Movie Mutuals

Public submission to the Consultation on a New National Cultural Policy
May 2026

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Renewal: the missing act of Revive

Why Australian screen policy must support the next generation of Australian screen storytellers

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Opening statement

Movie Mutuals welcomes the opportunity to contribute to the consultation on a new National Cultural Policy. This public submission should be read alongside the following attachments:

- **Attachment 1** is our analysis of the SVOD/Streaming Bill and parliamentary debate,
- **Attachment 2** is the interim results of the Who Gets a Break? survey, and
- **Attachment 3** is the economic modelling of emerging screen contribution.

Movie Mutuals is a Melbourne-based community of practice for filmmakers, actors and other screen practitioners. After a meeting with the Office of the Minister for the Arts in late 2024, we agreed to conduct a survey of our members to better understand the pathways, barriers, costs and career experiences of emerging screen practitioners. We also asked survey participants how successful they believed the government was in achieving the aims of Revive which we report here as the basis of our submission to assist government in its monitoring and evaluation of the National Cultural Policy.

The Who gets a break? survey was developed because one of the recurring problems in this field is that emerging practitioners are often discussed in principle but rarely counted in practice. Government, agencies and industry bodies frequently refer to new talent, future storytellers and career pathways, but there is limited public evidence about who is trying to enter the screen sector, what they have already invested, what support they have received, where they are being blocked, and how long they can afford to continue.

The survey indicates that emerging practitioners are not one age, pathway or type of practitioner. Around half carry student debt from film school. Some come from adjacent fields. Some are returning after years away from the industry. Many are building first credits through shorts, pilots, web series, low-budget features, crew work and unpaid collaboration.

What is clear is that the challenge for emerging screen practitioners is not a lack of ambition. It is that many emerging practitioners are trying to build screen careers outside the recognised centre of the publicly funded and market-endorsed screen system that is closed to most of them. The irony is that many of those now inside that centre built their experience during a period when public screen architecture was more open to new and unproven talent. Today's emerging practitioners are often asked to arrive at the gates with the evidence, experience and relationships that earlier public infrastructure helped others build.

Revive promises "a place for every story". We argue that promise cannot be fully realised by a screen system that only becomes accessible once a practitioner already has credits, market attachments, producer relationships and a finance plan. Emerging filmmakers are too often asked to finance their own projects and their own pathway as the price of entry. That does not build a cultural landscape that reflects our diversity, supports creative workers, strengthens the stories we share, or keeps Australian screen relevant and forward-looking. It is a policy of attrition not revival.

Background: how the emerging pipeline was hollowed out

The 2008 establishment of Screen Australia consolidated the Australian Film Commission, Film Finance Corporation Australia and Film Australia into a new national screen agency. Additionally, a tax offset on production expenditure (the Producer Offset), rather than an allowance on the capital cost of the underlying IP, became the principal way screen content would be supported.

Talent renewal was not meant to be carved out of that architecture. In the second reading speech, Arts Minister Peter Garrett described Screen Australia as a key plank in revitalising the industry and expected it to play an important role in promoting the work of emerging filmmakers. The stated ambition was not only to support a commercially sustainable industry, but a highly creative, innovative and diverse one.

The Opposition did not object to the principle of consolidation so much as the risk that the new agency would be underfunded for the task it had been given. Opposition Arts spokesperson Dr Sharman Stone warned that Screen Australia risked being “strangled at birth” without proper resourcing. In hindsight, that warning was not rhetorical overreach. It described the problem that would follow: a national screen agency asked to serve both industry stability and talent renewal, but increasingly pushed by funding pressure, market logic and production finance settings toward the safer, more commercially legible end of the system.

Metro Screen's 2015 report Emerging Visions shows how quickly that shift became visible.[1] Total federal support for the screen industry rose by 91 per cent, from $219.9 million in 2006-07 to $419.1 million in 2013-14, largely driven by the Producer Offset. Over the same period, targeted federal funding for emerging screen practitioners fell by an estimated 68 per cent, from around $11 million under the Australian Film Commission in 2006-07 to $3.5 million under Screen Australia in 2013-14, with projections suggesting it would fall further to around $2 million by 2016-17 after Screen Resource Organisation funding was phased out (an 82 per cent decline on 2006-07 investment). State agency support for emerging practitioners fell from about $7.9 million in 2008-09 to $3.1 million in 2013-14. Combined federal and state expenditure on emerging programs fell 49 per cent between 2008-09 and 2013-14, from $12.93 million to $6.53 million. The policy retreat became explicit in 2017 when Screen Australia Chief Operating Officer Fiona Cameron told a parliamentary inquiry that the agency had “had to get out of the entry-level film market as a result of funding cuts” and was working “at the very top end”. The emerging sector did not disappear. The people in it were pushed outside the public system and asked to carry more of the cost themselves.

The so-called Brandis cuts accelerated the loss of the remaining institutions that had made emerging practice possible. Screen Resource Organisations such as Metro Screen and Open Channel provided practical infrastructure between education and industry: communities of practice, equipment access, internships, mentoring, local development, screening opportunities, micro-production funding and low-cost spaces for filmmakers to make work before the market was ready to recognise them. In 2013, the SROs supported 316 productions, with 90 SRO-funded short films selected for festivals, 3,300 skills-development participants, internships, mentoring, equipment subsidies and industry networking. That was not ancillary activity. It was pathway infrastructure.

The loss of that layer changed the burden of proof. Emerging practitioners were still expected to build teams, test ideas, develop craft, make work, find audiences and prove their capability. They must then convince producers, funders and the marketplace, each with their own agendas and preferences, that their stories are worth backing, that they can attract the elements that make them marketable, playable and viable, and that they can deliver on time and on budget. They are expected to compete against established producers and with at their own personal cost. The system did not stop needing proof that someone was talented and they and their stories were worthy of a place in Australian screen culture. It simply stopped funding enough of the conditions through those without an established track record could generate the proof required of them.

That is why breakout examples should be treated carefully. *Bluey* and *Talk to Me* are often celebrated, rightly so, as evidence of Australia’s new creative talent. But they should not be used as proof that the pathway is healthy and the system works effectively. They show how distinctive Australian work can emerge from the long, underfunded stretch where practitioners develop a voice and try to stay in the game before the formal system takes them seriously. Most do not get that far. They run out of money, confidence, time or access before their work has a chance to mature. We will never know how many ‘*Bluey’s*’ have been lost to Australian culture simply because not enough new voices, new ideas, new talent were given the opportunity to develop.

A policy of revival should not conflate merit with attrition. New talent should not have to pass through a kind of medieval tournament in which those with the resources, connections and stamina to survive repeated exclusion are deemed worthy of support. Cultural policy requires a more enlightened approach: one guided by evidence rather than mythology, recognising that talent develops through practice rather than appearing fully formed, and creating a fairer field in which practitioners without inherited or structural advantages can take creative risks, fail safely, improve and find their audience. Its posture must be that of a friend before it becomes that of a judge, because the new rarely

[1] Metro Screen (2015), Emerging Visions: Career Pathways in the Australian Screen Production Industry,

arrives already proven. Of course, not everyone can become a great artist, but a great artist can come from anywhere. They just need time, feedback, trust, and audiences and institutions willing to risk something in their discovery and defense.

Emerging talent back in frame

In November 2025, the *Communications Legislation Amendment (Australian Content Requirement for SVOD/Streaming) Bill 2025* passed both houses of Parliament. **Attachment 1** documents that during the second reading debate in the House of Representatives several parliamentarians emphasised that:

- Emerging and young creatives are central to Australia's screen future. Speakers repeatedly linked content obligations for streaming services to career pathways for students, early-career practitioners and "young future filmmakers".
- Streaming expenditure quotas are seen as an intergenerational investment. MPs described the legislation as an investment in "the next decade of Australian storytelling", "future icons" and "a new generation of Australian storytellers, actors and filmmakers" rather than simply a preservation of existing practice.
- Education and local development are seen as key entry points for emerging creatives. Several members highlighted schools, TAFE, youth arts organisations and local film festivals as crucial "first rung" platforms for young creatives and future filmmakers.
- Non-commercial, developmental support is explicitly identified as necessary. There is clear recognition that emerging artists cannot be supported purely on commercial criteria, and that without specific support "we won't have an industry".
- Cultural identity and economic impact are tightly linked. MPs positioned emerging storytellers as central both to Australia's cultural sovereignty and to regional and national economic benefits, including jobs, trade and tourism.

The evidence in the attachments and in this submission points to the reality that the SVOD expenditure quotas will mostly benefit the established screen production industry rather than emerging and unproven talent. This reflects a broader problem of system design that has characterised Australian screen policy since 2008, in which emerging practitioners have increasingly been treated as an optional add-on rather than a core policy concern.

Over the last 20 years, Australia has built a screen architecture that supports production activity, business capability, infrastructure, jobs, exports and inward investment. It has not built an equivalent architecture for talent renewal: the stage where new practitioners test ideas, build teams, develop craft, gain credits, find audiences and move toward sustainable creative work. Implicit in current policy settings is the assumption that increasing production activity will automatically create opportunities for new talent. Yet this assumption is rarely monitored, measured or tested. It sits uneasily with the well-established reality of cultural production as a "nobody knows" industry, where opportunities are scarce, resources are limited, and capital tends to flow towards established practitioners, producers and projects that are perceived as less risky. In such an environment, increased production expenditure will rarely translate into meaningful opportunities for new entrants. Since 2008, talent renewal has largely been left to ad hoc initiatives, short-term diversity and equity programs, selective labs, a limited number of internships, tertiary education providers and, most often, the unpaid effort of emerging practitioners themselves.

To address this gap a new cultural framework is needed, one that moves from assessment to progression, from market failure to market creation. For both government and industry, this means moving from rhetoric to action, including a commitment to challenge the underlying assumptions of the current model and rebuild it based on an understanding of the unique needs of the emerging sector. The question is whether the existing screen architecture is culturally, structurally and operationally equipped to rebuild the pathway that has been eroded over the last 20 years.

The government's consultation paper itself suggests why that question needs to be asked. The paper states that "Australia's position in the competitive global environment will influence our ability to retain creative talent and connect with international markets over time." For screen, that sequence should be tested. Australia's creative talent is not simply the product of global competitiveness. It is one of the things that creates it. Talent, voice, authorship, craft, IP and distinctive Australian storytelling are what produce work capable of travelling.

This is the missing story arc of Revive. The beginning is talent development: finding, forming, testing and trusting new Australian screen practitioners. The middle is cultural and industrial strength: distinctive Australian stories, skilled creative teams, resilient businesses and work that can travel. The end is retention and international connection: a screen sector strong enough to keep talent here and confident enough to meet the world on its own terms. Talent is not the reward for a competitive screen industry. It is how a competitive screen industry is built.

As of March 2026, 75 of the 85 actions in Revive have been delivered. For the screen industry this has included the Digital Games Tax Offset, Australian content expenditure requirements for streaming services, and an increase in the Location Offset to 30 per cent. The government is now generously asking what next?

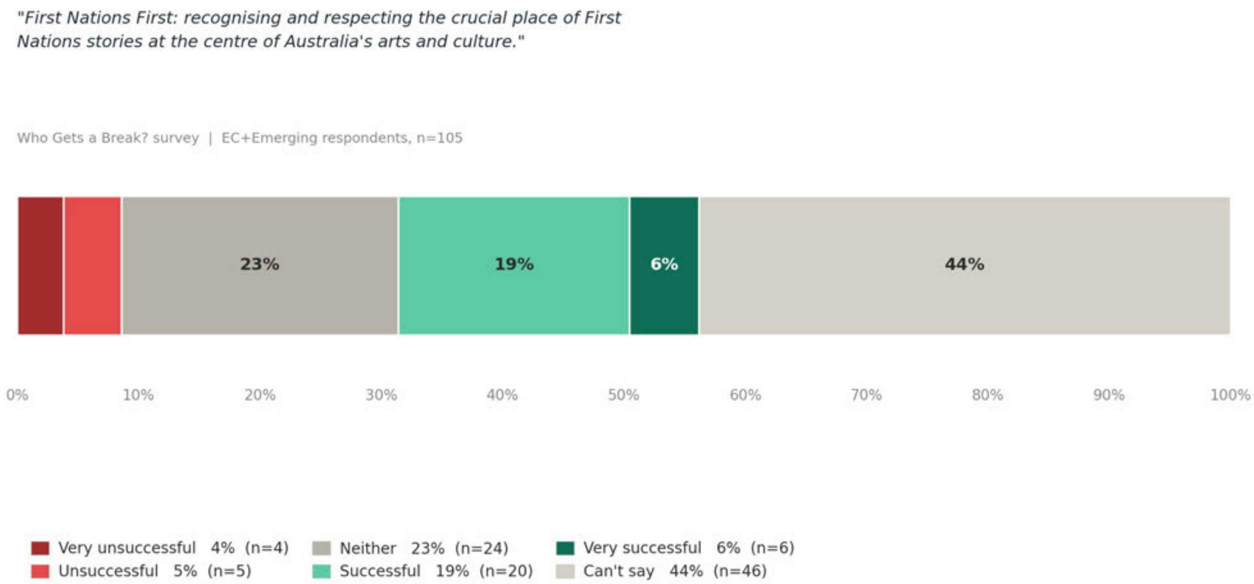
For Movie Mutual members the answer is obvious: **renewal.**

Australian screen policy has been too focused on generating production spend. It now needs to become serious about renewing the talent base that builds cultural meaning, future IP and long-term national value. Screen Australia cannot be expected to deliver a renewal function it has not been clearly funded or directed to perform. The Producer Offset cannot enable new works by new screen authors that do not have the financial means or market connections to meet the expenditure threshold. There is no architecture for the crucial space between learning and earning. Without renewal, Australian screen will struggle to do what Revive asks of Australian culture: help us see ourselves more clearly, learn about each other, and allow the world to know us better.

Our submission offers an insight into how emerging screen practitioners measure Revive's effectiveness and builds a case for why new talent needs to be central to a New National Cultural policy.

Pillar 1 - First Nations First

Recognising and respecting the crucial place of First Nations stories at the centre of Australia's arts and culture.



First Nations First was rated Successful or Very Successful by 25 per cent of emerging respondents, the highest success rating of any Revive aim tested. More strikingly, 44 per cent of respondents said they could not say, also the highest "Can't say" rate for any Revive aim by a significant margin. We do not read this as disengagement but as appropriate humility: respondents recognising that they lacked the lived experience, cultural authority or knowledge needed to judge First Nations policy with confidence.

Only two respondents to the Who Gets a Break? survey identified as First Nations practitioners. While not enough to speak more generally to the experience of emerging First Nations filmmakers, the responses nevertheless echoed aspects of the wider survey: difficulty accessing funding, unclear pathways, limited practical support, and a gap between formal training, creative ambition and sustained progression. One was approaching screen production as a serious personal creative practice but with no expectation of a professional career; the other had invested significantly in formal pathways, with clear professional career aspirations and found the bridge between learning and earning limited.

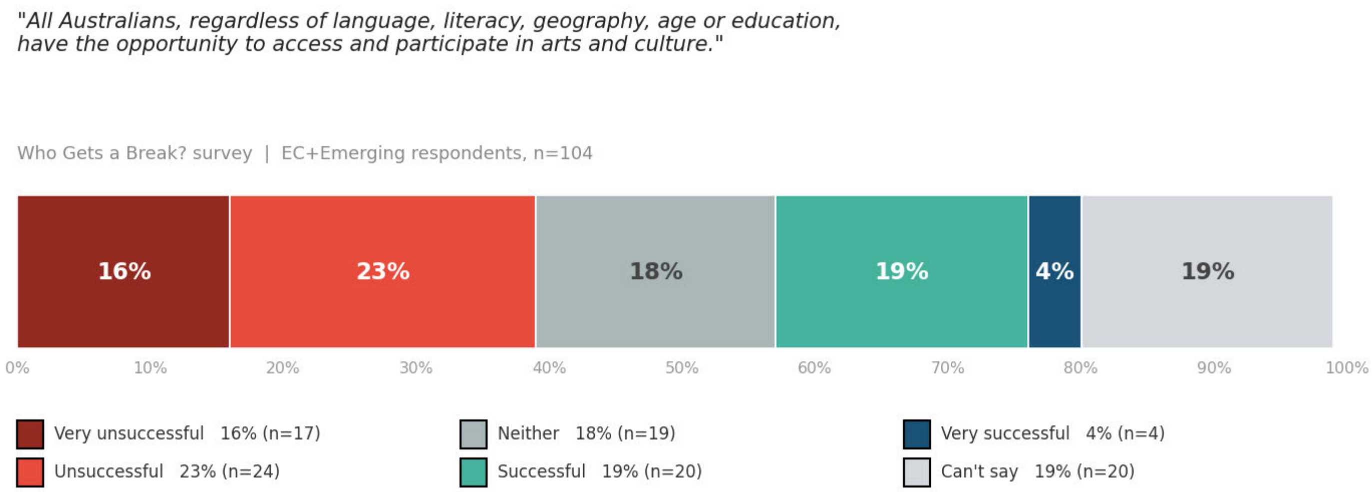
The survey also recorded a separate observation. When respondents were asked to name iconic Australian screen stories from the past 20 years, First Nations works appeared without prompting. *Samson and Delilah* was named by multiple respondents, as were *The Sapphires*, *Rabbit-Proof Fence* and *Mystery Road*, alongside titles such as *Mad Max: Fury Road* and *Bluey*. First Nations storytelling is therefore not peripheral to how the emerging screen community understands Australian screen culture. It recognizes its important and valuable contribution.

We note that this has not occurred by accident. It reflects First Nations creative leadership, community authority, long-term advocacy, and the existence of dedicated structures that recognise First Nation's community's particular needs and supports their self-determination. Screen Australia's First Nations department, with dedicated funding of around $7 million per year for First Nations talent development and career growth, is one example of a policy principle already accepted within the screen system: that particular communities have particular needs, and that those needs are best met through dedicated, purpose-built support rather than general programs that assume a level playing field. The First Nations department exists because screen policy recognised that emerging First Nations practitioners could not be expected to navigate a system built without them in mind. General access is not the same as a pathway.

Just as screen policy has recognised that First Nations practitioners benefit from dedicated structures tailored to their needs, emerging practitioners also require purposeful and sustained support if talent is to be renewed over time.

Pillar 2 - A Place for Every Story

Reflecting the breadth of our stories and the contribution of all Australians as the creators of culture.



When asked whether government had been successful in ensuring that all Australians, regardless of language, literacy, geography, age or education, can access and participate in arts and culture, 39 per cent rated progress as unsuccessful or very unsuccessful, compared with 23 per cent who rated it successful or very successful. The barriers to access and participation respondents describe closely match the barriers Revive says it wants to overcome: education, geography, age, language, financial background, connections and industry fit.

Evidence from the survey, industry reports and labour-market research suggests that entry points into screen production are narrow, informal and heavily mediated by prior credibility and networks. Screen agency funding requires market attachments, finance plans, credits and producer relationships. Work opportunities are rarely advertised and often flow through trusted networks. Unpaid work remains a rite of passage with no guarantees of paid work at the end of it, opening new entrants to risks of exploitation. Over the last two decades, talent renewal has periodically appeared in industry advocacy, but it has rarely been fought for with the same determination as issues affecting established practitioners and businesses. Guilds and industry associations understandably exist to represent their members' interests, and emerging practitioners are often outside those constituencies or lack the collective power to influence priorities. The result is that renewal is acknowledged as important but repeatedly deferred, deprioritised and under-resourced in industry discourse rather than systematically funded and delivered. Against this backdrop, it is unsurprising that survey respondents overwhelmingly identified personal connections and agency agendas as major barriers to career progression, contributing to a perception that the entire eco-system is structurally weighted towards those already inside it. In that sense, the system appears closed to most emerging practitioners.

This finding also reflects disillusionment with the return on career investment promised by parts of the system. Australia has a tertiary education pipeline and a taxpayer-funded screen system, but many emerging practitioners experience neither as a reliable bridge into screen work. Movie Mutuals estimates that there are conservatively around 26,000 emerging practitioners actively pursuing a career in screen production over any five-year period (see **Attachment 3**). This cohort invests substantial money, time and unpaid labour into screen production activity (both professional and self-led) and, in doing so, makes a significant contribution to Australian society and culture that is not properly acknowledged.

We estimate the annual contribution of the emerging sector to be:

- Approximately $159 million in annual volunteer labour
- Approximately $55.3 million in annual production GDP across cultural formats

- Approximately $149 million in associated education-related GDP by those actively still pursuing a career for 5 years after graduation
- Approximately $387 million in student payments for screen education (either paid as debt or fees) out of $447 million in total. Students are bearing 87% of the total cost of their tertiary screen education and an estimated $326 million in debt (including $273 million in debt carried by the active emerging cohort).

This equates to a conservative estimate of economic contribution of approximately $214 million per year through production activity plus volunteer labour, rising to approximately $363 million when education-related contribution of the active cohort is included.[2] The true figure is likely to be substantially higher when the broader pipeline of people in training, study, unpaid practice and self-funded development is taken into account. In practical terms, aspiring filmmakers are not merely seeking entry to the screen industry. They are already subsidising it, and helping to sustain the education and training markets built around the promise of future participation. The problem is that, for many, there is no funded pathway at the end of that promise.

In the Who Gets a Break? survey, 70 emerging respondents reported making 340 cultural productions across short films, documentaries, web series, low-budget features and television drama pilots, and 386 distribution outcomes including 96 festival screenings. Around half of active emerging producers reported at least one festival outcome, rising to 83 per cent among high-frequency short filmmakers. IMDb lists about 1,500 Australian short film titles per year. Metro Screen (2015), using Screen Australia production tracking data, found about 26 low-budget feature films were made each year by the emerging sector that were not included in national production statistics, and ABS data shows short-form screen content grew 218.7 per cent to $42.2 million between 2015-16 and 2021-22, largely driven by web series, although this would not include expenditure from emerging filmmakers like Movie Mutual members who do not have an ABN.

This activity does not directly translate into a pathway. The industry and Australian public benefits from this labour and risk but recognises it only after someone else has validated it: a festival, a producer, a market, a broadcaster, a foreign streamer or an established screen agency. The short film *All These Creatures* won the Palme d'Or at Cannes while *An Ostrich Told Me the World Is Fake and I Think I Believe It* was nominated for an Academy Award. These works were not funded by a screen agency and show that major cultural outcomes can emerge outside the established government funded system, but even outcomes of this calibre do not automatically translate into sustained career opportunity. Short films, proof-of-concept work, web series, community screenings and online-first work are too often treated as amateur activity until they become useful to the professional system.

Since the formation of Screen Australia and the introduction of the Producer Offset, the cost of talent renewal in screen production has increasingly been privatised. The Job-ready Graduates Package has been the most recent example of that shift. From 2021, government support for many arts students fell from around $35,000 to around $5,000 per student, while students were left carrying debts of up to $51,000 for a three-year degree.

Across the broad media and communications field, including journalism, public relations, advertising, screen production and related disciplines, outstanding HECS debt is likely to sit somewhere around $3 billion. Screen-specific graduates would be a subset of that, probably around $326 million. But after graduation, many practitioners find that the next step is not a bridge into practice. They find debt, unpaid work, opaque networks and a closed door. Hardly any of the student debt repaid to government is re-invested into the next step beyond completion. In that sense, the investment becomes increasingly unproductive for both the graduate and the government. It supports education providers, staff, infrastructure and research, and sits within a broader public funding system that also supports professional Australian productions and large-scale international productions. But many of the people who incur the

[2] These are conservative estimates based on a mid-range assumption of 26,000 active emerging practitioners. Attachment 3 estimates that the true population is likely to fall between 13,000 and 36,000 active emerging practitioners in any given year. On that basis, the annual economic contribution of this cohort ranges from approximately $80 million to $220 million in unpaid volunteer labour and from $27 million to $151 million in production-related GDP. Even at the lower bound, this represents a substantial economic contribution from a workforce that receives little direct policy attention. However, if the relationship identified by Throsby and Hollister (2003), that aspiring practitioners substantially outnumber those employed in the creative workforce, continues to hold, the broader pool of aspiring screen practitioners could plausibly exceed 120,000 individuals.

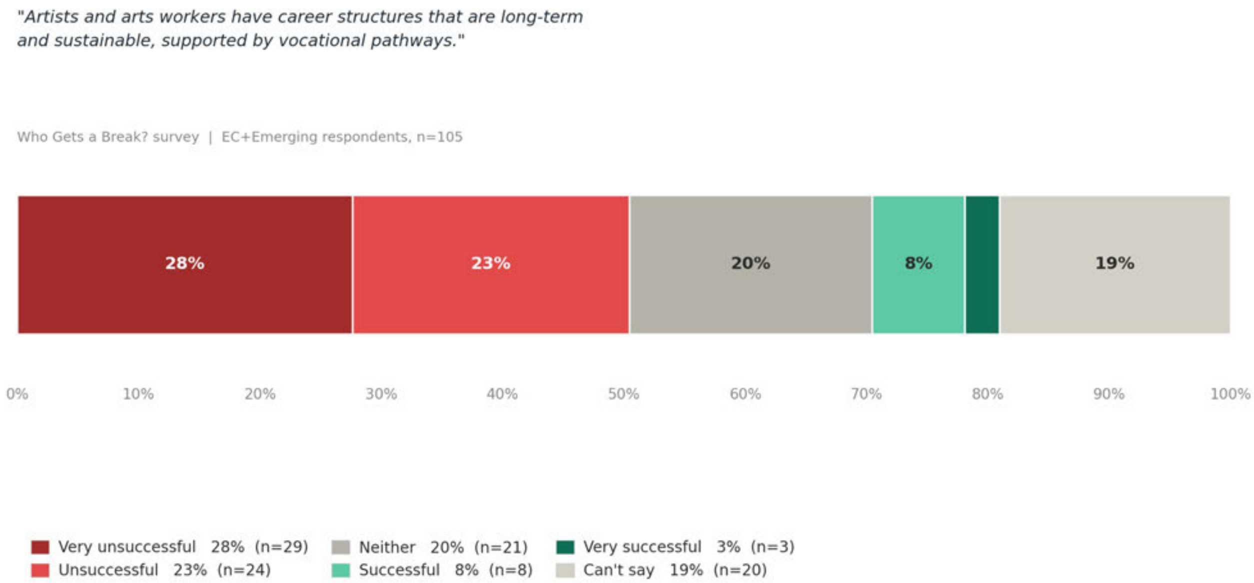
debt and fund that broader professional economic activity will never get to work on those productions, let alone creatively lead them. Why train people in skills they are unlikely to be given a meaningful opportunity to use?

That is not “a place for every story”. It is a policy architecture that allows people to invest in training to fulfill their aspirations to tell screen stories they are unlikely to ever receive market or public support to tell, while still carrying the debt, costs and risk of trying. This is not to say that all emerging filmmakers deserve to be funded but a generative arts and cultural sector should not leave its talent pipeline to whoever can best survive personal debt, unpaid labour and chance. That pipeline is only for the wealthy and well-connected, not the most talented.

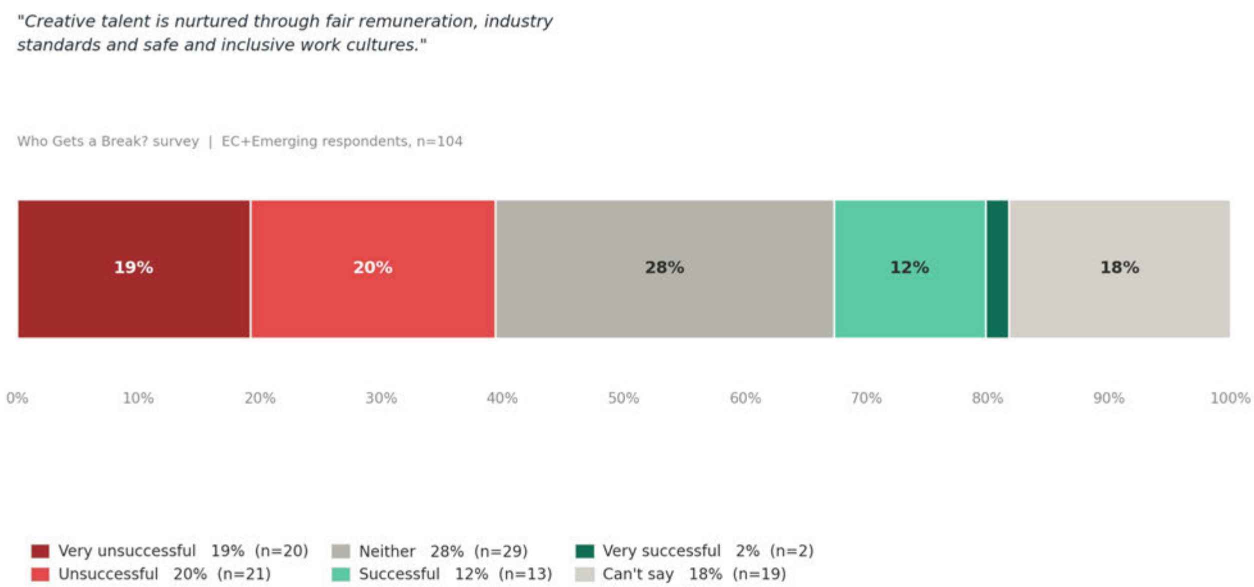
Pillar 3 - Centrality of the Artist

Supporting the artist as worker and celebrating artists as creators.

When Who gets a break? survey respondents were asked to rate two Revive commitments, both produced strongly negative results. On the commitment that artists and arts workers should have long-term, sustainable career structures supported by vocational pathways, only 10 per cent of emerging respondents rated the aim successful or very successful, while 51 per cent rated it unsuccessful or very unsuccessful. This was the most decisively negative result across all Revive aims tested.



On the commitment that creative talent should be nurtured through fair remuneration, industry standards and safe and inclusive work cultures, only 14 per cent rated the aim successful, while 39 per cent rated it unsuccessful or very unsuccessful, 28 per cent rated it neither successful nor unsuccessful, and 18 per cent could not say.



Those who are younger, earlier in their pursuit of a career are more optimistic about work cultures and are more likely to see this pillar of the National Cultural Policy as working. Those with longer exposure to the industry's actual conditions are more likely to judge it as failing. This may suggest direct experience of a system in which participation is possible, but progression is weak. It is worth acknowledging an alternative reading: that older respondents remaining in the emerging cohort are, by definition, those who have not yet broken through, and their pessimism may reflect individual circumstance as much as systemic failure. Both interpretations are possible. But the latter reading depends on the system operating as a genuine talent filter and not one based on connections, nepotism and network-based access as the dominant barriers to progression. This is not the experience of both academics who have studied screen careers[3] nor of the survey results.

These Revive results reflect the practical conditions emerging screen practitioners described. Among early career and emerging respondents, 62.7 per cent had done unpaid voluntary on-set work, both professional and amateur, because it was the only way to gain experience. Paid work on commercially funded Australian productions sat at 14.7 per cent, paid work on internationally funded productions at 8.0 per cent, and paid screen agency attachments at only 3.3 per cent. Only 10.6 per cent earned their main income from film, television or games production, and most of those were casual. Outreach to the established industry largely gets a nil response. These are not people failing to try. They are people trying to enter a system that has no formal entry mechanism for most of its future workforce. Where unpaid work becomes a routine condition of gaining experience, the boundary between learning, volunteering and productive labour becomes blurred. In that environment, exploitative conditions can become normalized.

The entry system is also structurally opaque. Metro Screen found in 2015 that only 14 per cent of producers advertised on-set jobs, while PICA confirms that heads of department tend to hire from known and trusted crew pools. That is rational in fast-moving production environments, where trust and reliability matter, but it means those outside existing networks lack the social proof the system uses to decide who is safe to hire. When small opportunities arise, they are often short, irregular, low-paid or offered at short notice, requiring people to leave or reduce day jobs, rearrange caring responsibilities, travel and absorb income loss. The industry then reads availability as commitment, when availability is often a function of savings, flexible employment and family support. The informal entry process selects for resilience, but resilience is not the same thing as talent.

Current policy settings assume that more production will create more opportunities for new talent. This “trickle-down” assumption needs to be tested. Television provides a clear example. Television and VOD production already benefit from multiple overlapping forms of public and regulatory support: the Producer Offset, broadcast obligations, publicly funded ABC and SBS commissioning, the new SVOD expenditure requirements, state agency investment, and direct production funding from Screen Australia. Yet television is a high-cost, commissioner-led form. Commissioners and producers must manage substantial financial, delivery and audience risk, which understandably encourages reliance on familiar genres and formats, established production companies, experienced creative leaders and trusted crews. Increased production expenditure can therefore circulate through the existing system without creating many first credits or meaningful pathways for emerging writers, directors, creative producers and technical leadership opportunities. As a result, SVOD expenditure obligations may increase production volume without materially improving talent renewal, making it unlikely that the scheme alone will deliver Parliament's stated ambition of supporting the next generation of Australian creators and the next Bluey.

This also raises a question of balance and additionality. Why should scarce discretionary Screen Australia funding continue to close the finance plans of commissioned television productions that already benefit from tax payer support, regulated expenditure and publicly funded broadcast commissioners, while early-stage film, short-form, online work and the practitioners who use those forms to develop voice, craft, teams and audiences receive comparatively little sustained support? The issue is not whether television produces public value. It is whether Screen Australia’s direct

[3] For example: Blair, H. (2001) ‘“You’re only as good as your last job”: The labour process and labour market in the British film industry’, Work, Employment and Society, 15(1), pp. 149–169. DOI: 10.1017/S0950017001000071.; Wing-Fai, L., Gill, R. and Randle, K. (2015) ‘Getting in, getting on, getting out? Women as career scramblers in the UK film and television industries’, The Sociological Review, 63(1_suppl), pp. 50–65. DOI: 10.1111/1467-954X.12240.; Jones, P., Verhoeven, D., Dadlani, A. and Zemaityte, V. (2024) ‘She must be seeing things! Gender disparity in camera department networks’, Social Networks, 76, pp. 120–134. DOI: 10.1016/j.socnet.2023.09.004.; Coate, B., Eltham, B. and Verhoeven, D. (2023) ‘By a long shot: Power, devaluation and discrimination in a toxic cultural workforce’, Australian Journal of Management, 48(4), pp. 732–753.

investment is addressing the area of greatest market failure or adding another layer of support to the part of the screen sector already served by public policy and commercial investment.

