defiance of 'making it on our own' and seeking new ways of financing the production of screen content (Ingham interview, 2005). In this framework, some local producers were more willing to position themselves as 'producers of content' than as 'filmmakers' and to look at outlets for delivery not confined to cinema and television but to embrace new platforms such as digital and online delivery and hand held mobile devices. While accepting their place in the commercial world of content creation, those in support of this remodelling argued that they were not abandoning the idea of creative excellence or cultural contribution. Their assertion was that art and economics could co-exist and subsidy should not be abandoned. The idea was that a healthy mix of commercial enterprise and government subsidy would produce not only better works, but more sustainable enterprises and businesses (Ingham interview 2005). The federal government's

introduction of the Producer Offset in 2007 as a new, more entrepreneurial government support mechanism was an example of this thinking.

The principles associated with the re-branding and re-positioning of screen industries as a more entrepreneurial, self-reliant industry sector did not always align with reality, and the question of what constitutes 'success' and 'sustainability' in screen industries remains a vexed one for the industry as a whole.

When considering the concept of 'sustainability' in the screen industries, it is useful to look at definitions offered by Jonathan Olsberg in his upcoming Sustainable Business Review (Olsberg, pending). He defines two distinct levels of sustainability. The first is when a business is strong and secure enough to attract investment, manage risk and ensure growth. The capacity to be 'investment ready' is regarded as a key measure of sustainability. The second measure is when a business is simply able to maintain consistency. In this scenario, a business will keep operating and making products that satisfy audience expectations and have irregular, often sporadic, outbursts of success. This type of sustainability does not mean the business is financially secure or stable enough to attract investment. These businesses remain volatile and high risk but are able to function without falling over and are, therefore, within the screen industry context, regarded as 'sustainable'. They frequently require some form of soft money, such as government subsidy, in order to survive. The majority of businesses in the screen industries in Australia fall into this second category of 'sustainable'.

Olsberg outlines a number of success factors that enable screen industry businesses to achieve sustainability, albeit of the second kind. These include making content that resonates with audiences and secure distribution in global markets. Producers of this content, however, need to secure and maintain some share of revenue of those successful products. Another factor is the company's ability to diversify revenue streams to reduce the impact of long development periods, uncertain cash flows and to minimise risk. Ensuring the company has entrepreneurial leadership is another factor, someone in the team who understands how to build a business and can focus on company growth and development and not just content development. Strong international relationships with large companies and corporations are other factors, as are strong talent relationships with directors, writers and key crew to ensure the

company keeps making distinctive content that meets audience expectations. Reliable public support and public policies that target corporate growth, reward success and are predictable and substantial are also key factors.

The Northern Rivers case study producers, Deb Cox, Fiona Eagger, Cate McQuillen and Hewey Eustace, demonstrated most of these factors in ensuring their success. Their production companies, Mememe Productions and Every Cloud Productions, may be regarded as successful and sustainable, but primarily by the second measure of the Olsberg definition. Every Cloud Productions is diversifying its business model to include a range of revenue streams, including long running television series, feature films and corporate work. Mememe Productions has strong international and talent relationships, and both companies have shown entrepreneurial leadership. Both have achieved levels of success with audiences in global markets but are still reliant on government subsidy and support for their productions. Both companies may achieve the first level of 'sustainability' in the near future, and to some degree Mememe Productions, which has attracted private investment of \$1 million dollars and has substantial equity invested in its products, may be regarded as progressing towards sustainability by the first measure. Further research over the next five to ten years of both these companies in relation to the Olsberg measures would be an extremely valuable exercise.

Another meaning of 'sustainable' is a company that performs well in the triple bottom line of economic, social/cultural and environmental performance (Sustainable Business Network, 2006). In this context, a sustainable business is one that considers its economic, environmental and social performance as equally important, and is actively looking for business opportunities in using natural resources more efficiently. These businesses understand the changing nature of competitive factors and recognise that a low carbon footprint is becoming a competitive necessity. They also understand the social and environmental impacts across both their business and product life cycles (Sustainable Business Network, 2006).

By this measure, Mememe Productions may also be regarded as a sustainable business. The company focuses on minimising its carbon footprint at every level of operation, and all *dirtgirlworld* products were created and produced from

sustainable or recycled materials. The company won the Australian Director's Guild "Green Awareness" Award in 2010 as recognition for its sustainable business practices.

The issues of what constitutes success and sustainability will continue to preoccupy the screen industries at a national level as the implications of the Producer Offset and simultaneous reduction in Screen Australia funding are assessed. New business models and new policy frameworks are being developed, by necessity, to accommodate these changes as well as the ongoing advances in digital platforms and the changes in audience consumption of content. The industry will, without doubt, remain in a state of uncertainty and change for some time to come, and further research into these developments, at both national and regional levels would be extremely valuable.

It remains to be seen whether the release of this thesis will trigger a fifth cycle of research and development in the Northern Rivers region and who will drive and support that research. Future research will need to take account of national trends as well as local developments. Will the Northern Rivers sector continue to be driven by Screenworks and the region's leading producers and creative practitioners and how will their priorities change? How will Screenworks and the local producers be resourced to continue this development? Who will undertake further research and data gathering on the progress of Screenworks, the Northern Rivers Consortium, and leading companies such as Mememe Productions and Every Cloud Productions on the future development of the screen industry sector in the region?

Evaluation of the action research method and research capacity building

At the start of the decade, there was limited creative industry data gathering capacity in the region, but by 2010 this had advanced considerably. The reasons for this may largely be found in the adoption of the action research method.

An action research approach was taken for both pragmatic and theoretical reasons: to answer the research questions and to develop the research capacity and data collection methods in the Northern Rivers region. Inherent in the methodology is the notion that research can instigate change within the community or location it is

investigating while at the same time retaining investigative rigour. The methodology encourages practitioners to build relationships and engage with the subject of the research, and to reflect on their experiences, learn from them, and apply what has been learnt to improve research practice. Because I both lived and worked in the region I was investigating, and was a part of the emerging screen industry sector, this approach was selected as the most appropriate amongst all the options considered for this project. Within the action research framework, I developed a range of methods for locating, capturing and analysing data, and assumed three roles in their implementation: researcher, industry advocate and regionally based screen producer. These three roles intersected and propelled a momentum that led to four sequential cycles of action research flows over the ten-year period.

Enrolling as a student at QUT provided me with access to research expertise and resources, and helped to refine the method to ensure it had academic integrity and rigour. Learning about designing and delivering industry surveys was a steep learning curve. The data collection, management and assessment process was cumbersome, time consuming and unwieldy during the first study, but the results proved surprising and extremely valuable to the ongoing development of the region. There were far more creative workers operating from the region than even the most optimistic observers had anticipated. When compared later to the data from the ABS Census figures, two things were revealed: the ABS data was confirmed as inadequate in measuring the creative ecology of a region and the ground up data collection method produced results almost double the ABS data. The ABS data on employment only recognises people earning an income from their creative work in the week of the Census. The cyclic and irregular nature of work is such that this is not an accurate measure of the full amplitude of the creative ecology in a regional area. A useful analogy is a forest eco-system. If only the fruiting trees in the forest are counted, this method omits the many non-fruiting varieties and trees out of season as well as the new growth and emerging saplings that are essential to the health and continued growth of the eco-system as a whole.

The disadvantages of the method lie in its reliance on industry networks and their capacity to collect and maintain useful data on the local sector. Cross-checking to remove duplication is also required. Some people who enrol as members of industry organisations may be working full-time in other sectors of the workforce and their interest

in the creative sector may only be secondary to their prime occupation, or they may be emerging and aspirant practitioners and students. This ground up method is mainly useful as a measure of the full ecology of the creative sector, and the ABS method is a more accurate measure of the number of people earning their living from this practice at the time of the Census. Together, they provide two ends of a spectrum of the creative sector.

