Gold Coast Independent Screen Production:

Summary of Research Findings

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A study commissioned by Council of the City of Gold Coast

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Background

The City of the Gold Coast, home to the Village Roadshow film and television production studios, is a significant location for large-scale US blockbusters and high-budget Australian feature film and television production. Over the last 30 years, a large number of Hollywood and Australian film and television series have filmed in the region, and over that time the Gold Coast has developed world-class production facilities, and a large workforce of skilled technical screen workers.

Since the early 2000s, a small group of content creators based on the Gold Coast have produced local content, largely feature films and documentaries both in and outside the region. Yet before 2009, the number of Gold Coast-based writers, directors and producers creating intellectual property (IP) and developing projects was small, production was infrequent, and talent-drain was common. Consequently, the Gold Coast film and television industry has long been viewed principally as a service industry for projects created by companies based elsewhere and filmed in the region, rather than as an industry producing local production. However, over the last decade, from the killer-shark movie *Bait* (2010) and the alien invasion film *Occupation* (2018), to the documentary *Nothing on Earth* (2013) and the web series *Stage Mums* (2018), evidence suggests that the independent screen production industry is growing, and an increasing number of Gold Coast-based content creators are making various forms of screen content in the region. To date, however, there has been no substantive study of the independent screen production activities occurring outside of the Village Roadshow Studios in the Gold Coast.

The Department of Economy, Planning and Environment of the Council of the City of Gold Coast commissioned this research as a scoping study of independent screen production activity and capacity in the City of Gold Coast. The research investigates the independent screen industry's size, value chain and workforce; the screen business ecology; the content formats created; and the views of above-the-line screen content creators on the state of the industry.

The research examines both **core screen content**—including short-form and long-form narrative-based feature film, documentary and television series, online content creation, and virtual reality (VR) and augmented reality (AR) production—and commercial **corporate video production**.

This study defines Gold Coast independent production as that which is independent of Hollywood, but also that which is independent of, and occurs outside of the Village Roadshow Studios. It does not examine foreign or Australian feature film and television production filmed at the Village Roadshow Studios, although it does interrogate the interdependencies between local independent and studio production.

The study focuses on the activities of screen workers who live and work in the Gold Coast, or those who may live outside the region but whose primary place of work or business is the Gold Coast. Surveys and interviews focus specifically on the productions of independent Gold Coast above-the-line screen content creators which includes producers, directors, screenwriters, and online content creators or someone writing, directing, editing, and/or making content for online platforms.

Key Findings

Over the last 20 years, and gaining pace in the last decade, the Gold Coast screen industry has shifted away from being predominantly a service industry to also becoming an emerging hub for local production.

- Between 2009 and 2019, there has been a marked increase in the volume of local production and the number of Gold Coast-based production companies and screen content creators producing content.
- The Gold Coast is an increasingly productive hub for locally produced low-budget feature films, online content and commercial corporate production. Scripted web

series and online content activity is also growing. VR and AR production is a minor, if not marginal, production activity.

- The growth in local production is the result of over 20 years of progressive development in local production capacity and the growing concentration of producers and above-the-line content creators living and working in the city.
- Between 2009 and 2019, 35 independent films were filmed on the Gold Coast outside the Village Roadshow Studios. Of this number, Gold Coast-based production companies produced 17 (49% of the total), averaging just under two per year. Brisbane-based production companies filmed nine feature films on the Gold Coast; another nine were shot largely by Sydney-based production entities.
- Therefore, the Gold Coast is a popular location for filming low-to-mid budget independent production by Brisbane-based or other Australian production companies.

Feature film productions by producer distinctions and production location, 2009 to 2019*

	Films created/made by Gold Coast production companies/producers filmed on the Gold Coast	**Films created/made by non-Gold Coast production companies/producers filmed on the Gold Coast**	**Independent Gold Coast feature films filmed at Village Roadshow Studios**	**Films created/made by Gold Coast production companies/producers filmed outside the Gold Coast**
2019	3	6	0	1
2018	3	0	0	0
2017	2	2	0	1
2016	1	1	0	0
2015	1	0	2	1
2014	1	1	0	1
2013	1	1	2	0
2012	0	3	1	0
2011	1	2	0	1
2010	3	2	0	0
2009	1	0	2	0
TOTAL	**17**	**18**	**7**	**5**

*Counts only include films listed as completed.

