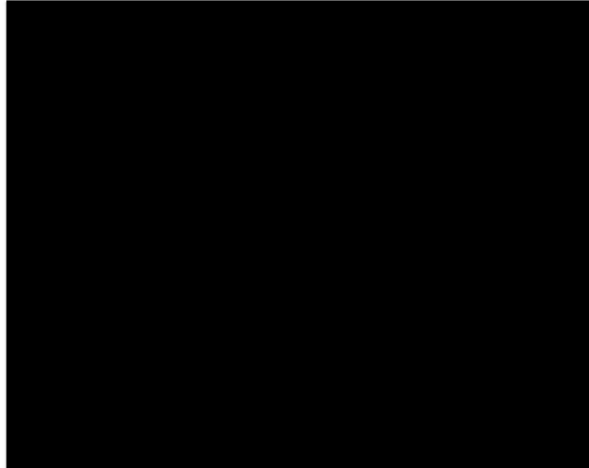
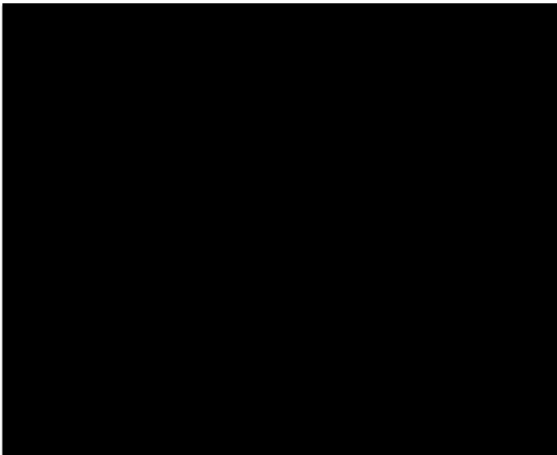
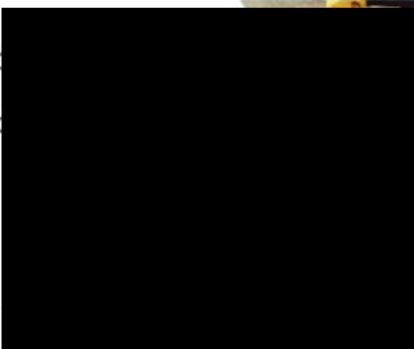


National Cultural Policy submission

24 May 2026



anzsa.film



ABOUT ANZSA

ANZSA represents the film and television content and distribution industry in Australia and New Zealand. Its core mission is to advance the business and art of filmmaking, increasing its enjoyment around the world and to support, protect and promote the safe and legal consumption of movie and TV content across all services. The ANZSA-represented companies are: Motion Picture Association; Amazon Studios LLC; Walt Disney Studios Motion Pictures; Netflix, Inc.; Paramount Pictures; Sony Pictures Releasing International Corporation; Universal International Films; Inc.; and Warner Bros. Pictures International, a division of Warner Bros. Entertainment Inc.

Our member companies produce and distribute a wide range of film and television content in Australia in cinemas, home entertainment, television and VOD services, and our members are committed to supporting the growth of the Australian screen industry.

INTRODUCTION

ANZSA appreciates the opportunity to participate in the National Cultural Policy ('**NCP**') consultation and provide our comments to the Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts ('**the Department**').

The Australian Screen Industry has gone from strength to strength in recent years as good policy, market opportunity and fierce competition between new entrants combined to increase investment in films and TV series.

The Screen Australia Drama Report tells the story; in 2024/25 total investment reached \$2.7 billion, 42% up from 2020/21. The results for local Australian stories (just in excess of \$1 billion) and international films and TV series filmed here (\$1.6 billion) were equally strong – both were all-time records.¹

For local TV series budgets for SVOD shows continued to increase, now averaging \$5.1 million per hour. This means the gap in funding between shows made in the United Kingdom and Australia continues to narrow, increasing the likelihood that Australian shows can really compete with those from around the world.

