SAVE AUSTRALIAN STORIES

Evidence for the National Cultural Policy Consultation 2026

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Submission Details

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Submission date: 24th May 2026

Submission to: Office for the Arts, Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts. Consultation: Towards a New National Cultural Policy (March 2026).

Supporting guilds: Australian Cinematographers Society (ACS), Australian Production Design Guild (APDG), Australian Guild of Screen Composers (AGSC), Australian Location Managers Guild (ALMG), and Australian Screen Sound Guild (ASSG).

Survey distribution partners: Australian Screen Industry Group (ASIG) member organisations, listed in full in the About This Survey section.

Pillars addressed: This submission addresses all five pillars of the Revive framework, with primary focus on Pillar 3 (Centrality of the Artist), Pillar 4 (Strong Cultural Infrastructure), and Pillar 5 (Engaging the Audience), reflecting the workforce-evidence base. Pillar 2 (A Place for Every Story) is addressed in depth. Pillar 1 (First Nations First) is addressed within the limits of the survey's First Nations sample, with broader First Nations cultural-rights, language, and leadership-pathway questions best answered by First Nations-led submissions.

Evidence base: Australian Screen Industry Workforce Impact Assessment, a survey of 1,250 screen industry professionals conducted between July and October 2025 across 135 federal electorates; supported by analysis of publicly available industry datasets from Screen Australia and the Australian Communications and Media Authority covering production expenditure, commercial television compliance and subscription video on demand investment from 2018/19 to 2024/25. The survey workbook, the evidence register, and the supporting source documents are available on request.

Table of Contents

Executive Summary

Australia's National Cultural Policy, Revive, was released in 2023 and built on a commitment to 'a place for every story, a story for every place'. Its five pillars (First Nations First, A Place for Every Story, Centrality of the Artist, Strong Cultural Infrastructure, and Engaging the Audience) set out the cultural framework to build for the next generation of Australian storytelling. Sitting across these pillars are 10 principles that guide the Government's actions and investments:

- First Nations arts and culture are First Nations led.
- All Australians, regardless of language, literacy, geography, age or education, have the opportunity to access and participate in arts and culture.
- Artists and arts workers have career structures that are long-term and sustainable, supported by vocational pathways.
- Australian students have the opportunity to receive an education that includes culture, creativity, humanities and the arts.
- Creative talent is nurtured through fair remuneration, industry standards and safe and inclusive work cultures.
- Arts and cultural organisations have representation and leadership that is reflective of contemporary Australia.
- Cultural infrastructure, including galleries, libraries, museums, archives and digital collections, is restored, built and maintained.
- Australian stories are seen and heard, regardless of platform.
- Creative industries and practice are future focused, technology enabled, networked and globally recognised, including through reciprocal exchange, export and cultural diplomacy.
- Arts and culture are generative (creating new works and supporting emerging artists) and preservative (protecting heritage and conserving cultural memory).

Three years on from Revive, the workforce that makes those stories is contracting. Headline expenditure has reached record levels, but the volume and hours of Australian production have fallen, with the sharpest declines in children's content. The 1,250 screen professionals surveyed here describe the financial hardship, mental-health impacts, and workforce attrition that follow.

This submission proposes that the next iteration of Revive treat the volume and hours of Australian production, alongside the headline expenditure figure, as the measure of cultural-policy success in the screen industry. This submission, organised against the five pillars, presents the workforce evidence, industry data and the policy steps that will let Australian stories continue to be made, by Australian people, for audiences at home and abroad.

The industry data cited in this submission are drawn principally from four publicly available datasets: the Screen Australia Drama Report, the ACMA commercial television Australian content compliance reports, the ACMA Spending by subscription video on demand providers reports, and the Screen Australia Documentary Production activity summary. Full source attribution, year ranges, publication dates and counting conventions are in the Data Source Methodology section.

From this submission's own 1,250-respondent workforce survey: 79.7 per cent of respondents reported decreased workloads and 44.5 per cent reported their work had been cut by more than half; 76.8 per cent cited inconsistent work and job insecurity as their biggest challenge; mean work-availability was rated 3.52 out of 10; AI was the most-cited future challenge in open-ended responses, raised by 31.2 per cent of the 769 respondents who answered that question.