The same issue arises with the Location and PDV Offsets which, along with the Producer Offset, cost taxpayers $904.4 million in 2024–25. International productions can provide technical employment, craft exposure and infrastructure use, but they rarely provide Australian practitioners with authorship credits, IP ownership, creative control or cultural value. We note that the workforce gaps the 2026 PICA report has identified are largely administrative and not creative: locations, production accounting, production management. Foreign productions also draw on the same labour, facilities, policy attention and public subsidy that Australian-authored projects depend on. Australian storytellers therefore compete for both Australian production services and government support. Further, they are also competing for audience attention within a screen economy increasingly shaped by internationally financed productions that Australia subsidises. As Burns and Eltham[4] have argued, Australian screen policy has long had to contend with Hollywood's "race to the bottom" dynamics, in which jurisdictions compete to attract mobile production through increasingly generous incentives.

In that race, cultural value becomes reduced to a matter of formal eligibility: whether expenditure occurs in Australia, whether enough Australian personnel are employed, or whether a production can be easily classified as Australian for policy purposes. That is different from supporting culture grounded in Australian people and places, shaped by Australian experiences, communities, histories and creative authorship. Revive's celebration of the increase in the Location Offset from 16.5 per cent to 30 per cent, almost doubling the amount of subsidy available to foreign cultural products that shoot or post-produce in Australia, is a clear example of this tension. It is difficult to reconcile a cultural policy that subsidises foreign stories and foreign creators at up to 30 per cent of their Australian expenditure federally, with some state governments adding another 10 per cent, while providing almost no production-stage support for new Australian creators telling new Australian stories.

The changing technological environment makes a re-assessment of screen policy more urgent. AI is likely to alter production processes, reduce production costs and displace some forms of labour. Only a small group of emerging filmmakers in the Who Gets a Break? survey were already using, or intending to use, AI in creative production. It was seen as a threat, not an opportunity. Their dominant concerns were job displacement, copyright infringement, loss of trust in screen content and misuse of personal data, all rated as likely by more than 85 per cent of respondents. Several named AI-related job displacement as their single biggest career challenge where education and training pathways that were already uncertain may now lead to fewer entry points than they did five years ago.

Nor can the current system be treated as safe or fair simply because it is culturally valued. The 2025 Pressure Point Report[5] found that 72 per cent of screen workers did not believe screen workplaces were mentally healthy places to work, one in four planned to leave the industry within six months, and 48 per cent had experienced bullying in the past year. The Who Gets a Break? survey did not measure mental health directly, but it describes the same combination of financial precarity, exclusion, lack of feedback and structural invisibility associated with poor outcomes. Thirty-eight per cent agreed that bullying is a problem in the industry, while 37 per cent could not assess it.

Cultural policy therefore needs to reconsider the relationship between production volume, technical employment and creative authorship, especially in an industry on the cusp of major technological disruption. It also needs to consider how it can design structural supports for new talent and reassess the balance of public subsidy for Australian screen stories and foreign screen productions in its assessment of what it means to truly centre and celebrate the Australian artist.

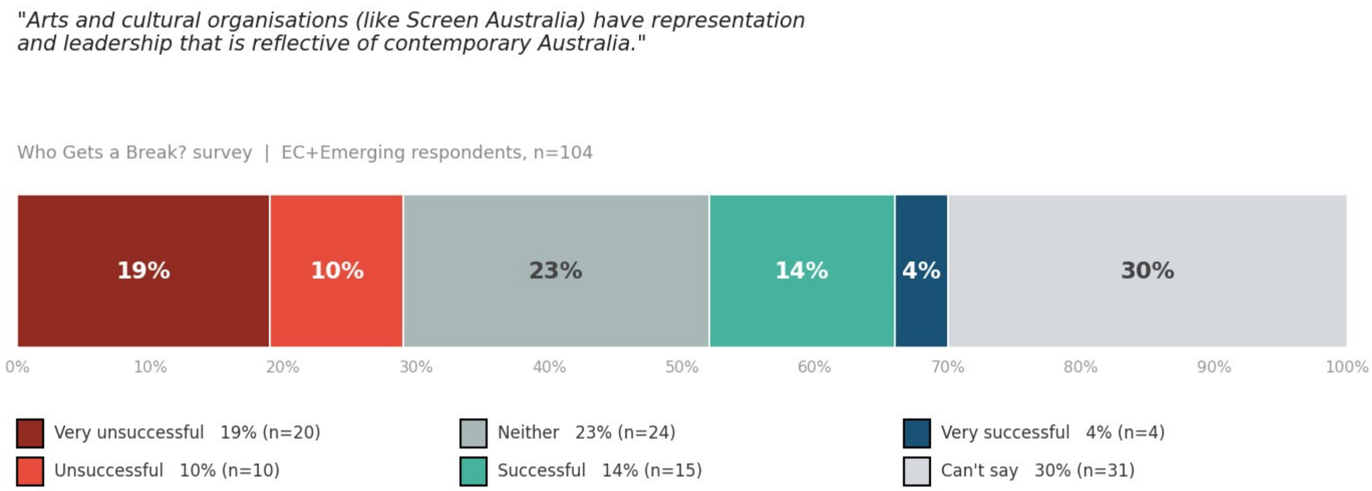
[4] Burns, A. and Eltham, B. (2010) 'Boom and bust in Australian screen policy: 10BA, the Film Finance Corporation and Hollywood's "race to the bottom"', Media International Australia, 136(1), pp. 103–118.

[5] Screen Well and Griffith University (2025). *Pressure Point: Mental Health and Wellbeing in the Australian Screen Industry*. Griffith University, Brisbane. Available at: australianscreencollective.com

Pillar 4 - Strong Cultural Infrastructure

Providing support across the spectrum of institutions which sustain our arts, culture and heritage.

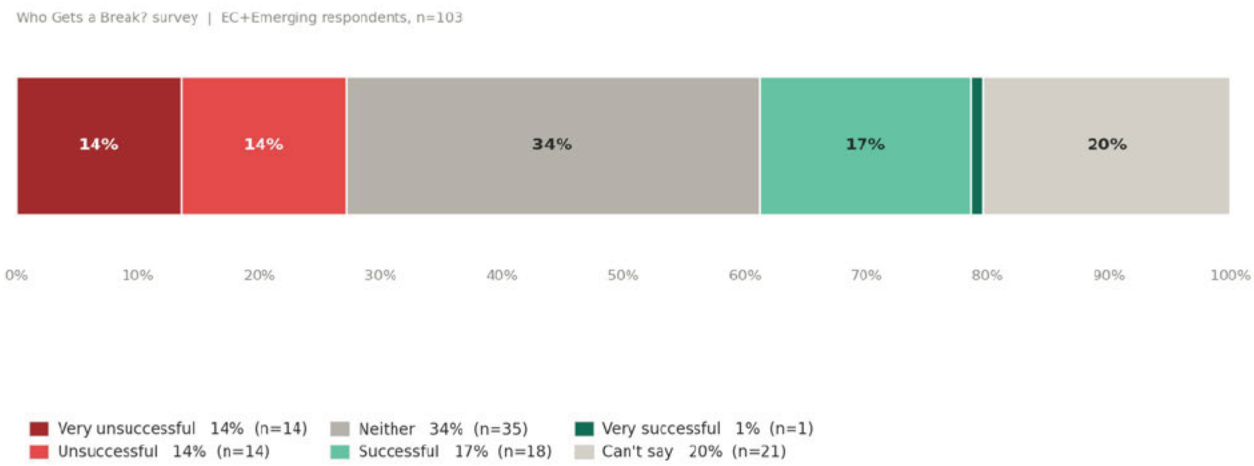
The Who Gets a Break? survey found that respondents were relatively non-committal about whether arts and cultural organisations have representation and leadership that reflects contemporary Australia. The largest group said they could not assess this aim, suggesting many emerging practitioners feel too distant from existing cultural institutions to judge their leadership directly. Even so, 29 per cent considered government unsuccessful or very unsuccessful in achieving it. This could point less to outright rejection than to limited visibility, weak institutional connection and uncertainty about who actually represents emerging practitioners within the screen system.



The Who Gets a Break? survey found that nearly half of emerging respondents (47 per cent) considered Screen Australia appropriate or totally appropriate in its role of deciding what constitutes Australian culture on screens; 40 per cent followed its communications to keep up-to-date on the Australian screen industry. Awareness is real but direct engagement was minimal. Only 12 emerging respondents had indicated they had ever applied to Screen Australia, and 11 of those 12 received nothing. No early career or emerging respondent reported receiving a Screen Australia grant as a source of production funding. The same distance is visible in relation to the Australian Film Television and Radio School (AFTRS). Only six respondents, or 4 per cent of the emerging cohort in the survey, had attended AFTRS specifically, including for short courses. Australia's flagship screen institutions therefore appear in the lives of this cohort mainly as symbols, not as practical pathways into it. No institution clearly owns the post-education, pre-market gap where emerging practitioners most often struggle.

Screen Resource Organisations once provided some of the missing middle: equipment access, communities of practice, local development, internships, mentoring, low-cost production space, screening opportunities and micro-production support. Their disappearance left a hole between education and industry that has not been rebuilt. We deduce that this gap is one of the reasons why few emerging respondents in our survey believed Australian arts and culture is generative.

"Arts and culture are generative (creating new works and supporting emerging artists) and preservative (protecting heritage and conserving cultural memory)."



Screen Australia does not serve emerging screen practitioners well, and not consistently.

What emerging programs the agency has had, have arguably been designed with a high bar: for practitioners who are already legible to the system. These programs reach very few people relative to demand and provide no transparent basis for how merit is fairly assessed for practitioners who do not yet have credits, market attachments or institutional or industry proximity. While promoted as a program for emerging practitioners, they are often used by experienced practitioners in one role to transition or gain experience and exposure to another role (say an experienced writer or actor wanting to transition to directing).

Program	Year	Funded	Applications	Conversion	Estimated unmet demand
Digital Originals (with SBS)	2019	3	More than 220 (published)	1.4%	~217 unfunded
Digital Originals (with SBS)	2025	5	More than 200 (published)	2.5%	~195 unfunded
Hot Shots Plus (short film production funding)	2017	11	162 (published)	6.8%	~151 unfunded
Online Production	2024/25	15	Not published	Unknown	56-1,150+ estimated
Skip Ahead (lifetime)	2014-2025	47	Not published	Unknown	174-3,600+ estimated
Short Film Production	2026 Round 1	4	Not published	Unknown	15-300+ estimated

Screen Australia also funds work experience pathways through internships, placements and skills development. BTL: Next Step helps mid-career below-the-line practitioners' step into senior crew and leadership roles, and the Skills Development Fund supports production companies, game studios and screen businesses to deliver structured training. They are not entry pathways for emerging screen creators.

Program	Stated focus	Practical eligibility floor	Transparency
BTL: Next Step	Mid-career below-the-line crew	Existing professional credits	Industry-facing, not entry-

Program	Stated focus	Practical eligibility floor	Transparency
		required	level
Skills Development Fund	Production companies and screen businesses	Requires host company	Company-facing, not individual
Enterprise People	Career placements	Requires negotiated placement host	Proximity to industry required

Screen Australia is not funded or directed to support emerging practitioners at scale, not even to provide feedback on applications. As the administrator of the Producer Offset, it also has limited engagement with a cohort that generally lacks the capital, budgets and production structures needed to reach the offset threshold. The deeper question is whether Screen Australia is the right vehicle to steward the next generation of screen talent, or whether that role should sit elsewhere, or be deliberately shared. An agency built around assessing experience, track record, market attachment and production readiness cannot simply be assumed to know how to assess potential, voice, creative risk and progression in practitioners who do not yet have those things.

Public broadcasters have shown what a pathway institution can do when it chooses to. The ABC and SBS have previously created low-cost, repeatable spaces where unknown or semi-formed talent could make work, face real editorial pressure, reach audiences and build credits. *D-Generation, Race Around the World, Eat Carpet, Fresh Blood* and *Digital Originals* all show the principle. Emerging talent needs a public place to develop before it is safe enough for the market. *Fresh Blood* and SBS's Talent Escalator still point in that direction, including through attachment roles, but the issue is scale, continuity and policy purpose. Useful, once-in-while initiatives are not the same as a national architecture.

AFTRS and other screen education institutions must also be part of the answer. Only 18 per cent of early career and emerging respondents agreed that film school is necessary for a successful screen career, and nearly half disagreed. Seventy-seven per cent agreed that hands-on experience provides better career value than tuition. Film school completers were much more likely to agree that post-graduate support is insufficient, at 77 per cent compared with 44 per cent. The people most convinced that film school forgets its graduates are the graduates themselves. The issue is whether public investment in education is connected to practice, transition, paid work, credits, regional outreach, rights education and career progression and if a bachelor's degree is the right model. The 2026 PICA report notes that graduates are highly qualified but not industry ready.

Between 2017 and 2021, the screen sector was repeatedly reviewed, consulted and examined. What is missing is a decision and a commitment. Government needs to decide what role emerging screen practitioners are meant to play in Australian cultural policy, how it wants them to engage with public institutions, and which institution or institutions are responsible for the missing middle between study, self-funded practice and professional production.

If that responsibility sits with Screen Australia, its remit, funding, assessment methods and feedback obligations need to reflect potential and progression, not only track record and market attachment. If it sits with AFTRS, the public broadcasters, state agencies, guilds, education providers or a new delivery partnership, that responsibility should be explicit, agreed and funded. What is not sustainable is a system that celebrates the next generation rhetorically while leaving that generation to navigate unpaid work, opaque networks, self-funded production and silence.

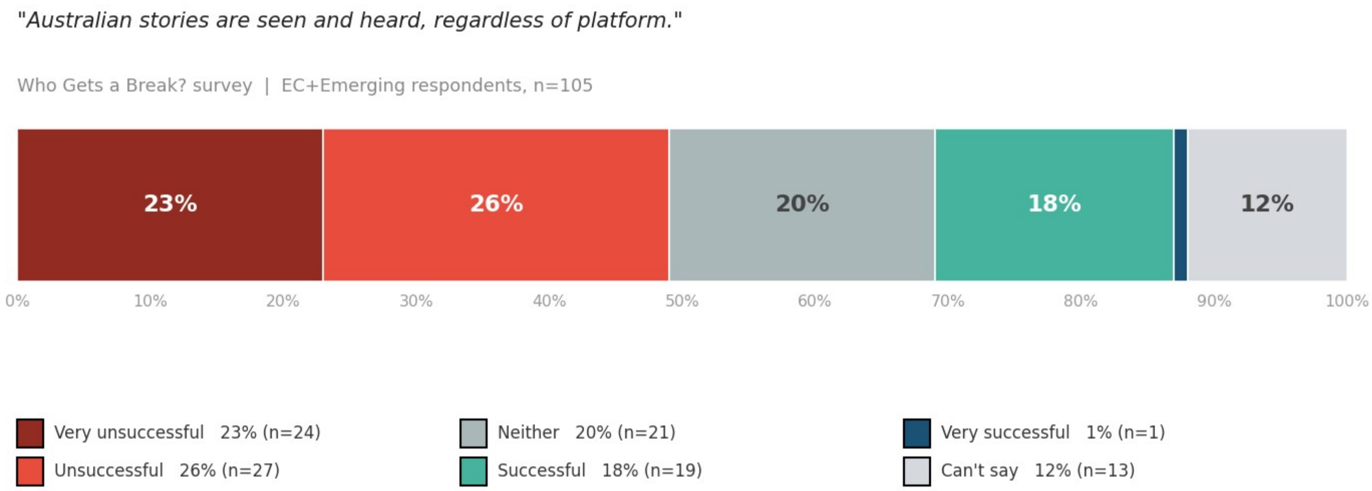
This decision is becoming more urgent because AI is changing the outside faster than the inside and that means opportunities for the industry as whole will be lost. If government wants emerging screen practitioners to be part of Australia's cultural future like it claimed to when it debated the SVOD bill, it needs to design a pathway deliberately. If it does not, it should be honest about that too. It is unfair to keep inviting people to invest unpaid labour, education debt and creative risk into a system that offers only encouragement, rhetoric and symbolic access, but no visible bridge. In designing that pathway, the test needs to be: can a capable emerging practitioner who lacks inherited wealth, industry family or established producer proximity, move from training or self-funded practice into credits, paid work, audiences, rights ownership and sustainable progress? If not, the program or infrastructure is not going to be fit for the renewal task.

We believe a different architecture is needed: one that measures progression rather trying (unsuccessfully) to select excellence in a ‘nobody knows’ world; provides feedback as a matter of course; supports repeat practice; creates paid entry points; connects education to production; includes regional and non-institutional practitioners; teaches rights and business capability; and does not require people to already look credible before they are given a chance to become credible. The central policy question is practical: who should engage with emerging practitioners, for what purpose, and through what mechanism? Until that is answered, emerging practitioners will continue to see Australia’s flagship institutions from a distance, close enough to recognise them, but too far away to represent or lead them.

Pillar 5 - Engaging the Audience

Making sure our stories connect with people at home and abroad.

When the Who Gets a Break? survey asked respondents to rate whether government had been successful in ensuring that Australian stories are seen and heard, regardless of platform, it produced one of the clearest negative results across all Revive aims tested: 19 per cent rated it successful or very successful, while 49 per cent rated it unsuccessful or very unsuccessful. Only 12 per cent said they could not say. Unlike some other Revive aims, respondents appeared confident forming a view. The concern about whether Australian stories are reaching audiences is widely shared across different backgrounds and career stages.



In trying to explain this, we note the survey results point to deeper concerns about the character of Australian screen output, and why Australian screen content may not be engaging Australian audiences. Only 24 per cent of respondents agreed that Australian screen productions demonstrate high levels of creative risk-taking and artistic originality, while 52 per cent disagreed. Only 21 per cent agreed that the quality of Australian content is strong enough to consistently capture and retain large national audiences, while 50 per cent disagreed. Only 27 per cent agreed that Australian screen content effectively captures and reflects the diversity of Australian life, while 43 per cent disagreed. Open-ended responses connected these concerns to risk aversion, narrow commissioning tastes and repeated reliance on familiar genres, names and formats. One respondent wrote that "no one takes creative risks because they won't get funded." Another described funded output as "the same stuff, remakes of 40-year-old stories or tired genres rolled out with the same tired actors." Another said screen agencies favour content with a proven income track record over "artistic integrity and vision."

The current system relies heavily on commercially oriented broadcasters, foreign-owned streaming platforms and distributors to determine which projects are viable, and therefore, in practice, act as gatekeepers to Australian screen culture. Market attachment and commissioning interest may be useful tests of deliverability, but they are not neutral measures of cultural value. They tend to privilege projects that already resemble existing formats, existing audiences and existing commercial assumptions. The emerging cohort in the Who Gets a Break? survey took a different view. Respondents were clear that the Australian public should be the primary gatekeeper and arbiter of Australian screen culture (not just the final one), followed by Australian producers themselves. Cultural policy should be careful about outsourcing cultural judgment to those whose incentives are not the same as the public interest.

Another challenge is that Australian screen stories are being made, but are they being discovered, tested, discussed and carried into public life? Cultural policy should not treat production, marketing and distribution as separate questions. Production without discovery is not audience engagement. A screen work that cannot find an audience cannot build the next career, the next company, the next community of practice or the next body of Australian work. If government wants Australian stories to be seen and heard across changing platforms, it needs to support the conditions in which audiences can actually find them.

For the works of emerging practitioners, the current system often leaves them to create the audience signal themselves, then asks for that signal as proof they are worthy of support. This is circular. If public policy wants stories from more places, it must help those stories reach audiences before they have already been endorsed by the market. Otherwise, discovery becomes another barrier to entry: those with existing networks, money for promotion, festival access, industry contacts or platform literacy are better placed to prove demand, while others remain invisible. Audience development starts early: at community screenings, festivals, social media groups, local cinemas, YouTube releases, pilot nights, proof-of-concept tests and short-form work shared with peers and strangers. They are where new screen language, new communities and new audiences are tested and should be acknowledged and supported. From our own experience, it is disappointing that publicly funded venues such as ACMI charge community screen organisations the same commercial hire rates as well-resourced corporate clients, with no concession for organisations whose purpose is to support emerging Australian screen culture. Public cultural infrastructure should be accessible to the communities it was built to serve.

A discovery framework is needed for both established and emerging screen work. For emerging practitioners, this could include curated national showcases, ABC, SBS and NITV windows for short-form and emerging work, micro-P&A or festival application support, local cinema seasons, links between festivals and communities of practice, accessible online curation, and support for classification and distribution costs that currently fall directly on practitioners. The aim is not to pretend every short film, pilot or web series is ready for prime time. The aim is to build a visible field from which stronger work, stronger teams and future professional projects can emerge.

This is also where rights and ownership matter. Emerging practitioners should not have to trade away IP, moral rights or creative control simply to access a first serious opportunity. Legal support, fair templates, chain-of-title assistance and rights education should be treated as pathway infrastructure, not luxuries or annoyances. If cultural policy wants Australian stories to be seen and heard across changing platforms, it must support not only production, but discovery, audience-building and the rights infrastructure that allows emerging creators to keep building from and protecting the work they make so we don't have to give away the financial rewards of the next *Bluey*. Public policy should not correct market failure after the fact, but help create the conditions in which new markets, audiences and forms of screen culture can emerge.

Conclusion

We recognise this submission is largely a document of challenges, and that it understates the fortunate position the established industry finds itself in, with a government that continues to underwrite a sector that would probably not exist at its current scale without public support. That is partly a reflection of the evidence base. The Who Gets a Break? survey was designed to understand what makes pursuing a screen career difficult, and the structure of this submission follows that logic. The picture it produces is honest but incomplete.

But even with the results of the survey there is much to celebrate. The emerging screen sector is persistent, self-directed and extraordinarily motivated. There is no shortage of aspiration and, in our experience, no shortage of talent. That is good news for government because it does not have to generate that ambition. It already exists, largely without public support and often despite the system rather than because of it.

Some are breaking through. The iconic works respondents named without prompting like *Bluey*, *Talk to Me*, *Samson and Delilah*, and *The Babadook* are evidence that Australian screen culture from new talent can reach the world when given the chance. Respondents cited them because they were inspired by them. Some entered the field because of them. But the fact that the same handful of titles appear again and again is itself a signal. A system producing talent at the rate this survey suggests could and should be generating far more of them.

Taken together, the survey describes a large, motivated, productive and culturally engaged cohort generating real economic and cultural value on its own steam. Government did not have to create this. It is self-seeding. The task now is not to manufacture enthusiasm but to stop wasting it. Creating the conditions for the most promising seeds to bear fruit, rather than allowing the system to default to financial endurance and social proximity. This is what government needs to focus on in the next National Cultural Policy.

This submission identifies problems, frames broad directions but shies away from offering detailed solutions. We believe the best response requires an all-of-industry conversation and we are committed to participating in that process if others are willing. Critically, the emerging sector needs to be leading at the forefront of any design process, not consulted after the fact.

The next National Cultural Policy needs to recognise emerging screen practitioners as central to the renewal of Australian screen culture. They are where new stories, new voices, new teams and new audiences begin. They are already making work, building crews, testing ideas, reaching communities, carrying debt, taking creative risks, contributing unpaid labour and generating cultural value all in isolation. Much of that work will fail. Some will remain local. Some will become the next major Australian screen story that wins the Palme d'Or at Cannes or is nominated for an Academy Award. The system cannot know which in advance. Failure is in itself a pathway to success. That is why cultural policy needs a wider and fairer field of practice, so more work can be made, tested, improved and seen.

Movie Mutuals is not asking government to fund everyone. We are asking government to recognise that market-ready production and talent renewal are different public policy functions. Australia has supported production stability of an established industry more consistently than it has supported the renewal pathways that allow new practitioners to enter, continue and progress. If the next policy is serious about a place for every story, the next step is to build the missing architecture of Revive: practical support that helps new Australian screen storytellers start, keep going, develop their voice, reach audiences and become part of the country's cultural future.

"The world is often unkind to new talent, new creations. The new needs friends."

Anton Ego, food critic (Pixar's *Ratatouille*, written by Brad Bird)

Public policy should be one.

Canberra's promise to the next generation: the new Australian streaming quotas.

"We will look back and say: that was the moment Australia stood up for our cultural sovereignty - when we said our stories matter, our creative talent matters, and our screen sector deserves a strong future."
— Susan Templeman MP (Special Envoy to the Arts)

1. Introduction

The *Communications Legislation Amendment (Australian Content Requirement for SVOD/Streaming) Bill 2025* was passed on 25 November 2025 and has now come into effect. In practical terms, the legislation creates a regulated Australian content expenditure obligation for subscription video-on-demand (SVOD) services operating in Australia.

In other words, major streaming platforms are now required to spend a minimum amount on Australian content.

For Movie Mutual members, this matters for two reasons.

The first is obvious: any policy designed to increase Australian screen production potentially affects jobs, opportunities, and the overall shape of the industry.

The second is less obvious but just as important: during the second reading debate, parliamentarians repeatedly framed the Bill as being about the next generation. The language used in Parliament did not only focus on quotas, compliance, or market settings. It also focused on pathways, future storytellers, creative risk, and the possibility that today's emerging practitioners and their stories could become tomorrow's major Australian screen voices and artefacts.

> *"Whether future icons begin on ABC, Channel 7, Stan or Netflix, this bill means there will be more opportunities for our future icons."*
> **— Anika Wells MP (Minister for Communications and Sport)**

That shift in language is significant.

In 2017, Screen Australia COO Fiona Cameron told a parliamentary inquiry (as reported by IF Magazine): "We have had to get out of the entry-level film market as a result of funding cuts."

In this debate, emerging filmmakers like us were central to the public story being told about why the Bill mattered. Emerging filmmakers were no longer absent from the policy story. They played a major role.

2. Emerging filmmakers back in frame

One of the most notable features of the debate was how often speakers linked the Bill to the future of Australian screen culture and to people at the beginning of their careers. The rhetoric was not narrowly technical. It was generational, aspirational and, at times, openly emotional.

> *"It's not just a creative economy we're building, but a full-circle powerhouse that turns ideas into careers and dreams onto screens."*
> **— Jo Briskey MP**

Taken together, these statements place emerging filmmakers clearly inside the policy narrative. That is new and worth noticing.

> *"…young people… eager to contribute to a global and competitive industry… By increasing Australian commissions, we give these students clearer pathways and opportunities to develop skills close to home."*
> **— David Moncrieff MP**

The debate repeatedly connected increased streaming investment with future careers, future talent pipelines, and future national screen icons. It also repeatedly suggested that policy success should not be measured only in production activity, but in what kind of industry future is built.

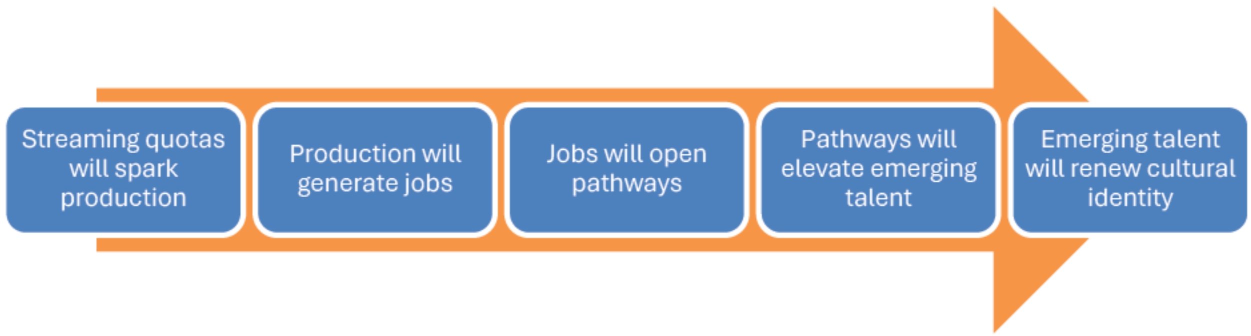
Bluey was a recurring example in the debate and functioned as shorthand for what success can look like when Australian work breaks through globally. That matters because *Bluey* was not just cited as a hit series. It was cited as evidence that policy settings should help create the conditions for the next breakout success. In that sense, *Bluey* was used both as proof of capability and as a symbol of what many MPs believed this Bill could help produce again.

> *"Imagine the next Bluey, perhaps made by a young animator in Moonee Ponds."*
> **— Jo Briskey MP**

3. The Parliamentary promise

> *"There is a place for us to provide support for emerging artists... otherwise, we won't have an industry."*
> **— Peter Khalil MP**

Across the second reading speeches which preceded the vote to pass the Bill, a relatively consistent theory of change can be inferred.



It is not always stated in one place, but the logic appears repeatedly in different forms.

- Regulate streaming services so they spend more on Australian content.
- More spending leads to more Australian commissions and productions.
- More productions create more jobs and more on-set opportunities.
- More opportunities help early-career workers gain skills, credits and industry experience.
- Those experiences then contribute to stronger career pathways and a larger, more sustainable local screen ecosystem.
- Over time, that ecosystem produces new Australian stories, creators and internationally recognised screen properties.

This is an optimistic theory. It links cultural sovereignty, economic activity and intergenerational opportunity in a single story. It also gives the Bill a broader public meaning: not just regulating global streamers but investing in a future Australian screen culture.

> *"The bill supports the next generation of storytellers, filmmakers, editors and animators — the way we support defence, manufacturing, apprenticeships."*
> **— Matt Burnell MP**

Importantly, this theory of change does not only rest on the idea that money enters the system. It rests on the assumption that the benefits of that money will move through the system in a way that supports progression. That is where the parliamentary rhetoric is strongest: it assumes a relationship between production growth and pathway growth.

> *'A stronger pipeline of Australian commissions on streaming platforms means more work for writers, directors, actors and crew. It means more opportunities for post-production houses, costume and set builders, caterers and small businesses. And it means more chances for students in our local schools and TAFEs who dream of a career in film, television or digital production.'*
> **— Renee Coffey MP**

The debate also shows a genuine awareness among some MPs that market logic alone does not necessarily protect Australian stories or emerging creatives. Peter Khalil's comments, in particular, speak directly to that concern.

> *"There is a place for us to provide support for emerging artists, for new art and for new film and television as it emerges. Otherwise, we won't have an industry. It can't just be totally based on the commercial value. Otherwise, we'd just be making Hollywood productions up in Queensland…having Dwayne Johnson run around with his top off and pretend to be in Los Angeles while he's in the Gold Coast is not an Australian story."*
> **— Peter Khalil, MP**

The debate is therefore not simply celebratory; it also contains an implicit recognition that cultural industries require policy support if they are to remain Australian in character and open to renewal.

> *"If we want the next generation of storytellers to thrive, we have to make space for them to start."*
> **— Matt Burnell MP**

At the same time, the Bill itself is primarily an expenditure framework. It is designed to increase investment in Australian content. It does not, in itself, describe a detailed pathway architecture for early-career progression. That distinction is important for understanding both the hope in the debate and the uncertainty that follows from it.

4. The lived experience

Following a meeting with the Office of the Arts in December 2024, we invited Movie Mutual members to tell us what they see are the biggest challenges in getting into the industry or having our stories told. From the stories gathered from that process, the anecdotes shared at the Movie Mutual weekly since we were established in 2022, and from what we can glean from academic and industry literature, it appears there exists a career entry environment that is far less linear than that reflected in the logic put forward in the parliamentary debate.

The common themes are familiar: project-based hiring, reliance on networks, unpaid or underpaid work, long gaps between jobs, a recurring sense of being stuck between demonstrated ability and recognised industry status, and a over reliance on self-funded professional development in the absence of ongoing and accessible pathway supports.

> *"As a composer trying to work my way into the film industry in Australia, I find myself looking at the plethora of creators and the work they are putting in (usually unpaid, or self-financed) and see no funding from a state, federal or even private level."*
> **— Brenton D.C. White, Movie Mutuals member**

The real-world path from aspiration to access is uneven. For most of us, there is no clear ladder. There are periods of momentum, long periods of limbo, and frequent dependence on personal finances, social support, or sheer persistence.

> *"Video Editor for over 8 years now and have recently got more into writing after graduating this year. The first year has been rough as I have been in career limbo… I have been looking for freelance work and so far I have only done a few gigs, paid and unpaid."*
> **— Elijah Manssour, Movie Mutuals member**

Access is not just about the existence of work, but about the structure of opportunity. A production boom driven by streaming quotas can increase total labour demand while still leaving creative authorship, decision-making roles and repeat opportunities concentrated among people who are already inside the system.

> *"All that seems to matter is who you're related to, who you know and if they like you."*
> **— Andrew Gray, Movie Mutuals member**

There's also a second issue: creative risk is often borne privately at the earliest stage. Emerging filmmakers, writers, editors, composers and animators who attend Movie Mutuals meetings and events regularly self-fund development, build portfolios on unpaid work, and sustain practice around other jobs. That means time, money and social support become career variables. In practice, the ability to stay in the game long enough to be noticed can matter as much as talent.

> *"Art is created by people who can devote the time and energy towards it. Inequality pushes people out of creative communities and isolates them from creative opportunities."*
> **— Djoran Kell, Movie Mutuals member**

In this context, the debate language about pathways is still valuable, but the lived experience of our members at least suggests that pathways are not going to be created by increased expenditure by streamers alone. They are shaped by how opportunities are distributed, who gets entrusted with responsibility, and who can afford to keep practicing and knocking on industry doors during the long development years.

5. Creating the next *Bluey*

> *"By ensuring a steady flow of investment into local production, it encourages creative risk taking - the kind that leads to new voices, new genres and new success stories."*
> — ***Matt Burnell MP***

Bluey was one of the most mentioned examples in the debate about the Bill and, in many ways, represents the hope attached to it.

MPs repeatedly invoked *Bluey* as a benchmark for Australian screen success: culturally specific, globally loved and commercially powerful. As a symbol of what Australian storytelling can achieve, that makes sense.

As a pathway example for emerging filmmakers, it deserves a closer look.

Joe Brumm, the creator of *Bluey*, developed the concept independently after years working as an animator in the UK. After returning to Brisbane, with a newborn and an uncertain freelance career, he has described using Australia's then-$4,000 "baby bonus" as a small financial buffer, alongside modest part-time work, to buy time to develop the idea. In his account, that window gave him enough space to "give it a go": to experiment, survive for a while, and keep building toward what eventually became a globally successful series. The project later gained momentum when Brisbane's Ludo Studio came on board and helped develop and pitch it successfully to the ABC.

That story reflects persistence, creative discipline and calculated personal risk. It is also a reminder that breakthrough work often begins **before** formal support arrives. *Bluey* did not emerge because there was a clear, protected, step-by-step pathway for an unknown creator to test ideas without financial pressure. It emerged because an unknown creator took a risk, found a small amount of breathing room, and then connected with the right support at the right time.

This matters because the Bill is primarily an expenditure mechanism. It requires investment in Australian content, but it does not itself determine how that spending will be distributed across project scales, creative risk profiles, or career stages. In practical terms, the same total spend could be concentrated in a smaller number of safer, higher-budget or more derivative projects, or spread across a larger number of projects and development opportunities. Those potentially offer very different pathway outcomes for emerging filmmakers.