INCENTIVES ARE THE DRIVERS OF INVESTMENT

Whilst it feels a little off-putting to talk about dollars in a cultural inquiry, it does reflect the reality of the screen sector. Making films and TV series is art, but it is amongst the most expensive art forms one can choose to be involved in. These programs bring teams of talented individuals both in front and behind the camera together, ranging from a hundred or so on smaller productions to 3000+ on films such as *Furiosa*. These productions call on specialist skills from each and every art form from writers to create the screenplays, and composers and musicians, costume designer, artists to create the artworks and production designs to the technical wizards creating VFX and digital

¹ <https://www.screenaustralia.gov.au/insights-and-trends/industry-reports/drama-report/>

worlds. But it is not only workers from the arts; carpenters, electricians, hair stylists, make-up artists, caterers and drivers are all employed through these productions as are a great number of businesses from accommodation providers to a broad range of suppliers of goods and services ensuring that the benefits ripple wide in society. See the example of *Apples Never Fall*,² a show filmed on the Gold Coast which created work opportunities for 1,100 people engaged directly by the production, with goods and services provided by 1,100 local businesses spread across most States.

That means we are a creative industry, and the availability of Government incentives reduces the share of the investment required that needs to be recouped from the attention from audiences either monetised via an SVOD subscription, a cinema ticket or home entertainment purchase, or monetised via advertising surrounding the program via broadcasting and now also increasingly via SVOD ad-supported tiers.

It is for that reason we applaud Minister Burke and the Labor Government's initiative to legislate an increase in the Location Offset to 30% in NCP1. That decision builds on an increase in the Producer Offset for TV series which was increased to 30% in 2021, and these changes combined have created work opportunities for tens of thousands of people. Now we see State Governments contributing to increasing access to dedicated screen infrastructure (mostly coming from *Disney Studios* in Sydney, *Docklands Studios* in Melbourne and *Village Roadshow Studios* on the Gold Coast). In recent years we have seen that the certainty and stability of these Offsets has enabled the Queensland Government to build and operate Screen Queensland Studios³ with facilities in Brisbane and Cairns, the WA Government to back the recently opened Perth Film Studios⁴ and it has encouraged the NSW Government to commence an Expressions of Interest for proposals to build a second major screen production facility in Sydney, which it plans to support with a \$100 million investment.⁵

STABLE, PREDICTABLE AND COMPETITIVE

Incentives are now offered in more than 100 countries, states or provinces around the world.⁶ There is one common characteristic amongst those that are most successful; there is dedicated screen infrastructure, skilled cast and crews, a stable political environment and a stable, predictable and competitive incentive.

This stability is particularly relevant given how the screen industry works. If a movie or a TV series is successful, it can lead to sequels or subsequent series. Our members prefer taking the most promising commercial opportunities to stable, competitive countries; if there is confidence that the incentive scheme will continue to be competitive and attractive into the future, it means that key local cast and crew can be hired again and sets can be utilised again, creating stability and efficiency.

² https://anzsa.film/wp-content/uploads/2025/05/OE_ApplesNeverFall_Digital.pdf

³ <https://www.screenqueenslandstudios.com.au>

⁴ <https://perthfilmstudios.com/>

⁵ <https://buy.nsw.gov.au/prcOpportunity/C7291720-6720-4C1F-A5B56C079AF28D32>

⁶ https://anzsa.film/wp-content/uploads/2025/05/OE_ApplesNeverFall_Digital.pdf

It also gives investors the confidence to invest; the recoupment period to build sound stages or other capital investments in equipment, technology and R&D requires the certainty that policy settings won't be tinkered with frequently and that a consistent flow of investment is highly likely.

NO NEED FOR MAJOR STRUCTURAL REFORMS

The good news is that the current system works well as evidenced by the investment numbers reported by Screen Australia and the new investments made to build dedicated screen infrastructure. Whilst there may be calls for further smaller changes from some parts of the sector, ANZSA understands that the Government is operating in a financially constrained environment and is not seeking further changes at this time.

ANZSA and its members thank the Government for the continued support for the Screen Industry – particularly via the Producer, Location and PDV Offsets which we consider the most important drivers of investment. These Offsets are working, they are internationally competitive, and as such we urge the Government to ensure that the systems remains stable and predictable for the long-term health of the Australian screen industry.

Paul Muller
Chief Executive Officer