Headline expenditure

Total drama expenditure (covering theatrical features, TV and streaming drama, and including international productions filming in Australia) reached $2.7 billion in 2024/25, a 43 per cent increase on the previous year and a new all-time high. In current prices, this is approximately 13 per cent above the previous peak of $2.38 billion in 2021/22; on an inflation-adjusted basis, 2024/25 is approximately 2.5 per cent below the 2021/22 peak (Screen Australia Drama Report 2024/25).

Of which, Australian content:

- **Expenditure:** $1.07 billion (40 per cent of total, down from 50 per cent the previous year)
- **Title count:** 71 titles, down from 89 (peak 98 in 2022/23)
- **TV/VOD titles:** 37, down from 51 the previous year (27 per cent fall) and from a peak of 65 in 2021/22 (43 per cent fall from peak)

Volume decline by category

- **Free-to-air drama:** 191 hours across 14 titles (down from 276 hours across 16 titles the previous year, and from peaks of 330 hours in 2020/21 and 29 titles in 2022/23)
- **Subscription TV and SVOD:** 105 hours across 18 titles (down from 135 hours across 28 titles, and from a peak of 136 hours across 30 titles in 2021/22)
- **Children's TV/VOD:** 21 hours across 5 titles (down from 33 hours across 7 titles the previous year, and from a peak of 132 hours across 15 titles in 2018/19, with $106 million in production expenditure)
- **SVOD cost per hour:** $5.1 million in 2024/25, up 44 per cent from $3.6 million in 2023/24, a rise far above inflation and a deliberate shift toward fewer, higher-budget titles

Documentary

- **SVOD documentary:** $3.7 million in 2024/25, down 90 per cent from $38.5 million peak in 2021/22 (91.6 per cent on an inflation-adjusted basis)
- **Screen Australia documentary:** $11.21 million in 2024/25, down from $15.14 million in 2019/20 (26 per cent in current prices, 39 per cent inflation-adjusted)
- **Commercial FTA documentary:** 156 hours in 2024, down from 161 hours in 2019 (3 per cent decline). The ACCTS counts observational factual series (workplace, animal and crime formats) as documentary at 1 point per hour, and these formats make up most of the total rather than authored documentary.

Children's content

Children's content has declined across every distribution channel simultaneously.

- **Drama Report:** titles fell from a peak of 15 in 2018/19 to 5 in 2024/25 (67 per cent decline); expenditure fell from a peak of $106 million in 2018/19 to $34 million in 2024/25 (68 per cent in current prices, approximately 75 per cent on an inflation-adjusted basis)
- **Commercial FTA:** children's content fell from 391 hours (2019) to 48 hours (2024) (87.72 per cent); children's drama fell from 98 to 10 hours (89.8 per cent), following the removal of sub-quotas
- **SVOD:** children's drama fell from $33.1 million (2019/20) to $3.3 million (2024/25), a 90 per cent fall (ACMA SVOD data); children's non-drama fell from $7.4 million to $0.4 million, a 95 per cent fall

Commercial FTA compliance

- **ACCTS quota compliance 2024 (250-point annual minimum per network):** on raw 2024 output, Seven 216.5 points and Nine 243.98 (both below the minimum); Ten 395.5 (above). With ACCTS carryover applied (up to 50 surplus points from prior years), the final reported totals were Seven 266.5, Nine 274.76, Ten 445.5 (ACMA 2024 commercial television Australian content compliance report)
- **Composition of first-release Australian content, 2024 (three networks combined):** drama 51 per cent (of which Home and Away 22 per cent of all Australian content, Neighbours 20 per cent; together the two long-running serials account for 42 per cent of all Australian content and 84 per cent of all Australian drama hours on commercial FTA); documentary 31 per cent; all children's content 9 per cent (of which children's drama approximately 2 per cent); acquired films 9 per cent

SVOD investment concentration

- **Adult drama and sport:** 93 per cent of total SVOD expenditure in 2024/25
- **Documentary and children's:** 1.8 per cent of total SVOD expenditure

This submission's recommendations cascade across the five Revive pillars.