Bluey is better understood as an outlier success story that shows what can happen when a strong idea survives long enough to find backing not proof that more investment will generate the "next Bluey" on demand. Like most industries, a lot of innovation in screen production happens at the edges: in low-budget experimentation, unpaid development time, projects that do not yet look "market ready," and work made outside established commissioning circles. For emerging filmmakers, that is often where the biggest creative risk is taken and where the least formal support exists.

> *"We need to see bolder, boundary pushing films getting made that people want to talk about. Sure, that's the riskier path, but playing it safe with uninspired formulaic drama films is the surest way to bleed all your chips away over time, with nothing significant to show for it."*
> — ***Brok Power, Movie Mutuals member***

Screen content is a high-risk business, and much of the business model is not just about taking risk, but about allocating and transferring risk across the production and distribution chain. The logic of risk management and risk transfer in film finance has often been discussed in the academic literature, including R. Phillips' *The Global Export of Risk: finance and the film business (2004)*, which examines the nature of risk and the limits of risk mitigation in film financing arrangements. It's not the most exciting read, but for those producers interested in the business dynamics, it is insightful.

Public mechanisms such as the Producer Offset and Screen Australia investment are, in part, designed to socialise some production risk so Australian work can be made at all. But where risk cannot be absorbed by public funding or larger institutions, it is often pushed downward toward smaller producers, independent creators and early-career practitioners with less leverage, or the potential upside is negotiated away in order to just get a project made.

Bluey provides further insight into this dynamic as a value-capture case study, not just a creative success story. While *Bluey* was created and produced in Australia, the commercial rights to the series were contracted through BBC Studios, meaning a significant share of global revenue is sent offshore. In simple terms: Australia created the work, but a significant share of the income goes to the Brits.

For emerging creatives, the commercial arrangement for *Bluey* illustrates what might be a common reality for emerging creators: take on the early creative and financial risk personally, develop the idea in precarious conditions, and then, if the project begins to show promise, negotiate from a weaker position with more established players. In some cases, that means giving up substantial rights or control to move the project forward. In others, it means remaining in development limbo, with no income and no clear route to market. The emerging creative carries the early uncertainty; the rewards, if they come, are often shared or captured further up the chain.

> *"Another gap is the absence of any requirement for Australian producers to retain their IP. Without their IP they lose the economic and cultural lifeblood of their work."*
> — ***Allegra Spender MP***

For Move Mutual members, *Bluey* is both a beacon and a warning. It shows what is possible when a strong idea is given time to evolve and eventually finds backing. It also shows how much can depend on conditions that are unevenly distributed: time, financial buffer, persistence, influence (just so we're clear, most of us have none – unless you're Kate Winslet's son) and access to the right partners after the creative work has already begun.

As a parliamentary symbol, *Bluey* expresses optimism about what Australian screen policy can make possible. As a pathway example, it points to a harder but important reality: creative success stories are not only about investment at the production stage, but also about whether creators can survive the early stages long enough to make something worth investing in.

6. Conclusion

The passage of the streaming content legislation is a major policy moment for Australian screen. It matters on its own terms because it places Australian stories inside a clearer regulatory framework for global streamers. But it also matters for Movie Mutual members because of the language that surrounded it. In the second reading debate, parliamentarians repeatedly placed emerging filmmakers, students, future storytellers and future screen icons in a starring role.

That is genuinely significant. For a long time, emerging practitioners were often treated as background extras or even not cast at all. At the same time, the gap between parliamentary aspiration and our lived experience remains visible. The debate made strong claims about what increased investment can mean for the next generation but most of us will experience a different and difficult reality: career progression is still shaped by precarity, networks, timing, and unequal capacity to carry financial and creative risk. As many emerging filmmakers like us know first-hand, there is still very limited public support for experimentation, early-stage development, and creative testing, and few formal pathways through those stages.

What hopefully is different now is that the politics has shifted. Emerging filmmakers and career pathways are no longer only an industry-side conversation; they are now part of the parliamentary language around screen policy. That is a meaningful change. It creates a stronger basis for future debate, clearer scrutiny of outcomes, and a more honest conversation about how Australia can not only produce more screen content but sustain the people who will create what comes next.

Parliament has placed the next generation in frame. That is worth acknowledging and it creates a real opportunity for us as 'the next generation' to engage in how this promise is fulfilled.

The Parliamentarians who debated the Bill are listed in the table below.

Name	Electorate	State	Political Party	Parliamentary Email Address
Hon. Justine Elliot	Richmond	NSW	Australian Labor Party (ALP)	[redacted]
Ms Ash Ambihaipahar	Barton	NSW	Australian Labor Party (ALP)	[redacted]
Ms Alison Byrnes	Cunningham	NSW	Australian Labor Party (ALP)	[redacted]
Mr David Moncrieff	Hughes	NSW	Australian Labor Party (ALP)	[redacted]
Ms Allegra Spender	Wentworth	NSW	Independent (IND)	[redacted]
Ms Zali Steggall, OAM	Warringah	NSW	Independent (IND)	[redacted]
Ms Susan Templeman	Macquarie	NSW	Australian Labor Party (ALP)	[redacted]
Hon. Anika Wells	Lilley	Qld	Australian Labor Party (ALP)	[redacted]
Ms Julie-Ann Campbell	Moreton	Qld	Australian Labor Party (ALP)	[redacted]
Ms Renee Coffey	Griffith	Qld	Australian Labor Party (ALP)	[redacted]
Ms Madonna Jarrett	Brisbane	Qld	Australian Labor Party (ALP)	[redacted]
Ms Elizabeth Watson-Brown	Ryan	Qld	Australian Greens (AG)	[redacted]
Mr Matt Burnell	Spence	SA	Australian Labor Party (ALP)	[redacted]
Ms Louise Miller-Frost	Boothby	SA	Australian Labor Party (ALP)	[redacted]
Ms Jo Briskey	Maribyrnong	Vic	Australian Labor Party (ALP)	[redacted]

Name	Electorate	State	Political Party	Parliamentary Email Address
Mr Julian Hill	Bruce	Vic	Australian Labor Party (ALP)	[redacted]
Mr Peter Khalil	Wills	Vic	Australian Labor Party (ALP)	[redacted]
Dr Monique Ryan	Kooyong	Vic	Independent (IND)	[redacted]
Ms Joanne Ryan	Lalor	Vic	Australian Labor Party (ALP)	[redacted]
Ms Kate Chaney	Curtin	WA	Independent (IND)	[redacted]

ATTACHMENT 2

Who gets a break?

Emerging Filmmakers Survey

INTERIM REPORT

Revised Draft, May 2026

Executive summary

Who Gets a Break? is a survey on emerging Australian screen practitioners, developed by Movie Mutuals with input from its community and informed by academic research, industry reports and screen agency materials. Based on a self-selected sample of 193 respondents, including 150 early career or emerging practitioners (EC+Em), it provides preliminary and indicative evidence on how grassroots practitioners are trying to enter the industry, build careers, finance work, access support, and navigate the points where careers stall or fall away.

These interim results describe a renewal problem more than a motivation problem. Respondents are strongly drawn to screen work for creative expression, collaboration and authorship, and most are already writing scripts, completing productions and spending years in sustained pursuit of a screen career. The pathway from that activity into stable work, however, is thin.

Across the Early Career and Emerging subset (n=150), which is the most reliable cohort in the data and is used as the headline base throughout this report, six findings stand out.

- **Career development activity is high but conversion to paid work is weak**. 62.7% have done unpaid voluntary on-set work, while paid work on commercially funded Australian productions (format not specified) sits at 14.7%, paid work on internationally funded productions at 8.0%, and paid screen agency attachments at 3.3%. Only 10.6% of EC+Em respondents who answered the industry-of-main-income question (9 of 85 respondents) earn their main income from film, television or games production, including corporate video production, and over one third of those are casual with less than 20% full time.
- **Creative practice is grassroots, recent and low-budget**. 52.7% have completed at least one production and 50.7% have done both writing and producing (mainly short films). Among EC+Em producers, the median total spend on the most recent project is $2,000 and the median personal contribution is $1,000. The aggregate personal share of total reported spend is 66%. EC+Em producers report 636 productions completed across all formats (including 279 short films and 290 corporate or commercial videos).
- **Volunteer labour drives production**. EC+Em producers report a total of 873 unpaid roles on most recent productions (486 on-set crew, 265 cast and 122 post / digital / VFX).
- **Formal public funding is seen as out of reach and, when it does happen, is rare**. 81.2% of EC+Em respondents have never applied to Screen Australia in the last five years, and 82.5% have never applied to a state screen agency. Among the small group who do apply (n=12 EC+Em respondents to Screen Australia and n=11 to state agencies), only two people got funding (1 for Screen Australia and 1 for state agency funding). Both those people reported applying 3 times and were 100% successful with each application. But the success rate per applicant is less than 10% and less

than 2% of the 65 respondents who answered the question. This success covers any application including for seminars, workshops, internships, attachments and travel grants, not only project finance. Only 3 out of 65(5%) EC+Em producers cite a local council grant on the last project, and none cite Screen Australia or state agency production or development on their recent production.

- **Confidence in a screen career pathway is low**. 67.8% agree they do not have a clear, known pathway to grow their career, only 17.6% agree film school is necessary for a successful career, 82.9% agree personal connections matter more than professional competence and only 22.2% agree the industry provides a safe and supportive work environment.
- **Survey respondents believe that the government's goals under the National Cultural Policy fall significantly short of their promise**, particularly in those objectives that connect with career conversion or reviving the screen industry, including by supporting new and fresh work that connects with audiences. Among EC+Em respondents 62.4% rate goals to achieve long-term sustainable career structures as unsuccessful or very unsuccessful, 55.4% rate broad access and participation goals (a place for every story and a story for every place) similarly, and 48.8% rate Australian stories as being seen and heard regardless of platform similarly.

On Artificial Intelligence (AI), the cohort is wary about consequences and selective about use. 89.7% agree AI will lead to a loss of trust in content, 88.2% see privacy risks, and 85.3% expect job displacement. Only 10.3% expect AI to help their own career. Adoption is concentrated in lower-stakes admin tasks (33.8% have used an LLM for admin or business work), with creative use (16.2%) and visual / audio / performance generators (around 9 to 12%) much lower.

Taken together, the survey describes an active, capable cohort that is already making work, often repeatedly, while investing heavily in its own development through study, debt, self-funded production, unpaid labour and peer collaboration. There is no absence of motivation or creative effort but the challenge is conversion to a career. For many respondents, the pathway from grassroots activity into paid, supported and recognised screen work is not visible, durable or fair. The screen industry they describe looks like a closed system in which money, time, connections and prior recognition shape who gets seen, who gets supported and who can keep going.

1. About the data

Following a meeting with the Office of the Arts in late 2024, Movie Mutuals[1] agreed to conduct a survey of its members to provide insight into the steps emerging screen practitioners have taken to enter the screen industry, the challenges they have faced, and the kinds of support that have made a difference.

This survey was created by emerging screen practitioners, for emerging screen practitioners. It was developed in mid-2025 with input from emerging practitioners and informed by academic research, industry reports and screen agency materials. The survey drew on Australian Bureau of Statistics items, academic studies, industry reports and screen agency websites (including Screen Australia's "Getting Started" guide on their website which is no longer available) to develop the questionnaire. It was tested and refined with Movie Mutuals members before entering the field from 21 October 2025 to 28 March 2026. The final survey included 56 survey items, including open ended questions that have been analysed separately in **Appendix A** with findings woven through this analysis to provide colour and movement to the descriptive analysis where appropriate.

Its purpose is practical: to provide evidence that is currently under-collected by the screen agencies, by documenting the steps people have taken to enter the industry, the barriers they have faced, the support that has made a difference, and the points at which careers stall or fall away. To assist government policy, the survey asked specific questions on the perceived effectiveness of the National Cultural Policy (Revive) as well as perceptions of industry performance.

There were 239 survey starts. During data cleaning, 7 responses were identified as likely duplicates based on shared IP addresses or personal information. Rather than deleting all duplicated entries, the most complete version of each response was retained. This left 193 usable responses for analysis, of which 138 were fully complete, representing a completion rate of 58 per cent. Based on Movie Mutuals membership figures, the estimated response rate is between 9 and 29 per cent, depending on whether Meetup or Discord is used as the denominator.

This is a self-selected sample centred on the Movie Mutuals community. It is not a census of all Australian screen workers. Most respondents live in Victoria, where Movie Mutuals is based. While not statistically representative of all emerging screen practitioners in Australia, the sample is broadly indicative of the experiences of people actively engaged in grassroots screen communities trying to build careers through self-initiated practice, peer networks and low-budget production. Its analytical value lies in describing how an engaged cohort of emerging and early-career practitioners is actually trying to build careers, finance work and judge the pathway in front of them.

[1] Movie Mutuals is a community of practice established in 2022. It serves as a community hub for filmmakers, actors and other practitioners, and hosts free weekly networking meetups in Melbourne, along with workshops and member screenings. At the time of the survey, the Movie Mutuals Meetup group had 2,265 members and its Discord server had 665 registered members.

Throughout this report, headline figures use the Early Career + Emerging subset (n=150) as the primary base. Where useful, comparisons with the full sample (n=193) are shown alongside. Some modules have smaller effective sample sizes because they were asked only of relevant respondents, or because not every respondent answered every item so the results should be read with caution, particularly when presented as a proportion.

The findings in this report are preliminary and have been generated to support submission to the public consultation on the New National Cultural Policy. Cleaning and recoding of data has been undertaken by human hand, but initial analysis and cross-tabulations have been assisted by AI (Claude and ChatGPT used in parallel and cross-validated against each other). Human spot checks have been performed against the raw data file but full human validation of the analysis has been rudimentary due to time available. Findings should be treated as indicative and preliminary until a fuller statistical review is completed.

Metric	Value
Total survey responses received	239
Usable responses retained for analysis	193
Early Career + Emerging subset (primary base)	150
Age data available	180
Education data available	181
Income data available	179
Producers with most-recent-production expenditure data	85 (EC+Em: 67)
AI module respondents (any answer)	~68 EC+Em
Revive module substantive raters (excl. "Can't say")	~85-105 EC+Em depending on item
Open-ended question respondents (any of three open fields)	126

Table 1. Survey base and key denominators.

The value of the data

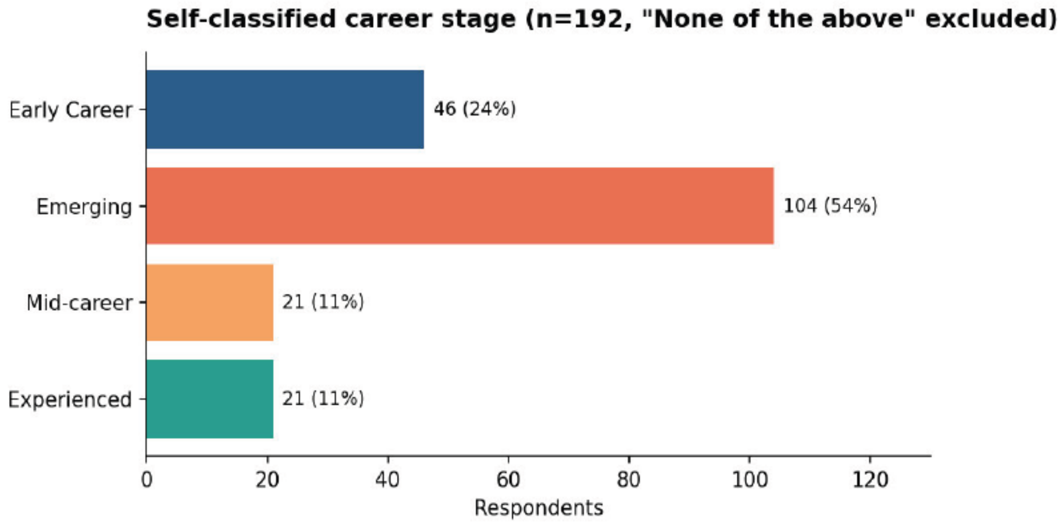
One of the underlying challenges in discussing the emerging screen sector is that it is poorly counted. There is no widely used national measure telling government or industry how many emerging or early-career screen practitioners there are, how many are actively trying to build careers, or what the scale of that effort looks like. The 2015 Emerging Visions report, commissioned by the now defunct Screen Resource Organisation Metro Screen, drew on Department of Education statistics to estimate around 30,000 annual enrolments in film and media production-related courses, with around 7,000 graduates, plus a further 8,500 enrolments in VET courses with around 4,200 completions. It also cited a 2007 ABS survey indicating around 64,900 people had worked in film and television without payment. Beyond fragments of this kind, there is no standard statistical account of the broader cohort from which screen activity emerges.

This survey does not fill that gap. It is not a census and cannot tell us how large the emerging sector is nationally. Outreach was attempted by inviting guilds and associations to share the survey with their members, but this produced only four responses. The survey's value is in making a usually weakly visible cohort more legible on its own terms: people who are writing, making, volunteering, studying, self-financing cultural production and persisting, often without secure attachment to the more established and publicly funded parts of the industry.

2. Who are emerging screen practitioners?

Career stage

Respondents were asked to self-classify their career stage using definitions adapted from the VicScreen glossary. Early Career and Emerging respondents make up 78% of the sample (n=150) and form the primary base for this report. Mid-career and Experienced respondents account for 11% each.



Stage	Definition (abridged)
Early Career	Student or non-graduate with little to no production or industry experience; no marketplace endorsement; few industry networks
Emerging	Some professional industry or production experience; produced work but not in a professional format; not yet endorsed by the marketplace; some networks; demonstrated long-term commitment
Mid-career	1 to 2 professional production credits in the nominated role; some reputation among public or peers; endorsed by the marketplace
Experienced	3 or more professional credits in the nominated role; significant reputation; international networks

Table 2. Self-classified career stage adapted from Screen Victoria online glossary.

Cross-checking self-classification against objective markers

Because the survey was anonymous, self-classifications cannot be verified directly. They were tested for internal consistency against other markers in the survey itself: professional credits in TV drama, features and documentary; industry acquisitions; A-list festival screenings; years pursuing a career; and median spend on the most recent production.

Marker	Early Career	Emerging	Mid-career	Experienced
Any professional credit (TV drama / feature / doco)	7%	17%	52%	33%
Median professional format credits (feature, TV drama, doco)	0	0	1	0
Any industry acquisition	0%	4%	14%	24%
Any A-list festival screening	0%	1%	19%	0%
Any festival screening (incl. non A-list)	13%	28%	48%	43%
Median years pursuing career	2	4	6	11
Median spend on last project (excl. zero spend)	$900	$2,000	$11,000	$75,000
Last project produced was a feature film or TV drama	0%	6%	19%	24%
Industry relationship: solid career / main income	2%	3%	43%	48%

Table 3. Markers used to cross-check self-classified stage.

The Early Career and Emerging (EC+Em) cohorts are highly internally consistent. Within the self-classified Mid-career group, 9 of 21 show no professional format credits across TV drama, features and documentary; the most likely explanations are credits held in commercial / branded formats not tracked in the survey or in paid supporting rather than primary roles. Within the self-classified Experienced group, 14 of 21 show no professional credits, no acquisitions and no A-list festival screenings, suggesting some respondents have interpreted "experienced" in the everyday sense of "I have been doing this a long time" rather than the technical definition used in the survey. They also may be very experienced in corporate or advertising, but this is not considered experienced by the screen agency definition which looks at drama and documentary and is the focus of this survey and the aspiration of most respondents. Median years pursuing (11) and median spend on the most recent project ($75,000) for the Experienced group are still genuinely elevated, so the group has real practice depth even where the formal credit markers are missing. As this can't be independently verified, the report leads with EC+Em (n=150) as the most reliable cohort, and treats Mid-career and Experienced figures as illustrative comparisons but this means the sample may be underrepresented and conservative.

Relationship to industry

The career-stage data cross-tabulated with industry relationship paints a diverse but coherent picture. The majority of Early Career respondents are either studying (vocational or university) or actively seeking entry. Emerging respondents are largely actively seeking entry or have a foot in the door (have connections, have met producers, work experience, an internship, or some paid corporate work) but are not earning their main income from screen. Most Mid-career respondents earn a solid income from screen production (including corporate); the same is broadly true of Experienced respondents. A small group (n=6) describe themselves as having given up on a career while still maintaining an interest in the industry, including by creating work.

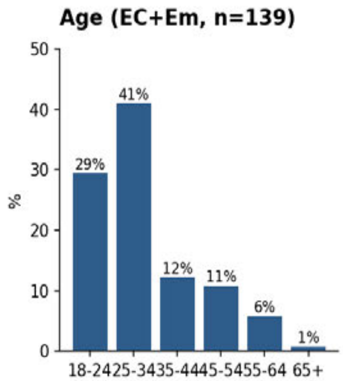
Industry relationship	Early Career	Emerging	Mid-career	Experienced	Total %
Student (film school)	17.4%	3.8%	0.0%	0.0%	6.2%
Student (other discipline)	13.0%	1.9%	0.0%	0.0%	4.1%
Actively seeking entry	41.3%	56.7%	9.5%	0.0%	41.5%
Foot in the door (not main income)	4.3%	23.1%	23.8%	38.1%	20.2%
Solid career (main income)	2.2%	2.9%	42.9%	47.6%	11.9%
Hobbyist / not seeking career	10.9%	2.9%	0.0%	0.0%	4.1%
Given up / maintains interest	2.2%	1.9%	9.5%	4.8%	3.1%
Other	8.7%	6.7%	14.3%	9.5%	8.8%

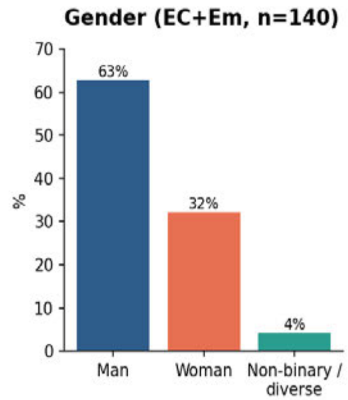
Table 4. Industry relationship by career stage.

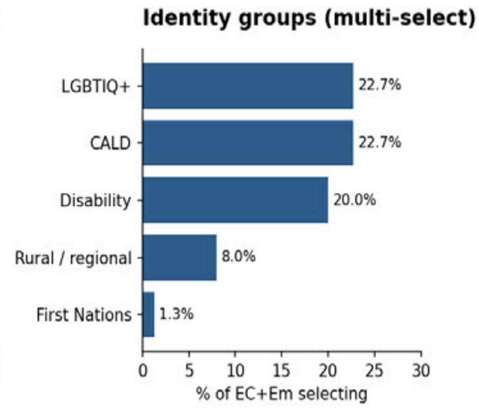
The "other" responses describe people in ambiguous middle positions, neither hobbyists nor yet able to rely on screen work. Examples include "Full time for three years. Still not earning enough to be financially sustainable" and "I have my foot in the door and make screen related income as my main source of income, but it's still early days". Other respondents describe having optioned scripts, awards, professional collaborators or years of practice that have not translated into dependable income. The combined picture is not a binary between amateur and professional but a spectrum shaped by precarity, stalled progression and partial attachment.

The cohort also includes respondents transitioning in from adjacent creative sectors or across industry roles, returning after time away, or trying to re-establish themselves after life disruption. One describes themselves as "a former film practitioner who retired and then returned to the screen industry"; another as "I had an on and off career but now I'm on maternity leave and I don't know if I'll be able to sustain a career with a young child". The cohort is therefore broader and more heterogeneous than a simple image of young first-time entrants. In fact, a number of respondents were quick to point out that "emerging" had very little to do with age or ability and more to do with access to the resources needed to produce certain kinds of content and audiences, as well as reputation within the established industry.

Demographics



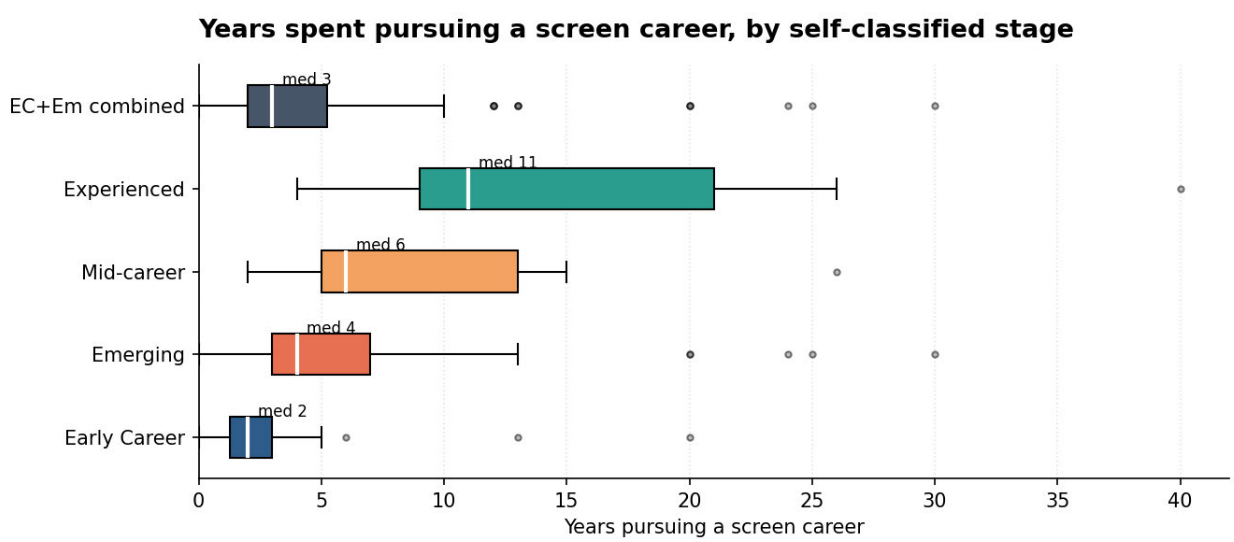




The respondent base skews younger and male. In the EC+Em subset, around seven in ten respondents are under 35; men account for 62.9% of EC+Em respondents; 32.1% are women and 4.3% non-binary or gender-diverse. The gender skew in this sample is more significant that the industry generally as indicated by ABS data where 56% of the workforce are male and 44% are female (the ABS data does not break out non-binary/diverse). Direct comparisons should be made with caution.

On identity, 22.7% of EC+Em respondents identify as CALD, 22.7% as LGBTIQ+, 20.0% have a disability and 8.0% live in a rural or regional area. First Nations respondents account for 1.3% of the EC+Em subset (n=2). Around 58% of EC+Em respondents identify with at least one diversity or equity group. Some respondents identify with multiple groups: 42% of LGBTIQ+ respondents also have a disability and 21% are CALD; 13% of disability respondents also live regionally.

Time pursuing a career



The median EC+Em respondent has been pursuing a screen career for 3 years (Q1 = 2, Q3 = 5). The average is 5 years. Median years rise predictably across stages, from 2 years for Early Career, 4 for

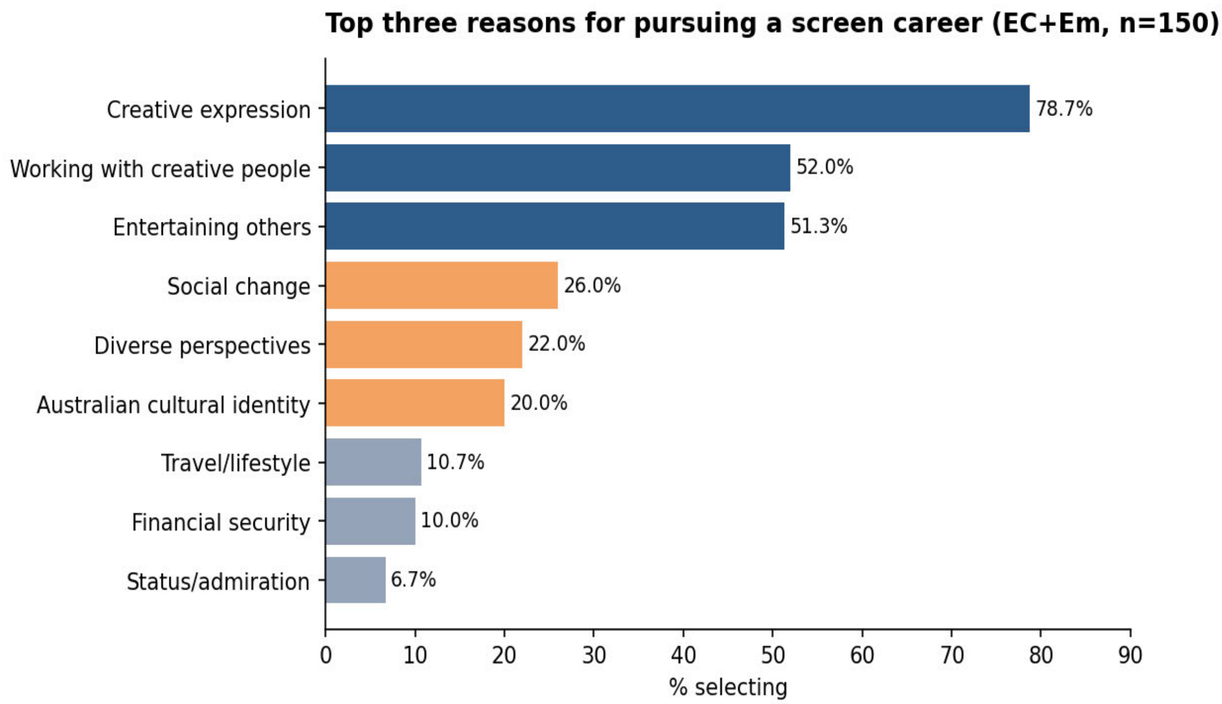
Emerging, 6 for Mid-career and 11 for Experienced. Career stage broadly tracks with time, but only imperfectly: some respondents who still identify as Emerging have been pursuing a screen career for 20 to 30 years, indicating that "emerging" in this sample often does not mean "brand new" as previously discussed. It frequently describes several years of active pursuit without yet converting that pursuit into a stable career foothold.

Employment and education

Education levels are high. About two thirds of EC+Em respondents hold a bachelor's degree or postgraduate qualification (48.9% bachelor's; 16.3% postgraduate). About 11% are still studying, either at film school or in another discipline. Almost half (47.5%) of EC+Em respondents earn wages or a salary as their main source of income; 20.1% rely on government benefits and allowances; 15.1% earn through their own business. 10.6% of EC+Em respondents who answered the industry-of-main-income question (9 of 85) identify film, television and games production as the industry from which their main income is drawn. Casual work accounts for 43.5% of main-income earners in the EC+Em group, ahead of permanent full-time (24.7%) and permanent part-time (23.5%).

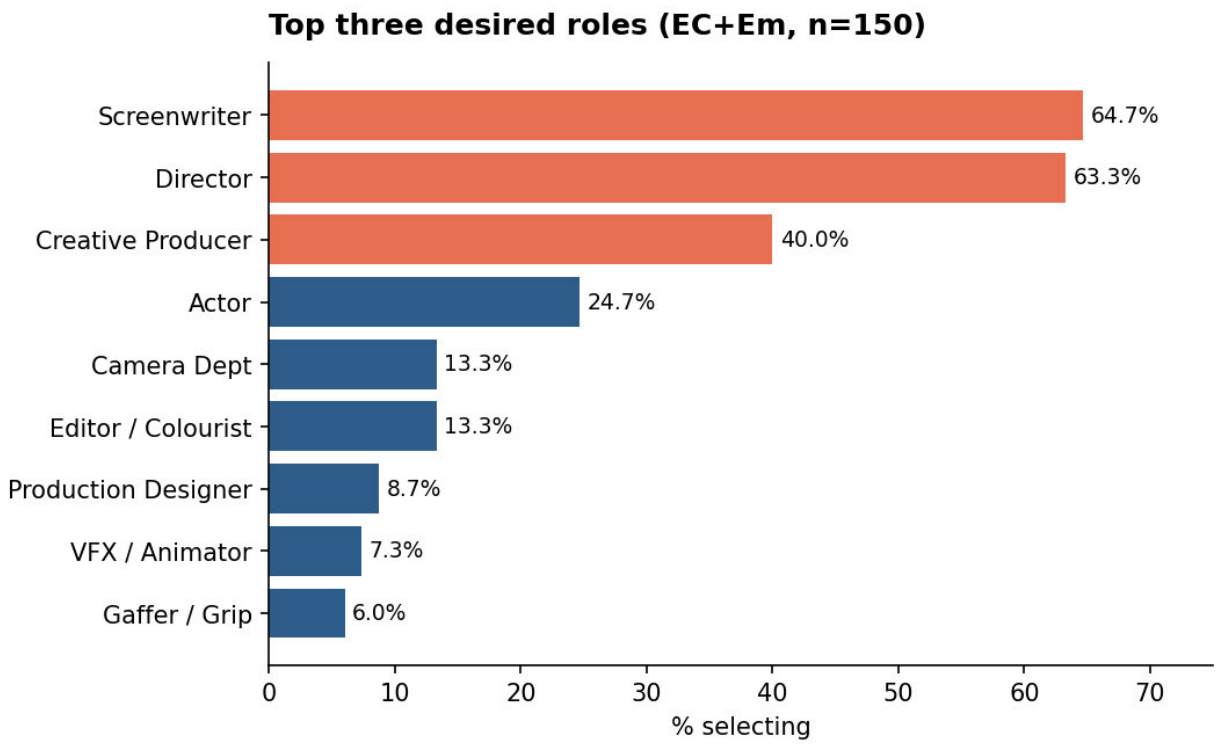
3. Reasons for pursuing a screen career

Respondents are pursuing screen primarily for creative and collaborative reasons, not because they expect a straightforward income pathway. Respondents were asked the top 3 reasons for pursuing a career and creative expression is the dominant reason in the EC+Em subset (78.7%), followed by working with other creative professionals (52.0%) and entertaining others (51.3%). Financial security and admiration / status are selected by only 10.0% and 6.7% respectively. The pattern is consistent with a vocation-led pursuit and a form of psychological income, even where the financial return is weak.



The notable result is not that financial reasons rank below creative expression, but that they rank so low in importance. The pattern is consistent in general results of the survey with respondents pursuing screen careers despite the weak economic and professional signals, rather than because of strong reward expectations. Aspirations point in the same direction.

The most desired roles in the EC+Em subset are Screenwriter (64.7%), Director (63.3%) and Creative Producer (40.0%): the central creative and leadership roles through which projects are conceived, authored and driven. This is largely a sample of story-tellers.