Core content created by Gold Coast screen creators is a two-speed industry with two distinct tiers of production activity: **1) screen production that is part of the formal screen industry and is supported largely by public funding; and 2) 'indie' self-funded or privately funded 'guerrilla' screen production.**

- **Tier 1: Formal screen production** accounts for the production activities of both emerging and experienced screen content creators who have professional credits and are part of the broader formal and professional film and television industry. The small group of producers involved in the formal screen industry located on the Gold Coast are financing and making features films in and outside the region, and where possible at the studios. Projects are generally supported by public funding, and producers/directors/writers typically apply for, or work towards applying for, public funding for a project's development and production.
- **Tier 2: Indie production** has surged strongly in the last 10 years and accounts for a large portion of the growth in independent production. Indie projects are generally self-funded and/or privately funded: the principal filmmakers often invest in their own films, supplemented by finance raised from friends, family, cast/crew members and other private investors. Production is often, though not always, 'guerrilla' filmmaking: labour is generally voluntary or paid on a deferred basis and in some cases amateur-professional production.

Commercial corporate production is its own industry subsector that produces short-from screen content as commercial services for a broad range of sectors of the economy, from advertising and education to the accommodation and health industries. Although primarily a separate subsector, indie filmmakers often self-fund projects using money they earn from commercial video work.

The Gold Coast film and television workforce is growing faster than the rest of the city's workforce and has a significantly larger proportion of support workers than specialist

creatives. At the time of the 2016 Australian Bureau of Statistics Census, there were **1,274 people working within the Gold Coast film and television industry.**[1] This includes:

- **162 film and television 'Specialist Creatives'.**
- **260 'Other Creative Specialists'.**
- **856 people were employed as 'Support Workers'**, which is **more than twice the number of 422 'Specialist Creatives' and 'Other Creative Specialists'.**
- According to 2011 and 2016 ABS data, **the Gold Coast's film and television workforce is growing at a slightly faster rate than the overall employment rate for the region – 5.3% compared with 5%.**

The film and television industry has a significant presence in the Gold Coast economy. There are a higher proportion of film and television workers as a percentage of the overall workforce in the Gold Coast than any other capital city in Australia with the exception of Sydney.