Pillar 1 calls for investment in First Nations storytelling and First Nations-led production companies; the centring of Indigenous cultural authority in any cultural-policy response to AI (drawing on the Relational Futures research); Indigenous Cultural and Intellectual Property (ICIP) protection; and consent and consultation for AI-generated content depicting Indigenous Australians.

Pillar 2 documents the volume decline and recommends shifting policy settings to grow mid-budget drama, authored documentary, and children's content; reforming the commercial free-to-air points system under the Australian Content and Children's Television Standard (ACCTS) to deliver more volume; encouraging broadcasters to make fuller use of the international co-production framework, since official co-productions already qualify as Australian content; recognising the workforce support for a 20 per cent streamer content quota (89.8 per cent of survey respondents agree or strongly agree); and that Screen Australia publish an annual Documentary Report covering all commissioning channels.

Pillar 3 grounds workforce conditions: safer and fairer workplaces, supporting completion of the current Screen Producers Australia and Media, Entertainment and Arts Alliance (SPA-MEAA) bargaining round; training and career development, including a federally funded insurance facility for shadowing and mentor placements; protection of human creative labour from replacement by AI, including amending the Australian content definition so AI-generated material does not satisfy the creative-role tests and clarifying that AI-generated content does not qualify as human-performed PDV work under the PDV Offset; and provenance disclosure for news, current affairs and documentary content using AI-generated or AI-modified material.

Pillar 4 reforms the public-investment architecture: a transparency framework answering who is receiving public investment, what is being made, and the cultural and workforce outcomes delivered; removing the Qualifying Australian Production Expenditure (QAPE) threshold from the Producer Offset (the existing Producer Offset process for productions over $500,000 is unaffected); designing a modern 10BA-style private-investment incentive (modelled on Division 10BA of the Income Tax Assessment Act 1936); pairing both with a software-managed compliance platform for the new incentive and for productions under $500,000; and developing a Screen Australia Digital Assessment Platform to support stronger applications and more consistent assessment across funding programs.

Pillar 5 reforms the audience-facing settings: at the legislated review of the streaming services framework, apply the Spender amendment (10 per cent of expenditure or 7.5 per cent of revenue with offsets excluded, delivering the 13 to 14 per cent gross commissioning effect the Minister for the Arts, Tony Burke, acknowledged); strengthen the ABC and SBS; establish a streamer-filmmaker audience data partnership; ensure Australian IP is retained by Australian production companies; address the historic-low cinema audience for Australian films through a coordinated national audience-building campaign; reform the Producer Offset distribution-eligibility requirement; and support the Steggall and Spender amendments on balanced genre investment and subgenre reporting, and the Webster amendment on regional reporting, from the November 2025 House debate.

This submission builds on what Revive has delivered since 2023: the Australian content requirement for streaming services, the increase of the Location Offset to 30 per cent, and the establishment of Creative Workplaces. Revive also established Creative Australia (with Music Australia, Writing Australia, and the First Nations-led Board), the Digital Games Tax Offset, and the Arts and Disability Plan 2022-2026.

The recommendations that follow propose how the next iteration of the National Cultural Policy, Revive, can build on that progress. This document is organised around the five Revive pillars, with each pillar section self-contained so that an assessor reviewing a single pillar can find the relevant framing, evidence, survey data, and recommendations together. Where a piece of evidence supports more than one pillar, the evidence is repeated in each pillar that relies on it; this duplication is by design.

Key Recommendations

The recommendations below are grouped by Revive pillar. They draw on three sources: the 1,250-respondent workforce survey's solutions and future-challenge data; the amendments and proposals advanced in the November 2025 House of Representatives and Senate debates by Ryan, Spender, Steggall, Leeser, Webster, Hanson-Young, Duniam and Payman; and the author's policy analysis and design. Section references in brackets point to the supporting evidence.