Other disadvantages of the methodology are that it is time consuming and requires a deep commitment to the subject of the research and, preferably, an investment in the outcomes. This type of commitment may not be suitable for all researchers, but for those involved in the creative sector as practitioners, this approach can yield high-level rewards. In my case, the increase in both hard and soft infrastructure that emerged from the research and the advanced networking and research capacity of the region assisted my career as a content producer. In the feedback loop of action research, the success of my work as a producer, both nationally and internationally, added to the profile and reputation of the region as a viable and successful screen industry hub.

Drivers and barriers to further growth and development

The screen industries at both a national and international level underwent a succession of profound changes during the decade of this research, as outlined in Chapter 1. These changes served as both drivers and obstacles to development in the Northern Rivers region. The effects of the new technologies, changes in consumer patterns, increased access to broadband and the opening up of new platforms for delivery of content had the effect of enhancing some businesses and putting others out of action. For example, a number of small businesses emerged in the early 2000s providing web content creation and hosting services that subsequently became redundant as large suppliers, such as Gmail, began providing these services and content management systems for far less or for free. These aggregated businesses had the effect of pricing the small operators out of the market. As more niche markets opened up, some small businesses thrived and others who had been exclusively reliant on television and traditional media platforms were affected by reduced opportunities in these markets and were not able to survive.

The entire sector remains volatile and high risk, experiencing cycles of growth, stagnation and decline, followed by new growth. Business models in the creative sector are comprised largely of sole traders or micro-businesses that can be footloose and flexible, but are high risk and often exist on the verge of falling over. They operate in a complex eco-system of cross-flows and reliance that does not fit well within traditional regional development frameworks. Employment is measured by number of projects and project budgets rather than number of jobs. Most people are self-employed, driven by passion, vision and determination. Some achieve beyond expectation and enjoy the 'blue sky' of success. The two case studies presented in this thesis are examples of this, to a certain extent. The majority of practitioners rise and fall on the roller-coaster of risk, accepting the struggles and hurdles and knowing it's not for the faint-hearted. For these practitioners, achieving some level of sustainability is a hard-earned measure of success.

Findings in relation to research policy and industry development

The creative industries in Australia are still overwhelmingly city-based. However, these industries do not, by their nature, need to be confined to metropolitan areas. Certain regions, with specific sets of characteristics and capacities, can become viable centres for screen and creative industry development. The Northern Rivers region is an example of such a region. The large number of, and the strategic engagement of, the region's experienced producers, as described above, are keys to this region's success in growing and developing its screen industry capacity.

The ecology of creative industries is a very complex, cross-fertilised sector made up of many varieties of inter-dependent components. The sector is frequently depicted as comprising mainly talented individuals driven by creativity and entrepreneurial energy. But in the larger eco-system, not all components are creative. The complex value chain includes complementary skills such as legal services, accounting, technical services, maintenance, material supply, transport and distribution.

Creative industries are frequently portrayed as uniquely local. However, this is not always the case. Creative workers and the content they create are becoming increasingly global. This does not mean there won't be a demand for localised and regional product. Businesses need to know where their strengths are and which part

of the eco-system they wish to contribute to, and mix their marketing, distribution and sources of income accordingly.

The Northern Rivers research revealed that employment in creative industries tends to be mainly the well-educated and socially connected who have some form of financial security or back-up to cope with the high levels of risk. Creative industries are not showing signs of advancing a social inclusion agenda. Many businesses fail and practitioners without some form of safety net are very vulnerable. This industry is not for those who are risk averse; it is also not for those with completely flat wallets. Creative producers need some kind of financial back-up and resources, even if it's a couple of credit cards.

Another key finding of the study was in relation to the double-back effect on some creative centres, or 'hot-spots', when they pass a certain threshold of development. Artists and creative workers moving to certain areas within the region were shown to assist regional regeneration, but at some point the effect reaches a threshold and then turns back on itself. The ambience and buzz of the creative region attracts people with higher levels of disposable income, leading to increases in property prices and gentrification of the area. At this point the artists and small creative businesses move out as they can no longer afford to live there. This effect emerged during the study, with a noticeable decline in the number of practitioners using the towns of Byron Bay and Suffolk Park as their place of business in favour of 'less trendy' towns such as Bangalow, Grafton and Lismore.

Conclusions and research priorities arising from the study

The central role of producers in driving and championing the regional screen industry development in the Northern Rivers was highlighted in the study. Further research is needed to develop a more nuanced understanding of the contribution and needs of screen industry producers in the region in particular, how to address the issue of sustainability. This research and analysis may serve as a useful tool in developing future policies and programs for screen industry development in regional areas.

The issues of communal spaces and the value of clustering in the development of creative regions remain open. Small cluster have emerged in Mullumbimby and the

Byron Industrial estate that could be evaluated. The Aboriginal Art space and *Art in the Heart* projects in Lismore will also be valuable sources of future data and information on the uptake and benefits of shared community spaces in the region.

Not all regions are able or interested in developing creative industries that will flourish as autonomous industry sectors. However, those regions with some of the attributes, character and circumstances described in this thesis and which are evident in the Northern Rivers region, could benefit from the intervention of an active research approach to regional and industry development. Regions that lack the key attributes and characteristics needed to develop a regional industry may benefit from recognising and nurturing the creative talent they have embedded in other sectors of their economy.

The central strategic role of intermediary organisations like Screenworks, Arts Northern Rivers and the Creative Industries Consortium emerged as key drivers of development in the region. These organisations not only provide valuable industry services, networks and professional development, but they also provide a unified voice for advocacy and promotion of the sector. These regional agencies also serve as valuable sources of data collection and research capacity building for the region.

The fragmentation of the creative industries sub-sectors was addressed by the formation of the Creative Industries Consortium. This symbolic and pragmatic collective provides a single voice for the combined sector, strength in numbers, the advantages of a shared vision and shared goals, practical support for events, preventing duplication and unnecessary competition for audiences and the sharing of resources. Jill Moonie, manager of Screenworks, understands first hand the value of the Consortium to the screen industry sector:

Screenworks has benefited from the partnerships, broader reach, knowledge exchange and funding opportunities that the Northern Rivers Creative Consortium encompasses. Each of us has gained a greater audience for our organisations and events via the Consortium and it has strengthened the creative voice and wider recognition of this sector and its contribution to the region as a whole (Moonie interview, 2010).

The Northern Rivers region has demonstrated the key attributes needed to develop regional creative and screen industry sectors. Over the decade 2000 to 2010, these sectors have moved from the margins to the mainstream and are now widely recognised as playing a significant role in the economic, social and cultural life of the region. Whether these sectors, and the producers who drive them, can achieve a level of sustainability, and how that is to be defined, would be an excellent starting point for future research.

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Additional Reading

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- Encore Magazine*, The Production Magazine, monthly
- The Write Stuff*, journal of the Northern Rivers Writers Centre, monthly
- Art Reach*, Regional Arts NSW journal, quarterly
- Screen Hub*, weekly on-line news bulletin for Australian screen professionals

Interviews with producers and policy stakeholders

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- Lesley Buckley, Community Development Officer, Tweed City Council, June 2005

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 Deb Cox, Writer/Producer, *East of Everything*, November 2005 and March 2010
 Frank Coorey, Manager, Byron Film Club, Byron Bay, April 2004
 Ros Derrett, Southern Cross University, December 2005, 2010
 Fiona Eagger, Producer, *East of Everything*, Byron Bay, March 2010
 Matthew Flanagan, Producer, Indigo project, Bangalow, May 2004
 Noelene Hayes, Documentary Producer, Byron Bay, April 2006
 Kate Ingham, Industry Development Officer, Screenworks, October 2005.
 Lois Kelly, Project Co-ordinator, Economic Development Unit, Lismore, June 2004
 Julie Lafferty, The Farmacy Design, May 2005
 Katrina Luckie, Northern Rivers Regional Development Board, May 2005
 Catherine Marciniak, Director, Clunes, May 2001 and April 2005
 Ken McLeod, Executive Officer, CLIC and *New Creative*, Mullumbimby, May 2004
 Cate McQuillen, Producer, Whiporie, May 2004 and March 2010
 Jill Moonie, General Manager, Screenworks, March 2010
 Roger Monk, Writer and Producer, Byron Bay, November 2005
 Kate Oakley, Creative Innovation Forum, Ballina, May 2005.
 Lois Randall, CEO, Arts Northern Rivers, April 2005 and March 2010
 Sue Ryan, Department of State and Regional Development, May 2005
 Kerry Sunderland, New Media Producer, Ocean Shores, June 2004
 Ian Tiley, Mayor, Clarence Valley Council, May 2005
 John Weiley, Producer, Byron Bay, May 2001 and October 2005
 Trevor Wilson, Industry and Investment NSW, Tweed Heads, March 2010
 Sophia Zachariou, Producer, Micro-movies, Mullumbimby, June 2004