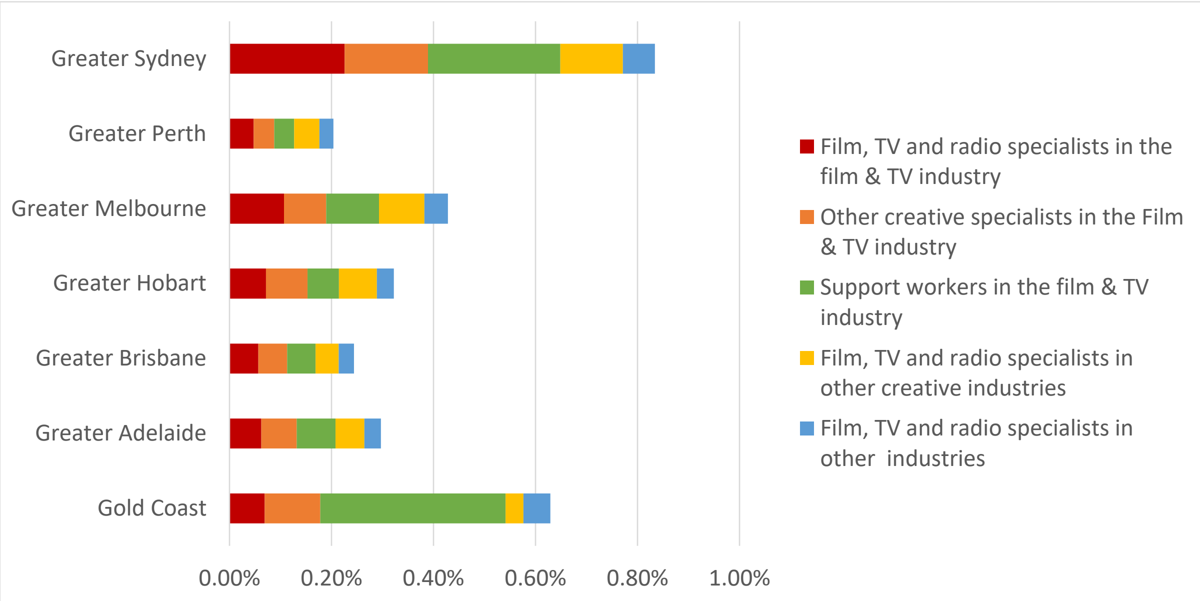
- Employment intensity for Film, Television and Radio Specialists employed in the film and television industry on the Gold Coast at 0.07% of total employment is the same as the intensity for Greater Hobart (0.07%) and slightly higher than all other greater capital city regions except Greater Melbourne (0.11%) and Greater Sydney (0.23%), which are home to a large portion of Australia's national screen industry.
- When the number of people employed in 'Other creative specialists in the Film & TV industry' is considered, a category that captures actors, make-up artists, musicians, sound technicians and camera operators, the Gold Coast's employment intensity of 0.11% is higher than Greater Perth (0.04%), Greater Brisbane (0.06%), Greater Adelaide (0.07%), Greater Hobart (0.08%), and Greater Melbourne (0.08%), but less than Greater Sydney (0.16%).
- In line with the relatively high numbers of Support Workers in the film and television industry on the Gold Coast, its intensity measure at 0.36% is higher than in all the greater capital city regions. **This indicates that the Gold Coast film and television**

[1] This figure does not include embedded creatives.

industry has a very large, and a nationally significant, number of people employed in support roles.

- The high creative intensity of support workers can be attributed to three factors: 1) the large number of support workers who provide services for the Village Roadshow Studios; 2) the workforce of regional television stations in the LGA; and 3) the presence of a handful of large commercial corporate companies in the Gold Coast.
- Overall, the Gold Coast's total trident employment intensity of 0.63% is higher than all greater capital city regions except for Greater Sydney. **This is a highly significant finding indicating that the Gold Coast has one of the most concentrated film and television workforces as a percentage of the total workforce in the country, behind only Sydney.**

Screen employment intensity, Gold Coast compared with greater capital city areas, 2016



In the last five years, there has been strong growth in the number of sole traders entering the industry, as well as steady growth in the number of companies registered for GST (companies with a turnover of over $75,000).

- The total number of active ABNs in the film and television industry grew from 608 in 2015 to 921 in 2019. 'Motion Picture and Video Production' represents by far the large proportion of companies and has experienced the most significant growth.
- The Gold Coast experienced a growth rate of 4.8 % between 2015 and 2019 for companies with an annual turnover of over $75, 000.
- **The Gold Coast experienced a growth rate of 11.6% between 2015 and 2019 for companies without GST registration. This indicates a large increase in the number of small-scale or freelance film and television companies in the last five years.**
- Growth in the number of active ABNs without GST registration in 'Post-production Services and Other Motion Picture and Video Activities' in the Gold Coast has almost doubled between 2015 and 2019. This suggests strong growth in the number of freelancers or sole traders providing editing, post-production or visual effects in the Gold Coast during this time.

Gold Coast Film and TV businesses by GST registration status

	2015	2016	2017	2018	2019
Active ABNs with GST registrations	283	285	300	333	358
Active ABNs with no GST registration	325	346	403	490	563

At the time of the research, an online environmental scan identified 79 commercial corporate production companies, 36 core screen content production companies, and a significant cluster of 32 wedding videographers on the Gold Coast.