Pillar 1: First Nations First

- Increase investment in First Nations storytelling and in First Nations-led production companies, strengthening First Nations cultural authority on screen and employment for First Nations practitioners.
- In any cultural-policy response to AI, protect Indigenous Cultural and Intellectual Property (ICIP) and keep cultural authority over how Indigenous knowledge and stories are represented with First Nations communities, consistent with the Relational Futures research.
- Require the prior and informed consent of the relevant First Nations community before AI-generated content reproduces Indigenous knowledge, cultural expression or artistic styles, sacred or culturally restricted imagery, or the likeness of identifiable Indigenous people or communities.
- Support and expedite the standalone ICIP legislation currently in development under Revive, including the foreshadowed first-stage bill on fake art.

Pillar 2: A Place for Every Story

- Substantially increase Australian production across formats, genres, budgets and platforms, so Australian stories retain a meaningful presence in what audiences watch.
- Treat the volume and hours of Australian production, alongside total expenditure, as a measure of success.
- Restore mid-tier production volume by addressing the structural reduction in commissioning of mid-budget drama and documentary.

- Strengthen children's content requirements through quotas, direct funding, or commissioning targets, recognising children's content as a matter of cultural identity for the next generation.
- Acknowledge the workforce support for streamer content obligations: 89.8 per cent of respondents agree a 20 per cent streamer content quota would benefit the industry, which the November 2025 streaming legislation partially addresses.
- Have Screen Australia publish an annual Documentary Report covering commissioning across all channels (ABC, SBS, NITV, commercial free-to-air, theatrical and streaming), as it already does for drama.
- Reform the commercial free-to-air points system under the ACCTS: restore format-specific minimum points for drama, documentary and children's content as separate sub-obligations; differentiate authored documentary from observational factual; and lift the overall points requirement to increase volume in each format.
- Encourage broadcasters to make fuller use of the international co-production framework to lift Australian production volume. Official co-productions already qualify as Australian programs under the ACCTS (where the broadcaster makes a material financial contribution) and as Australian for the Producer Offset under Division 376 of the Income Tax Assessment Act 1997, so the gap is in commissioning practice, not classification.
- Review the 2025 Documentary Production Program against the outcomes the Producer Equity Program previously delivered for low-budget documentary.

Pillar 3: Centrality of the Artist

- Recognise that the financial hardship, mental-health impacts and workforce attrition documented in this submission are connected to reduced production volume, linking Pillar 3 outcomes to the volume measures in Pillars 2 and 4.
- Extend the Creative Workplaces remit to rates, hours, leave and casualisation; conclude the current SPA-MEAA bargaining round on the Motion Picture Production Agreement (crew) and the Actors Feature Film and Television Collective Agreements (performers); and mandate safety-critical hiring (unit medic, safety supervisor, intimacy coordinator) on government-funded productions above a budget threshold.
- Restore training pathways: paid entry-level positions on government-funded productions (additional roles, not replacements); long-running Australian drama through the Pillar 5 streaming reforms; continued funding of AFTRS, NIDA and other

national training organisations with periodic alignment review; and mid-career retention support.

- Establish a federally funded insurance facility for shadowing, mentor and trainee placements on government-funded productions, removing the insurance barrier to unfunded mentorships.
- As AI replaces advertising and commercial production, expand drama, documentary and children's commissioning so the freelancers who depend on advertising income can sustain a year's work within the screen industry.
- Strengthen creative rights in the digital environment: copyright protection, licensing, attribution and fair compensation, including where Australian creative works are used to train AI systems.
- Direct cultural-policy and production funding (including the Producer Offset, Location Offset and PDV Offset) toward human creative labour rather than AI-generated content, with acquittal disclosure of any AI tool use as a share of total expenditure and the roles affected, and clarify that such content does not qualify as human-performed work under the PDV Offset.
- Amend the Australian content definition under the ACCTS and the November 2025 streaming framework so that AI-generated material does not satisfy the requirement that creative roles be filled by Australians.
- Mandate provenance disclosure for news, current affairs and documentary content that uses AI-generated or AI-modified imagery, audio or text.