Interviews with practitioners and policy stakeholders in Highlands and Islands of Scotland, July 2005

Trish Shorthouse: Scottish Highlands and Islands Film Commission, Inverness
 Iain Hamilton: Highlands and Islands Enterprise, Inverness
 Jeremy Sim: Manager AIMHI
 Patricia Eccles: Badenoch & Strathspey Councillor
 Norrie McLaren, Chairman, AIMHI
 Gordie Ross, Executive Officer, Genuine Games, Fort William
 Jim Coyle, hotelier and chairperson for the *Monarch Country* campaign

Members of the cast and crew of *Monarch of the Glen*

**Interviews with practitioners and policy stakeholders in New Zealand,
September 2006**

Stuart Trundel, Chief Executive, Venture Taranaki Trust

Penelope Borland, Chief Executive, SPADA

Judith McCann, Executive Director, Film New Zealand

Sue Ward, Projects Manager, Film New Zealand

Hamish McIntyre, Key Grip, Wellington

Appendix 1

Creative Ecology of the Northern Rivers region

Creative arts and Industry agencies: a brief history

Summary of data supply status in 2000 and 2005

Festivals and Events in the region

In 2000, the arts and cultural sector were serviced by four organisations. They were NORPA (Northern Rivers Performing Arts), the flagship performing arts company in the region; The Northern Rivers Writers' Centre providing services and a festival for local writers; NCEIA, the North Coast Entertainment Industry Association, providing a point of contact for musicians and host of the Dolphin Music Industry Awards; and Northern Rivers IT (NRIT), established to bring together the new media practitioners. By 2005, NRIT had ceased operations and two new organisations had emerged and established themselves as vital new players in the region; Northern Rivers Screenworks and Arts Northern Rivers.

NORPA (Northern Rivers Performing Arts) was established in 1994. Unlike the other organisations in this section, NORPA does not claim to be an industry representative body. It is however regarded as the flagship theatre company for the region and has experienced steady growth and expansion each year since its inception. NORPA acts as a venue manager, presenter and producer of performing arts productions, and aims to provide a strong foundation for growth of the arts in the region. The company initiated the NORPA Creative Laboratory in 2002 to bring high calibre artists into the region, support the development of new Australian works and provide local artists with access to visiting professionals through the facilitation of workshops and forums. The lab was considered to be highly successful but lost its funding in 2005. The company's annual subscription season provides regional audiences with a range of quality cultural experiences that would otherwise only be available in metropolitan centres. At a grass roots level, NORPA provides a creative outlet for local youth, senior citizens and local artists through NORPA Dance Action. Established in 2001, Dance Action aims to support a diversity of dance practice by supporting and encouraging all styles of dance as a hobby, a career, a health routine, a celebration or a ritual. Some of the activities it supports include *Big Feet Little Feet*, an annual showcase of new contemporary dance and physical theatre, *Urban Street Rural Beat*, a hip hop dance group, a wide range of classes and workshops and a regional Dance Map, listing all the dance classes in the region. NORPA has a wide range of sponsors including state and federal funding agencies, Lismore City Council, Southern Cross University, local media organisations and a wide range of local businesses.

The Northern Rivers Writers' Centre was formed in 1994 as a non-profit, incorporated organisation receiving its core funding from the then NSW Ministry for the Arts. It is one of eight such centres in NSW all of which are part of a network called Litlink. The Centre is responsible for the promotion of Australian literature and the development of skills for readers and writers in the Northern Rivers. It provides a year round program of readings, courses, workshops and writer visits to various parts of the region and stages the Byron Bay Writers Festival which has become one of the major regional literary events in Australia. The 4 day program attracts an audience of 8,500 including over

200 school students and brings more than 100 high profile, celebrated writers to the region each year. By the end of 2005, the Writers Centre had a membership of 700 individuals and organisations and an annual turn-over of \$650,000. The Centre employs 130 volunteers and runs over 20 workshops and events each year which attract an additional 1,000 people outside of the festival. It also produces a regular newsletter outlining its activities and relevant information including a calendar of literary events, competitions and industry opportunities.

NCEIA, North Coast Entertainment Industry Association was formed in late 1989 as the North Coast Music Industry Association (NCMIA) with the purpose of rewarding excellence in original North Coast music and entertainment. The founding members recognised the need to promote and showcase unsigned bands and established an annual music industry awards event, which was first presented in 1990. In 1992 the Association was incorporated under its present name and the Awards became known as the Dolphin Awards. Driven entirely by volunteers, NCEIA has developed as an industry association that aims to assist independent artists further their music careers. The organisation maintains a number of resources including industry and media contact databases, member's e-news bulletins, information and referrals. Its website is a central resource for the local music industry.

Northern Rivers IT (NRIT) was established in 1999 to provide a wide range of information technology and new media related services and a regional network of specialised service providers. In 2000 the network had a skills and services database of 410 individuals and businesses operating in the region. This private database was established and maintained by new media specialist Glen Schaefer who at the time considered the figure of 410 a conservative estimate of the actual number of people working locally in this sub-sector. During 2000, there were moves to expand Northern Rivers IT&T from a database to a Multimedia Association or industry body for the local online and interactive media sector. However, this group was not successful in attracting sufficient funds or support for their concept and NRIT ceased operations in 2002. There remains no specific industry body or organisation for online and interactive media specialists but Screenworks regards it as a key function to represent this sector.

Northern Rivers Screenworks was established in 2000 to foster and support screen industries in the region. The inaugural board of Screenworks secured a grant from the Department of Transport and Regional Services through its Sustainable Regions program to run a three year Industry Development initiative from 2003 to 2005. Screenworks operates a substantial industry directory and website and a regular e-news letter which had over 800 subscribers by the end of 2005. A full account of the activities and achievements of Screenworks are provided in Chapter 5.

Arts Northern Rivers is a partnership between the seven local councils of the Northern Rivers Region and the then NSW Ministry for the Arts. In 2006, a new state government department was formed called the NSW Department of Arts, Sport and Recreation which is responsible for arts funding through Arts NSW. Arts Northern Rivers is part of the Regional Arts NSW network of thirteen Regional Arts Boards across regional communities in NSW. As well as supporting community initiatives, Arts Northern Rivers has initiated a series of regional projects such as the Youth Arts Roadshow, a touring ceramics exhibition entitled *Converge* and the formation of an Indigenous Artists Advisory Group. Arts Northern Rivers also developed a number of important initiatives directly relating to the development of creative industries, one of four priority areas outlined in its Strategic Plan. These include the Visual Arts Network (VAN) developed in

response to demand from artists to develop a regional visual arts strategy and provide professional development, marketing support and export assistance for local artists. It includes a range of workshops, marketing events and initiatives, a virtual gallery and a high profile Visual Arts Curatorial and Advisory Panel. Another initiative of Arts Northern Rivers is the Cultural Festivals and Events network and the development of an audience and marketing report for the region.

In 2006 the Northern Rivers Consortium was formed comprising eleven creative industry, training and regional development agencies: Arts Northern Rivers, Screenworks, Northern Rivers Writers Centre, NORPA, NCEIA (Music industry association), the regional Gallery network, TAFE, Southern Cross University, Northern Rivers Conservatorium, NRRDB and Northern Rivers Tourism.

Summary of data supply status from industry organisations in the Northern Rivers region: 2000 and 2005.

For both the 2000 and 2005 studies, all existing databases were sourced from industry development agencies representing the sub-sectors of creative industries. The number of industry organisations had grown by 2006, and several had vastly improved data collection methods. A summary of the data supply status of each representative body is included below. Conclusions regarding the value of comparisons between the 2000 figures and the 2005 figures for each sub-sector are also included.