- Three survey respondents owned and managed medium-sized production companies that employ between 21 and 199 people. Companies operating at this size are mostly likely commercial corporate production companies.
- Several commercial corporate producers running successful corporate video companies are in the process of transitioning into producing core screen content.

- Gold Coast independent screen content creators are to an extent entrepreneurial. Several companies supplement their main production offerings with diverse business services such as studio, equipment and costume hire, training and workshops.
- The local economy is by far the most important market for Gold Coast producers and production companies, followed by interstate and international markets. Well over a third, or 42.4%, of survey responses indicated that Gold Coast businesses or clients were their primary markets, 19.3% indicated interstate clients, 18.3% indicated international clients, and 15.3% of responses indicated Brisbane clients/businesses.

Taking into consideration both industry experience based on total number of screen credits and the number of years worked in the industry, a large portion of Gold Coast producers, content creators and owners of screen content companies are highly experienced industry practitioners.

- From the analysis of screen industry directories, there are 93 producers, 82 directors, 45 writers, 60 camera operators, 24 editors, 33 art department specialists and 3 post-production specialists living and working on the Gold Coast .The number of producers and directors includes a large portion of indie producers and directors.
- Almost 60% of the survey's sample size have worked for more than 11 years, with 18% with 11 to 15 years' experience, 20% with 15 to 25 years' experience, and 19% of respondents with more than 25 years' experience.
- When the age of respondents and the number of years respondents have worked in the industry are considered together, almost 50% of the respondent sample size is over the age of 40 and highly experienced.
- From the 100-person survey respondent sample size, 73% were male and 26% were female. The low percentage of females in above-the-line roles in the Gold Coast screen industry reflects a gender imbalance in the Australian screen industry more generally.
- The Village Roadshow Studios is critical to maintaining a large skilled workforce of crew and technicians in the city. Increasingly, however, the growth in low-budget independent production means that many of these technicians are also working on home-grown production in between their studio work.

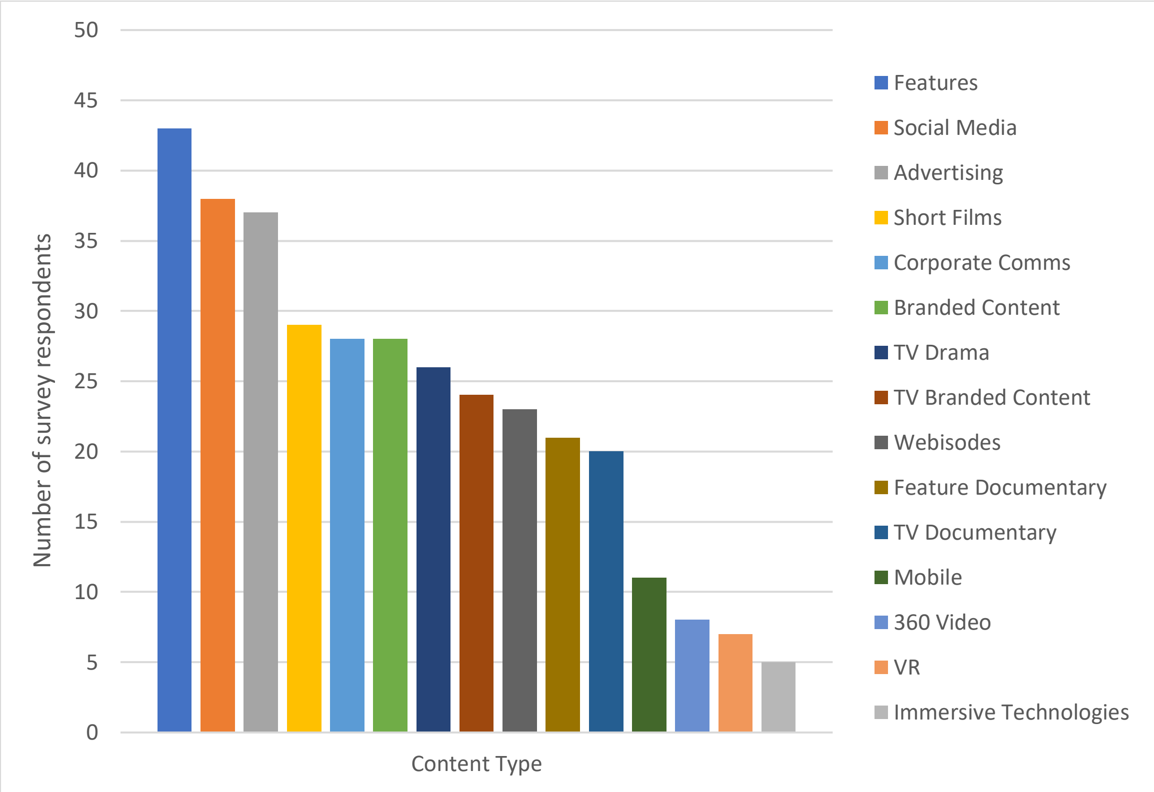
Profile: The typical Gold Coast above-the-line key creative