A note on contributing to Australian culture

Respondents who chose 'contributing to Australian cultural identity' as one of their top three reasons for pursuing a screen career are a minority but a substantial one: 20.0% of EC+Em respondents and 21.2% of all respondents (41 of 193). The subgroup across the entire sample skews towards respondents who are emerging or mid-career and slightly older overall, and over-indexes among CALD respondents (32% selection rate vs 21.2% overall), among postgraduate-qualified respondents and, intriguingly, among respondents from financially less secure family backgrounds. For this segment of the cohort, cultural motivation may be connected to questions of representation, belonging, voice and recognition within Australian screen culture.

A modest selection rate, however, should not be read as indifference to Australian culture. The wider survey results point to a cohort that is highly aware of structural fragility in the local industry. Among EC+Em respondents, 67.8% agree they do not have a clear, known pathway to grow their career, 56.3% agree they have missed opportunities that may have helped them, and 82.9% agree personal connections matter more than professional competence. The ranking of wanting to tell Australian stories may be a pragmatic response to limited opportunities to do so, ranking their aspirations accordingly to optimise perceived best pathway to success. If they believed there were more realistic opportunities to tell Australian screen stories, this motivating factor may be higher.

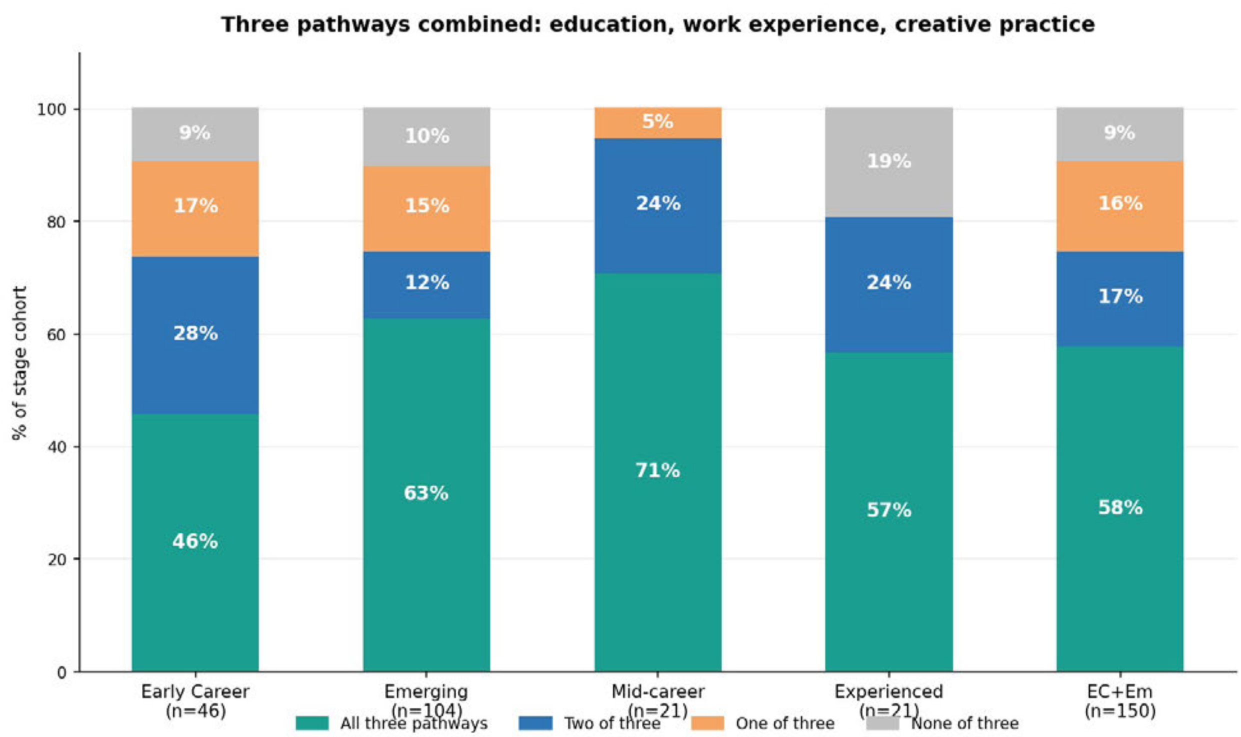
Cultural confidence is similarly mixed: only 26.7% of EC+Em respondents agree that Australian screen content effectively reflects the diversity of Australian culture and life, and only 23.8% agree that

Australian productions demonstrate high levels of creative risk-taking and originality. That is, the kind and quality of Australian content being made may not be perceived to be at a level that elevates its importance as a priority. Australian content being produced is not inspirational enough to drive aspiration and so motivation is pragmatic. These are speculative and worth testing in future studies but open-text responses include comments consistent with this reading, including: "If you're not writing Australiana there is simply no point" and several remarks about creatively stale outputs (see Appendix A.4.5). In that context, contributing to Australian cultural identity is important to many but not dominant for most: respondents are operating in a mode of survival, access and career navigation first, with cultural mission possibly constrained by limited confidence in the opportunities available locally.

4. What are respondents doing to build a screen career?

The survey explores three pathways: education and training; work experience; and creative practice.

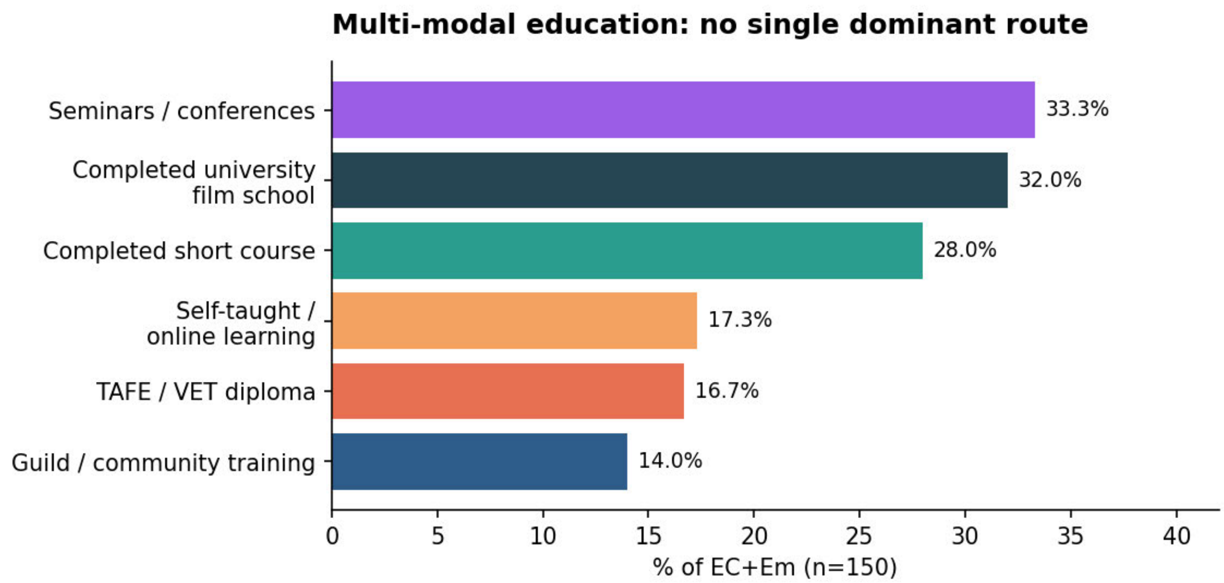
The definitions used for each pathway are deliberately broad, including seminars and conferences within education, unpaid or volunteer work experience including on non-professional productions, and screenwriting alongside production within creative practice. The intent is not to make value judgments about effort in each category, much of which can reflect socio-economic position, geography, ATAR scores or industry networks rather than ability or aspiration.



In the EC+Em subset, 85.3% have undertaken some screen education or training, 68.7% have any screen work experience and 68.7% have any creative practice. 58.7% have done all three. Only 9.3% of EC+Em respondents fall outside all three definitions, and a further 13.3% sit in education alone (no work experience or creative practice). The pattern suggests a cohort investing heavily in self-development across multiple channels at once, even where that effort does not reliably convert into stable professional progression.

4.1 Education and training

Education routes are multi-modal. Among EC+Em respondents, the most common forms are seminars and conferences (33.3%), completed university film school (32.0%) and completed short courses (28.0%), followed by TAFE or VET diplomas (16.7%), self-taught and online learning (17.3%) and guild or community training (14.0%). This is not a single-pipeline cohort moving cleanly from one prestigious tertiary institution into the industry; it is a cohort assembling know-how from multiple places. As a heralding note, attitudes data later in this section also show that respondents largely do not see film school as necessary for a screen career, but do value its networking and experimentation benefits.

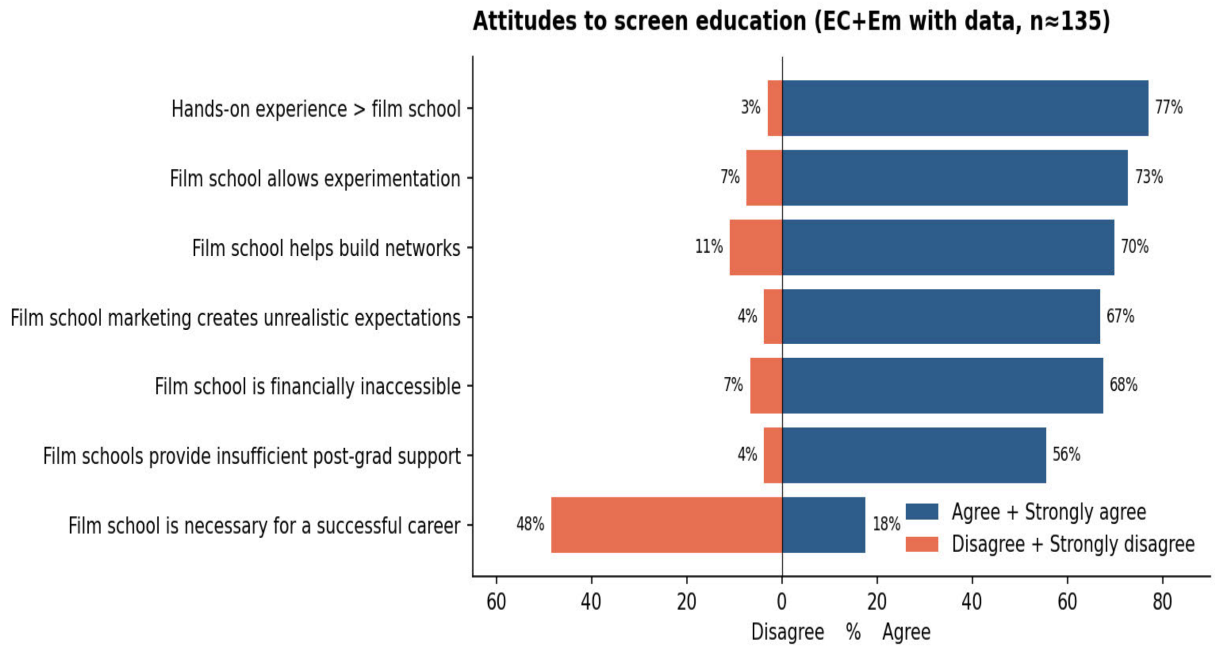


Prestigious CILECT institutions are a minority route, not the dominant one. CILECT (the Centre International de Liaison des Écoles de Cinéma et de Télévision) is the international association of film and television schools whose membership is treated as a signal of formal screen-training quality. The Australian listed CILECT members include AFTRS, Swinburne (SSFT), VCA, UTS, Griffith and WASA. Only around 15% of all respondents attended any listed CILECT institution. Of the 64 respondents who completed university film school, only 20 (31%) attended a CILECT institution. The remaining 44 (69%) studied at non-CILECT film schools including RMIT, Bond University, Macquarie, La Trobe and Deakin. Combined (completed or attended), 22 of 82 (27%) were at a CILECT institution, with Swinburne the most represented at 13 students, followed by AFTRS (3), UTS (3), VCA (2), Griffith (1) and WASA (1).

The survey does not explicitly establish why respondents do not attend film school, which may include financial barriers, academic entry thresholds, geography and exclusivity. The survey did ask a number of questions that touched on some of these issues.

What it does establish is that many respondents pursue screen careers without that prestigious educational background. In this dataset, attendance at film school, CILECT or otherwise, is clearly not a necessary condition for pursuing a career, and the wider pathway results suggest it is also far from sufficient.

Attitudes to screen education



Among EC+Em respondents who answered the education attitudes module (n≈135), only 17.6% agree that film school is necessary for a successful career in screen production, while 48.5% disagree. 77.0% agree that hands-on experience provides better career value than film school tuition. At the same time, respondents are not anti-education: 72.8% agree film school allows experimentation with the craft, 69.9% agree it helps build valuable networks and 67.6% agree it is financially inaccessible for many aspiring practitioners. 66.9% agree film school marketing creates unrealistic expectations about career prospects after graduation, and 55.6% agree film schools provide insufficient post-graduate support for continued craft development. The pattern is one in which respondents value the experience, networks and creative space that film school can provide, while doubting that screen education functions as a credentialling system that actually opens a career. Formal education is, in this sample, neither necessary nor sufficient.

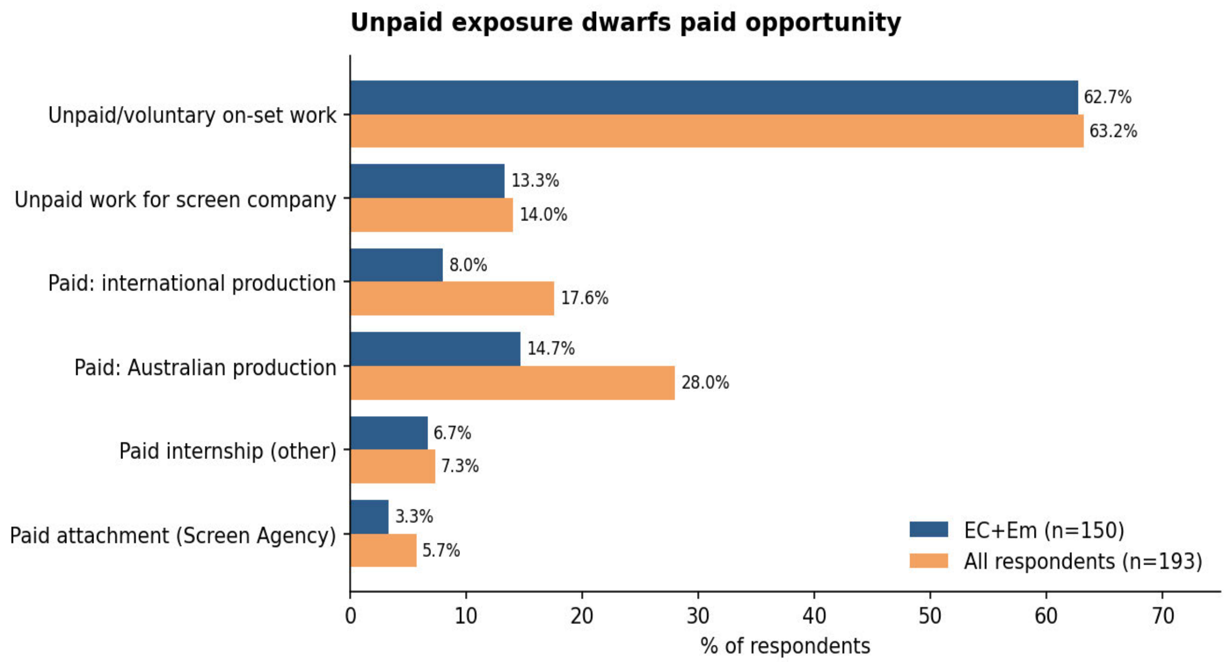
Student debt

Almost half of all respondents (48.7%) and just over half of the EC+Em subset (50.7%) report some form of student debt. Education is therefore common but not costless, sitting inside a broader story of self-investment rather than guaranteed progression.

4.2 Work experience

Work experience shows the clearest imbalance in the report: exposure to unpaid work is widespread, paid work is much less common. Across all respondents, regardless of experience, 63.2% have done unpaid or voluntary work on a production set; in the EC+Em subset the figure is 62.7%. By contrast, only

14.7% of EC+Em respondents have done paid work on a commercially funded Australian production, 8.0% on an internationally funded production and 3.3% through a paid screen agency attachment.



The aggregate picture is one of widespread practical participation but a thin bridge from experience into paid professionalisation.

The gap between EC+Em (14.7%) and all respondents (28.0%) on paid Australian production work is itself meaningful: paid Australian work concentrates within the more experienced cohorts, consistent with paid work depending on credits and networks that EC+Em practitioners have not yet accumulated. The same is true for international production. It is also important to note that this work experience may only be a once-off, not reflect ongoing employment, especially given the project nature of the industry. It could also reflect only days or weeks of paid employment and rarely (if not never) ongoing full-time employment but this level of detail was not captured in the survey.

Respondents were asked a number of questions which suggest that access is a function of know-who, not know-how, and that the emerging sector is worried about exploitation and bullying. Two further Q26 items reinforce this. Among EC+Em respondents who answered, 48.3% agree the industry experience they have gained so far directly aligns with their long-term career goals while 18.6% disagree, and 41.5% agree they have had sufficient on-set production experience to feel confident in professional roles while 34.7% disagree. Many respondents are gaining experience that they themselves do not see as building toward the career they want, or do not feel sufficient to step into professional roles.

4.3 Creative practice

Script development

Across all respondents, 64.8% have written at least one script; in the EC+Em subset the writing rate rises to 66.7%. Short form dominates: 59.1% of all respondents have written at least one short-film script, 29.5% have written a feature and 20.2% have written TV drama. Among EC+Em respondents who are active developers, the median number of short-film scripts written is 4 (Q1 = 2, Q3 = 7.5). In total, the EC+Em developer cohort reports 722 short film scripts, 213 feature film scripts, 51 TV drama scripts, 48 documentary scripts, 59 webseries scripts and 23 games scripts.

Variable	N	Median	Q1	Q3	Max	EC+Em total	All-sample total
Short film scripts (EC+Em developers)	99	4	2	7.5	80	722	~840
Feature film scripts (EC+Em developers)	86	0.5	0	3	26	213	~340
TV drama scripts (EC+Em developers)	82	0	0	1	4	51	~310
Documentary scripts (EC+Em developers)	82	0	0	1	5	48	~250
Webseries scripts (EC+Em developers)	83	0	0	1	13	59	~80
Games scripts (EC+Em developers)	80	0	0	0	20	23	~30

Table 6a. Distribution of scripts written. EC+Em totals shown alongside total-sample totals.

Production volume

55.4% of all respondents and 52.7% of EC+Em respondents have completed at least one production; 50.7% of EC+Em respondents have done both writing and producing. Short form again dominates: 47.7% of all respondents have completed at least one short film. The median EC+Em producer has completed 2 short films (Q1 = 1, Q3 = 4.5). Feature and TV drama production are rare in this cohort: median outputs are zero in both categories. In total, the EC+Em producer cohort reports completing 279 short films, 33 documentaries, 17 webseries, 8 features, 6 games, 3 TV drama productions and 290 corporate or commercial videos.

Variable	N	Median	Q1	Q3	Max	EC+Em total	All-sample total
Short films completed (EC+Em producers)	75	2	1	4.5	33	279	~480
Feature films completed (EC+Em producers)	56	0	0	0	2	8	~30
TV drama completed (EC+Em	56	0	0	0	2	3	~260

Variable	N	Median	Q1	Q3	Max	EC+Em total	All-sample total
producers)							
Documentaries completed (EC+Em producers)	58	0	0	1	4	33	~80
Webseries completed (EC+Em producers)	62	0	0	0	3	17	~25
Corporate videos completed (EC+Em producers)	60	0	0	2	100	290	~750

Table 6b. Distribution of productions completed. EC+Em totals shown alongside total-sample totals.

Production expenditure

Most projects are micro-budget: 47% of EC+Em producers spent under $1,000 on their most recent project, and only around 22% spent $5,000 or more. In total, EC+Em producers report spending $273,485 across their most recent productions (n=66 with data and that specify a production format); all respondents combined report spending $2,817,235 across their most recent productions (n=84 with data and that specify a format). The gap reflects a small number of high-budget projects in the more experienced cohort.

Spend on most recent productions (recent projects only, not annual or cumulative spend) by format in the EC+Em cohort: 42 short dramatic films totalling about $131,450 (median $1,750); 14 other short films totalling about $72,835 (median $950); 3 feature films totalling about $19,000 (median $4,000); 1 TV documentary at $14,000; 3 webseries totalling about $31,200 (median $1,000); and 2 TV drama or pilot projects totalling about $5,000 (median $2,500).

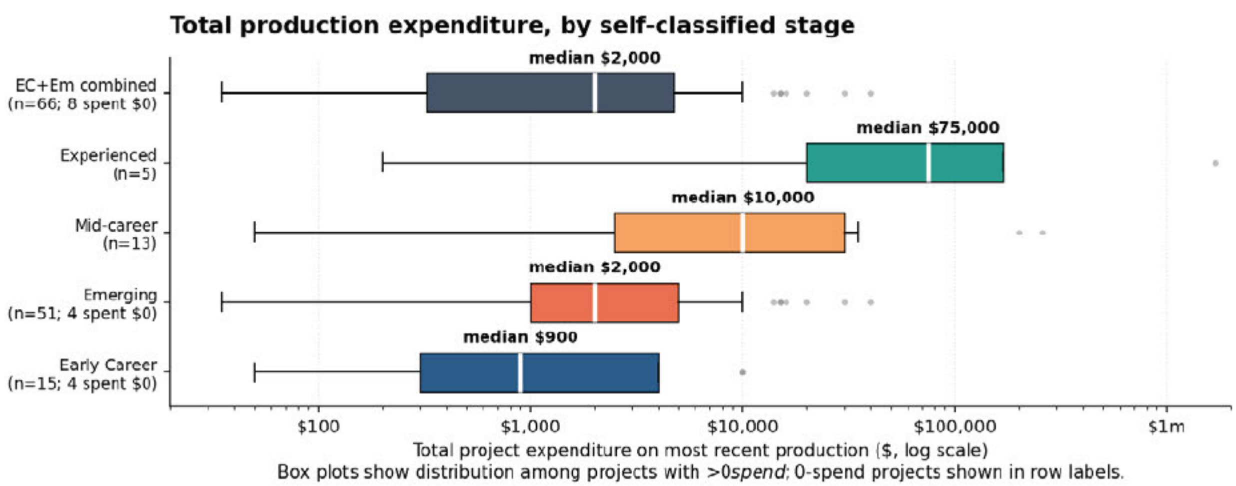
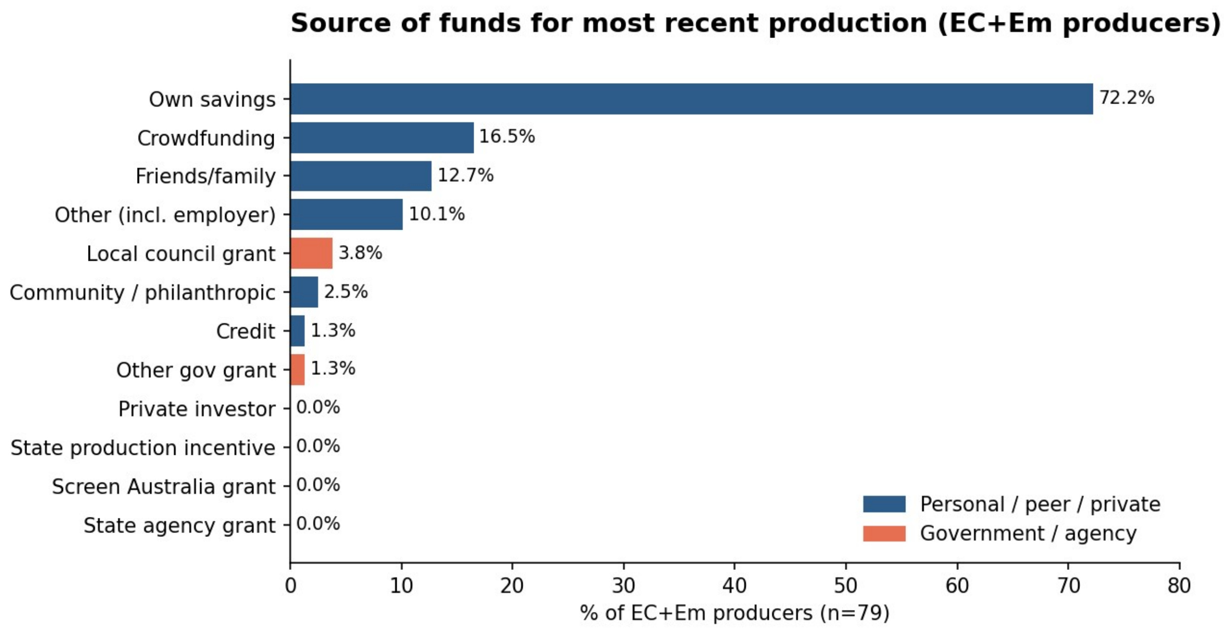


Figure. Total production expenditure on most recent project, by self-classified stage (log scale). Note: this does not include those producers who reported $0 spend (n=8).

Source of funds for the most recent production

Sources of funds are really limited. Among EC+Em producers, 72.2% report own savings as a source of finance for their most recent production. Crowdfunding (16.5%) and friends and family (12.7%) follow well behind. None of the EC+Em producers report Screen Australia or state screen agency finance on their most recent production. The only public funding visible at any meaningful level is local council grants, cited by 3.8% of EC+Em producers. Government, either state or federal, does not register meaningfully as a source of production capital for this cohort.



Personal contribution to production expenditure

The level of project expenditure carried personally by respondents sits at roughly two-thirds of all reported EC+Em production spend. Medians are compressed but individual contributions can be substantial. Only 10% contributed more than $5,000 of their own funds, but put into the context that mots are young, working casually, even $1,000 contribution is likely to represent a significant proportion of their income.

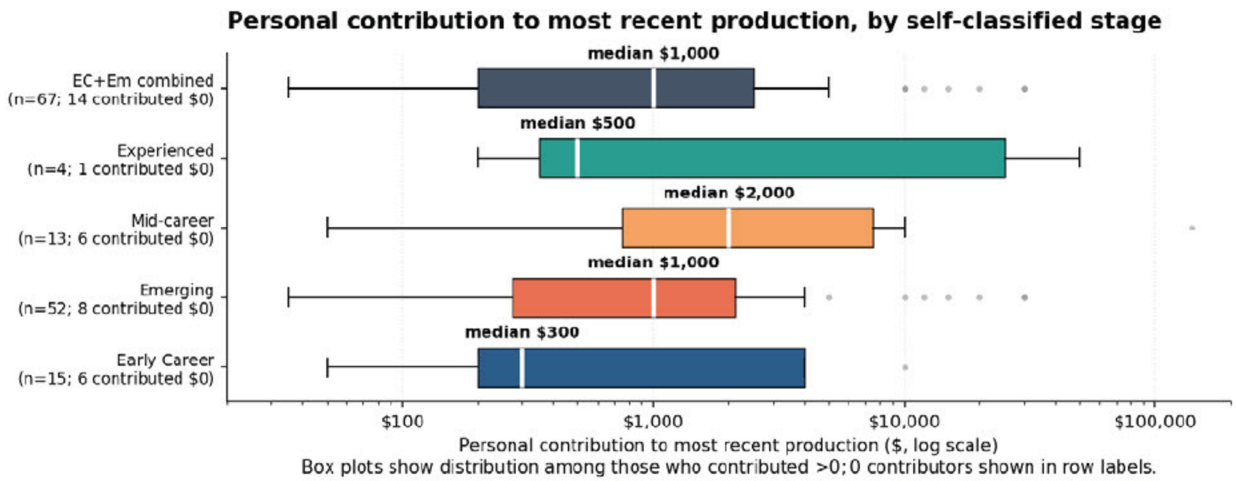


Figure. Personal contribution to most recent production, by self-classified stage (symlog scale).

Volunteer labour

Volunteer labour (time) is another major input. Across most recent productions, EC+Em producers report a total of 873 unpaid roles: 486 unpaid on-set crew positions, 265 unpaid cast positions and 122 unpaid post / digital / VFX roles. Median unpaid inputs are six on-set crew, three cast and two post roles. Volunteer reliance is not just resourcefulness. It shows that the practical cost of talent development is being shifted onto respondents' own finances, their unpaid time, and the unpaid labour of their peers and collaborators.

Volunteer band on last production	Median on-set crew	Median cast	Median post / VFX	% auteur (W+D+P)	% applied to Screen Australia
Zero volunteers	0	0	0	10.3%	13.8%
1 to 5	1	0.5	0	56.2%	25.0%
6 to 15	5	3	2	47.1%	8.8%
16 to 30	13.5	7	3	30.0%	25.0%
31+	17.5	17.5	3	37.5%	37.5%

Table 9. Volunteer use and project profile by band.

Creative roles and authorship

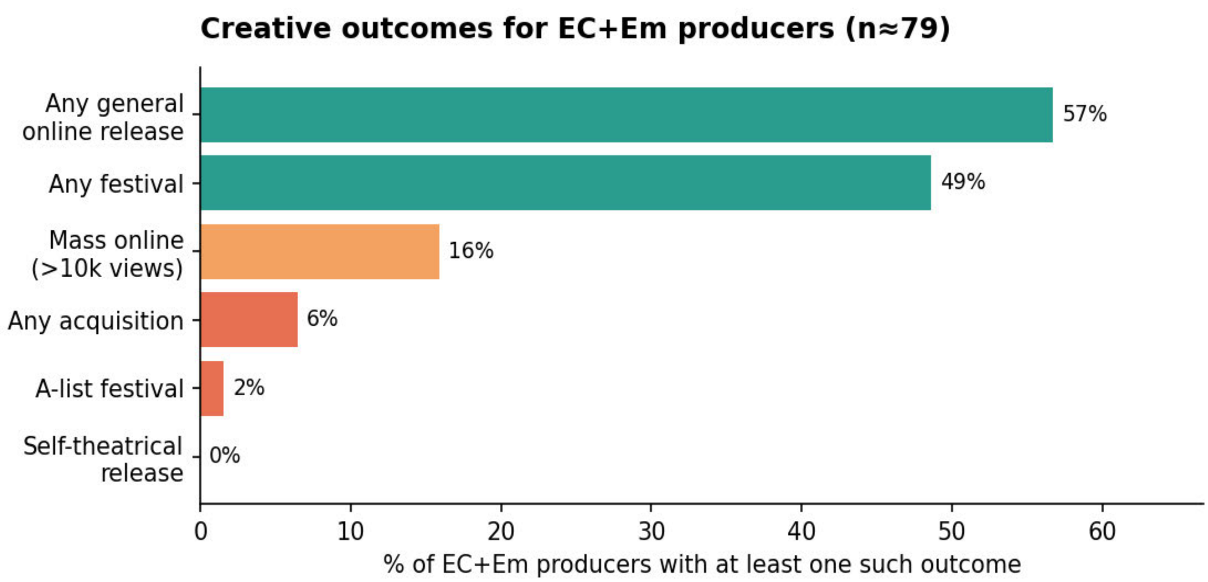
Among EC+Em respondents who have completed productions, 40.5% performed all three core roles of writer, director and producer on their most recent project. We categorise this group as "auteurs". A further 26.6% performed two of the three.

Among the auteur subgroup (writer + director + producer), 73.0% also edited their project, 43.2% acted as cinematographer or DOP, and 43.2% also handled sound design. Multi-hyphenate practice is therefore not a niche pattern. It is normal for this cohort.

It is not clear whether this is ego or necessity but the pathway is not one in which early filmmakers are cleanly specialised or gradually move upward through predefined industrial roles. Many are already trying to self-generate authorship, direction and production capacity at once, supported by collaborators contributing through informal or unpaid labour.

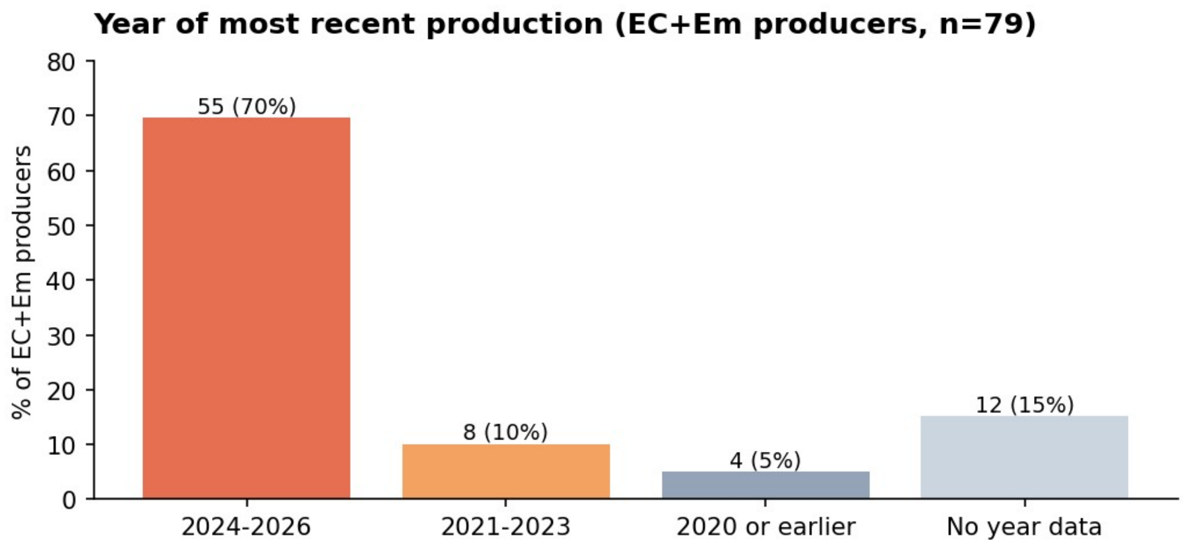
4.4. Creative and cultural outcomes

The production activity undertaken by the EC+Em cohort yields a relatively narrow range of outcomes. Industry "acquisition" is defined in the survey as TV, theatrical or streamer pickup. Outcomes are reported per producer, on the most recent project. More detail on outcomes can be found in Appendix B6.