Writing & Communication is the sub-sector with the most defined representation in the Northern Rivers, through the services of the Northern Rivers Writers Centre (NRWC). This Centre also has the longest standing, most reliable data collection and management history of all the creative sub-sectors. The Writers Centre began in 1994 and from the beginning compiled a database of members. In 2000, the number of members was 268 and this was the estimate used for the number of writers in the region. By December 2005 the Writers Centre membership consisted of 700 individuals. Duplication and people known to work in other fields were eliminated from this list resulting in a list of 550 writers. This finding is an indication of a large increase in the number of writers, and as the source of data was the same, may be used as the basis for a reliable comparison between 2000 and 2005.

Music is represented by the North Coast Entertainment and Industry Association (NCEIA), which was formed in 1989 and incorporated in 1992. Precise records of NCEIA membership did not exist prior to 1997. Between 1997 and 2000, the average number of members per year was 174. Chris Gibson of the University of Sydney undertook a study of the music industry in 1999. His study included musicians, retail and service providers and people working in live music venues and provided a total of 1,628 (Gibson, 2000). As some of these people were captured in other databases in the region, the number of people involved in the music industry in 2000 was conservatively estimated to be 1,500. By 2005, NCEIA had 121 musicians listed on a more streamlined database. People working in the retail and services sectors and music venues and outlets were counted in separate categories, so no reliable comparisons exist between the 2000 and 2005 figures for the music sub-sector. In February 2006, NCEIA released a Business Plan (NCEIA, 2006) which provided a comprehensive overview of the status of the music industry and proposed a number of recommendations for future development of the sector. The report stated that "NCEIA represents over 1000 musicians and each year receives more than 600 entries for its Awards Night". Further

research was clearly required, however, to obtain an accurate figure for the size of the music industry in the region.

The performing arts had no single industry organisation representation in the region in either 2000 or 2006. There were numerous small to medium sized theatre groups and organisations representing a mix of amateur and professional operating models. Northern Rivers Performing Arts (NORPA), established in 1994, had developed as the flagship theatre company for the region, experiencing steady growth and expansion each year since its inception (NORPA, 2006). Although NORPA did not keep a database of theatre practitioners, the company was able to provide, both in 2000 and 2005, a list of people who had worked for the company in the previous 12 months, representing a small pool of professional theatre practitioners. This figure was conservatively estimated to be around 100 in 2000 and remained constant at this estimate in 2005.

In 2000, **screen industries** had no representative body. For the first study, data was compiled from the Yellow Pages, Encore Directory, a database of new media practitioners put together by Mullumbimby Access Point (MAP) and participants at the industry forums, workshops and related events held during the Filmworks Expo. Screenworks was established in 2001 and began to compile a database of screen practitioners. By March 2006, there were 350 people listed in the Screenworks directory and 808 subscribers to the e-newsletter. This is the basis for the comparison in number of people working in screen industries in 2000 and 2005.

Visual artists and crafts practitioners also had no regional representative body in 2000. Each of the regional art galleries had databases of members but these included non-professional artists, enthusiasts and art lovers. There was no central source of the number of visual artists working in the region and the figures for 2000 were compiled from local knowledge and people who attended functions organised during the research stage. By 2005, Arts Northern Rivers had set up the Visual Arts Network (VAN) with a database of over 1000 practitioners. Many of these people appeared on other databases in the region (eg. The Writers Centre and Screenworks databases) and when duplication was eliminated, 660 visual artists were recorded for the study. In 2005, Arts Northern Rivers compiled a survey list of 1,500 visual artists from art gallery lists. Some of these people were represented by other databases or were enthusiasts and art lovers, but it is probable that the figure for visual artists was under-estimated in the 2005 study.

Design & Architecture did not have any representative industry or networking body during both the 2000 and 2005 studies. In 2000, this sub-sector was not counted as part of creative industries. The new definition of creative industries incorporated in the *Northern Rivers RIEP* (NRRDB, 2005) was adopted for this study and it included design and architecture. Data for this sector in 2005 was sourced entirely from the Yellow pages and a phone survey to determine the number of employees. Those designers who also worked as visual artists or screen industry practitioners, and were registered on the Screenworks or Arts Northern Rivers databases, were eliminated from this sub-sector.

In 2004, Arts Northern Rivers began compiling a database of creative workers and by December 2005 had 1,542 entries comprising people working across all of the six industry sub-sectors. This database was counted in the 2005 study and cross-checked against all the other industry databases and duplication was eliminated. In future studies, the Arts Northern Rivers database may be the most reliable and

comprehensive database for the region in terms of the size and scope of creative industries.

Festivals and events in the Northern Rivers region: 2005

The following is a list of some of the festivals and events held throughout the Northern Rivers region in the year 2005.

TWEED SHIRE

- Australia Day Celebrations
- Cabarita Rodeo
- Tweed Coast Raft Race
- Queen's Baton Relay Commonwealth Games
- Tweed Shire Council Centenary Celebrations
- Whole Woman Festival
- Harmony Day
- Seniors Week
- Tweed Youth 3F (Funky Film Festival)
- Twin Towns Fireworks Challenge
- Seniors Expo
- Tour de Tweed
- Wintersun
- World Environment Day
- Festival of Performing Arts
- Tyalgum Diggers Sports Day & Rodeo
- Tweed Valley Banana Festival and Harvest Week
- Tyalgum Festival of Classical Music
- Kingscliff Art, Food and all that Jazz
- Speed on Tweed
- Wollumbin Festival
- Tweed River Festival
- Tweed River Agricultural Show
- Melbourne Cup Day
- Kids in Need Dragon Boat Festival
- Salt Village Xmas Carols
- Twin Towns New Year Eve Fireworks

BYRON SHIRE

- New Years Eve celebrations by Byron Shire businesses & tourism group
- East Coast International Blues & Roots Festival, Easter weekend
- Byron Bay Writers Festival August/September
- Byron All-Screens independent Film festival
- Bangalow Music Festival – September
- Byron markets, 1st Sunday of every month
- Bangalow Markets 4th Sunday of every month
- Splendour in the Grass - Belongil Fields mid-winter
- Visual Artists Expo
- FEHVA 48 Hours of Visual Arts - June

LISMORE

- Australia Day youth hip hop, dance & music event (NORPA)
- North Coast National Show
- Lismore Lantern Parade – winter solstice
- Lismore Herb Festival August
- Nimbin Mardigrass May
- Nimbin Poetry Cup August/September
- Nimbin 39 Hours and Independent Film Festival
- The Channon market – second Sunday of each month

BALLINA

- Southern Cross Arts expo early summer
- Ballina Arts & Crafts Society fundraising expo
- Thursday Plantation Sculpture show, all summer.
- Annual Battle of the Bands

KYOGLE SHIRE

- Kyogle Fairymount Festival
- Mummulgum Country Music Competition September
- Shire wide arts events in planning stage

RICHMOND VALLEY SHIRE

- Beef Week - May
- Casino markets – second Sunday of each month

CLARENCE VALLEY SHIRE

- Surfing the Coldstream Festival Yamba, October
- Grafton Artsfest – twice yearly spring & autumn
- Philosophy, Science & Technology Festival Grafton, biannual
- Ulmarra River Festival September
- Multicultural Festival of the Five Senses, May
- Lower Clarence Arts and Crafts Association Expo at Maclean, July
- Jacaranda Festival – one of Australia's oldest community festivals
- Maclean Highland gathering

Appendix 2

Local government investment in creative industries: 2000 - 2005

All seven local councils in the Northern Rivers region made major investments in the arts, cultural events and creative industries in the period 2000 to 2005. These included investment in infrastructure and services such as art galleries, libraries, museums, festivals and performing spaces. A full audit of the value of this investment was recommended in *Imagining the Future2* as this commitment by local government is often under-estimated. The seven local councils also partnered to support Arts Northern Rivers, the peak body for the arts and culture sector in the Northern Rivers region. All the local councils invested in some way in the development of arts and creative industry activities in the region between 2000 and 2005. Some of these are summarised below:

Tweed Shire Council invested in the Tweed *City of the Arts* program, a two-year cultural program (2004/05) built on the foundation of Council's Cultural Policy and Cultural Program Plan. Structured on the core elements of local distinctiveness and sense of place, the *City of the Arts* program was designed to nurture and promote Tweed's unique sense of self, and to "forge the bubbling wellspring of creative energy and artistic imagination that is endemic to our Shire." The program contained three sub themes:

- Cultural Diversity - A two-year program to promote the rich cultural heritage and art form diversity inherent in the Tweed.
- Place Making and Policy - A two-year program to provide a public launch pad for Council's newly adopted Place Making and Public Art Policy.
- Festivals and Events - A two-year program to animate a strategic campaign to promote and expand the collective appeal of Tweed's calendar of events.