A typical Gold Coast screen practitioner is a male producer, 35–50 years old, with a significant number of screen production credits (10+) who lives and works on the Gold Coast. They entered the screen industry by making their own films and getting hands-on experience, rather than university training. This person most likely makes screen content independently of the Village Roadshow Studios and owns and runs their own business as a sole trader. Most of their work and income comes from Gold Coast businesses and clients. The primary formats they create are feature film production, followed closely by YouTube, Instagram and Facebook content and advertising content. They are most likely employed full-time in this work, but if they have another job inside the screen industry, it will be a crew role on other local independent productions outside the Village Roadshow Studios. If they have a job outside the screen industry, it will be on a casual basis. The average Gold Coast content creator will be earning less than $100, 000 per annum from their business.

When a project is in development, a Gold Coast content creator will talk to their industry peers, clients or distributor/network to develop their content, rather than screen agencies. Most Gold Coast screen practitioners are self-funded. They are aware of the City of Gold Coast Council, Screen Queensland and Screen Australia funding, but are highly unlikely to have received government financial support for their projects.
Gold Coast content creators see their main challenge as a lack of opportunities for small independent production companies, although they are generally positive about the outlook for their business over the next five years. They see themselves remaining in the industry, doing better than now in five years' time. They are planning to produce content specifically for YouTube, Instagram or Facebook in the near future, but are not planning to produce VR or AR content, largely due to a lack of technological expertise and skills required to make this content. This person will live and work on the Gold Coast. The lifestyle and access to a diverse number of world-class filming locations are the main reasons they choose to work in the city.