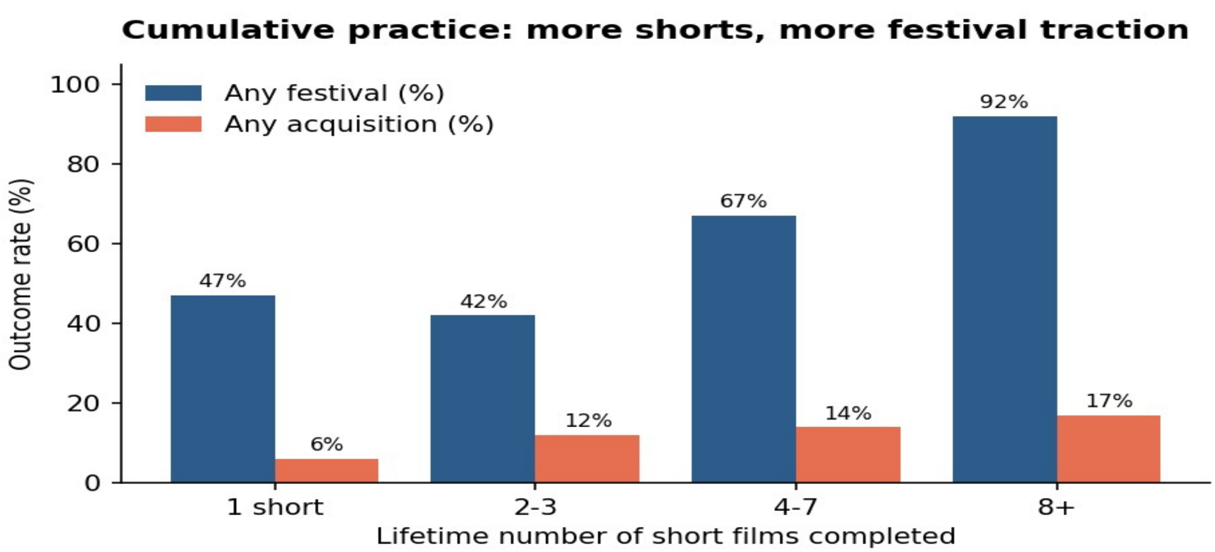
Recency, frequency and outcomes

Among EC+Em producers with recency data, 70% completed their most recent project in 2024 to 2026, 10% in 2021 to 2023, and 5% in or before 2020 (15% have no year data). The cohort is active now, not merely historically.

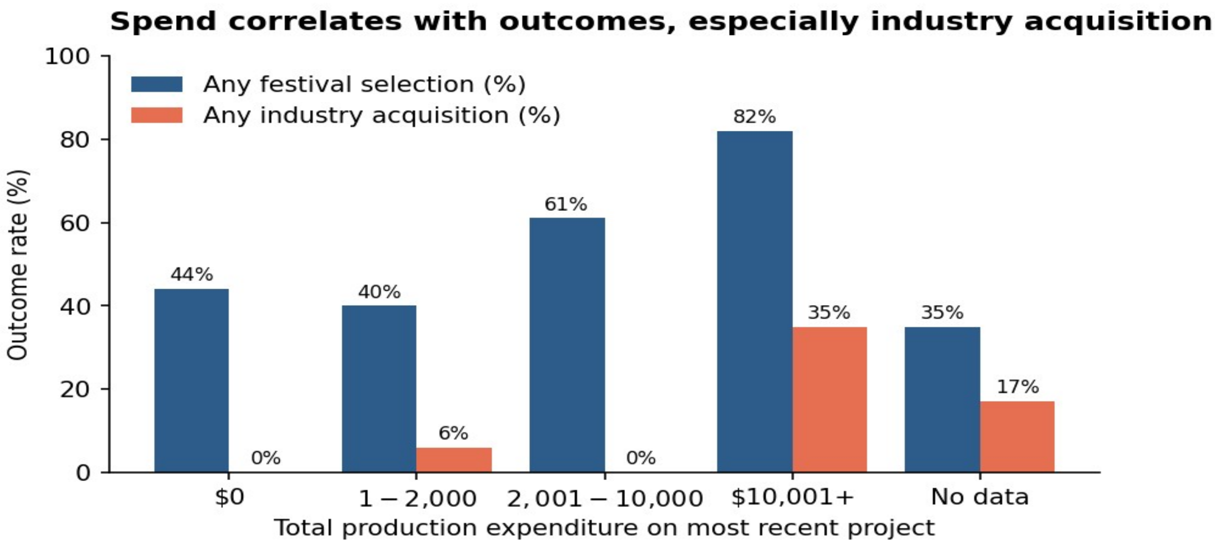


Production is not quick: 28.8% of EC+Em producers spent more than a year on their most recent project, with another 19.7% spending six to twelve months.

Frequency matters for outcomes. Among the broader producer base, festival selection rates rise sharply with cumulative output: from 47% for those with one short, to 67% at four to seven, and 92% at eight or more. Industry acquisition rates also climb with frequency, although they remain relatively rare overall (around 17% at the most prolific end). Forty-four percent of EC+Em producers who completed at least one production reported a festival outcome while 51% of all producers who completed at least once production reported a festival outcome regardless of their experience. .

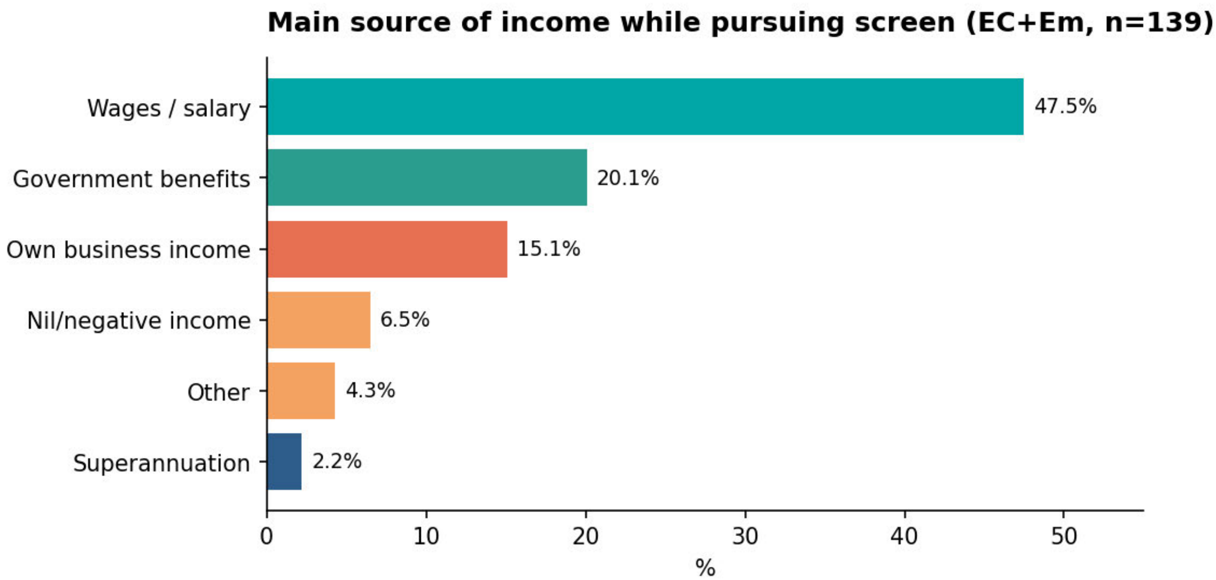


Spend has a similar gradient. Among producers with expenditure data, festival selection rises from 40% for projects under $2,000 to 82% for projects over $10,000, while industry acquisition rises from effectively zero to 35% over the same range. Outcomes are not impossible at low budgets, but they cluster strongly at higher spend levels.


Spend correlates with outcomes, especially industry acquisition
Any festival selection (%)
Any industry acquisition (%)
Outcome rate (%)
100
80
60
40
20
0
44%
0%
40%
6%
61%
0%
82%
35%
35%
17%
$0
1 − 2,000
2,001 − 10,000
$10,001+
No data
Total production expenditure on most recent project

6. How are respondents supporting themselves while seeking a screen career?

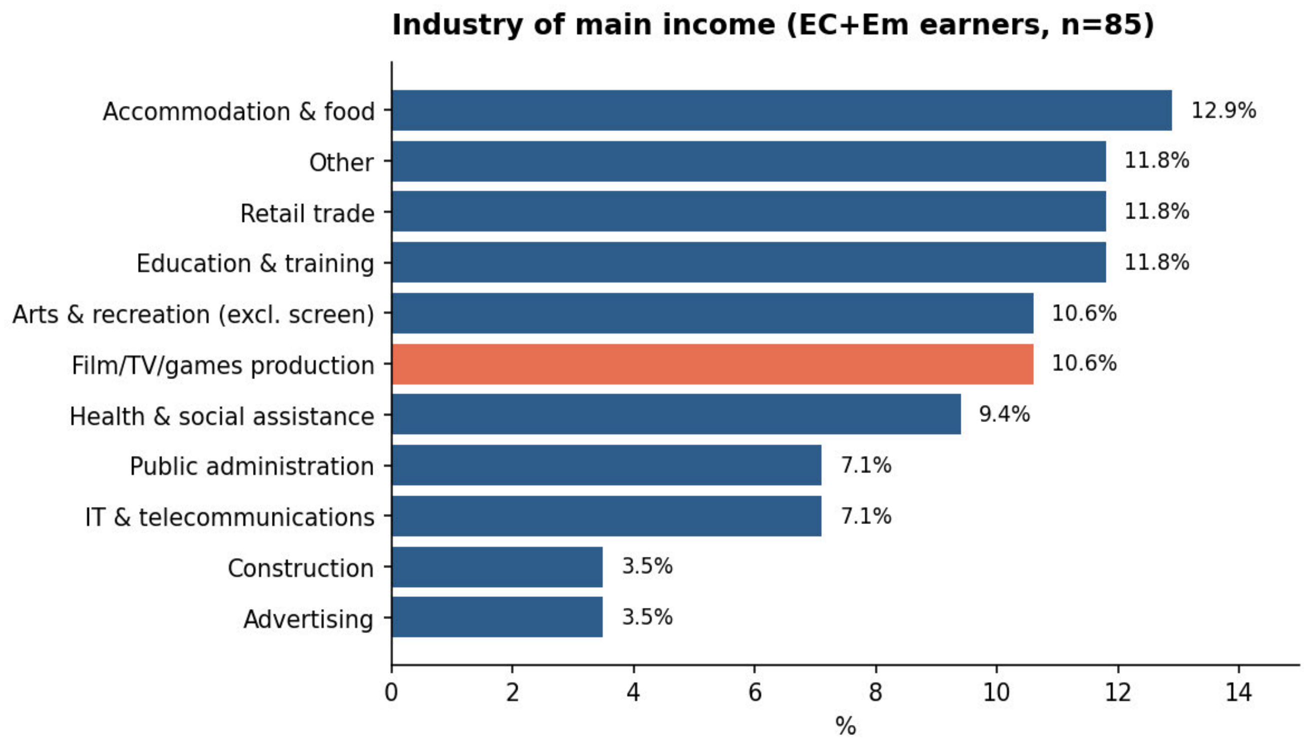
Wages and salary are the most common main source of income for both the full sample and the EC+Em subset, but this should not be read as evidence that most respondents are professionally established in screen.



Most EC+Em respondents are financing their screen ambitions through work elsewhere. Accommodation and food services (12.9%), education and training (11.8%), retail trade (11.8%), and arts and recreation services excluding screen (10.6%) all appear as meaningful income bases. Screen careers are being built alongside another labour market, not inside the industry.

Employment conditions deepen the precarity picture. Among EC+Em main-income earners, 43.5% are casual, ahead of permanent full-time (24.7%) and permanent part-time (23.5%). Government benefits and allowances are the main income source for 20.1% of EC+Em respondents, and 6.5% report nil or negative income.

Of the nine EC+Em respondents who answered the question on employment and earn their main income from film, television or games production, three are casual, two are permanent full-time, one is permanent part-time and three are "other" or not reported (contractors). Across the whole sample of 28 respondents earning main income from film, television or games production, casual and permanent full-time are roughly equally common (9 each), with permanent part-time, "other" and unreported employment types accounting for the remainder.



Financial security is correspondingly weak. In the full sample, 47.2% report sometimes struggling to make ends meet or never having enough money; in the EC+Em subset, the equivalent is 48.9%. By contrast, only 24.6% of the full sample and 20.1% of the EC+Em subset describe their family-of-origin background that way: 75.4% of the full sample and 79.9% of the EC+Em subset describe their family background as broadly comfortable or usually having enough. Current financial insecurity is therefore much more widespread than their level of childhood financial disadvantage. The implication is that pursuing a screen career appears to push respondents financially backwards relative to where they started, rather than the difficulty being mostly inherited from family circumstances.

Interestingly, respondents from less financially secure family backgrounds are directionally more likely to have completed a production than those from more secure backgrounds (60.7% vs 48.6% in EC+Em). The difference is not statistically strong in this sample and should be treated as suggestive: it may indicate that some respondents from less secure backgrounds are using creative practice very actively as a way of building entry, but the sample is not strong enough to conclude this with confidence.

7. Connecting to the industry

7.1 How they keep informed

Across EC+Em respondents, the most common screen-industry information sources are private social media (60.0%), watching Australian content (52.7%), community groups such as Movie Mutuals (50.0%), film festivals, conferences and seminars (48.7%). Only 40% used Screen Australia newsletters / social media / podcast, while industry publications and state agency channels each reach around a third of EC+Em respondents. Around 11% of EC+Em respondents are not actively keeping up to date with the industry. A higher proportion of those who are actively producing have higher levels of engagement across all sources of information.

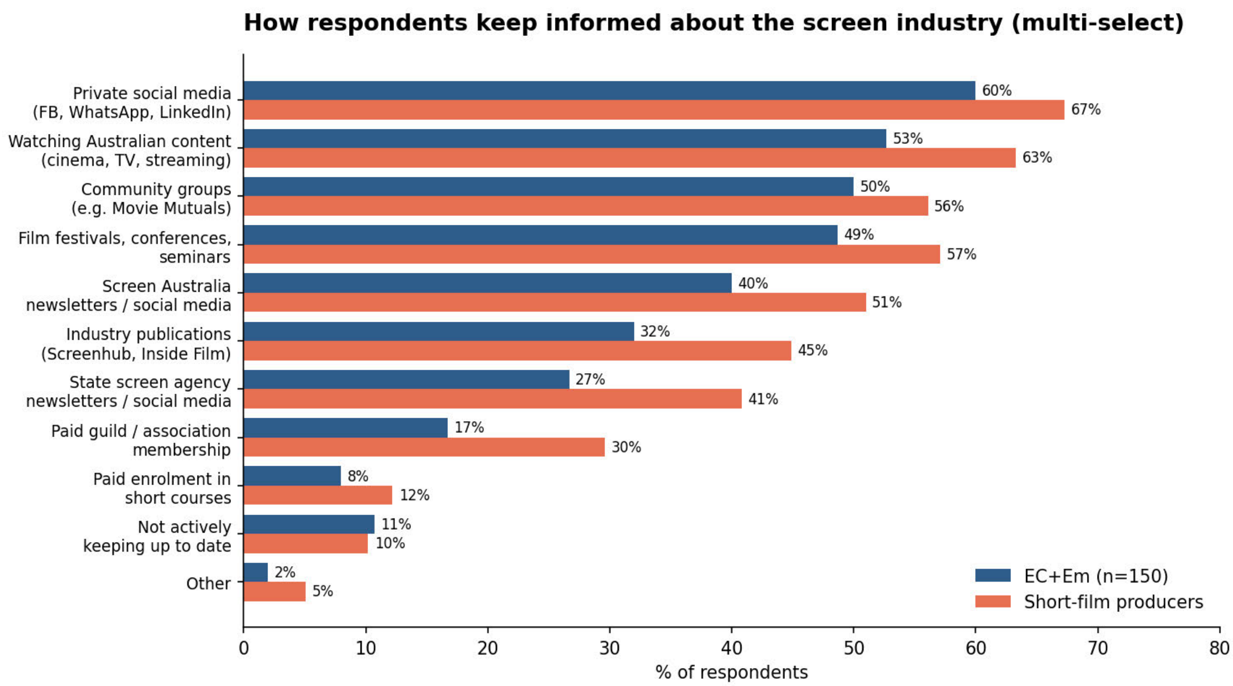
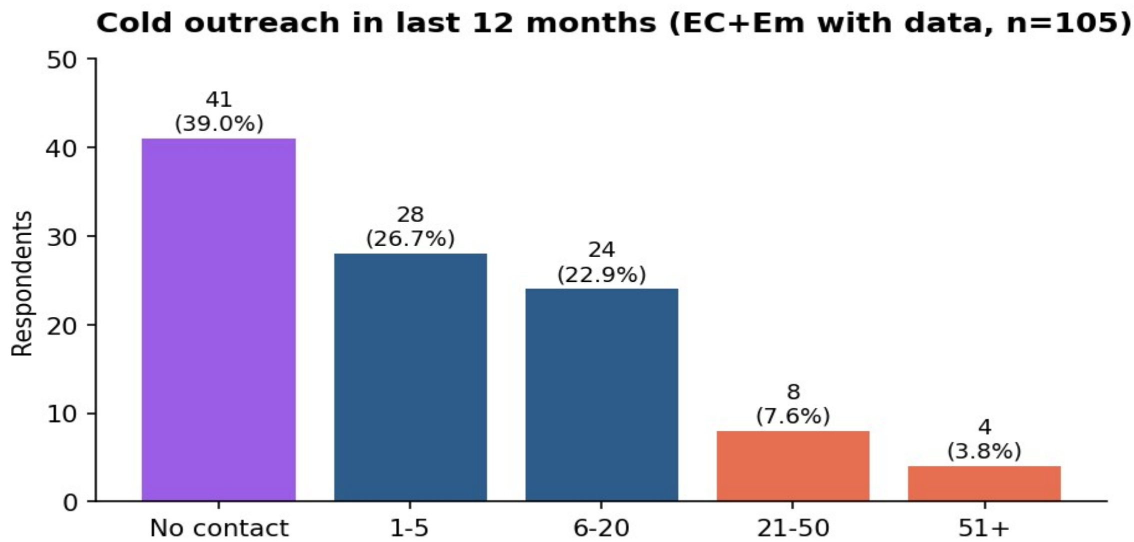


Figure. How respondents keep informed about the screen industry (multi-select).

7.2 Cold outreach

Cold outreach to the professional industry is widespread but uneven.

Among EC+Em respondents with outreach data (n=105), 39.0% (41 respondents) made no cold contacts in the last 12 months, 26.7% (28) made 1 to 5, and 22.9% (24) made 6 to 20. A smaller minority pushed much harder, with 7.6% (8 respondents) making 21 to 50 contacts and 3.8% (4 respondents) making 51 or more.



The 64 EC+Em respondents who made some sort of cold contact together generated 1,233 contacts with industry, 209 responses (an aggregate response rate of 18.7%) and 97 positive outcomes[2] (a contacts-to-conversion rate of 7.9%). Contacts include: cold emails to production companies, calls to agents, letters to broadcasters and screen agencies seeking work, funding or project support. Positive outcome: a job offer, confirmed funding, a letter of interest or feedback or meeting. The 97 positive outcomes were concentrated among those 22 respondents. For the remaining 42 who made contact, outreach produced nothing at all.

These headline numbers conceal a highly skewed distribution: among the 64 respondents who reached out, the upper quartile of positive outcomes was just one. In other words, most respondents who tried outreach got little or nothing back; a small group accounted for a disproportionate share of the responses and positive outcomes.

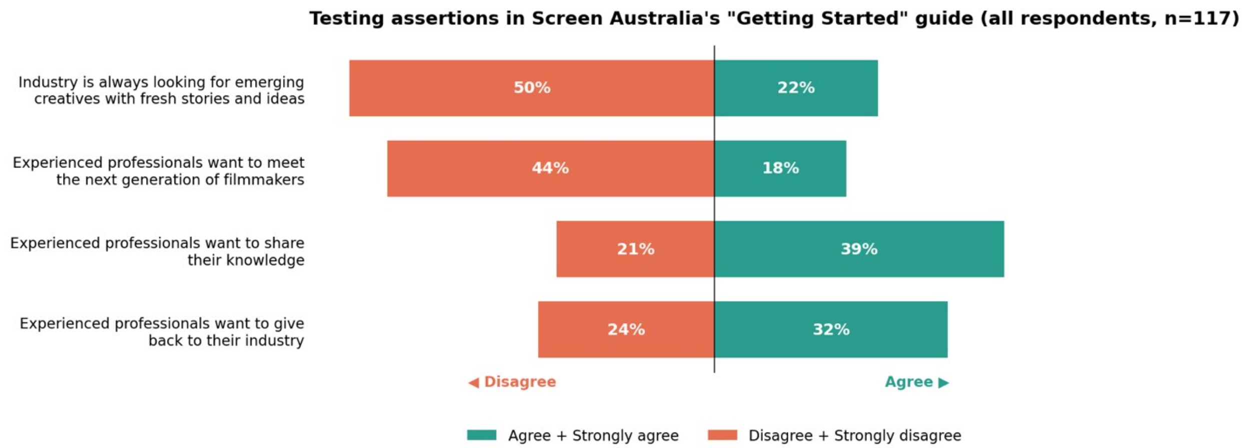
7.3 Screen Australia – Getting Started

Screen Australia published advice to emerging screen practitioners on their website called "Getting Started" although at time of analysis this appears no longer available. The guide said it "aims to provide useful industry insights, resources and advice that can help you get started in the screen industry", and includes assertions such as "Tertiary education can be an advantage… but a degree is not essential. Getting hands-on experience in the industry, developing your scripts, directing online content" can substitute.

Since the agency publicly stepped back from supporting entry-level activity in 2017 due to budget constraints, this guide was one of the few publicly visible signals about how the agency frames the entry

[2]Survey question: "How many times did the outreach deliver a specific positive outcome you were seeking (e.g. getting hired, securing funding, receiving a Letter of Interest, or getting a confirmed feedback meeting)?"

pathway. The survey tested several of the guide's claims to see whether respondents' lived experience matches the picture the guide paints. The intent is to compare claim against lived experience.



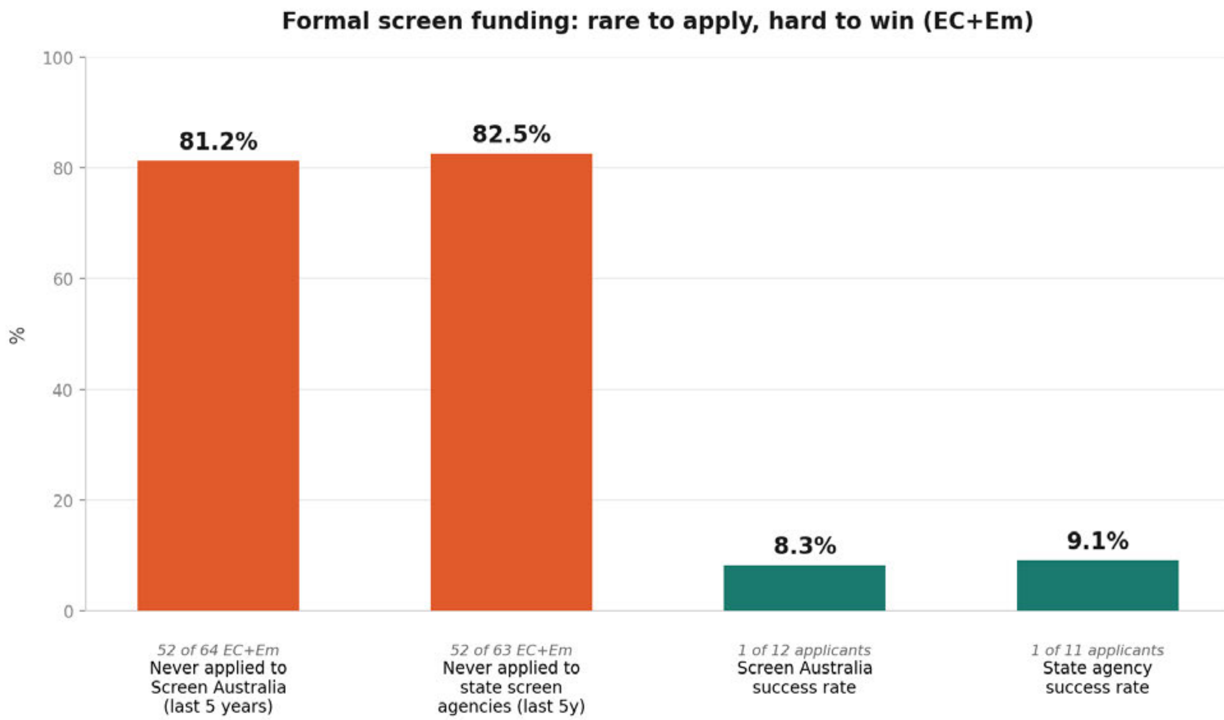
Among all respondents who answered the relevant items (n=117), only 22.2% agree the Australian screen production industry is always looking for emerging screen creatives with fresh stories and ideas, and 49.6% disagree. 17.9% agree experienced industry professionals want to meet the next generation of filmmakers, and 44.4% disagree. A more positive picture emerges on knowledge sharing (39.3% agree experienced professionals want to share their knowledge) and on giving back (31.6% agree they want to give back to their industry), but neither reaches a majority. Contrary to Screen Australia's claims, respondents' lived experience is that the established industry appears less accessible and open than promised.

7.4 Applications to formal funding systems

Formal screen funding is distant. In the EC+Em subset, 81.2% of those who answered (52 of 64 respondents) have never applied to Screen Australia in the last five years; 82.5% (52 of 63) have never applied to a state screen agency.

Among the minority who do apply, 12 to Screen Australia, 11 to state agencies), only one person received Screen Australia support and one different person received state agency support. Both reported applying three times and succeeding on every application, giving a per-application success rate of 100% but a per-applicant success rate of 8.3% for Screen Australia and 9.1% for the state agency (not stated). On the broader production base of 65 EC+Em producers who answered the funding question, less than 2% cite any Screen Australia support and none cite Screen Australia or state agency finance on their most recent production. Local council arts grants record a higher reach, with 3 of 65 producers (5%) citing one on their most recent project.

The application question covers any application across the agency's programs, including for seminars, workshops, internships, attachments and travel grants, not only project finance for production or development which are undoubtedly most valued. The figures should therefore be read as a measure of whether emerging practitioners engage with these agencies at all, not as a measure of project funding success specifically. The thematic analysis of open-ended questions in **Appendix A** provide further insights.

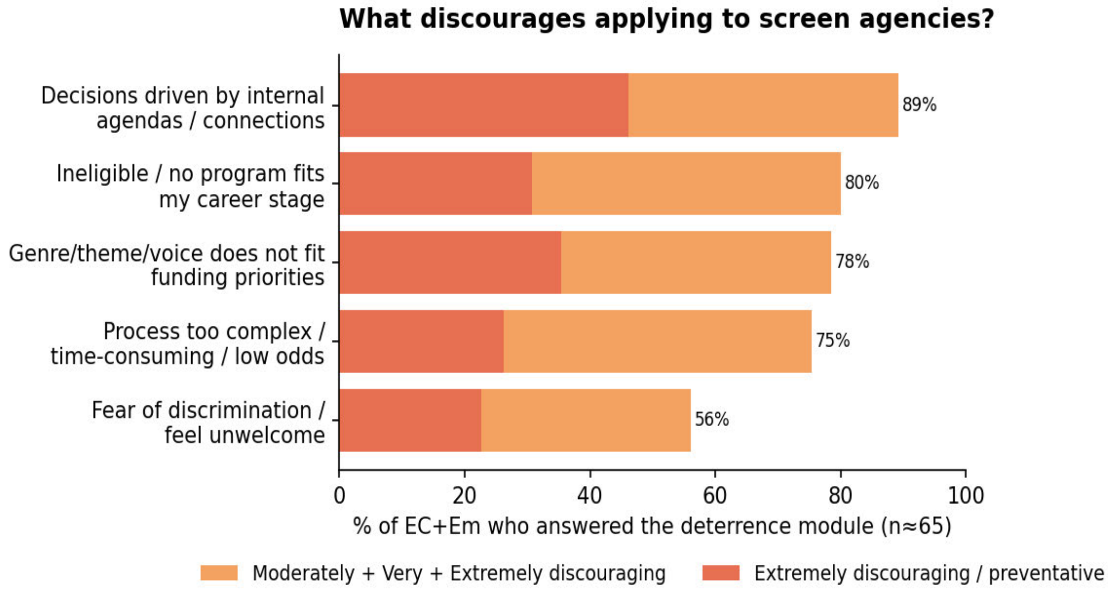


It should also be noted that 86 of 150 EC+Em respondents did not answer the Screen Australia application question, and 87 did not answer the state agency equivalent. This is a majority non-response and likely understates disengagement rather than overstates it. Respondents who have never considered applying, or who regard the agencies as irrelevant to their practice, may have simply skipped the question. If non-respondents are treated as non-applicants, the never-applied rate rises to 92% for Screen Australia (138 of 150) and 93% for state agencies. The true picture of disengagement from formal funding bodies is probably closer to these figures than to the answered-only rates.

Non-participation is the dominant finding.

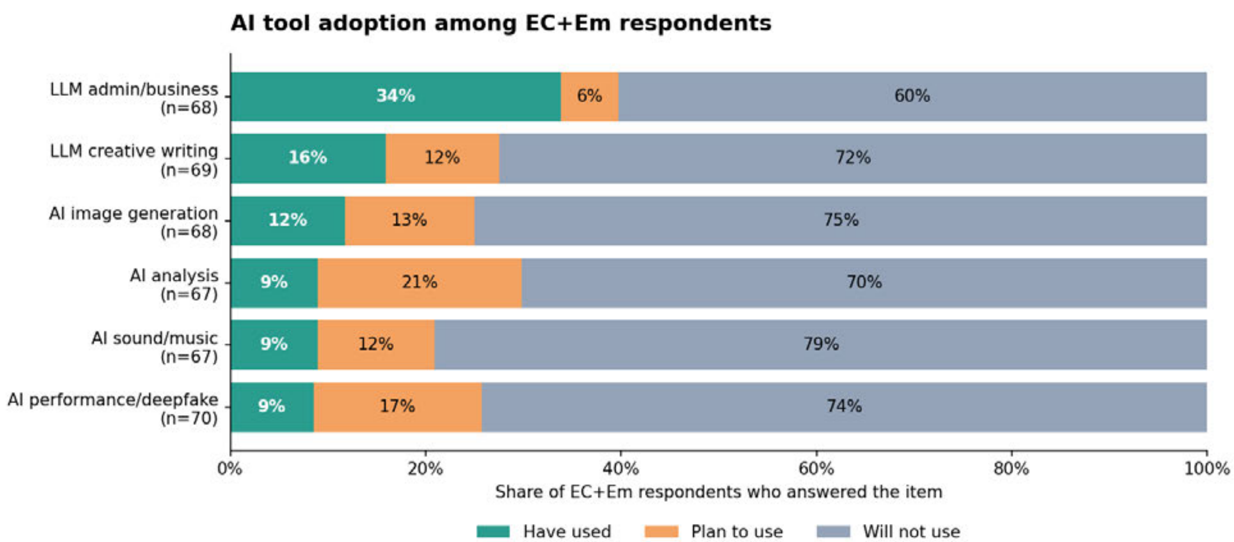
Why don't they apply?

The survey posed a number of reasons why people may be deterred from applying to screen agencies which may provide some insights into why this cohort does not apply. Among EC+Em respondents who answered the deterrence module (n≈65), perceptions of internal agendas and connections is the strongest deterrent: 89.2% rate this moderately, very or extremely discouraging, and 46.2% rate it extremely discouraging or preventative. Eligibility and program-fit are also major deterrents: 80.0% find ineligibility or the absence of a program fitting their career stage at least moderately discouraging. Genre, theme or voice mismatch with funding priorities is rated similarly (78.5%), and process complexity / low odds is close behind (75.4%). Fear of discrimination or feeling unwelcome is rated at least moderately discouraging by 56.1% of respondents.



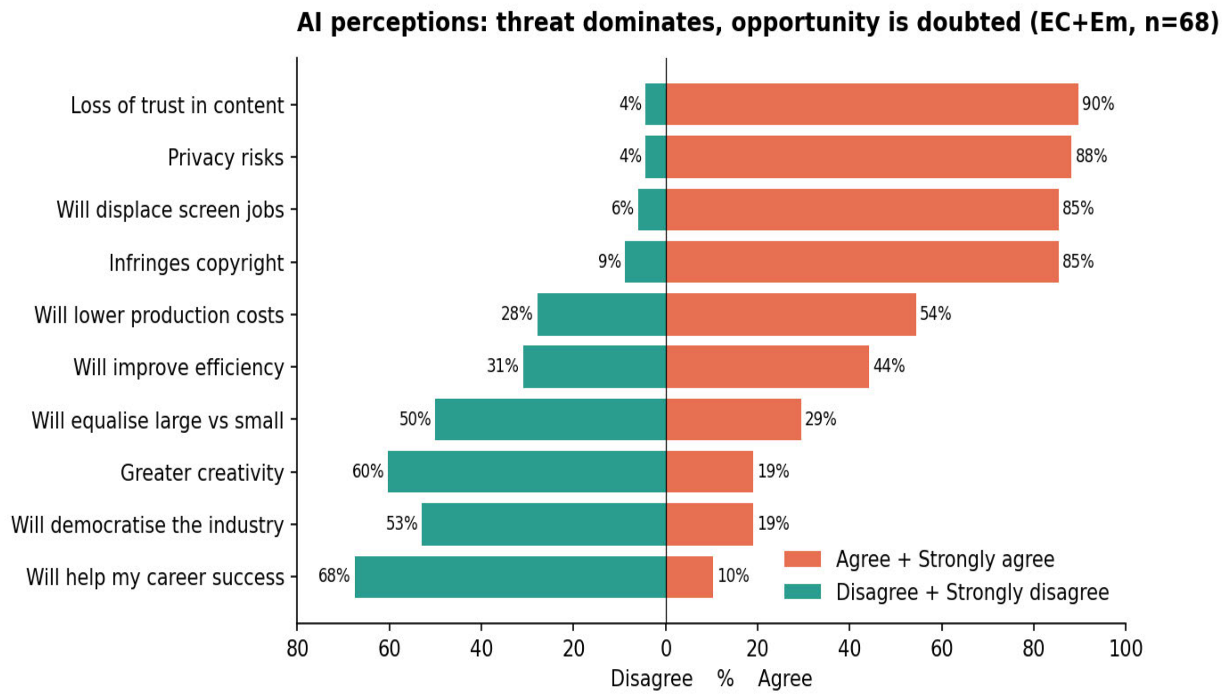
8. Use and perceptions of AI

Among EC+Em respondents who answered questions relating to Artificial Intelligence (n≈68), tool adoption is concentrated in lower-stakes admin and creative writing tasks. 33.8% have used an LLM for admin or business work, 16.2% have used an LLM for creative writing or scripting, and 11.9% have used AI image generation. Performance, AI sound and music tools, and AI analysis tools are each used by around 9% of respondents, with similar or slightly larger shares saying they plan to use them. The largest share in every category remains "will not use", ranging from 60.3% for LLM admin to 79.1% for AI sound and music.