Approximately 9,000 people were involved in the Tweed *City of the Arts* program over the two year period, either as audience members, participants in workshops and seminars or involved in professional development activities. A further 148 people gained mid to short-term employment from the program. These were mainly artists and cultural industry workers. The database of people interested in cultural development increased from 350 to 700.

Six films were produced under the *Homegrown Filmworks* project celebrating various aspects of life in the Tweed region. Two of these films focussed on indigenous stories. The six films were launched on May 28th 2005 to an audience of 400 people on the banks of the river in Murwillumbah.

The *City of the Arts* program had numerous other major strands including the Disability Arts Project, the Shaping a Distinctive Environment program (SADE), the Tweed Audience Development Program and the 2005 Aboriginal and Torres Strait Islander program. All drew significant participation levels and forged new partnerships and cross sectoral collaboration (Buckley, interview, 2005)

The **Byron Shire Council** adopted a cultural policy in 2003 which proposed the establishment of a cultural committee and the development of a cultural plan. It also

proposed that Byron Shire position itself as a centre for innovation in sustainable creative and cultural industries. In 2005, the Council acknowledged the importance of the creative industries in the Shire by stating on its home page that "Thriving home-based businesses focus on alternative, cultural and knowledge industries, with a growing population of artists, writers and filmmakers" (www.byron.nsw.gov.au, 2005). Two other goals proposed in the Byron cultural plan were:

- Utilise Byron Shire's cultural resources for the diversification and generation of local employment opportunities
- Recognise and foster Byron Shire's distinctiveness as a national and global centre of the creative, spiritual and healing arts.

The Council released its cultural plan in 2008

Lismore City Council provided support for a wide range of cultural and community events and festivals such as the annual Lismore Lantern Parade and the Northern Rivers Health and Herb festival. Council also provided major support for the Lismore Regional Art Gallery and NORPA. The Council initiated and provided substantial support for the Lismore Cultural Precinct (Art in the Heart) and the Lismore Wilson River project.

The *Art in the Heart* project, involving the redevelopment of the old Lismore High School site and the adjoining Harold Fredericks car park into a major arts and cultural precinct, began when Lismore Council purchased the land and buildings in 2001. A business plan for the site was completed in September 2001. In 2003 Council commissioned consultants and landscape architects to develop a master plan for the site, which was accepted and endorsed by Council in June 2004. By 2010, the project was still in development.

The master plan provided a guide to further planning for the site which included:

- The regional library
- A regional Gallery/Museum (incorporating an Indigenous cultural section)
- Multi-media/training/youth arts space
- Outdoor performance space
- Residential apartments
- Commercial/retail section including alfresco dining
- Multi-level car park
- Transit Centre

Phase 1 of the project was completed in 2003 with the relocation of the former library in Carrington Street to the Magellan Street Site. The building was totally refurbished and opened in 2004. Costing in excess of \$1.8m, the project received a \$200,000 grant from the State Government Library Development Grant program

Lismore Council also supported the Wilson River Redevelopment project which aimed to identify and develop the potential of the Lismore riverbank for recreational and other activities. A new multi-level wharf was completed and the banks of the river were landscaped and planted with native species. The project also included the development of a series of historic sites linking Lismore's culture, indigenous history and social stories. The theme of the first historic site was "Gathering Place" and comprised a series of information panels taking the visitor on a journey through the past, telling stories of early industrial and social activities and providing an understanding of the Wjabel people's continuing use of indigenous foods.

Ballina Council committed \$900,000 towards the construction of a community art and craft gallery in Shaws Bay as part of a push to make the town the arts hub of the region. The project, driven by Ballina Arts and Craft centre Inc, also secured federal funding and a grant from the NSW government. The centre will feature a gallery for local arts and crafts plus a learning centre for workshops and classes and a café to help fund the gallery operations. Ballina Council has also introduced a public art policy which includes a levy.

Kyogle Council engaged in developing the Kyogle Memorial Institute Hall and restored it as a performing arts and cultural centre. The council also supported the Roxy Gallery in the main street of Kyogle.

Richmond Valley supported the Platypus Gallery in Casino and employed an Events and Cultural Liaison officer to support community festivals and events in the region. The Council also acted as a presenter of touring screen and performing arts events to Casino and other communities in the Valley. In 2005, the Council hosted a short film festival which toured to three locations in the region: Coraki, Casino and Evans Head.

Clarence Valley Council supported the Grafton Regional Gallery and employed a Cultural Development co-ordinator whose first task was to develop a cultural plan for the Shire. Clarence Valley Council also hosted specific events to encourage home-based business (HBB) operators to network with the wider business community and promote their products or services. The Council also supported non-profit community organisations in the staging of festivals and events. In 2006 Council released the Clarence Valley Economic Development Strategic Plan which recognised the importance of creative industries in the area. The plan identified the need for a multi-use dedicated precinct or facilities to provide exhibition, performance, and workshop/retail spaces to support and develop creative industries within the Clarence Valley.

Building on strengths, value adding existing industry, attracting new industry and to a lesser extent increasing diversity and structural change are considered to be essential ingredients for the development of the Clarence valley into the 21st century. (Clarence Valley Economic Development Strategic Plan, 2006)

All of the local councils in the Northern Rivers region except for Byron Shire Council were involved in an innovative broadband access project aimed at extending the local provision of broadband services. The project, *Broadening Broadband - Connecting Your Place*, was jointly funded by a partnership group of local councils and the Federal Government's Community Based Broadband Demand Aggregation Broker Program. Each council worked closely with their communities to establish the demand for broadband, assisted in creating an appropriate committee to champion connection for their community, and liaised with telecommunication service providers to encourage them to offer solutions to meet the needs of each community.

In addition, the seven local councils collectively contributed \$100,000 per year to the operations of Arts Northern Rivers, one of only a few organisations which actively works in partnership with all seven local councils.

Appendix 3

State and federal government investment in creative industries:

2000 – 2005

State government investment

The state government supports cultural and creative industries in the region through Arts NSW, which in 2006 was housed within the newly formed NSW Department of Arts, Sport and Recreation. By 2010, Arts NSW was part of the state government's new Communities NSW. Screen industries were supported through the NSW Film and TV Office, which in 2009 changed its name to Screen NSW. Regional Arts NSW provided a wide range of services to the arts and cultural sector in regional areas, including a regional arts grant scheme.

The Department of State and Regional Development also provided substantial support for the emerging creative industry sector in the region through its support of business development and research initiatives including the 2005 study and report *Imagining the Future*². DSRD also provided support for the 2003 Australian International Documentary Conference (\$50,000), the Screenworks Location Office (\$80,000), the media Lab workshops (\$5,000) and supported Arts Northern Rivers in the development of the music and visual arts sectors.

The state government also engaged in planning for land management and employment through its Far North Coast Regional Strategy and was a key partner in the preparation of the Northern Rivers Regional Industry and Economic Plan (RIEP) in 2004/05.