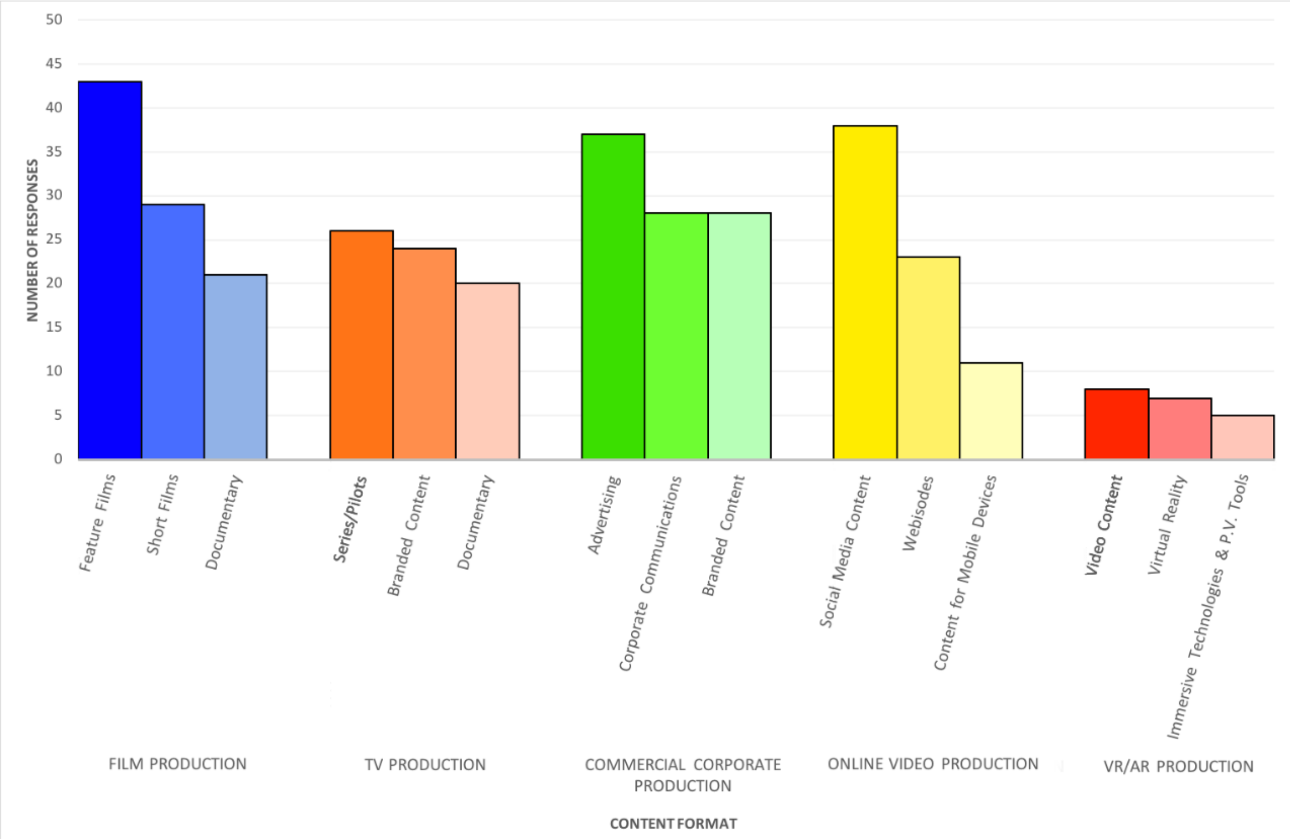
The most common content formats currently produced by Gold Coast independent screen content creators are feature films, social media and advertising content:

Gold Coast Independent Content Production Formats



Another way to conceptualise the key formats produced by Gold Coast independent screen content creators is by grouping formats by key content types; namely, film, television, commercial corporate video, online video and VR/AR production (see the Figure 5 below). For film, the most popular formats are features and short films; for television, the most popular are television series/pilots, branded content and documentaries; and for commercial corporate production, the most popular formats are advertising and corporate communication content.

Figure 1: Content formats by content type



Barriers, weaknesses and recommendations

While local independent screen production in the Gold Coast has experienced notable growth in the last 10 years, much of the indie production occurring in the industry is precarious, volatile and vulnerable. Three major barriers facing the industry are:

- A lack of established producers involved in the formal screen industry and large production companies with significant and ongoing slates of core screen content.
- A need for more professionalisation of business and financing practices in indie production.
- Weak industry networks.

Other barriers include:

- **The lack of post-production facility in the Gold Coast**. A dedicated post-production facility is extremely expensive to set up and run. Consequently, the size of the industry is unlikely to sustain such a facility at this point in time.
- While survey participants were generally positive about the role council is already playing in supporting the independent screen production sector, there is **confusion around location permits for filming and zoning regulations.** Numerous survey participants and interviewees wanted clearer communication from council around the regulations for permits.
- There is a **low awareness of the council's funding initiatives** for screen production among local content creators which presents an important opportunity for the City of the Gold Coast.

Key recommendations are:

- Establish a producer development and mentorship program.
- Develop a mid-career mentorship program designed to transition proven commercial corporate producers into core screen content production.
- Introduce a targeted mentorship program to increase the number of highly skilled above-the-line creatives and increase professionalisation in aspect of the industry.
- Lower the Council's film attraction $1.5 million production threshold to support local low-budget (and 'indie') production.