Pillar 4: Strong Cultural Infrastructure

- Treat the volume and hours of Australian production as the central Pillar 4 measure of success, and set the federal levers (the Producer, Location and PDV Offsets, the streaming obligation, the ACCTS points obligation and direct Screen Australia funding) to fund more productions rather than fewer, larger ones.
- Disaggregate federal screen-sector reporting by offset type (Producer, Location, PDV, Digital Games) and by sector (film and television versus digital games), so the outcomes of each can be assessed on evidence.
- Commission a periodic, publicly reported independent audit of the Producer, Location and PDV offsets, answering who receives public investment (including ultimate parent entity and foreign ownership), what is made, and what the public gets back,

measured by the share of spending on Australian creative roles and the IP retained by Australian companies.

- Rebalance the Location and Producer Offset settings to support the broader Australian production pipeline while preserving the workforce currently dependent on international shoots.
- Develop a modern 10BA-style private investment incentive for Australian production, with integrity safeguards, sitting as an alternative to the Producer Offset on a given production (a filmmaker chooses one, not both); the next step is to commission Treasury and the Office for the Arts to develop and consult on it.
- Remove the $500,000 QAPE threshold from the Producer Offset so early-career filmmakers can access it for micro-budget Australian productions, with the significant-Australian-content test continuing to limit it to Australian content; the Location and PDV Offset thresholds remain, since those offsets exist to attract international work.
- Pair the QAPE-threshold removal and the 10BA incentive with a software-based compliance platform that integrates with production accounting and reports only statutory-test outcomes to the regulator, keeping commercial detail confidential; mandatory for the 10BA incentive and Producer Offset productions under $500,000, optional for others.
- Develop a Screen Australia Digital Assessment Platform to support stronger applications and more consistent assessment, with AI as a decision-support tool for assessors and a plain-language guide for applicants, not a replacement for human judgement.
- Recognise the US trade-policy exposure of inbound production: proposed US tariffs of up to 100 per cent on films made outside the United States would directly affect the $1.3 billion in international production Australia attracted in 2024/25, a further reason to grow the domestic Australian production base.

Pillar 5: Engaging the Audience

- Recognise that 2025 cinema admissions remain at 64 per cent of the 2019 baseline, and that Australian films take a share of that reduced market below their long-term range, driven by a fall in the number of Australian films being made rather than by lower attendance alone.
- Establish a coordinated national audience-building campaign for Australian cinema, run by distributors, exhibitors and creative agencies, with subsidised tickets for

Australian films, event screenings, and consolidation of existing industry initiatives under one framework.

- Strengthen the ABC and SBS as commissioners of Australian content, addressing the audience-facing consequence of reduced commercial-network commissioning of drama, authored documentary and children's programming.
- At the legislated review, set the streaming obligation at 10 per cent of expenditure or 7.5 per cent of revenue with federal and state offsets excluded from the calculation (the Spender amendment), lifting the effective commissioning to about 13 to 14 per cent of expenditure, and preclude commissioning arrangements that pass Producer Offset value back to the streamer.
- Ensure Australian IP is retained by Australian production companies across all commissioning relationships, including domestic broadcasters, streaming services and international co-production partners.
- Adopt the Steggall and Spender amendments on balanced genre investment across drama, children's, documentary, arts and educational content, with annual reporting by subgenre, within the streaming obligation.
- Adopt the Webster amendment requiring streaming services to report annual Australian program expenditure by ABS Remoteness Structure category, with ACMA publication and ministerial tabling.
- Establish a streamer-filmmaker audience data partnership, mediated through Screen Australia or the ACMA with statutory confidentiality protections, that aggregates anonymised cross-platform viewership and makes the signals available to Australian producers, writers and directors as a guide, not a constraint.
- Reform the Producer Offset distribution-eligibility requirement at the next offset review to recognise direct-to-platform, festival and producer-led distribution alongside conventional arrangements, and preclude distributors charging producers a fee to be included in the offset paperwork; the current rule is a barrier for independent productions.

Data Source Methodology

The industry data cited in this submission are drawn principally from four publicly available datasets. Each uses different reporting periods, definitions and counting methodologies; aggregate figures from different sources should be interpreted with these definitions in mind.