The Area Assistance Scheme (AAS) was a regional community development program run by the Department of Community Services. It provided grants to local councils and non-government organisations for projects that improved community well-being and the way communities function. The AAS worked within a 'whole of government' framework to deliver its outcomes. Some of the projects supported by AAS in 2005 included:

- Northern Rivers Screenworks (Byron) – Heart2Heart Project to encourage interaction and sharing of experiences between senior citizens and young people to uncover a diversity of stories reflecting the region - \$23,000
- Clarence Valley Arts Inc. – to develop a professional magazine by Clarence Valley youth for the purpose of connecting youth and promoting youth issues, objectives and skills - \$124,790
- Federal School of Arts Association – to upgrade the existing facilities and provide new and improved facilities - \$28,366
- Chillingham Community Association (Tweed) – to build a people sized chessboard with sculptured pieces using local artists thus providing a community sculpting project plus a small building project - \$3,880

Federal government investment

Federal government support for the arts and creative industries was provided through the Australia Council, the Australian Film Commission, the Department of Communications, Information Technology and the Arts (DCITA) and the Department

of Transport and Regional Services (DOTRS) through its Sustainable Regions funding. Individual screen producers also received funding or support from federally funded agencies such as Film Finance Corporation Australia (FFC), the ABC, SBS and Film Australia. In March 2006, the Australia Council announced a new community partnerships initiative which brought together the Australia Council for the Arts' work in the areas of community cultural development (CCD), youth, education, disability and regional development. It sits within the Council's Community Partnerships and Market Development division.

Federal funding for creative industries in the region during 2005 was in excess of \$1.5 million and provided an indication of the depth and breadth of local activity. Some examples of regional projects that attracted federal funding are listed below.

Funding for creative industries projects in the Northern Rivers region under DOTARS Sustainable Regions funding was secured for:

- Byron Bay Community Association Inc - equipping the Byron Bay Conference and Performance Space with theatre, cinema, conference and catering equipment - \$150,000
- Northern Rivers Screenworks – development of screen and creative industries - \$320,000
- Northern Rivers Conservatorium and Arts Centre – provision of an outdoor stage for performances and events - \$27,000
- Northern Rivers Community Gallery – establishment of a community arts and crafts gallery in Ballina - \$350,000

The Northern Rivers Area Consultative Committee (NRACC) acted as a conduit between government and the community. The NRACC followed a Strategic Plan that the Northern Rivers community developed each three years, and creative industries were identified as a priority in the 2004 Strategic Plan (Area Consultative Committee, 2004). These priorities were used to advise the Australian Government and could impact on funding decisions made in the region. The ACC provided assistance with Regional Partnerships funding and information and services for small businesses in the region. The ACC assisted a variety of creative industries projects throughout the region including:

- Naval and maritime museum extension, Ballina - \$187,000
- Art gallery extension, Tweed Heads - \$143,000
- Northern Rivers Visual Arts Network - \$33,000
- North Coast Music Implementation Plan - \$29,000
- Kyogle town park redevelopment – amphitheatre - \$150,000
- Light n Up, Lismore – community events and festivals - \$27,500

DCITA provided strategic advice and professional support to the Australian Government on a wide range of rapidly changing policy areas including:

- arts and culture
- broadcasting and online regulation
- indigenous programs
- information and communications technology
- information economy
- intellectual property
- post, sport and telecommunications

DCITA funding for creative industries was delivered via a range of programs including Festivals Australia and the Contemporary Music Touring Program.

Numerous national initiatives and programs developed by screen industry organisations in recent times were based on the need to diversify the funding base for screen industries from a predominantly subsidy dependent model to more private investment, more philanthropy support and more innovation and research investment. Enterprise Tasman was an intensive workshop for screen business entrepreneurs to foster the building of sustainable businesses. The workshop, held for the third time in 2006, was supported by the AFC, FFC, Australian Film Television & Radio School, New Zealand Screen Council and three state film agencies. Selection for the program was extremely competitive and open only to screen industry businesses with substantial credits and experience. My company, Hatchling Productions, was successful in being selected for the scheme in 2004.

A 2005 report into the prospects for the documentary sector argued for more business support for the sector and a shift from a fee-for-service model to a more sustainable model based on developing, owning and exploiting intellectual property(Higgs, 2005). This model argued that, side by side with improving the business development and commercial viability of the sector, there was a need for greater federal government assistance for the local industry in the form of increased funding to the AFC, the FFC, the ABC and Film Australia.

In the 2006 budget, a wide ranging review of the federal government's support for screen industries was announced. This review was expected to consider the most appropriate funding mechanisms for film and television and tax based private investment. A new 'super agency' model combining all federal government agencies into one coordinated body was being discussed. The government also announced a review of all tax incentives and offsets provisions. The findings of this review had major policy consequences for the Australian screen industry sector and resulted in major structural changes to the industry. Screen Australia was formed from an amalgamation of the Australian Film Commission, The Film Finance Corporation and Film Australia, and the producer offset mechanism was introduced, all of which have had, and continue to have, major implications for the sector.

Appendix 4

COMMERCIAL IN CONFIDENCE PRODUCER REPORTING

This survey form is circulated by Screenworks to producers in the Northern Rivers region every six months for the purpose of capturing local data on screen industry activity.

Regional filming survey: NORTHERN RIVERS SCREENWORKS INC

Regional film office: Screenworks

Regional officer:

Date:

Production title:

Production company details

Production company	
Producer/production manager	
Phone/mobile details	
Company address	
Type of production: (eg: TV, feature, TVC etc)	
Email address	

Budget & schedule details

Total production budget	
Total regional spend (actual)	
Spend on accommodation (as component of regional spend)	
Duration of regional shoot (in days)	
Duration of regional pre-production (in days)	

Employment details

Total number of cast & crew (for regional shoot)	
Total number locals employed	

Location Details

Filming location	Property owner	Shoot dates

Signature of production company

representative verifying above information

:

Name:

Title/position:

Date:

Appendix 5: Screen industry survey form

SURVEY OF SCREEN INDUSTRIES IN THE NORTHERN RIVERS REGION 2004

The information gathered from the Screen Industries Survey 2004 will assist the region by providing statistics, growth drivers and indicators of future prospects for the local screen industries. This information will be used to develop strategies and gain support for further development of these industries in the Northern Rivers Region. The questions refer to your experience in screen industries, and should not be answered in relation to other work activities you are engaged in. Once completed, the survey results and strategies for further development of screen industries will be publicly launched and posted on the Screenworks website.

When published, no individual or business will be identified, as all data will be aggregated.

This survey will take approximately 20 - 30 minutes to complete.

Please indicate your selection with a tick ☒

In the case of *OTHER*, please include relevant details.

What are Screen Industries?

This survey is relevant to you if you are involved in creating content or providing services for the following:

- Film
- Television
- Print media
- Photography
- Performance (including digital delivery on CD, DVD or internet)
- Digital Media (including internet, CD, DVD, mobile phones and other platforms)
- Video
- Radio
- Visual arts

This survey is a joint venture between Cathy Henkel, PhD student in the Creative Industries Faculty of Queensland University of Technology (QUT) and 3 industry partners: Northern Rivers Regional Development Board (NRRDB), Northern Rivers Screenworks and Hatchling Productions.



Participation in this project is voluntary; respondents are not required to provide names, and may elect to withdraw at any time without comment or penalty. If anyone has any complaints about any aspect of this research, contact the Research Ethics Officer at QUT on 07 3864 2340 or ethicscontact@qut.edu.au

SECTION ONE: PARTICIPANT INFORMATION

Question 1: Are you male or female?

01	MALE	
02	FEMALE	

Question 2: How old are you?

	AGE	
01	15-25	
02	26-35	
03	36-45	
04	46-55	
05	56-65	
06	over 65	

Question 3: Which local government area in the Northern Rivers region do you live in?

	LGA	LIVE IN
01	Ballina Shire Council	
02	Byron Shire Council	
03	Clarence Valley Council	
04	Kyogle Council	
05	Lismore City Council	
06	Richmond Valley Council	
07	Tweed Shire Council	

Question 4: Which local government area in the Northern Rivers region do you work in? Tick all that apply.

	LGA	WORK IN
01	Ballina Shire Council	
02	Byron Shire Council	
03	Clarence Valley Council	
04	Kyogle Council	
05	Lismore City Council	
06	Richmond Valley Council	
07	Tweed Shire Council	
08	Work outside the region	
09	Work overseas	

Question 5: What is your nearest district centre (major shopping facility)?