Perceptions are dominated by concern and perceived threats. 89.7% of EC+Em respondents agree that AI will lead to a loss of trust in content, 88.2% agree it poses privacy risks, 85.3% agree it will displace screen industry jobs and 85.3% agree it infringes practitioners' copyright.

On opportunity claims, only 19.1% agree AI will enable greater creativity, 19.1% agree it will democratise the industry, 29.4% agree it will equalise large versus small producers, and only 10.3% agree AI will help their own career success. A majority (54.4%) do agree AI will lower production costs, and 44.1% expect efficiency gains, but in this sample those productivity expectations sit alongside, rather than displacing, the threat narrative. The analysis of open-ended questions in **Appendix A** provides further insights into this phenomenon.



Even among respondents who strongly agree AI will displace jobs, a meaningful share of respondents are still using AI tools, particularly for admin tasks. The pattern is one of pragmatic adaptation: holding strong threat beliefs while engaging anyway, primarily through lower-stakes admin uses rather than creative ones.

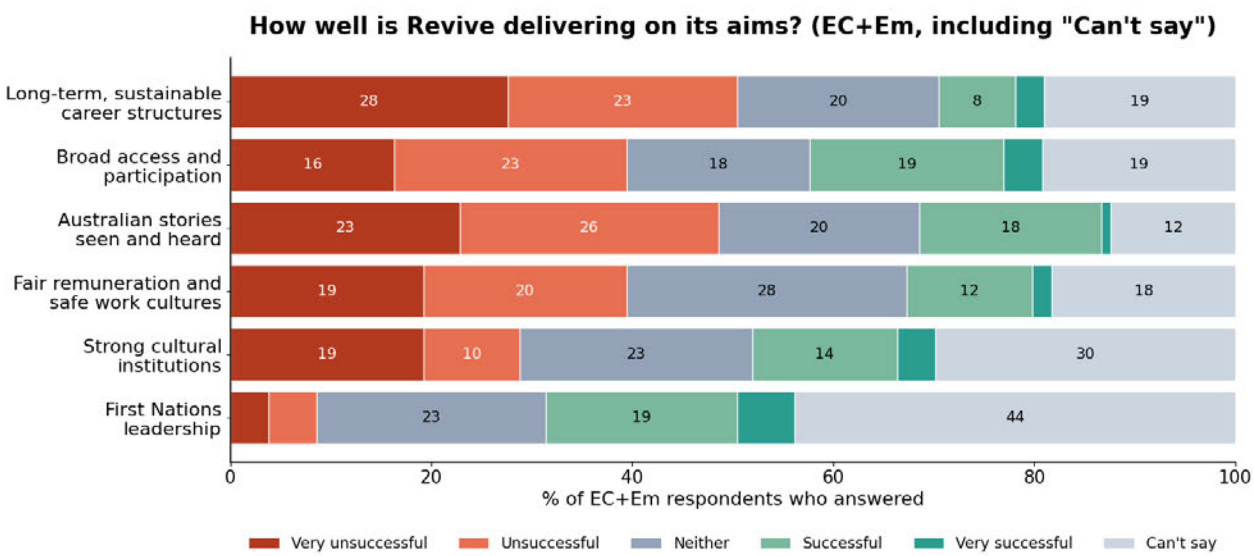
9. National Cultural Policy

9.1 The effectiveness of Revive

Respondents were asked to rate their perceptions about whether the government is succeeding in its objectives outlined in the current iteration of Revive, the National Cultural Policy.

Among EC+Em respondents who answered each item, including those who selected "Can't say", the strongest negative assessment concerned long-term, sustainable career structures, which 50.5% rated unsuccessful or very unsuccessful. Australian stories being seen and heard regardless of platform followed at 48.6%. Broad access and participation, described in the policy as "a place for every story, and a story for every place", and fair remuneration and safe work cultures were each rated unsuccessful or very unsuccessful by 39.4%. Strong cultural institutions was rated unsuccessful or very unsuccessful by 28.8%.

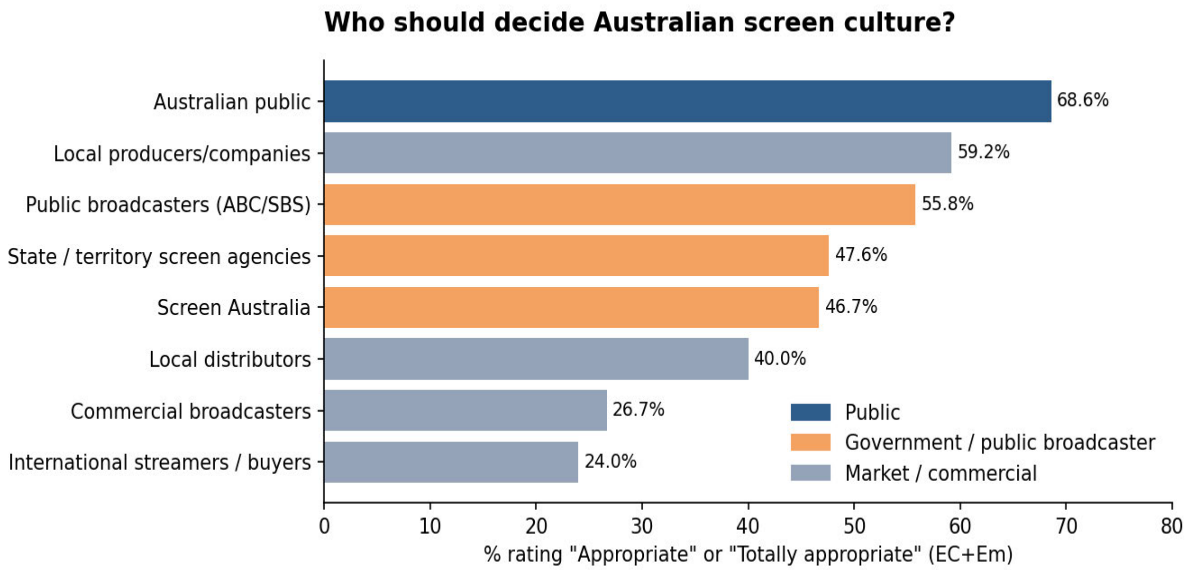
On First Nations leadership, 8.6% rated the aim unsuccessful or very unsuccessful and 24.8% rated it successful or very successful. However, 43.8% selected "Can't say", the largest response category, consistent with a predominantly non-Indigenous sample feeling under-informed or unable or inappropriate to assess progress in this area.



Respondents are most clearly negative where policy should be touching career conversion directly, while on institutions and First Nations leadership the stronger finding is one of limited visibility, distance or uncertainty.

9.2 Who should decide Australian screen culture?

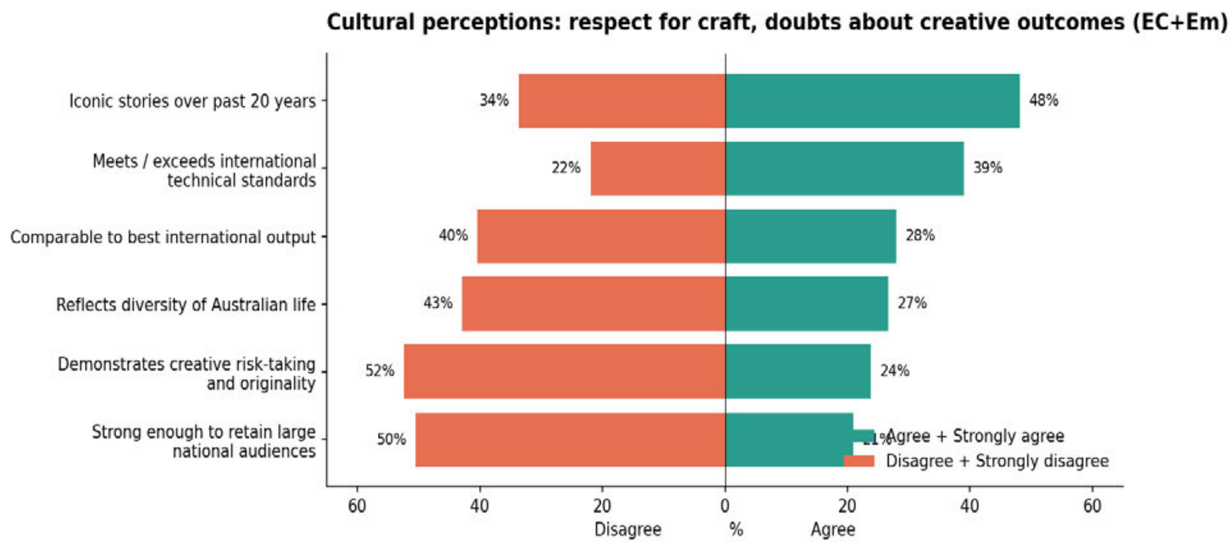
Respondent views on who are appropriate decision-makers about Australian screen culture are clear. The Australian public is the most endorsed decision-maker among EC+Em respondents (68.6% rating their role appropriate or totally appropriate), followed by local producers and production companies (59.2%) and public broadcasters ABC and SBS (55.8%). State and territory screen agencies (47.6%) and Screen Australia (46.7%) are a toss-up, while commercial broadcasters (26.7%) and international streamers and buyers (24.0%) are seen by most as not appropriate. Respondents appear to be distinguishing between bodies that feel publicly legitimate or locally accountable and those that feel more remote, market or commercially led or externally driven.



9.3 Performance of the Australian screen industry

Respondents are positive about technical craft of the Australian screen industry but more critical about creative outcomes. In the EC+Em subset, only 48.1% agree the Australian screen industry has produced iconic stories over the past 20 years. A reference list of widely recognised Australian productions over that period is included as **Appendix C**.

Only 39.0% agree productions meet or exceed high international technical standards and most respondents do not believe that Australian productions demonstrate creative risk-taking and originality (23.8% agree, 52.4% disagree), reflect the diversity of Australian culture and life (26.7% agree, 42.9% disagree), are comparable to the best international output (27.9% agree, 40.4% disagree) or are strong enough to capture and retain large national audiences (21.0% agree, 50.5% disagree).

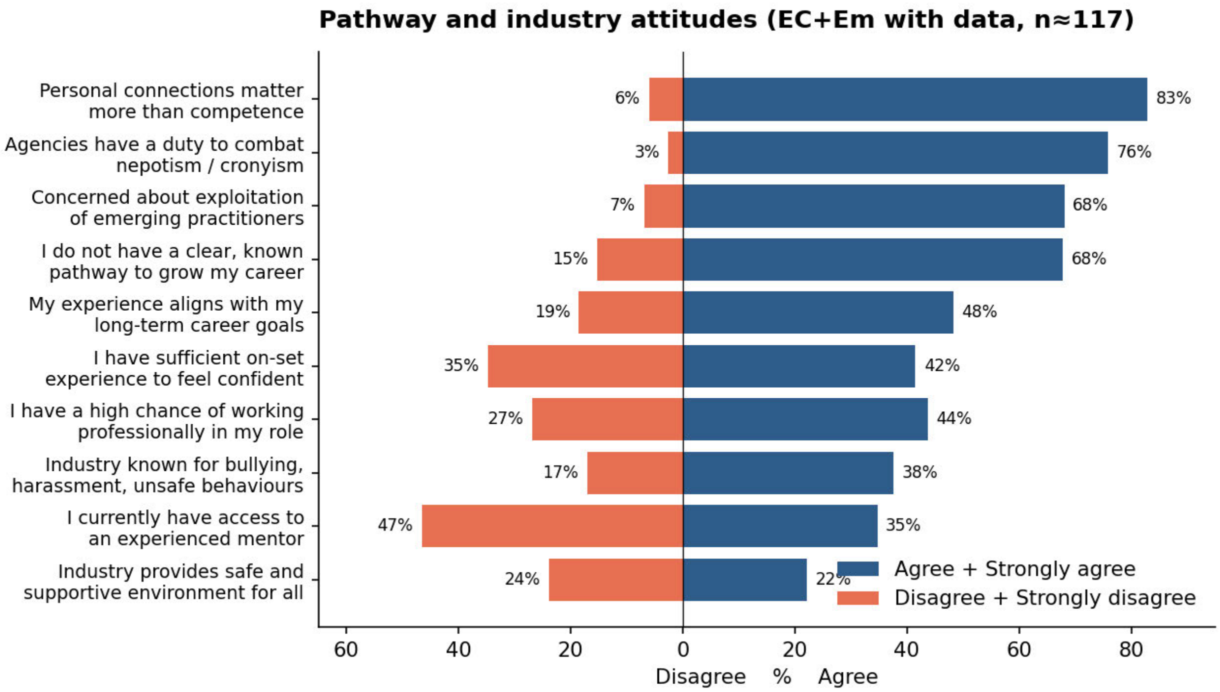


9.4 Pathway and industry confidence

Finally, the survey also included questions that tested respondents' perceptions of the career pathway and of the possible experience of a career in the industry.

Among EC+Em respondents with data, 67.8% agree they do not have a clear, known pathway to grow their career, 56.3% agree they have missed opportunities that may have helped them, 82.9% agree personal connections matter more than professional competence, 75.9% agree agencies have a duty to combat nepotism and cronyism, and 68.1% are concerned about exploitation of emerging practitioners by more experienced industry actors.

Only 22.2% agree the industry provides a safe and supportive work environment for all, and only 34.7% agree they currently have access to an experienced mentor working in the screen industry. Confidence of achieving a career they want is a flip of the coin but mostly uncertain: 43.7% agree they have a high chance of working professionally in their aspired role; 26.8% disagree.


Pathway and industry attitudes (EC+Em with data, n≈117)
Personal connections matter more than competence
6%
83%
Agencies have a duty to combat nepotism / cronyism
3%
76%
Concerned about exploitation of emerging practitioners
7%
68%
I do not have a clear, known pathway to grow my career
15%
68%
My experience aligns with my long-term career goals
19%
48%
I have sufficient on-set experience to feel confident
35%
42%
I have a high chance of working professionally in my role
27%
44%
Industry known for bullying, harassment, unsafe behaviours
17%
38%
I currently have access to an experienced mentor
47%
35%
Industry provides safe and supportive environment for all
24%
22%
Agree + Strongly agree
Disagree + Strongly disagree
60
40
20
0
20
40
60
80
Disagree % Agree

10. Conclusion

The Who Gets a Break? survey does not describe a passive or lightly attached cohort waiting for institutions to do the work for them. It describes emerging practitioners who are already investing heavily in their screen careers: through study, debt, self-funded production, unpaid labour, collaboration and sustained creative practice around insecure income.

That investment is visible across the survey. Many respondents are carrying student debt. Many are financing productions from their own savings. Many spend months, and sometimes more than a year, bringing projects to completion. Many also rely on unpaid cast, crew, post-production and peer labour to make work possible.

The survey also suggests that respondents perceive formal education as not enough for a career. Respondents recognise the value of film school and other training for experimentation, networks and confidence, but they do not see education as a dependable bridge into professional progression.

At the same time, the cohort is not without momentum. Respondents are motivated by creative expression and collaboration. They are producing work, often repeatedly. They rely on community groups such as Movie Mutuals for information, connection and encouragement where formal pathways and supports are thin or difficult to access. Those who write, produce, reach out and persist do achieve cultural outcomes, including festival selections, online releases and other forms of public exposure.

The clearest finding is therefore not a deficit of aspiration. The aspiration is already there. The gap lies between the effort emerging practitioners are already making and the structures available to convert that effort into paid, supported and recognised screen work. Respondents describe almost a closed system in which the odds are unevenly stacked, and where money, time, connections and prior recognition shape who gets seen, who gets supported and who can keep going.

Appendix A. Detailed thematic analysis of open-ended survey responses

1. Dataset and approach

The Who gets a break? survey included a number of open-ended questions focused specifically on the challenges of pursuing a screen career. As a result, the story told through these responses is, unsurprisingly, framed largely in the negative. While this focus was useful in surfacing problems that may require policy or industry attention, it may also represent a limitation in the survey design. Future iterations could be strengthened by balancing questions about barriers and challenges with questions about opportunities, supports and enablers, to produce a fuller picture of emerging practitioners' experiences.

The survey contained 193 responses. Of these, 126 respondents provided at least one answer in the three open-ended fields:

Question A — "What are the biggest challenges you face in continuing to undertake creative practice and producing screen projects? If applicable, is there anything you would like to share about your experience with the screen agencies?" (61 responses)

Question B — "What do you think is the single biggest challenge facing emerging screen practitioners and why is it an issue?" (121 responses)

Question C — "Are there any other comments you would like to make?" (61 responses)

The analysis treats the open-ended material as a qualitative dataset. Each respondent was coded across the combined text of all questions. Themes overlap, so one respondent can speak to several themes at once. Frequencies in this report are therefore indicative theme prevalence counts, not mutually exclusive categories.

To deepen the reading, the analysis also checks whether themes cluster around the descriptive variables in the workbook, including age, gender, current relationship to the screen industry, self-described experience level, current income position, childhood household finances and main source of income.

The analysis stays close to what respondents actually say. Where respondents are angry, blunt, profane or contemptuous, that language is part of the finding and has been retained.

2. The core story in the data

Many respondents describe a system they believe is closed, socially filtered and creatively conservative. They do not only say that there is not enough work, money or support. They say access to work, money, legitimacy and progression is controlled by a narrow set of institutions and people, and that the criteria used to distribute opportunity are circular, opaque and biased toward prior validation.

Taken together, the comments describe a linked chain of problems:

- Creative work is expensive to make.
- Survival income consumes the time needed to build a body of work.
- There is no clear bridge from unpaid practice into stable, paid screen employment.
- Eligibility for support is seen as dependent on credits, experience, relationships or proof of prior market confidence. These are significant disadvantages for emerging screen practitioners.
- Support is perceived to flow disproportionately to people, projects and settings that already look safe.

The result is seen to be a system that filters career persistence by money, time, socio-economic advantage, contacts and institutional legitimacy.

The comments are also harder on the creative outcomes of the system than a simple barriers analysis would suggest. Many respondents do not just say they are excluded. They say they are being excluded in favour of work they regard as timid, repetitive, overly sanitised, commercially imitative, or designed around institutional risk management rather than artistic originality.

3. Theme prevalence across the 126 respondents who provided open-text comments

Theme	Respondents	Share of open-text respondents
Financial precarity and cost barriers	79	63%
Time poverty and competing demands	37	29%
Pathways, entry and progression	45	36%
Gatekeeping, concentration and nepotism	20	16%
Funding-body and agency barriers	18	14%
Community, mentoring and resource gaps	26	21%
Industry model and market weakness	24	19%

Because themes overlap, percentages do not sum to 100%.

4. Detailed findings by theme

4.1 Survival is the first filter: money, time, unpaid labour and socio-economic privilege

Financial pressure is the dominant theme in the dataset, but respondents are not talking about one financial problem. They describe at least four linked pressures:

- the direct cost of making work,
- the scarcity of consistent paid work,
- the need to keep separate income streams just to live, and
- the way those pressures sort people by privilege and family backing.

Cost. At the most immediate level, respondents talk about the practical cost of making work. They mention crew, equipment, locations, set dressing, festival applications, marketing, archival footage, contracts and the inability to reimburse collaborators. The point is not only that budgets are hard to secure. It is that even ultra-low-budget creative work requires cash that many respondents do not have.

> *"The biggest challenge is always money. Lack of financial power to reimburse crew members and to acquire equipment/locations/set dressing."*
>
> *"Funding - more grants for short films, around 10k would do wonders for small filmmakers and would shoulder much of the initial costs, and allow many crew to be paid even fuel and stipend amounts so they aren't going unpaid like I try to do."*

Scarcity of work. Respondents also describe a screen labour market where the work that is available is too sporadic, too low paid, or too contingent to sustain a life. They talk about one-off jobs, unpaid work, commercial work drying up, and productions that cannot pay enough to justify the income lost elsewhere.

> *"Landing a few paid jobs is the biggest challenge. A one off $100 job is not doing much when you want to sustain your lifestyle through filmmaking. Most projects have close to zero budget and those are the ones you have to work on when you have no other credits under your belt."*
>
> *"Receiving regular work. It's all nepotism, so if you don't have the right connections, you don't get work. Getting consistent paid work, even when you've got your foot in the door. Just about everyone I know has another job or two on the side to support themselves, and we're burning out as a result."*
>
> *"I don't feel a sense of stability in my work. I feel like I'm constantly hopping between casual work (films) without any guarantee I'll make my money back at a profit, or at all."*

The time cost of survival. A large part of the financial story is really a time story. Time is repeatedly described as the thing that gets eaten by survival. Respondents do not portray day jobs as temporary inconveniences. They describe them as structurally displacing the time needed to write, direct, produce, network and develop.

> *"Biggest challenge is having enough time to work on projects around regular jobs that pay the bills."*

> *"Probably money. Cost of living crisis means all sorts of things, but mostly that focusing on financial survival must be prioritised (unless you have familial financial support) over creating your own work."*

> *"Financing your life is extremely difficult if you're not from a wealthy background. The time one takes to solve this is taken from creative efforts. Years can pass and momentum is easily lost."*

Disadvantage. The socio-economic dimension is explicit in the data. Some respondents say plainly that only people with financial privilege can afford to stay in the race long enough to build the track record later required by funding bodies or employers.

> *"Opportunities for emerging screen practitioners cater for those with financial privilege who can afford film school, or time off from their day job, and who are young."*

> *"My biggest concern is a large number of creatives will never get the chance to give their projects life due to financial reasons and the only people who are able to pursue this career are people who come from privilege and are financially secure which will limit and narrow the creative voice of this country in the long term."*

> *"Making the leap between hobby and commercial - very difficult, even with connections, to sustain a career in the arts without having enough savings or support to do it full time, otherwise too many missed opportunities."*

Financial-pressure coding is highest among respondents who say they already have "their foot in the door" but screen income is not their main source of income (85%). It is also very high among those whose main income comes from freelance or own-business work (77%), and among respondents who said their family sometimes struggled to make ends meet growing up (73%) or never had enough money (75%). This suggests that socio-economic disadvantage is a real barrier.

4.2 Pathways in name only: no clear entry point, circular eligibility and role trapping

The pathway problem in this dataset is sharper than a general complaint about "lack of opportunities". Respondents repeatedly say there is no clear, legible way to move from wanting a screen career, or even from already making work, into sustained professional participation.

No entry point. They describe missing entry-level roles, unclear first steps, too few paid attachments or internships, and a catch-22 in which people need credits, credits need work, and work goes to people who already have credits.

> *"I feel that there is a significant lack of entry-level positions, and that experienced film practitioners have created a gate-kept community which does not include many grass-roots creators or filmmakers. During my experiences with screen agencies, they only want to deal with content that has a proven track-record with generating income over artistic integrity and vision. This makes it incredibly difficult for early-stage creators such as myself to gain a foothold in the industry."*

> *"There's no clear entry point let alone a way to apply for it like an ordinary job."*

> *"Lack of opportunities on paid sets of any kind of job even internships."*

> *"Nowhere for people to cut their teeth inexpensively."*

Catch 22 and a high bar. The sense of circularity is one of the strongest findings in the open text. Respondents often speak as if the system is formally open but practically closed: "emerging" opportunities exist, but the standard of proof needed to access them already resembles mid-career validation.

> *"You can't prove yourself until you've made it and you can't make it until you've proven yourself. (Unless you got a free pass)."*
>
> *"Screen agencies often label programs as being for "emerging / early career" practitioners. However, the people who are selected are NOT early career, they have credits, experience, and often have already received funding / attention / development programs from the screen agencies - almost as if they are a "safe choice"."*
>
> *"Not having a screen broadcasting credit puts me out of the race most of the time."*
>
> *"I also note the requirement for an acceptable "credit" to access development funding, again lends itself to those with money being able to produce a short film."*

Role trapping. Some respondents also describe role trapping: being told, explicitly or implicitly, to enter through jobs they do not want in the hope of one day transitioning into the work they actually care about. The comments suggest people do not trust that such movement is really available.

> *"The problem with being forced to go into a part of the industry or an industry position you personally have no passion or desire for on the slightest hope you may eventually get the role you actually do. The problem is most roles are very different and very hard to move between so it could still lead to you never even getting to try the position you're interested in."*

Pathway concerns are especially concentrated among respondents who say they have their foot in the door but do not yet live off screen income (48%), and among those actively seeking entry (38%). Women mention this theme more often than men in the open-text subset (46% versus 32%). Respondents who said their family sometimes struggled to make ends meet growing up also mention pathway failure at a higher rate (64%).

4.3 A closed industry: gatekeeping, clique culture, nepotism and repeat recipients

A large cluster of responses says the problem is not only scarcity, but how opportunity is distributed. Respondents describe an industry organised around clique culture, gatekeeping, repeat hiring, repeat funding and "safe" selections. These comments are not just saying it is competitive. They are saying the field is socially filtered.

> *"Gatekeeping and clique culture. Experienced practitioners work with the same crews, over and over, and therefore are reluctant or do not need to open the door to new practitioners. They also gatekeep the industry from emerging talent as if we need to pass some sort of hidden test to be given a chance."*
>
> *"A lack of feeling welcomed into the Screen Industry."*

> *"There is lots of ambition, lots of aspiration, and in my experience, lots of talent. It's just that the talent doesn't get the opportunity - the holders of the keys to the gate (the agencies, the marketplace) are part of an exclusive club that I don't think is interested in real talent."*

> *"Nepotism. It's who you know and nothing else."*

> *"Nepotism. Nepotism. Nepotism."*

A related complaint is that support is concentrated around people who already look validated. In the responses, this is not only about who gets picked once; it is about who gets picked again and again.

> *"A huge issue is that the same people keep getting government handouts/funding support, yet the taxpayer funded results underwhelm for the most part."*

> *"Stop propping up the same people."*

> *"It's just about making sure that the people working in the industry - their friends - get to continue working in the industry."*

These themes are strongest among respondents with "their foot in the door" but without a sustainable screen income (26% for gatekeeping; 26% for agency barriers). They are also more common in the 45 to 54 age group than in the 18 to 24 group, people who have more experience engaging with the established industry.

4.4 Screen agencies, taxpayer support and public legitimacy: opacity, experience filters, safer projects and international priority

The strongest agency criticism in the data is not simply that funding is limited. Respondents say the system is hard to understand, hard to access, and often unaccountable.

Opacity. The narrative describes unclear pathways through the agencies, limited or absent feedback, opaque assessment processes, and an institutional preference for applications that already carry recognised credits, producers, budget scale, market proof or some other marker of safety.

> *"I have found applying for screen funding to be taxing on every occasion and have never been pushed forward in the process."*

> *"Complete lack of feedback."*

> *"Lack of clarity around which projects are selected and why - they are government, they need to be accountable to their spending. Selected projects should be shared and noted next to a checklist of why they were awarded."*

> *"Lack of transparency around screening processes - I know it is not the head of Screen Australia reading my application, it's someone much more entry level, who I (respectfully) doubt has any applied screen experience."*

At its angriest, this line of criticism becomes a complaint about public legitimacy itself: that taxpayer risk is socialised, but decisions remain unaccountable and concentrated.

> *"There is no accountability in the system. The risk is transferred to the tax payer and they neither get a say in what is made, nor do they get a share in the financial rewards if something actually gets made."*

> *"I think government screen agency funding is just a form of Centrelink handed out by the welfare recipients to their own tribe."*

Experience filters. Several responses suggest that public support is perceived to privilege prior experience, recognised credits and already-legible producers over genuinely early-stage creators.

> *"During my experiences with screen agencies, they only want to deal with content that has a proven track-record with generating income over artistic integrity and vision."*

> *"Funding opportunities it's really hard to get funding from resources unless you have tons of experience."*

> *"I had support from someone who had worked at a screen agency, and my application had been checked and submitted with them. I had also met with the screen agency prior to applying. We were both very surprised I did not get accepted into the program, and the screen agency would not give any feedback."*

Safe and commercial. Another strand of criticism is that the policy settings and funding architecture are seen as misaligned with the economics of emerging work.

> *"Screen Australia needs other sources to provide funding, but my funding sources (commercial brands) are not valid. And broadcasters don't fund webseries. Also, Vic Screen don't give funding unless Screen Aus have already agreed to pay and the budget is more than $300,000."*

> *"There are only a few paths to make a film, and they all go through Screen Australia. But Screen Aus is picky in what they support…"*

> *"Met with the state agency about production funding - they wanted the budget to be $8 million. It would never have made it's money back, but it might have gotten a "star" which may have attracted a distributor and a tiny Minimum Guarantee but exorbitant distribution fees meant we would never have seen a dime from any of the revenues."*

International production is not a cultural priority. Respondents repeatedly contrast support for major or international production activity with the lack of practical pathways for local, emerging and lower-budget creators.

> *"Strong focus on large international projects."*

> *"Producers backing projects that are too safe, either creatively, morally or technically. That and an industry that puts more emphasis in supporting international productions (especially from the US) than it does on being self-sustaining."*

> *"More and more the big productions that get made here are US blockbusters that need soundstages and an anywhere looking city. Our culture deserves better than that."*

4.5 Creative consequences: safe projects, stale output and distrust of what gets backed

A notable feature of the data is that respondents are not only upset about access. They are also highly critical of the content and creative logic they believe the system rewards.

Safe investments. The comments repeatedly suggest that public and broadcaster support favour projects that are safe, conventional, issue-led in a narrow way, tied to known personalities, or designed to look culturally respectable rather than artistically daring.

> *"Australian Broadcasters and production companies all like to churn out the same slop that we see all the time. They will not give emerging film makers with creativity a chance."*
>
> *"No market for small budget films - no commercial creativity in aus television, safe ideas and using the same personalities for every project instead of investing - and continuing to support - new faces/talent."*
>
> *"Every movie has to be about an issue, or a problem, or an injustice. That leaves very little room for stories that are whimsical, comedic and/or adventurous."*
>
> *"If you're not writing Australiana there is simply no point. If you're writing scripts based in other countries, zero point. Creating a feature that's a tourism ad or propagates stereotypes - golden!"*

Stale outputs. Some respondents tie this directly to weak development practice and institutional risk aversion.

> *"The output of 90% of Aussie content is real lowest common denominator stuff. If it's the kind of program that airs on the ABC on a Saturday/Sunday night, it's generic and creatively stale."*
>
> *"No one takes creative risks cos they won't get funded."*
>
> *"You see the same stuff - remakes of 40 year old stories or tired genres and storyline rolled out with the same tired actors - just getting made because of risk aversion and laziness. There's no experimentation. Nothing bold. The boldest ideas have come from emerging screen practitioners. Always has."*

This is one of the clearest places where respondents implicitly contrast industry stability with creative renewal. Their complaint is not just that incumbents keep working. It is that the creative outcomes they see do not justify the concentration of support to those who get the bulk of the opportunities and support.

4.6 Community, mentoring and practical infrastructure

A separate strand of responses is less about formal funding and more about practical infrastructure. Respondents ask for people, know-how and physical resources: collaborators, mentors, network access, shared spaces, equipment, and places where skills can actually be built through use.

> *"Meeting people who are as dedicated and willing to grow together as a team where we all just help each other whenever is needed so that we can all get to tell our stories."*

> *"No encouragement. No knowledge of where to start. No professionals educating or teaching how it all works."*
>
> *"Would love to have more knowledge and network opportunities."*
>
> *"I wish that there was a studio that lets young artists and filmmakers use their equipment… like a library but instead of books it's things like sets and cameras and equipment."*

This theme is strongest among the "foot in the door but not main income" group (33%) and among respondents whose main income is government benefits or allowances (37%). It is also relatively common among respondents who say they currently struggle to make ends meet.

4.7 What government should do is contested

The responses are not unified on the solution. What they share is dissatisfaction with the current model. Some respondents want more direct government support, more seed funding and stronger intervention to create pathways. Others think the deeper problem is over-reliance on outdated public funding structures and want more private investment, entrepreneurialism and tax settings that support local capital.

> *"We need more entrepreneurial spirit and private investment and tax breaks for investing in screen content rather than a government driven system."*
>
> *"I think Australia's reliance on Government funded support to produce films is unsustainable… there needs to be more of a thriving privately funded sector with investors."*
>
> *"We need government support to strictly regulate AI use, provide streaming quotas, and directly support making Australian films and series."*

The data does not support a simplistic conclusion that respondents either want more government or less government. What it shows is a broad loss of confidence in the way support currently works.

4.8 Fairness, exclusion and contested diversity language

A minority of responses explicitly frame exclusion through identity language. Some respondents describe industry hostility toward some marginalised groups and inexperienced and emerging practitioners. Others argue that age, socio-economic disadvantage, being outside film-school networks, or being older and not fitting preferred identity profiles affects access. These comments are strongly worded and are part of the response pattern, but they are not the dominant explanatory frame in the broader open-text data.

> *"A substantial part of the Australian film industry is adversarial to emerging practitioners due to various factors including workplace culture which is hostile to inexperienced practitioners and people from marginalised groups, as well as nepotism, lack of funding, secrecy and vagueness in early career access/pathway programs, and a lack of artistic innovation or adventurousness in the kinds of home-grown content being funded."*
>
> *"There needs to be more opportunities for older people too."*

> *"Opportunities for emerging screen practitioners cater for those with financial privilege who can afford film school, or time off from their day job, and who are young. There is a bias towards youth, you see that every time an opportunity is put forth…"*
>
> *"As a straight white middle aged male, the industry won't give me a look in 'cause I don't tick any of their woke left wing boxes."*
>
> *"Cut the woke agenda bullshit."*

Several respondents acknowledge the importance of diversity and equity initiatives but argue that many of the visible programs and policy responses directed at emerging screen practitioners now sit within diversity and inclusion frameworks. Some distinguish between diversity of people and diversity of ideas, noting they are not the same thing, while others argue that socio-economics, wealth and geographic location are not adequately captured by current conceptions of equity.

This does not resolve the disagreement in the data, but it does show that ideas of "fairness" are being contested on multiple grounds at once.

4.9 Artificial intelligence (AI): a smaller but highly charged theme

AI is not one of the dominant themes by volume in the open-text responses, but it is clearly present and deserves separate attention. In total, 8 respondents explicitly referred to AI or closely related concerns. These comments are overwhelmingly negative. Respondents who answered open-ended questions do not present AI as an opportunity. They present it as a threat to paid work, authorship and independently made stories.

> *"Uncertainty around use of AI to replace creatives."*
>
> *"AI replacing commercial work and likely extras work too will have a large impact on many production roles, including actors and agents."*
>
> *"Unclear pathways into the screen industry. The rise of AI in the screen industry is taking away jobs."*
>
> *"AI, with it looking so realistic, how do you prove you're really writing it? When people may not believe you?"*
>
> *"reliance on AI, and the move away from independently made stories."*

Most AI comments came from younger and earlier-career respondents. Two anonymous respondents did not discuss AI primarily as an industry or labour-market issue but instead used the open-text field to attack the survey itself. These responses are qualitatively different from the rest of the AI material. They are best understood not as evidence about AI's impact on screen careers, but as evidence that AI is sufficiently charged as an issue to shape respondents' trust in the survey and in those conducting it.

In this dataset, AI appears less as a standalone technology topic than as an intensifier of the broader pathway problem.

5. Descriptive patterns that sharpen the story

The most important subgroup finding is that pressure is especially concentrated at the transition point between participation and sustainability.

Respondents who say they already have "their foot in the door" but screen is not their main income show the highest rates of financial pressure and some of the highest rates of pathway, gatekeeping and resource complaints. This suggests the hardest point is not initial aspiration, but conversion from partial participation into a stable professional life.

Childhood finances also matter. Respondents who say their family sometimes struggled, or never had enough money, are more likely to talk about pathways, precarity and the difficulty of staying in the field. The data therefore supports a socio-economic reading as well as an industry reading.

Gender and age shape some parts of the picture, though less uniformly than socio-economics and employment position. Women in the open-text subset mention time pressure and pathway barriers at higher rates. Older respondents are more likely to zoom out and criticise the industry model itself, while some explicitly argue that age bias and youth-coded "emerging" opportunities shut them out.

This is why the strongest interpretation of the dataset is not simply that emerging practitioners face barriers. It is that many respondents perceive those barriers as socially produced and institutionally maintained.

Appendix B: Supplementary tables and definitions

B1. Pathway definitions

A respondent is counted as having any screen education if they have a non-null response in any of: completed a university film school degree; attended but did not complete university film school; applied to film school (accepted or not); completed a VET / TAFE screen course; attended a paid short screen course; attended screen industry seminars or conferences; participated in community / guild screen programs; or any other screen education. This is a broad definition: attending a single industry seminar qualifies a respondent the same as completing a three-year degree, which is why over 80% of respondents at every stage meet this threshold. A stricter definition limited to formal qualifications would produce a lower rate.

A respondent is counted as having any screen work experience if they have a non-null response in any of: paid internship via a government screen agency; other paid internship / placement; unpaid / volunteer on-set work; unpaid / volunteer work at a screen company; paid work on an internationally funded production; or paid work on a commercially funded Australian production.

A respondent is counted as having creative practice if either the Screenwriter column equals "Yes" (they have written at least one script of any type) or the Production column equals "Yes" (they have completed at least one production).

B2. Demographic detail

Age group	All N	All %	EC+Em N	EC+Em %
Under 18	1	0.6%	1	0.7%
18 to 24	43	23.9%	41	29.3%
25 to 34	69	38.3%	57	40.7%
35 to 44	31	17.2%	17	12.1%
45 to 54	21	11.7%	15	10.7%
55 to 64	12	6.7%	8	5.7%
65+	3	1.7%	1	0.7%
Total	180	100.0%	140	100.0%

Table B2.1 Age distribution.

Education level	All N	All %	EC+Em N	EC+Em %
Bachelor's degree	86	47.5%	69	48.9%

Education level	All N	All %	EC+Em N	EC+Em %
Postgraduate degree	29	16.0%	23	16.3%
Year 11 or below	4	2.2%	3	2.1%
Year 12 certificate	16	8.8%	13	9.2%
Graduate Diploma / Certificate	15	8.3%	12	8.5%
Advanced Diploma	15	8.3%	6	4.3%
Certificate III / IV	7	3.9%	7	5.0%
Certificate I / II	4	2.2%	4	2.8%
Prefer not to say	5	2.8%	4	2.8%
Total	181	100.0%	141	100.0%

Table B2.2 Highest level of education.

Identity group (multi-select)	All N	All %	EC+Em N	EC+Em %
First Nations	2	1.0%	2	1.3%
CALD (Culturally and Linguistically Diverse)	46	23.8%	34	22.7%
LGBTIQ+	43	22.3%	34	22.7%
Person with a disability	36	18.7%	30	20.0%
Living in rural / regional area	15	7.8%	12	8.0%
No identity group selected	70	36.3%	52	34.7%
Any identity group (excl. None)	109	56.5%	87	58.0%

Table B2.3 Identity group prevalence.

B3. Three-pathway combinations

Pathway segment	EC+Em N	EC+Em %	All N	All %
All three (Education + Work + Creative)	87	58.0%	114	59.1%
Education + Work only (no Creative)	10	6.7%	19	9.8%
Education + Creative only (no Work)	11	7.3%	13	6.7%
Work + Creative only (no Education)	4	2.7%	4	2.1%
Education only	20	13.3%	21	10.9%
Work only	2	1.3%	2	1.0%
Creative only	2	1.3%	2	1.0%
None of the three	14	9.3%	18	9.3%

Table B3.1 Pathway combinations.

B4. Production outcomes (RFM-style)

Frequency band (lifetime shorts)	N	Any festival	A-list festival	Acquisition	Mass online	Any outcome
1 short	32	47%	0%	6%	16%	66%
2 to 3	26	42%	4%	12%	19%	73%
4 to 7	21	67%	10%	14%	14%	95%
8+	12	92%	17%	17%	8%	92%
No shorts data / 0	16	19%	0%	13%	0%	38%
All producers	107	51%	5%	11%	13%	72%

Table B4.1 Outcomes by lifetime number of short films completed.

Spend band on last production	N	Any festival	A-list festival	Acquisition	Any online	Any outcome
$0 (nil budget)	9	44%	11%	0%	44%	67%
$1 to $2,000	35	40%	0%	6%	66%	69%
$2,001 to $10,000	23	61%	9%	0%	57%	78%
$10,001+	17	82%	12%	35%	71%	100%
No expenditure data	23	35%	0%	17%	39%	52%
All producers (with data)	84	55%	6%	10%	62%	77%

Table B4.2 Outcomes by total expenditure on last project.

Producer group	N	Any festival	A-list	Acquisition	Any online	Any outcome
High-engagement (recent + 4+ films + >$2k spend)	12	100%	25%	17%	75%	100%
Low-engagement (1 film + <$1k spend)	19	32%	0%	0%	63%	63%
All producers	107	51%	5%	11%	57%	72%

Table B4.3 Combined RFM: high-engagement vs low-engagement producers.

B5. Source of production funding

Source	EC+Em producers (n=62) %	All producers (n=81) %
Own savings	87.1%	79.0%
Crowdfunding	17.7%	18.5%
Friends and family	16.1%	18.5%
Other (incl. employer in-kind, university, local fundraising)	12.9%	16.0%
Local council grant	4.8%	3.7%
Other government grant, investment or loans	1.6%	1.2%
Community / philanthropic	3.2%	3.7%
Credit	1.6%	1.2%
State agency grant, investment or loan	0.0%	2.5%
Screen Australia grant, investment or loan	0.0%	2.5%
State government production incentive / offset	0.0%	1.2%
Professional private investors	0.0%	6.2%
Producer Offset	0.0%	

Table B5.1 Sources of funds for most recent production. Multi-select.

B6. Production outcomes

Outcome type	All producers (n=98) N with outcome	All %	EC+Em (n=71) N with outcome	EC+Em %	Total outcomes (all prods.)	Max by one producer (all prods.)
Any outcome (festival, acquisition, online or theatrical)	76	77.6%	52	73.2%	—	—
A-list festival (Cannes, Berlin, Sundance, Toronto, Venice)	5	5.1%	1	1.4%	6	2
Other film festival screening	52	53.1%	35	49.3%	382	200
Major industry acquisition (TV, theatrical, streamer)	12	12.2%	4	5.6%	45	30
Self-distributed theatrical release	5	5.1%	0	0.0%	8	3
Mass online reach (1M+ views)	14	14.3%	10	14.1%	30	5
General online distribution	54	55.1%	36	50.7%	418	100

Outcome type	All producers (n=98) N with outcome	All %	EC+Em (n=71) N with outcome	EC+Em %	Total outcomes (all prods.)	Max by one producer (all prods.)
No outcome of any kind	22	22.4%	19	26.8%	—	—

Table B6.1 Production outcomes per producer (most recent project)

***Note**: producers in B6 are defined as respondents who completed at least one production of any type. Other festival total of 382 includes one non-EC+Em respondent who reported 200 screenings; excluding that outlier the all-respondent total is 182. General online total of 418 excludes one respondent with 421 reported; the corrected EC+Em total is 265. This could be feasible as The Landing Short film screened at over 70 festivals, so a producer who has made multiple films and screened at multiple festivals.*

B7. AI module detail

Statement	Strongly disagree	Disagree	Neither	Agree	Strongly agree	Agree + SA
AI leads to loss of trust in content	3%	2%	5%	24%	66%	90%
AI poses privacy risks	2%	1%	9%	20%	68%	87%
AI will displace screen industry jobs	3%	1%	8%	30%	57%	87%
AI infringes practitioners' copyright	3%	5%	7%	24%	61%	85%
AI will lower production costs	15%	11%	20%	38%	16%	54%
AI will improve production efficiency	17%	11%	24%	36%	11%	47%
AI will equalise large vs small producers	33%	21%	17%	18%	10%	29%
AI will enable greater creativity	37%	22%	18%	14%	9%	23%
AI will democratise the industry	40%	11%	29%	14%	6%	20%
AI will help my career success	46%	22%	18%	7%	7%	14%

Table B7.1 AI perceptions, all respondents.

Appendix C. List of iconic Australian screen content named by respondents

Respondents were asked to name the three most iconic screen stories the Australian screen industry has produced over the last 20 years. 61 respondents answered the question (55 named at least one title); the others responded "no idea", "zero", "I don't know" or used the field to dispute the question. Below is the complete list of every title named by respondents, sorted by the number of times it was mentioned. Titles outside the 20-year window have been retained per respondent intent. Some titles named are not Australian (e.g. The Matrix, NCIS: Sydney) but are reproduced exactly as named. Novice screen practitioners feature heavily in this list and are **bolded.**

Title	Format	Year	Notable emerging-creator association	Times named
Mad Max: Fury Road	Feature	2015	George Miller (established director)	14
Talk to Me	**Feature**	**2022**	**Danny and Michael Philippou, first feature as writer-directors**	**10**
Australia	Feature	2008	Baz Luhrmann (established director)	9
Bluey	**TV (animation)**	**2018-current**	**Joe Brumm, first major TV series as creator**	**8**
Red Dog	Feature	2011	Kriv Stenders (established director)	8
Mad Max	**Feature**	**1979**	**George Miller, first feature as writer-director**	**6**
The Babadook	**Feature**	**2014**	**Jennifer Kent, first feature as writer-director**	**6**
Wolf Creek	**Feature**	**2005**	**Greg McLean, first feature**	**6**
Heartbreak High	TV drama	2022-current	Hannah Carroll Chapman, first series as showrunner	5
The Dry	Feature	2020	Robert Connolly (established director)	5
Happy Feet	Feature (animation)	2006	George Miller (established director)	4
The Nightingale	Feature	2018	Jennifer Kent (second feature)	4
Animal Kingdom	**Feature**	**2010**	**David Michod, first feature as writer-director**	**3**
Furiosa: A Mad Max Saga	Feature	2024	George Miller (established director)	3
Lion	**Feature**	**2016**	**Garth Davis, first feature as director**	**3**

Title	Format	Year	Notable emerging-creator association	Times named
Samson and Delilah	**Feature**	**2009**	**Warwick Thornton, first feature as writer-director**	**3**
Bring Her Back	Feature	2025	Danny and Michael Philippou (second feature)	2
Deadloch	**TV series (comedy)**	**2023**	**Kate McCartney and Kate McLennan, first TV series as creators**	**2**
H2O: Just Add Water	TV series (children's)	2006-2010	Jonathan M. Shiff (established producer)	2
Muriel's Wedding	Feature	1994	P. J. Hogan, second feature as writer-director	2
Mystery Road	Feature / TV drama	2013-current	Ivan Sen (established) with multiple emerging crew	2
Picnic at Hanging Rock	Feature	1975	Peter Weir (early-career feature at the time)	2
The Newsreader	**TV drama**	**2021-current**	**Michael Lucas, first series as creator**	**2**
The Sapphires	Feature	2012	Wayne Blair, first feature as director	2
A Moody Christmas / The Moodys	TV series	2012-2014	Phil Lloyd and Trent O'Donnell, first major series	1
Australian Survivor	TV reality	2002-current	Various producers (established formats)	1
Babe	Feature	1995	Chris Noonan, first feature as director	1
Better Man	Feature	2024	Michael Gracey (second feature)	1
Black Snow	TV drama	2023-current	Lucas Taylor, first series as creator	1
Blue Murder	TV drama	1995	Michael Jenkins (established at time)	1
Bootmen	**Feature**	**2000**	**Dein Perry, first feature as director**	**1**
Chopper	**Feature**	**2000**	**Andrew Dominik, first feature as writer-director**	**1**
Danger Close: The Battle of Long Tan	Feature	2019	Kriv Stenders (established director)	1
Dangerous Animals	Feature	2025	Sean Byrne (third feature)	1
Elvis	Feature	2022	Baz Luhrmann (established director)	1
Fat Pizza	TV / film	2003-	Paul Fenech (established creator)	1
Hollow Knight	Game	2017	Team Cherry, debut major release	1

Title	Format	Year	Notable emerging-creator association	Times named
Home and Away	TV drama soap	1988-current	Long-running soap, multiple creators	1
L.A. Noire	Game	2011	Team Bondi (Australian developer, one major release)	1
Lake Mungo	**Feature**	**2008**	**Joel Anderson, first feature as writer-director**	**1**
Lantana	Feature	2001	Ray Lawrence (returning director after long break)	1
Last Taxi to Darwin	Feature	2015	Jeremy Sims (established director)	1
Married at First Sight Australia	TV reality	2015-current	Various producers (established format)	1
Moulin Rouge!	Feature	2001	Baz Luhrmann (established director)	1
Mr Inbetween	TV drama	2018-2021	Nash Edgerton, first major series as director	1
NCIS: Sydney	TV drama	2023-current	US format produced in Australia (Morgan O'Neill showrunner)	1
Neighbours	TV drama soap	1985-current	Long-running soap, multiple creators	1
Paper Planes	Feature	2014	Robert Connolly (established director)	1
Rabbit-Proof Fence	Feature	2002	Phillip Noyce (established director)	1
Rake	TV drama	2010-2018	Peter Duncan, first major series as creator	1
Storm Boy	Feature	2019	Shawn Seet (third feature)	1
Summer Heights High	TV mockumentary	2007	Chris Lilley, second major series	1
Swift Street	TV drama	2024	Tig Terera, first series as creator	1
The Adventures of Priscilla, Queen of the Desert	Feature	1994	Stephan Elliott (early-career feature)	1
The Correspondent	Feature	2025	Kriv Stenders (established director)	1
The Dressmaker	Feature	2015	Jocelyn Moorhouse (return after long break)	1
The Family Next Door	TV drama	2024	Unknown	1
The Great Gatsby	Feature	2013	Baz Luhrmann (established director)	1
The Legend of Ben Hall	Feature	2016	Matthew Holmes, second feature as	1

Title	Format	Year	Notable emerging-creator association	Times named
			director	
The Lego Movie	Feature (animation)	2014	US production, animated in Australia by Animal Logic (established)	1
The Matrix	Feature	1999	US production filmed in Sydney; Wachowskis (early career at time)	1
The Plains	**Feature**	**2022**	**David Easteal, first feature as writer-director**	**1**
The Proposition	Feature	2005	John Hillcoat (second feature)	1
The Wiggles	TV children's	1998-current	Long-running children's series	1
Top End Wedding	Feature	2019	Wayne Blair (director); Miranda Tapsell, first feature as writer-star	1
True History of the Kelly Gang	Feature	2019	Justin Kurzel (established director)	1
Under the Cover of Cloud	**Feature**	**2018**	**Ted Wilson, first feature as writer-director**	**1**
Unpacking	Game	2021	Witch Beam, debut major release	1
Upgrade	Feature	2018	Leigh Whannell, first feature as director	1
Utopia	TV satire	2014-2019	Working Dog Productions (established creators)	1
Wentworth	TV drama	2013-2021	Reboot of Prisoner; Reg Watson (established)	1
Westgate	Unknown	Unknown	Unknown	1
Wolf Creek 2	Feature	2013	Greg McLean (second feature in series)	1
Wyrmwood: Road of the Dead	**Feature**	**2014**	**Kiah Roache-Turner, first feature as writer-director**	**1**

Table C1. Titles named by respondents in answer to "Please name the three most iconic screen stories the Australian screen industry has produced over the last 20 years." (61 respondents answered; 55 named at least one title; 74 unique titles named.)

ATTACHMENT 3

The Economic and Social Value of Australia's Emerging Screen Practitioners

Contents

Executive Summary

Australia's active emerging screen practitioners carry approximately $273 million in student debt from study at institutions the government helped to build: AFTRS and Commonwealth-supported university screen courses. Those institutions, together with decades of public investment in Screen Australia and successive production incentives, signal to aspiring practitioners that a screen career is viable and worth the debt. All screen graduates carry around $326 million in student debt in any given year. That promise has been undermined by the tripling of arts degree costs and by the lack of meaningful follow-through support in the space between learning and earning. At the same time, emerging screen practitioners donate an estimated $159 million per year in volunteer labour to Australian screen culture, generate approximately $55.3 million in annual GDP through their own production activity across five cultural formats, and sustain significant economic activity in the higher education sector through their enrolment choices.

The argument in brief

The fairness question: students collectively repay about $3.2 billion more per year in HECS than the entire oil and gas industry pays through the Petroleum Resource Rent Tax (PRRT), a levy designed to return profits from publicly owned resources to Australians (Australia Institute Senate submission, April 2026).

The education and training economy: emerging filmmakers generate real economic activity through their enrolment in screen education, supporting university and VET staff, facilities and communities, with a genuine economic multiplier effect.

The volunteer economy: they then attempt to enter the industry donating an estimated $159 million per year in unpaid labour to professional and non-professional screen productions, trying to build the skills, experience (credits), networks and reputation required to progress.

The micro-production economy: they produce short films, web series, low-budget features and other online content that generates an estimated $55.3 million in annual GDP through direct and multiplier effects: a micro-economy of Australian storytelling that does not appear in official economic accounting of the industry.

The social dividend: they build communities, develop broadly transferable skills, contribute to mental health and social cohesion, tell diverse Australian stories, and promote Australian culture internationally; benefits that GDP and official agency figures cannot capture.

The broken logic: the government now provides only around $5,000 per arts student in university grants for arts degrees, down from around $35,000 before 2021, while loading students with up to $51,000 in HECS debt; provides little meaningful ongoing production-stage support post-study to those in the space between learning and earning through their funded cultural institutions; and then relies on market and agency systems structurally geared to backing proven practitioners rather than developing unproven ones for industry renewal.

1. About This Paper

1.1 Scope and focus

This paper focuses on Australia’s early career and emerging (EC+Emerging) screen practitioners. Its main evidence base is the 150 respondents, 78% of the Who Gets a Break? survey sample of n=193, who classify themselves as either emerging or early career . They are the practitioners who have trained for screen careers, are actively pursuing them, and receive the least support in doing so.

The 42 respondents who classified themselves as mid-career or experienced are excluded from the economic modelling. This is a methodological choice, not a finding about their significance. They reported substantially higher production activity than the EC+Emerging cohort, including median project expenditure of $16,000 compared with $2,500, and a median of 11 years pursuing a screen career.

They are excluded for reasons of validity and conservatism. A consistency check in **Attachment 2 (the Interim Who gets a break? Survey Report)** found that some self-classified mid-career and experienced respondents did not clearly meet the formal stage definitions used in the survey. That reflects the blurred reality of screen careers and the difficulty of classifying practitioners whose work falls outside agency-recognised credits or formal marketplace endorsement.

Including this group would almost certainly increase the estimated economic contribution. Many of these practitioners still produce, volunteer and circulate money through the screen economy. Their exclusion therefore makes the economic modelling more conservative, while reinforcing a broader point: the precarious “wilderness years” between learning and earning often extend well beyond the formal emerging stage.

Put simply, this paper estimates the floor of a sector whose ceiling has not been counted. It estimates value across three streams of education, volunteer labour and direct cultural screen production (excluding corporate work that is paid for by a third party, sometimes at a discount) and documents the social and community benefits that GDP figures alone cannot capture. It does not prescribe a specific policy solution; it establishes what this sector contributes, and what its contribution costs it.

1.2 Multipliers and methodology

All multipliers are applied at the conservative end of published ranges. The 2.1× GDP multiplier for screen production is from Deloitte Access Economics modelling commissioned by Screen Australia and is consistent with ABS input-output tables. The education sector multiplier of 1.7× is from ABS/RBA modelling of the higher education and VET sectors. Volunteer labour rates use MEAA minimum short film day rates. The illustrative cultural value premium of 1.5×, which is not included in the primary total, but which is used to estimate non-economic contribution, follows the British Film Institute’s methodology. These figures are treated as conservative floors, not ceilings.

This analysis has several important limitations that readers should bear in mind. The pool estimates, participation rates and economic multipliers are modelled approximations, not measured figures. The

Who gets a break? survey on which much of the analysis rests is a self-selected sample distributed through screen community networks, which means it systematically underrepresents practitioners who have left the field and overrepresents those still actively connected to screen communities. Any model is only as good as the inputs and assumptions that underlie it, and we encourage government and researchers to treat these figures as indicative rather than definitive. The purpose here is to provide indicative estimates that fill a known but ignored gap.

Movie Mutuals is a volunteer-run organisation with no dedicated research budget and no in-house economic modelling expertise. Economic evidence is nonetheless the language of government, and we made a deliberate decision that an imperfect attempt to quantify the contribution of emerging screen practitioners is more useful than continued silence on the question. This analysis was produced with the assistance of artificial intelligence tools, primarily for data processing, calculation checking and drafting support, with all methodology, assumptions and conclusions reviewed and approved by Movie Mutuals members. Unlike peak screen industry bodies with professional research staff and commissioned consultancies, Movie Mutuals relies on the goodwill, expertise and unpaid time of its members to produce evidence of this kind. That constraint is itself consistent with the central argument of this submission: the emerging screen sector generates significant cultural and economic value while operating almost entirely outside formal public support structures. This analysis is no exception.

2. The EC+Emerging Cohort: Who We Are Talking About

2.1 The active pool of novice screen practitioners: estimating a cohort official data does not count

There is no official dataset that counts early career and emerging screen practitioners in Australia. Screen Australia data captures funded and professionally recognised production. ABS data captures formal registered businesses and employment. Education data captures completions. None of these sources counts the people in between: those seriously pursuing a screen career, making screen work, volunteering, building credits and trying to move from learning into earning.

For that reason, this paper first estimates the size of the active EC+Emerging pool. We define this pool as people in Australia who are seriously pursuing a screen career but have not yet reached professional or marketplace-endorsed status.

The central estimate used throughout this paper is approximately 26,000 active EC+Emerging practitioners nationally at any point in time. A conservative low estimate is approximately 13,000, while a high estimate sits around 36,000–40,000**.** These figures should not be read as a definitive census. They establish a plausible national scale for a cohort that is active, productive and economically significant, but largely invisible in official screen-sector accounting.

The estimate is triangulated from three imperfect but complementary indicators:

Triangulation check	Anchor / logic	Central estimate
M1: Production output	IMDb-tracked short films adjusted for festival visibility, annual production rate and production participation	~26,000
M2: ABS workforce ratio	Formal screen employment adjusted using creative-industries aspirant ratios and EC+Emerging share	~27,000
M3: Education flows	Formal and non-formal education entrant flows modelled against mean pursuit duration	~26,000

The detailed low, mid and high calculations for each triangulation check are provided in **Appendix A.**

2.2 Entry points, not complete pathways

This paper posits that active EC+Emerging practitioners arrive at screen practice through two broad sources of preparation: formal screen education and non-formal routes such as short courses, self-teaching, lateral career change, work experience and independent production.

These are entry points rather than complete pathways. In screen production, progression generally occurs through creative practice, production credits, relationships, work experience and repeated production activity. A degree may prepare someone for screen work, but it does not by itself create a pathway into the industry.

2.2.1 The formal qualification stream

According to Metro Screen's 2015 Emerging Visions report, around 11,250 people complete a screen or media qualification in Australia each year, about 7,000 through university and 4,250 through TAFE. Not all of them go on to seriously pursue a screen career. Some move into adjacent fields like marketing or journalism. Some make the occasional short film but do not commit to a career. A small number break through into paid professional screen work. Government data shows only about 1 in 20 VET screen graduates work in a screen job six months after finishing, which gives a sense of how few are earning from it quickly, though many more are still trying.

To estimate how many people are actively pursuing a screen career at any given time, we started with our central pool estimate of approximately 26,000, derived from three independent methods described in Appendix A. The Who Gets a Break? survey found that 45% of EC+Emerging respondents came through formal screen qualifications. Applying that to the 26,000 pool gives approximately 11,700 people from the formal education pathway actively pursuing at any point in time. Since the survey also found that people spend an average of five years in active pursuit, a pool of 11,700 that turns over every five years implies roughly 2,340 new formal-pathway pursuers entering each year on average.

Expressed as a proportion of 11,253 annual completions, that works out to approximately one in five graduates, but this figure is a consequence of the pool estimate and the career duration assumption, not an independently measured rate. We are not claiming to have measured what proportion of graduates pursue a screen career. We are showing that if our pool estimate is roughly right, and if five years is roughly the right average pursuit duration, then the arithmetic implies one in five graduates remains active in pursuit at any given point. It is a consistency check, not a separate finding, and it should be read as such.

What this also cannot tell us is how many people tried and stopped pursuing a career before we could ask them. The survey reached people still connected to screen communities: film events, industry networks, organisations like Movie Mutuals. People who gave up may be unlikely to still be in those spaces, which could mean the survey overrepresents persistence and underrepresents dropouts. The one in five figure likely overstates how many graduates sustain pursuit over time. The true picture of how many start, how long they last, and why they stop remains unmeasured, and that absence of that data is a policy problem.

2.2.2 The non-formal stream

The second stream is non-formal. In the EC+ Who Gets a Break? Survey sample, 54.7% of respondents had not completed formal screen qualification (that is, a degree or certificate/diploma). They entered through short courses, self-teaching, attended-but-did-not-complete a degree/diploma pathway, made a lateral career change, undertook work experience or independent creative practice.

This is most of the pool, but it has no equivalent graduate tracking mechanism. Using the survey composition, the non-formal stream appears to be roughly 1.2 times the size of the formal education stream, yielding approximately 2,870 non-formal but active entrants per year (that will continue to pursue a career for 5 years).

Combined with the formal stream, this suggests approximately 5,230 active entrants annually across both routes who will continue to pursue a career by making projects, volunteering on products, applying for funding, undertaking outreach, or attending seminars and short courses as well as other activities trying to break in. Because the non-formal stream has no external administrative dataset, this figure should be read as indicative. It should also not be read as the total number of people who aspire to work in screen. Rather, it estimates those actively pursuing a screen career through one or more practical routes: paid or unpaid work experience, independent creative practice, volunteering, crewing, networking or credit-building activity.

2.3 Two populations: authors and technical practitioners

Alongside formal and non-formal routes into screen practice, the EC+Emerging pool can also be understood by function. For modelling purposes, the key distinction is between practitioners who initiate production and practitioners who supply the labour that makes production possible.

Author practitioners (directors, screenwriters and creative producers) initiate cultural production. They develop projects, self-finance productions, assemble crews and drive creative output. Their contribution is therefore most visible in the production GDP estimate. In the Who Gets a Break? survey, 83% of EC+Emerging respondents aspired to author roles, reflecting both genuine career intent and the survey's distribution through Movie Mutuals, a community of practice that actively encourages authorship. Among respondents aspiring to author roles,54% completed at least one production over their career to date.

Technical and craft practitioners (cinematographers, editors, sound designers, production designers, visual effects artists, gaffers and grips) supply the skilled labour that makes those productions possible. Their contribution is therefore most visible in the volunteer labour estimate. They may not initiate or finance productions themselves, but without them EC+Emerging production would not occur at the scale recorded in the survey.

The survey likely underrepresents this group. Only 18 EC+Emerging respondents identified as technical-only practitioners, despite technical crew being present on every production recorded in the survey. Mid-career technical respondents who did answer reported 80% volunteer rates, suggesting that the real-world volunteer contribution of technical and craft practitioners is higher than the EC+Emerging technical-only rate captured in this sample. It also suggests that most screen practitioners harbour aspirations for authorship but adjust their expectations by the reality of the limited opportunities that exist in authoring work.

Actors occupy a third position. Twenty-five per cent of respondents aspired to acting, and actors are a significant component of volunteer labour in EC+Emerging production. Of the 873 volunteer roles recorded in the Who gets a break? Survey (n=150), 265 were cast roles (or 476 were cast roles for the full sample n=193).

2.3 Why they matter?

These active entrants are not aspirants in name only. Sixty-nine per cent of EC+Em respondents describe themselves as actively seeking screen industry entry or already making some screen-related income. There were 70 out of 150 EC+Emerging respondents that collectively produced 340 cultural productions: 279 short films, 33 documentaries, 17 web series, 8 low-budget features and 3 TV drama pilots. They have achieved 96 festival screenings and recorded 873 volunteer labour roles (388 film festival screenings and 1,233 volunteers for the full sample). Forty-nine per cent (35 of 71 EC+Em responses) achieved at least one festival outcome; among high-frequency producers, those with eight or more short films, the festival rate reaches 83%. They are producing non-professional work at scale, predominantly through their own effort and financial backing.

3. The Fairness Question: What government collects and what they give back

Before estimating what this sector contributes to the economy, it is worth establishing what the government currently extracts from it. The numbers are drawn from the Senate Inquiry of the Select Committee on the Taxation of Gas Resources.

3.1 HECS repayments vs Petroleum Resource Rent Tax

The Petroleum Resource Rent Tax (PRRT) was designed to return a share of profits from Australia's publicly owned petroleum resources to Australian citizens. According to the Australia Institute:

Measure	Amount / finding
Annual HECS/HELP repayments collected nationally (est.)	~$5.1 billion/year
Annual PRRT collected from oil and gas	~$1.9 billion/year (lower in forward estimates)
Students repay more through HECS/HELP than oil and gas pays through PRRT each year	~$3.2 billion more
PRRT revenue in 2024–25 vs 2014–15	$400M lower despite $47.7B LNG export surge
Share of Australian LNG exports that are royalty-free	56% ($65 billion in exports in 2024-25)
Total outstanding HECS debt nationally (2023–24)	$81 billion

Sources:https://australiainstitute.org.au/wp-content/uploads/2026/05/P2021-Five-facts-about-gas-and-tax-Web.pdf;https://archive.budget.gov.au/2024-25/fbo/download/00_fbo_2024-25.pdf;
https://australiainstitute.org.au/wp-content/uploads/2024/05/P1451-Australias-great-gas-giveaway-Web.pdf;
https://bcec.edu.au/assets/2025/04/BCEC-Briefing-Note-2025-HECS-HELP-in-Australia-2025-final-web.pdf

While some of these figures may be contestable, we use them as indicative to attempt to estimate the amount spent on formal screen education using the Metro Screen (2015) figures as a base - 11,250 completions including 7,000 through university and 4,250 through TAFE/VET. The following table under-represents because it is based on completions and not enrolments, but it gives a total estimate of $447.4 million of which $387.1 million (or 87%) is borne by the student themselves, either through debt or upfront payments.[1]

[1] We note that the vast majority of domestic university students defer their student contribution through the HECS-HELP scheme. For Certificate III and IV courses, students typically pay fees upfront at enrolment, sometimes in instalments. For Diploma and Advanced Diploma courses, VET Student Loans (VSL) are available, allowing students to defer fees similarly to HECS-HELP. So this figure is partly upfront fees paid and partly VSL debt incurred, with the split depending on course level. The estimate assumed roughly 60% Certificate (upfront) and 40% Diploma (VSL eligible). Of the $387.1M student share is: approximately $326M is HECS-HELP debt incurred by university students, approximately $18M is upfront fees

Stream	Who pays	Amount	Share
University student contributions	Students (upfront or debt)	$356.8M	80%
University Commonwealth Grant (CGS)	Federal government	$34.5M	8%
VET student fees	Students (upfront or VSL debt)	$30.6M	7%
VET government funding	State governments	$25.5M	6%
Total		**$447.4M**	**100%**

Student contribution rates for university screen and media degrees are based on the Job-Ready Graduates Band 3 rate of $16,992 per student per year, with a Commonwealth Grant Scheme contribution of $1,644 per year, both set by the Department of Education. VET fees are estimated averages given that state governments set their own rates: $4,000 student fee and $4,000 government subsidy for Certificate III and IV courses, and $8,000 student fee and $6,000 government subsidy for Diploma level courses. The VET figures should be treated as indicative rather than precise, as actual fees vary by state, provider and course level.

For consistency in the modelling, the approximately 26,000 EC+Emerging practitioners estimated to be active nationally carry around $273 million in student debt between them (note: this is only a portion of all screen education graduates). They are filmmakers in their twenties and thirties (and sometimes forties and fifties), often working day jobs in hospitality, retail and education, making short films on weekends, and repaying degrees the Morrison government effectively treated as lower economic priority under the Job-Ready Graduates package even as high numbers of students were enrolling in them.

paid by VET Certificate students, and approximately $12M is VSL debt incurred by VET Diploma students.

3.2 The Job-Ready Graduates policy shift: who paid the price

The Morrison government's Job-Ready Graduates package (2021) classified creative arts as a non-national-priority. The consequences for screen practitioners were direct and severe:

	Pre-2021	**Post-2021 (JRG)**
Student contribution per year	$6,568	$16,992 (indexed)
Student contribution - 3-year degree	~$17,600	~$51,000
Commonwealth Grant (govt) per year	~$11,681	~$1,644
Government contribution - 3-year degree	~$35,000	~$4,900
Student share of total education cost	36%	~90%

The government's contribution per arts student fell by 86% under the Job-Ready Graduates changes. The student contribution nearly tripled. The policy was intended to steer students toward nursing, teaching and STEM, yet students continued to enrol in creative arts degrees. This suggests that creative career aspiration is not highly price sensitive. Students still take on the debt because they believe the career remains worth pursuing.

The problem is what happens after study. Government creates the HECS liability and collects repayments over time but has not provided comparable and meaningful production-stage support to help graduates move from training into practice (learning to earning) since 2008. The degree creates debt and unfulfilled aspiration; the system provides no reliable bridge into credits, production experience or paid screen work.