01	
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SECTION TWO: BACKGROUND INFORMATION

Question 6: What year did you begin working in screen industries?

01	
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Question 7: What year did you come to the Northern Rivers region? If born here, give year of birth.

01	
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SECTION THREE: OCCUPATION / BUSINESS INFORMATION

Question 8: Which occupation categories does your work fall under? Please choose one Primary activity and tick all other Secondary occupations that apply. If answering *other* please specify.

	OCCUPATION	PRIMARY	SECONDARY
01	Actor, Performer, Comedian		
02	Advertising Manager, Advertising Specialist		
03	Animator, Cartoonist		
04	Art Director, Production Designer		
05	Caterer, Catering Manager		
06	Choreographer, Dancer		
07	Cinema / Theatre Manager, Worker, Usher		
08	Cinematographer, Camera Operator / assistant		
09	Community Artist		
10	Computer Artist, Digital Artist, Interactive Media Artist		
11	Computer Technician		
12	Costume Designer		
13	Critic		
14	Desktop Publishing Operator		
15	Director (film, video, radio, digital media)		
16	Disc Jockey		
17	Distribution Manager, Publicist		
18	Editor (film, video)		
19	Editor (print, script editor)		
20	Exhibition Manager, Festival Organiser		
21	Gallery Owner, Worker		
22	Graphic Designer, Artist, Illustrator, Calligraphy Artist		
23	Journalist, Copywriter, Feature Writer		
24	Librarian		
25	Lighting Director, Lighting Technician, Gaffer		
26	Location Manager, Road Manager		
27	Make-up Artist		
28	Multimedia Designer, Web Publisher		
29	Museum Curator, Worker		
30	Musical Instrument Maker, Retailer, Piano Tuner		
31	Musician, Composer, Performer		
32	Photographer		
33	Printing Machinist, Operator		
34	Producer - Professional		
35	Producer - Emerging		
36	Production Manager, Production Assistant		
37	Production Support Crew, Continuity		
38	Production Accounting, Administration		
39	Projectionist		
40	Retail Audiovisual		
41	Radio Announcer, Journalist		
42	Sign Writer		
43	Sound Technician, Mixer		
44	Sound Recordist, Boom Operator		
45	Special Effects Person		
46	Teacher in Creative Enterprises (music, dance, drama etc.)		
47	Television Presenter, Journalist		
48	Visual Artist, Craftsperson (potter, painter, sculptor, etc.)		
49	Writer, Author, Screenwriter		
50	Other1 (specify)		
61			

Question 9: Which of the following occupation categories have you utilised in the past 12 months? Tick all that apply. If answering *other*, please specify.

	OCCUPATION	WITHIN REGION	OUTSIDE REGION	OVERSEAS
01	Actor, Performer, Comedian			
02	Advertising Manager, Advertising Specialist			
03	Animator, Cartoonist			
04	Art Director, Production Designer			
05	Caterer, Catering Manager			
06	Choreographer, Dancer			
07	Cinema/Theatre Manager, Worker, Usher			
08	Cinematographer, Camera Operator / assistant			
09	Community Artist			
10	Computer Artist, Digital Artist, Interactive Media Artist			
11	Computer Technician			
12	Costume Designer			
13	Critic			
14	Desktop Publishing Operator			
15	Director (film, video, radio, digital media)			
16	Disc Jockey			
17	Distribution Manager, Publicist			
18	Editor (film, video)			
19	Editor (print, script editor)			
20	Exhibition Manager, Festival Organiser			
21	Gallery Owner, Worker			
22	Graphic Designer, Artist, Illustrator, Calligraphy Artist			
23	Journalist, Copywriter, Feature Writer			
24	Librarian			
25	Lighting Director, Lighting Technician, Gaffer			
26	Location Manager, Road Manager			
27	Make-up Artist			
28	Multimedia Designer, Web Publisher			
29	Museum Curator, Worker			
30	Musical Instrument Maker, Retailer, Piano Tuner			
31	Musician, Composer, Performer			
32	Photographer			
33	Printing Machinist, Operator			
34	Producer - Professional			
35	Producer - Emerging			
36	Production Manager, Production Assistant			
37	Production Support Crew, Continuity, Researcher			
38	Production Accounting, Administration			
39	Projectionist			
40	Retail Audiovisual			
41	Radio Announcer, Journalist			
42	Sign Writer			
43	Sound Technician, Mixer			
44	Sound Recordist, Boom Operator			
45	Special Effects Person			
46	Teacher in Creative Enterprises (music, dance, drama etc.)			
47	Television Presenter, Journalist			
48	Visual Artist, Craftsperson (potter, painter, sculptor, etc.)			
49	Writer, Author, Screenwriter			
50	Other1 (specify)			

Question 10: Are you salaried, self-employed or a volunteer? Tick all that apply.

			% OF INCOME
01	salaried		
02	self-employed		
03	volunteer		

Question 11: Which of the following best describes your business activity?

	BUSINESS	
01	sole trader	
02	partnership	
03	company	
04	other (specify)	
05	not applicable	

Question 12: Who performs the main work of your business? Tick all that apply.

01	yourself	
02	your partner	
03	paid staff	
04	contract workers	
05	volunteers	

Question 13: What percentage of your work in screen industries in the past four years was initiated or commissioned from within the NR region and from outside the NR region?

	% OF WORK	WITHIN REGION	OUTSIDE REGION	OVERSEAS
01	0-10%			
02	10-20%			
03	20-30%			
04	30-40%			
05	40-50%			
06	50-60%			
07	60-70%			
08	70-80%			
09	80-90%			
10	90-100%			

Question 14: Did you apply for and/or receive grant funding or investment from any of the following in the past four years?

	ORGANISATION	APPLIED	FUNDING	REJECTED
01	Film Finance Corporation			
02	Australian Film Commission			
03	Australia Council			
04	NSW Film & Television Office			
05	NSW Arts funding			
06	Local Arts funding			
07	Private funding (specify)			
08	Industry Assoc. funding (specify)			
09	Non-government / community organisation			
10	Other1(specify)			

Question 15: What is the estimated annual gross income (before tax) derived from your activities in screen industries. This question will enable us to properly assess the economic impact of the screen industries in the region.

	ESTIMATED INCOME	
01	0-\$5,000	
02	\$5,000 - \$10,000	
03	\$10,000 - \$15,000	
04	\$15,000 - \$20,000	
05	\$20,000 - \$25,000	
06	\$25,000 - \$30,000	
07	\$30,000 - \$35,000	
08	\$35,000 - \$40,000	
09	\$40,000 - \$45,000	
10	\$45,000 - \$50,000	
11	\$50,000 - \$55,000	
12	\$55,000 - \$60,000	
13	\$60,000 - \$65,000	
14	\$65,000 - \$70,000	
15	\$70,000 - \$75,000	
16	\$75,000 - \$80,000	
17	\$80,000 - \$85,000	
18	\$85,000 - \$90,000	
19	\$90,000 - \$95,000	
20	\$95,000 - \$100,000	
21	OVER \$100,000	

Question 16: What percentage of your gross income (before tax) for the last 12 months comes from within the NR region?

	% OF INCOME	WITHIN REGION
01	0-10%	
02	10-20%	
03	20-30%	
04	30-40%	
05	40-50%	
06	50-60%	
07	60-70%	
08	70-80%	
09	80-90%	
10	90-100%	

Question 17: Which of the following aspects of your work are conducted within/outside the NR region? Tick all that apply.

	STAGE	WITHIN REGION	OUTSIDE REGION
01	Research		
02	Writing		
03	Development		
04	Pre-production		
05	Production		
06	Off-line Editing		
07	On-Line Editing		
08	Sound Post-production/Mixing		
09	Music		
10	Narration		
11	Special Effects		
12	Graphics		
13	Grade		
14	Translations		
15	Sub-Titles		
16	Distribution		
17	Marketing		
18	Developing & Printing		
19	Database programming		
20	DVD authoring		
21	Flash development		
22	On-line content development		
23	Web design		
24	Other (specify		

SECTION FOUR: CONTENT AND DISTRIBUTION

Question 18: Which of the following types of content do your activities contribute to? Tick all that apply.