This gap has widened over time. Metro Screen (2015) documented that between 2006/07 and 2013/14, total federal support for the screen industry rose 91%, from $219.9 million to $419.1 million, driven by production growth fuelled by the Producer Offset. Targeted funding for emerging screen practitioners has fallen overall by an estimated 82%, firstly from $11 million in 2006/07 through the Australian Film Commission to $3.5 million in 2013/14 through Screen Australia; and then projected to fall further to around $2 million by 2016/17 after Screen Resource Organisation funding was phased out after the Brandis cuts. The budget cuts that led to these changes were not restored under the first iteration of Revive.

The decline was not only federal. Combined federal and state expenditure on emerging programs fell 49% between 2008/09 and 2013/14, from $12.93 million to $6.53 million. As a share of total agency appropriations, it fell from 7.1%to 4.0%. State agencies reduced targeted support from an estimated $7.9 million in 2008/09 to $3.1 million in 2013/14. Screen Australia also ceased its $240,000 annual contribution to Metro Screen's core operating costs, contributing to Metro Screen's closure in 2015. In its final year, Metro Screen had supported 11 productions, placed 24 interns, completed 24 multiplatform projects and 30 student films, and run networking events attended by 600 emerging filmmakers.

In other words, public support for the screen industry increased, but support for emerging practitioners and entry-level production infrastructure declined to virtually a trickle. More public money flowed through industry-facing mechanisms, while the production-stage bridge between education and professional practice weakened. More recently, subsidy for foreign-backed and inward-investment productions through PDV and the Location Offset has also increased, with the first iteration of *Revive* almost doubling the Location Offset subsidy to 30%, despite providing arguably limited cultural benefit.

The result is a cohort carrying substantial debt without comparable support at the point where career transition occurs. The weighted average HECS debt for EC+Emerging practitioners is approximately $41,400: 60% post-2021 at about $51,000, and 40% pre-2021 at about $27,000. Applied to the approximately 6,600 debt-carrying formal-pathway practitioners (11,700 formal-pathway practitioners × 56.3% carrying HECS/HELP debt), this produces a total debt stock of about $273 million.

This is money loaded onto practitioners as a future income-contingent repayment obligation. It is being repaid through the tax system over their careers. The question is not whether they will repay it; they have little choice. The question is whether government will support the stage of their careers that determines whether the degree produces a working screen professional.

4. The Education Economy: What Emerging Filmmakers Contribute to Australia's tertiary education sector

Screen-career aspiration also generates economic activity in the education sector; an economically significant sector, that recorded $45.2 billion in total institutional revenue in 2024. Metro Screen (2015) estimated that approximately 11,253 students complete screen and media production courses each year: 7,000 from university and 4,253 from VET. If all completions are counted as demand for screen education, the annual flow of student fees and government grants into universities and VET providers is approximately $417 million, generating an estimated $709 million in GDP through the 1.7× education multiplier.

This paper uses a more conservative measure. It counts only the estimated 21% of completions who continue into serious screen-career pursuit (active aspirants). This produces approximately 1,470 university graduates and 893 VET completions entering the active pool each year, or 2,363 education-pathway entrants annually.

In the Who Gets a Break? survey, 45% of EC+Emerging respondents had completed a formal screen qualification: 48 had completed a university film school degree and 25 had completed a VET screen qualification. Applying a conservative education-pathway estimate produces the following annual education contribution.

Measure	Estimate
Committed University screen career pursuers in study at any time (1,470 × 3yr)	~4,410
Committed VET screen career pursuers in study at any time (893 × 1.5yr)	~1,340
Total screen career pursuers who studied for screen careers in any given year	~5,750
Annual student fees paid (post-2021 rate, $16,992/yr per uni student)	~$74.9M/year
Annual student fees paid (VET, est. $4,000/yr per student)	~$5.4M/year
Total annual student investment in screen education	~$80.3M/year
Annual government grant contribution (post-2021, ~$1,644/yr per uni)	~$7.3M/year
Total annual flow into university/VET from screen career pursuit	~$87.5M/year

Education spending has a multiplier effect. Student fees and government grants support staff, facilities, equipment, services and surrounding communities. Applying the 1.7× education multiplier to the $87.5 million annual flow gives an estimated $149 million in GDP per year. This is real economic activity generated by people who actively choose and commit to a screen career and enrol in education to pursue it. This estimate is conservative. It is based on annual completions in screen and media courses rather than total enrolments and further filtered to only those estimated to go on to actively pursue a screen career for an average of five years. Metro Screen (2015) estimated around 30,000 annual enrolments across university and VET screen and media courses. Applying the education multiplier to the full enrolment flow would produce a substantially larger GDP figure.

4.1 The return problem

The striking policy implication is not simply that screen education generates economic activity. It is that government collects HECS from screen graduates over their careers while providing little production-stage support at the point that determines whether screen education can become a working screen career. The result is a broken consumer-style promise: students pay for screen education on the reasonable expectation that it can lead to a working screen career, but the bridge into practice is precarious, uncertain and largely self-led. The failure is not in the value of education itself, but in the policy system that leaves graduates without a realistic route from training into practice.

Progress depends on know-who networks, reputational credentials and on-set experience that emerging practitioners often cannot access without first doing unpaid work or financing their own creative and cultural R&D. That R&D is not meaningfully funded by the established industry or marketplace, and emerging practitioners must compete for jobs, attention and resources against established practitioners. Screen Australia policy has often compounded this problem through a hands-off or ad hoc approach to early-career production support, while funding criteria that preference prior credits and experience have turned public funding into a barrier to entry for many of the practitioners it would otherwise help develop.

The Who Gets a Break? survey data reflects this barrier. Eighty-one per cent of EC+Emerging respondents have never applied to Screen Australia. This does not, by itself, prove why they have not applied, but the surrounding results point to likely access barriers: 64% cite ineligibility due to experience requirements, 70% find applications too complex, and other results that shows strong agreement that the system favours those already connected. Taken together, these findings suggest that eligibility rules, perceived ineligibility, application complexity and prior-credit requirements are major barriers to access.

The eligibility system requires production credits that can only be obtained with resources the system does not provide. Government has therefore created a closed loop: train, debt-load, close the gate.

This also raises equity and access concerns. Criteria that appear neutral, such as experience requirements, can reproduce historic exclusion where access to credits, paid screen work, industry endorsement and professional networks has not been evenly distributed. Public funding that preferences prior access can therefore become a mechanism for narrowing opportunity, rather than broadening it. That makes the issue not just a pipeline problem.

As Metro Screen (2015, p.22) documented more than a decade ago, “the evolution from on-the-job to university-based training has been incomplete because the pathways from academy to industry have never been clear.” Ten years later, with fees tripled and support programs defunded, that gap has widened, particularly for emerging practitioners trying to develop as screen authors.

5. The Volunteer Economy: What Emerging Filmmakers Give Away for Free

After education, emerging screen practitioners often enter the industry by working for free: on professional sets, on peer productions and on their own projects. This is how they build the credits, skills and relationships needed to progress. Author practitioners initiate and finance productions; technical and craft practitioners supply the skilled labour that makes those productions possible. In EC+Emerging productions, all these roles are typically filled by volunteers. That labour has real market value, but it does not appear in national accounts.

5.1 The scale of unpaid contribution

Across the full Who Gets a Break? survey sample, all respondents recorded 1,233 volunteer roles across on-set crew, cast and post-production. Applying conservative MEAA minimum day rates produces the following estimate of replacement labour value:

Volunteer role category	Calculation / value
On-set volunteer crew	619 roles × \$350/day × 3 days avg = \$650,000
Volunteer cast	476 roles × \$250/day × 2 days avg = \$238,000
Volunteer PDV/post	138 roles × \$450/day × 5 days avg = \$310,500
Total volunteer labour value - full survey sample (n=193)	\$1,199,000
Volunteer labour value - EC+Emerging subset only (n=150)	\$917,300
Volunteer labour per EC+Emerging respondent (\$917,300 ÷ 150)	~\$6,115

The volunteer labour estimate is based on respondents' most recent production, not their lifetime unpaid work. This keeps the estimate conservative. It provides a snapshot of the unpaid labour attached to current EC+Emerging production activity. On average, the EC+Emerging sample recorded unpaid labour worth approximately $6,115 per respondent**.** Applying that figure to the estimated national pool of 26,000 active EC+Emerging practitioners gives an annual volunteer labour contribution of approximately $159 million**.**

This is consistent with ABS (2008) data showing that 64,900 of 99,500 people involved in film production in Australia in 2007 volunteered without payment (or 65%). The Who Gets a Break? survey records 63% of EC+Emerging respondents having volunteered on screen productions, suggesting that volunteer labour remains a structural and persistent feature of the sector.

The resulting range is approximately $80 million in the LOW scenario, based on a 13,000-person pool, and approximately $220 million in the HIGH scenario, based on a 36,000-person pool. These figures are conservative because rates are set at the short end of MEAA minimums.

5.2 Who benefits from this labour

Volunteer labour does not accrue only to emerging practitioners' own productions. The Who Gets a Break? survey captures roles on professional productions, including attachments, runners and assistants, as well as roles on non-professional productions. The professional screen industry therefore also benefits from this unpaid contribution, particularly through credit-building labour. Experienced practitioners interviewed by Metro Screen (2015) acknowledged that their own careers were built in part on access to this volunteer workforce. The industry's gatekeeping system requires credits as the price of entry; acquiring those credits often requires unpaid work; and that unpaid work subsidises the productions on which credits are bestowed.

6. The Production Micro-Economy: Short Films, Documentaries, Web Series and Features

Beyond volunteer labour on others' productions, emerging filmmakers create their own work: short films, documentaries, web series, low-budget features and other online content. This activity is self-funded, largely invisible to government economic accounting, and generates a real micro-economy through direct and multiplier effects.

These productions largely do not appear in official statistics. Features under $500,000 fall below the Producer Offset threshold and are not included in Screen Australia's National Drama Survey. Short films and web series made without ABNs are invisible to the ABS. Online-only content is generally not tracked by any agency. This is the uncounted economy of Australian cultural production.

6.1 Production activity

Across their careers, the 70 EC+Emerging respondents in the Who Gets a Break? Survey who indicated that they have made a production in their lifetime have collectively produced 340 cultural productions across five formats: 279 short films, 33 documentaries, 17 web series, 8 low-budget features and 3 TV drama pilots. Forty-seven per cent completed at least one production, and 50% of those achieved at least one festival outcome. Among high-frequency producers, those with eight or more short films, the festival rate reaches 83%. Of the producers who reported a primary funding source,87% drew on personal savings; 18% on crowdfunding; and 16% on friends and family. No producer reported receiving a Screen Australia grant, a state agency grant, or any state screen incentive. Around 5% drew on a local government grant.

6.2 What they spend - and why $1,750 is a ceiling, not a choice

The Who Gets a Break? survey records expenditure on respondents' most recent production. The median spend on a short film, excluding zero-budget productions, is $1,750 (noting that the median spend across all productions for the EC+Em cohort was $2,000). This is not what practitioners aspire to spend; it is what they can afford since they are mostly paying for it out of their own pocket. The quality, scale and visibility of their work is therefore constrained by resource availability, not simply by vision or talent. The fact that Australian practitioners emerging from low-resource environments can still produce work such as *All These Creatures (2018),* which won the Short Film Palme d'Or at Cannes in 2018, and *An Ostrich Told Me the World Is Fake and I Think I Believe It (2023)***,** which was nominated for Best Animated Short Film at the 95th Academy Awards, points to the level of talent currently being under-recognised and under-supported. These productions did not have Screen Australia or state agency funding.

The financial constraint is visible in the data. Practitioners who describe themselves as financially comfortable spend a median of $3,000 per film; those managing on enough spend $1,000. Interestingly, those struggling spend $1,500. Practitioners carrying HECS or HELP debt spend a median of $1,400 per film, compared with $2,000 for those without student debt. Half of active producers make a new film within a year; but the mean gap is two years, and 14% average four years or more between productions, a pace that makes career progression extremely difficult. It takes time to recover and re-save the money to continually make work.

6.3 National GDP estimate

The production GDP model scales survey-derived production rates to the estimated national EC+Emerging pool of approximately 26,000, noting of course that not all of this cohort produce cultural work. It includes five cultural formats: short films, documentaries, web series and online content, low-budget features, and TV drama pilots. It excludes corporate and branded content. Many practitioners undertake that work to survive financially while continuing to develop their craft, but for the purposes of this model it is treated as commercial service work rather than cultural production.

The MID estimate is deliberately conservative. It uses the Who Gets a Break? survey median spend for short films and documentary proxies, modest spend assumptions for online content and pilots, and a conservative $50,000 estimate for low-budget features at the EC+Emerging end of the market.

Measure	MID estimate
Annual cultural production volume	~14,650 productions/year across five formats
Annual production expenditure	~$26.3M/year
Screen production GDP multiplier	2.1×
Annual production GDP impact	~$55.3M/year

The full format-by-format calculation, including low, mid and high production GDP scenarios, is provided in **Appendix B.**

6.4 The ABS official sector - additional and complementary

The ABS Film, Television and Digital Games Survey (2021–22) captures a separate and complementary population: businesses registered on the ABS Business Register with active ABNs. The Movie Mutuals Senate submission (2025) notes that many productions by emerging creators are uncounted in official statistics because they lack ABNs. We assume the Who Gets a Break? survey captures the unofficial sector without ABNs; the ABS captures the official sector with ABNs. These are additive, not competing estimates, though some overlap and classification uncertainty remain.

If ABS-captured short film and web series activity were considered alongside the unofficial-sector estimate, the combined below-threshold production economy would be substantially larger. ABS-captured official sector activity of $42.2 million in web series and approximately $2.25 million in short films, multiplied by 2.1, equals about $93 million in GDP. Added to the EC+Emerging informal-sector estimate of $55.3 million, this suggests a combined production GDP of approximately $149 million. This combined figure is not included in the primary estimate because of potential overlap and classification uncertainty. The paper therefore retains the EC+Emerging estimate of $55.3 million as the conservative floor.

6.5 Australian content in the online space

A growing share of this production activity is created for online distribution: YouTube channels, Vimeo series, TikTok and Instagram content, and online-first short documentary series. This work is systematically undercounted across official datasets. IMDb tracking captures approximately 1,500 Australian short films per year, but the model implies that approximately 12,295 are produced nationally each year. The gap represents productions that go directly online, never screen at a tracked festival, or are made without the formal structures that would bring them to official attention. They are Australian stories, made by Australian practitioners, reaching Australian and international audiences on the platforms those audiences use. The counting system does not see them; the economic and cultural value is real regardless.

This is not an unreasonable scale assumption. YouTube reported that Australian creators uploaded more than 550,000 hours of video to Australian YouTube channels in 2016. If the average upload were 10 minutes, that would equate to approximately 3.3 million videos. Against that backdrop, a national estimate of approximately 12,295 EC+Emerging short films represents less than 0.4% of Australian YouTube upload volume. The comparison does not suggest that most YouTube uploads are short films. It simply shows that the untracked short-film estimate is plausible within the much larger scale of Australian online video production.

7. Total Economic Contribution: Putting It Together

The economic contribution of EC+Emerging practitioners operates through three linked channels: screen education, unpaid labour and self-financed production. Together, these streams show that emerging screen practitioners are not simply seeking support from the public system. They are already generating measurable economic value.

7.1 The three streams: education, volunteer labour and production

The first stream is the education economy generated by active screen-career aspiration. This does not count every student who completes a screen or media course. It counts the estimated share who continue into serious screen-career pursuit. Their fees, HECS liabilities and associated government grants support universities, VET providers, staff, facilities and equipment. This generates an estimated $149 million in GDP each year. The education component appears in higher education accounts rather than screen-sector accounts, but it is still generated by the pursuit of screen careers. Excluding it would understate the economic footprint of the cohort this paper is trying to measure.

The second stream is the volunteer economy. EC+Emerging practitioners donate labour to their own and others' productions, building the credits, skills and relationships required to progress. The replacement value of this unpaid labour is estimated at $159 million per year.

The third stream is the production micro-economy. EC+Emerging practitioners self-finance short films, documentaries, web series, low-budget features and pilots. This activity generates an estimated $55.3 million in annual production GDP.

Taken together, these three streams produce an estimated annual economic contribution of approximately $363 million. This is the value generated by screen-career aspiration and emerging practice before the cohort receives meaningful production-stage support.

Across the robustness range, the primary screen-sector contribution is approximately $106 million to $371 million annually. Detailed low, mid and high scenario assumptions are provided in **Appendix C.**

The $273 million debt stock is reported separately as a measure of individual financial commitment and policy context. It is not added to the annual GDP figures because it represents the stock of debt carried by practitioners, not an additional annual economic flow, however it does contribute to government income and cashflow.

The key point is not that education, volunteer labour and production GDP are identical categories. They are not. The point is that all three are generated by the same underlying cohort and the same underlying aspiration: people trying to build screen careers. The public benefits from that aspiration through education demand, unpaid labour and self-financed production.

Stream	Measure	Estimate

Stream 1: Education investment	Annual flow into universities/VET from screen career pursuit	~$87.5M/year
	GDP impact (1.7× higher education multiplier)	~$149M/year
	Total student debt stock (debt-carrying formal-pathway practitioners, ~6,600)	~$273M
Stream 2: Volunteer labour	Annual volunteer labour value (~26,000 pool, MID)	~$159M/year
Stream 3: Direct production GDP	Annual production expenditure, MID estimate	~$26.3M/year
	GDP impact (2.1× screen production multiplier, MID)	~$55.3M/year
Total annual economic contribution	Education GDP + volunteer labour + production GDP	~$363M/year
Screen-practice contribution, excluding education	Volunteer labour + production GD	~$214M/year
Illustrative only	Cultural value premium (1.5× BFI, not in primary)	~$320M/year

7.2 Context: the micro-economy of community screen production

Screen production and volunteer labour together form a $214 million micro-economy of community screen practice. This is not simply a label for small-scale activity. In local development and creative-economy theory, micro-economies matter because they are where capability, networks, enterprise and future growth are often formed. They circulate money through local suppliers and services, but they also create less visible forms of value: skills, innovation, social capital, peer networks, reputational exchange, demand for related services and future industry capability. The OECD has framed cultural and creative sectors as contributors to jobs, income, innovation, wellbeing, inclusion and local development. The same logic applies at the grassroots level of screen production.

The EC+Emerging screen micro-economy is made up of low-budget productions, unpaid and underpaid labour, local spending, skill formation, creative experimentation, peer learning and network-building. A short film, web series, pilot or micro-budget feature is not only a cultural output. It is also a prototype, a training ground, a networking mechanism, a reputational credential and a form of creative R&D. It creates opportunities to test ideas, build teams, develop craft, accumulate credits and move from aspiration into practice.

This is the kind of micro-economic activity governments already support in other sectors. In startups, public grants, incubators and accelerators exist because markets underinvest in early-stage ideas with uncertain commercial returns. In R&D, public support exists because experimentation produces benefits beyond the individual project. In apprenticeships and vocational training, government supports structured practice because training alone does not create a skilled worker. In creative clusters, policymakers recognise that repeated interaction between practitioners, suppliers, institutions and audiences can build capability and local economic value.

Community sport provides an additional perspective. Australia's sports sector generates approximately $50 billion per year across community, amateur and professional sport in direct economic, productivity and volunteering benefits. It involves 1.8 million volunteers donating 158 million hours annually, equivalent to nearly 90,000 full-time jobs and $3 billion in economic value. The Australian Government allocates more than $500 million per year to sport through the Australian Sports Commission, covering community participation, high performance and infrastructure. Community sport receives substantial public investment because grassroots participation is understood to generate benefits beyond direct economic output, including health, social cohesion, skills development, volunteering, national identity and future elite talent.

The comparison is not that emerging screen practice is the same size as sport. It is that the policy logic is similar. Grassroots investment is understood to develop the participation base, skills, networks and talent from which professional performance later emerges. Nobody argues that community football clubs should only receive funding after they produce a professional AFL player. The same logic applies to screen. The writers, directors, producers, performers and crew who will later make the Australian films and television counted in official agency statistics are developed through early-stage practice long before they become eligible for most professional funding.

The $214 million screen-practice contribution identified in this paper (volunteer labour plus self-financed production GDP) should be understood in that context. It is the measurable part of a grassroots cultural economy that is already generating production activity, unpaid labour, skill formation and creative output without a coherent national production-stage support pathway at meaningful scale. It is not large beside the whole sports sector, but it is large enough to show that EC+Emerging practitioners are already contributing materially to the broader economy.

Any concern that a $214 million screen-practice contribution is too small to warrant serious attention misreads its significance. First, it is a floor, not a ceiling. The true contribution is likely larger especially once mid-career, experienced and formalised practitioners are included. Second, it is the value generated under conditions of scarcity. The public receives cultural and economic output while practitioners carry virtually all of the cost. Third, it is the base of the future screen industry. Without investment at this level, the system relies on individual debt, unpaid labour and private sacrifice to perform the talent-development work that other sectors recognise as a public good.

8. Social Value: What the Numbers Do Not Capture

Economic multipliers capture flows of money. They do not capture the full range of value that community screen practice generates. This paper includes a 1.5× cultural value premium as an illustrative sensitivity to produce an indicative value of approximately $320 million per year (not included in the primary estimate). It should not be read as a comprehensive valuation of the social, cultural and pipeline benefits described below. However, these benefits are real and material, even where they resist precise monetisation.

8.1 Community cohesion and creative clustering

The average EC+Emerging production in the survey involved a mean of 11.5 volunteer participants. These productions are not isolated acts of self-expression; they are collaborative community events that create sustained professional and social relationships. The survey records that community groups, festivals and conferences, and social media are the primary ways this cohort stays connected to the industry. The social fabric is not a by-product of the work; it is a precondition for it.

Metro Screen (2015) documented this effect through interviews with established practitioners: “It’s not only skills they’re getting; it’s a whole peer group, and a whole support structure.” The defunding of screen resource organisations, including Metro Screen’s closure after Screen Australia withdrew core funding, directly dismantled part of this infrastructure.

8.2 Skills formation with broader workforce benefits

Screen production develops skills across project management, budgeting, technical production, interpersonal communication, leadership, creative problem-solving and entrepreneurship. These are not narrow screen-industry skills; they transfer across the economy.

NCVER (2015) data shows that the top employment industries for VET Screen and Media graduates include Retail Trade, Information Media and Technology, and Accommodation and Food Services. ABS (2012) also noted that employment of screen practitioners embedded in non-screen industries is growing faster than in the traditional screen sector. Screen training therefore generates workforce externalities beyond the screen industry itself.

8.3 Mental health and purposeful work

The survey documents a cohort under considerable financial stress: 49% sometimes or never have enough money; 56% carry student debt; and the median years in pursuit is three, with some practitioners in the pool for 20 or 30 years. Against this backdrop, creative practice provides psychological sustenance, purpose and community belonging.

Research on creative participation consistently finds associations with positive mental health, sense of purpose and social connection. The WHO’s framework for social determinants of health identifies meaningful participation and social connection as protective factors. These benefits are real but are not quantified in the economic figures above.

8.4 Cultural identity and diversity

The cohort contains substantial diversity of storytelling perspective. Twenty-three per cent of respondents identify as Culturally and Linguistically Diverse, 23% as LGBTIQ+,20% as having a disability and 8% as rural or regional.

CALD respondents are disproportionately motivated by contributing to Australian cultural identity: 32% selected this as a career motivation, compared with 21% overall. If supported, the EC+Emerging cohort could materially broaden the cultural diversity of Australian screen content beyond what is currently produced through professionally funded channels. As Metro Screen (2015, p.39) noted, “diversify the gatekeepers and you can change the culture.”

8.5 International soft power and festival reach

The survey records 388 festival screenings from its 193 respondents over their careers. Emerging Visions documented that Australian short films achieved 453 screenings at high profile international festivals between 2005 and 2014, approaching the 490 achieved by professionally produced features over the same period. Using a conservative per-screening value of $5,000, the survey sample’s screenings represent approximately $1.9 million in soft-power value from this cohort alone. If even a portion of the approximately 1,500 tracked Australian short films each year reach international festival audiences, the wider soft-power value would be materially larger than the survey sample alone suggests.

9. Confidence in the Analysis

The estimates in this paper are intended as conservative floors, not precise ceilings. Given the dearth of data on the activity of this cohort it is to be expected. The strongest figures are those calculated directly from the Who gets a break? survey and scaled using conservative external anchors: volunteer labour, production expenditure, education flows and the central active-pool estimate.

9.1 Well-grounded

- Volunteer labour values are calculated directly from survey data at conservative MEAA minimum rates, consistent with ABS (2008) methodology.
- The production GDP estimate applies a 2.1× multiplier drawn from published Deloitte Access Economics modelling commissioned by Screen Australia.
- The education GDP estimate applies a 1.7× education-sector multiplier to a conservative serious-pursuer subset of screen and media completions.
- The active pool estimate is triangulated using three checks: production output, ABS workforce ratios and education flows.

9.2 Where caution is warranted

The analysis involves modelling assumptions, especially around the active-pool estimate, the weighted HECS debt figure, the distinction between official and unofficial production, and the illustrative cultural premium. Those assumptions are set out in **Appendix C.** Importantly, the conclusion holds across conservative, central and high scenarios: EC+Emerging practitioners generate substantial unrecognised value while carrying substantial debt and receiving little meaningful production-stage support.

10. Summary of Findings

THE COHORT	Estimate
Active EC+Emerging practitioners nationally (MID estimate, 3-method triangulation)	~26,000
Annual entrants to EC+Emerging pool	Formal pathway: ~2,363/year; non-formal pathway: ~2,870/year; combined ~5,230/year
% carrying student debt (HECS/HELP)	56%
Weighted average student debt (60% post-2021)	~$41,400
Student debt per graduate, post-2021 (Job-Ready Graduates)	~$51,000
Govt grant per graduate, post-2021 arts (down 86% from $35k)	~$4,900
HECS debt stock - national EC+Em cohort	~$273M
% who have never applied to Screen Australia	81%
% sometimes or never have enough money	49%

THE ECONOMIC CONTRIBUTION	Estimate
Education GDP (1.7× on ~$87.5M annual flow, Option C - serious pursuers)	~$149M/year
Volunteer labour value (MID, ~26,000 pool)	~$159M/year
Production GDP (2.1× on ~$26.3M annual spend, MID)	~$55.3M/year
Primary total (Streams 2+3, directly attributable to screen sector)	~$214M/year
Illustrative cultural value premium (1.5× BFI - not in primary total)	~$320M/year
FTE employment supported (direct, production, MID)	~270 FTE

THE PRODUCTION OUTPUT (Who gets a break? Survey)	Estimate
Short films produced (survey sample, lifetime)	279
Festival screenings (survey sample, lifetime)	388

% of producers achieving any festival outcome	51%
Festival rate for high-frequency producers (8+ films)	83%

THE FAIRNESS CONTEXT	**Estimate**
Students repay ~$4B more through HECS/HELP than oil and gas pays through PRRT each year	~$4 billion more
PRRT vs 2014–15, despite $47.7B LNG export surge	$400M lower
Total HECS outstanding nationally	$81 billion

Appendix A: Active Pool Estimation Method

This appendix provides the detailed calculations behind the central active-pool estimate of approximately 26,000 EC+Emerging practitioners. These calculations are summarised in Section 2.1 of the main paper.

A.1 Scenario summary

Scenario	Basis (all survey-derived or externally anchored)	Pool estimate	Notes
LOW	IMDb 1,500 ÷ 25.1% visibility ÷ 1.02 rate ÷ 45.3% production participation	~13,000	Conservative
MID ✓	IMDb 1,500 ÷ 12.2% visibility ÷ 1.02 rate ÷ 45.3% production participation	~26,000	Central estimate supported by three triangulation checks
HIGH	ABS 30,213 employed × 2× Throsby ratio × 60% EC+Em fraction	~36,000	Upper bound

Scenario	M1: Production output	M2: ABS workforce ratio	M3: Education flows
LOW	~13,000	~18,000	~15,000
MID ✓	~26,000	~27,000	~26,000
HIGH	~36,000–40,000	~36,000	~38,000

A.2 Method 1: Short film output

IMDb currently tracks approximately 1,500 Australian short films per year. These are productions that have been formally submitted, have festival distribution, or have otherwise entered a tracking system. They represent the visible tip of total production activity.

The Who Gets a Break? survey is used to estimate what proportion of all short films reach that level of visibility. Of the 279 short films produced by EC+Emerging respondents, 34 producers achieved any festival outcome. Assuming each successful producer got approximately one film to festival level, that equates to 12.2% of all productions. The remaining 87.8% are practice films, community screenings, online-only releases or submissions that were not accepted. This is consistent with typical festival acceptance rates of 5–15%.

The survey also measures the annual production rate. Among the 69 EC+Emerging respondents who had made at least one short film and reported their years of pursuit, the mean rate was 1.02 short films per active producer per year.

Step	Calculation	LOW	MID (central)	HIGH
IMDb tracked shorts/yr	External source	1,500	1,500	1,500
Festival visibility rate	Survey: 34÷279	25.1% (2 films)	12.2% (1 film)	8.1% (0.67 film)
Total shorts nationally	1,500 ÷ rate	~5,976	~12,295	~18,443
÷ Annual rate	Survey derived	5,859	12,054	18,082
÷ Production participation	Survey derived	12,934	26,609	39,916
EC+Em pool estimate		~13,000	~26,000	~36,000–40,000

YouTube provides a sanity check on scale. In 2016, Australian creators uploaded 550,000 hours of content to YouTube. At an average of 10 minutes per video, that equals 3.3 million videos. The estimate of approximately 12,000 EC+Emerging short films represents less than 0.4% of those uploads, which is plausible for intentional narrative screen production as distinct from vlogs, gaming, tutorials and other content types.

A.3 Method 2: ABS workforce ratio

Throsby and Hollister (2003) documented that, in creative industries, aspiring practitioners typically outnumber employed practitioners by 2–4 times. ABS 2021–22 records 26,808 people employed in film and video production and 3,405 in post-production: 30,213 formally employed in the registered screen sector.

Applying a 2–4× ratio gives 60,000–120,000 total aspiring practitioners across all career stages. For this model, EC+Emerging practitioners are conservatively estimated at 60% of the seriously aspiring pool because it produces a pool estimate broadly consistent with the independent estimates derived from Methods 1 and 3.

Scenario	Ratio	EC+Em fraction	EC+Em pool
Conservative (seriously aspiring only)	1.0×	60%	~18,000

Mid (Throsby lower bound, EC+Em adj)	1.5×	60%	~27,000
Upper (Throsby mid, EC+Em adj)	2.0×	60%	~36,000

A.4 Method 3: Education flows

The education-flow method builds from annual completion figures. Metro Screen (2015) recorded approximately 7,000 university completions and 4,253 VET completions in screen-related courses per year: 11,253 completions annually.

If the total active pool is approximately 26,000, and 45% came through formal screen qualifications, then about 11,700 practitioners in the pool hold formal screen qualifications. With a mean pursuit duration of five years, approximately 2,340 formal-qualification practitioners enter the pool each year. That is 2,340 ÷ 11,253, or approximately 21%.

Pursuit rate	Formal pathway pool	Total pool (formal÷45%)	Consistency with M1
12% (conservative)	6,752	~15,000	Conservative cross-check, near LOW range
21% (implied by Method 1)	11,700	~26,000	Converges ✓
30% (high)	16,880	~37,500	Above M1 HIGH

Appendix B: Production GDP by Format

This appendix provides the format-by-format production GDP calculation summarised in Section 6.3. The model applies survey-derived production rates to the national EC+Emerging pool and uses a 2.1× screen production GDP multiplier.

Cultural production format	Vol. / yr	Spend / production	Annual spend	GDP (2.1×)	Basis
Short films	~12,295	$1,750	$21.5M	~$45.2M	Survey median (excl. zeros)
Documentaries	~1,454	$1,750	$2.5M	~$5.3M	Survey proxy (short film median)
Web series / online content	~749	$1,000	$0.7M	~$1.6M	Survey median (n=3)
Low-budget features (sub-$500k)	~24	$50,000	~$1.2M	$2.5M	Metro Screen (2015) vol.; est. spend
TV drama / pilots	~132	$2,500	$0.3M	$0.7M	Survey (n=2, indicative)
TOTAL - cultural production	~14,650		~$26.3M	~$55.3M	

Short film spend is the survey median for most recent production. Metro Screen (2015) estimated informal-sector short film production was worth at least $6 million per year, equivalent to approximately $8.3 million in 2026 dollars after CPI adjustment. The revised MID estimate of approximately $21.5 million for short films sits above that inflation-adjusted floor because it reflects the broader national production volume implied by the IMDb visibility model.

Low-budget feature volume, about 24 per year, is drawn from Metro Screen's analysis of Screen Australia production tracking data: 262 non-professional features over ten years. These are sub-$500,000 productions, below the Producer Offset threshold. The $50,000 spend per feature is a conservative estimate for the EC+Emerging end of this range, approximately 30% of Metro Screen's inflation-adjusted average across all non-professional features.

Appendix C: Assumptions, Caveats and Robustness Checks

This appendix consolidates the main modelling caveats and low/high robustness checks. These are summarised in Section 9 of the paper.

C.1 Core assumptions

- The MID active-pool estimate of approximately 26,000 is a point-in-time estimate of serious pursuit. It likely understates the true pool because practitioners who entered via non-formal pathways and withdrew after brief pursuit are underrepresented.
- The weighted average debt figure of approximately $41,400 is estimated from a 60/40 split of post/pre-2021 enrolees; the survey does not directly record enrolment year. The $273 million figure is calculated as approximately 11,700 formal-pathway practitioners × 56.3% carrying HECS or HELP debt × $41,400, or about 6,600 debt-carrying practitioners × $41,400.
- The education GDP figure of $149 million is not included in the primary screen-sector total, to avoid conflating higher-education GDP with direct screen-sector contribution. It is shown separately as part of the broader combined economic footprint of approximately $363 million.
- The cultural premium of 1.5× involves greater methodological assumptions. The BFI methodology is established in UK cultural economics but is not formally adopted by Australian agencies.

C.2 Robustness range

Scenario	Pool assumption	Production GDP	Volunteer labour	Primary contribution (Streams 2+3)
LOW	~13,000 pool, median expenditure including zeros	~$26.9M	~$80M	~$106M/year
MID ✓	~26,000 pool, median expenditure excluding zeros	~$55.3M	~$159M	~$214M/year
HIGH	~36,000 pool, mean expenditure across formats	~$151M	~$220M	~$371M/year

The conclusion holds across scenarios. Even at the LOW estimate, EC+Emerging practitioners generate substantial unrecognised value while carrying substantial debt from training that government made more expensive without adequately funding the transition from learning to earning. At the HIGH estimate, the contribution is much larger, especially once more experienced, formalised and adjacent practitioners are considered.

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