	CONTENT	
01	Feature Film	
02	Documentary	
03	Short Film	
04	Websites	
05	Animation	
06	Commercial (TV,radio,print)	
07	Corporate	
08	Radio Program	
09	Newspapers,Magazines	
10	Artwork	
11	Printed Literature	
12	Community Information	
13	Educational	
14	Other (specify)	

Question 19: What are the destination markets of productions/content you have worked on in the past four years? Tick all that apply.

	MARKETS	
01	ABC	
02	SBS	
03	Commercial TV National	
04	Commercial TV International	
05	Cinema National	
06	Cinema International	
07	Community TV National	
08	Community TV International	
09	Corporate National	
10	Corporate International	
11	CD/DVD National	
12	CD/DVD International	
13	Commercial Radio	
14	Commercial Press	
15	Community Radio	
16	Community Press	
17	Educational National	
18	Educational International	
19	Festivals National	
20	Festivals International	
21	Commercial TV Northern Rivers	
22	Cinema Northern Rivers	
23	Community TV Northern Rivers	
24	Corporate Northern Rivers	
25	CD/DVD Northern Rivers	
26	Educational Northern Rivers	
27	Festivals Northern Rivers	
28	Internet	
29	Other1(specify)	

SECTION FIVE: TRAINING AND PROFESSIONAL DEVELOPMENT

Question 20: Have you taken advantage of training or professional development options provided by any of the following organisations in the NR region?

	TRAINING OPTIONS	
01	Southern Cross University	
02	TAFE	
03	North Coast CAMERA	
04	NR Writers Centre	
05	Screenworks	
06	SAE	
07	Other1(specify)	

Question 21: What previous training have you had?

	WHERE	
01	National Broadcaster (ABC/SBS)	
02	University / TAFE - Northern Rivers	
03	University / TAFE - outside region	
04	Community - Northern Rivers	
05	Community - outside region	
06	On-the-Job - Northern Rivers	
07	On-the-Job - outside region	
08	Commercial TV (Ch 7,9,10)	
09	None	
10	Other1(specify)	

Question 22: What training would you like to undertake?

	TYPE	FORMAL	ON-THE-JOB
01	Radio Production		
02	Writing		
03	Pre-Production		
04	Cinematography		
05	Sound		
06	Other production		
07	Directing		
08	Post-production / Editing		
09	Marketing / Distribution		
10	Multi-media / Computers		
11	Performing		
12	Producing		
13	Photography		
14	Journalism		
15	Business Development		
16	Other1(specify)		

Question 23: Where would you like to pursue your future training?

	TRAINING	
01	Northern Rivers - Media org/professional	
02	Northern Rivers - SCU	
03	Northern Rivers - TAFE	
04	Northern Rivers - Community	
05	Northern Rivers Screenworks	
06	Northern Rivers - professionals	
07	Northern Rivers - Other	
08	Sydney	
09	Brisbane	
10	Gold Coast	
11	Outside NR	

SECTION SIX: IMPORTANCE OF PLACE

Question 24: What are the advantages for you of living and working in the NR region?

Please rate in order of priority (1 being the most important)

	ADVANTAGES	YES	RATING
01	Enhances personal health		
02	Physical beauty /less pollution/climate		
03	Access to leisure/sports facilities		
04	Sense of community/like-minded people		
05	Less crime		
06	Culturally diverse community		
07	Creative potential / developing Industry		
08	Provides sense of peace/freedom/tranquility		
09	Cost of Living		
10	Less competition		
11	Less traffic / travel		
12	Employment prospects/work is here		
13	Close to Gold Coast / Brisbane		
14	Access to services (eg education, health etc.)		
15	Other1(specify)		

Question 25: What are the disadvantages for you of living and working in the NR region? Please rate in order of priority (1 being the most important)

	DISADVANTAGES	YES	RATING
01	Distance from cities /events		
02	Limited paid work opportunities		
03	Lack of skilled /professional people		
04	Lack of funding /clients with money		
05	Lack of training opporrtnuities / support		
06	Lack of contacts /networking opportunities		
07	Lack of facilities /equipment		
08	Lack of stimulation /cultural scope		
09	Lack of marketing /distribution		
10	Too much focus on tourism		
11	Climate /heat/wet		
12	Lack of population /audiences		
13	Dependence on private transport		
14	Too much competition		
15	Inadequate telecommunications infrastructure		
16	Lack of recognition /low profile for region		
17	Lack of access to complementary skills		
18	Product & services gaps for your business (specify)		
19	Other1(specify)		
20	Other2(specify)		

Question 26: How would you describe the overall prospects for your business/career in the Northern Rivers region over the next 5 years?

01	Commencing	
02	Sustainable	
03	Growing	
04	In-decline	
05	Ceasing	

Why do you think this?

Question 27: What market share of your work do you **estimate** will come from within the region, outside the region or overseas in 5 years time?

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SECTION SEVEN: SKILLS, SERVICES, FACILITIES

Question 28: What skills, services or facilities do you have to contribute to the industry in the Northern Rivers region?

	SKILLS/SERVICES/FACILITIES YOU OFFER	
01	Skills in area of expertise	
02	Experience in area of expertise	
03	Potential / enthusiasm / energy	
04	Low cost facilities / equipment for hire	
05	Low cost services for hire	
06	High end facilities / equipment for hire	
07	Professional services for hire	
08	Professional attitude / well organised	
09	Knowledge of area / industry	
10	Training / teaching skills / mentor role	
11	Collaboration skills	
12	Web-site creation	
13	Producing / Creating Projects	
14	Financial Advice / Securing / Investment	
15	Other1(specify)	

Question 29: What skills, services or facilities do you require in the Northern Rivers region to advance your business or career?

	SERVICE AND FACILITIES	URGENT	SOMETIMES	NEVER
01	Specialised Training / teachers / mentors			
02	Low cost edit facilities / equipment			
03	State-of-art equipment / high end / on-line editing			
04	More networking opportunities / contacts			
05	Regional funding body / local funding			
06	More projects / larger industry / bigger budgets			
07	Film centre / local hub / business centre			
08	Film / video agency / Industry liaison person			
09	Greater advertising / promotion / marketing / distribution			
10	More producers			
11	Database of people / services / outlets			
12	Large client base / more pro-active business			
13	Larger cash flow into region / stronger economy			
14	Cultural centre / resource centre			
15	Computer Support Services			
16	Sound stage / large studios / live venues			
17	On-line facilities / web-site / bulletin board			
18	Access to broadband / high speed communication			
19	Grant writing expertise			
20	Reliable power supply			
21	More festivals			
22	Technical repair centre			
23	Visits to region by funding bodies			
24	Cinema venues / community centres			
25	Access to complementary project skills / services			
26	Business assistance			
27	Improvements in critical business infrastructure eg internet, telecommunications, air services, road transport etc. (specify)			
28	Other1 (specify)			

Question 30: Have you heard of Northern Rivers Screenworks? If NO, go to Question 32.

01	YES	
02	NO	

Question 31: If yes, have you utilised any of the following services/facilities/activities?
Tick all that apply. How would you rate them?

	SCREENWORKS ACTIVITES	NO VALUE AT ALL	SOME VALUE	VALUABLE	EXTREMELY VALUABLE
01	Masterclasses				
02	Conferences - AIDC, SPAA Fringe				
03	Industry Seminars				
04	Library				
05	Staff support / advice				
06	Pitching Competition				
07	Location Liaison Officer				
08	Database				
09	Funding Agencies visits				
10	Clinics				
11	Networking Events				
12	Website				
13	Practitioners Database				
14	E-newsletter				
15	Other1(specify)				

Question 32: Do you have any further ideas or suggestions that may contribute to the development of the screen industries in the Northern Rivers region?

Thank you for taking the time to fill out this survey.
This valuable information will be used to further develop
screen industries in the Northern Rivers region.