Screen Australia Drama Report

The Screen Australia Drama Report tracks production expenditure, titles, hours and finance for Australian and international drama by financial year of production commencement. It counts 100 per cent of a production's cost (including offsets and third-party investment), attributed to the broadcaster or platform of first release. This submission draws on Drama Reports from 2018/19 to 2024/25. The most recent edition (2024/25) was published on 4th December 2025.

ACMA commercial television Australian content compliance reports

The ACMA broadcaster compliance with TV content standards reports record first release Australian content hours and ACCTS points broadcast by each metropolitan and regional commercial television licensee, by calendar year. This submission draws on compliance reports from 2019 (the last year under the previous Australian Content Standard) through 2024 (the fourth year under the ACCTS). The most recent edition (2024) was published on 14th August 2025.

ACMA Spending by subscription video on demand providers

The ACMA SVOD spending reports record SVOD investment in Australian content by genre and financial year. They count the total production expenditure on Australian and Australian-related content as defined under the ACCTS, in the year content first becomes publicly available. The $414 million SVOD figure for 2024/25 is total production expenditure and includes any applicable federal and state offsets together with third-party investment, not only the cash investment from the commissioning platform. Marketing, distribution and licensing are excluded. SVOD cash investment (the platform's own funds, excluding offsets and co-financing) is analysed separately later in this submission. This submission draws on

SVOD reports from 2019/20 to 2024/25. The most recent edition (2024/25) was published on 9th December 2025.

Screen Australia Documentary Production activity summary

The Screen Australia Documentary Production activity summary tracks documentary production volume and investment across all distribution channels. This summary, Screen Australia's Annual Reports, and the ACMA datasets are the primary sources for documentary-specific data cited in this submission. The page was last updated on 13th April 2026, with data covering up to 2023/24.

Inflation adjustment

Where multi-year dollar comparisons are made, both figures in current prices (as published by Screen Australia and ACMA) and figures on an inflation-adjusted basis (adjusted for ABS CPI All Groups Australia, financial-year average, 2019/20 = 100) are presented. The current-price figures preserve the published reference points so they can be cross-checked against source documents; the inflation-adjusted figures preserve purchasing-power comparability across years, given that cumulative CPI inflation from 2019/20 to 2024/25 was approximately 22 per cent.

Data analysis and verification

Every figure in this submission was extracted, analysed and cross-checked against its primary source using Claude Opus 4.8. This covers the four datasets above, the other public sources cited (including Screen Australia's annual reports, ABS data, ACMA reports, the parliamentary record, advertising-market data and box-office data), and this submission's own 1,250-respondent workforce survey. Each figure is recorded in the Evidence Register with its source and, where a calculation is involved, the working, so that any number in this submission can be independently traced and verified.

About the Screen Workforce Survey

The Australian Screen Industry Workforce Impact Assessment surveyed 1,250 screen professionals between July and October 2025. Participants were recruited through the Australian Screen Industry Group (ASIG) member organisations: the Australian Cinematographers Society (ACS), Screen Producers Australia (SPA), the Australian Writers Guild (AWG), the Australian Directors Guild (ADG), the Australian Location Managers Guild (ALMG), the Australian Guild of Screen Composers (AGSC), the Australian Production Design Guild (APDG), the Australian Screen Sound Guild (ASSG), the Australian Screen Editors (ASE), the Visual Effects Society (VES), Women in Film and Television (WIFT), the Media Entertainment and Arts Alliance (MEAA), and Documentary Australia, together with direct posting in approximately 15 Australian screen-industry Facebook groups and informal sharing through industry networks. The survey captured respondents from all Australian states and territories, spanning 135 federal electorates, with the heaviest concentrations in Sydney and Melbourne.

The questionnaire asked respondents about their sector and primary role, their rating of work volume over the past 1-2 years (1 to 10 scale), the biggest challenges they had faced, overall workload, agreement with a 20 per cent Australian content quota for streaming and broadcasters, and federal electorate. Optional free-text questions covered personal or professional impact, alternative solutions, the most significant challenge or opportunity in the next 2-3 years, and willingness to engage in advocacy.

782 respondents chose to provide personal statements describing how industry conditions had affected them. The two other open-ended questions, on solutions and on future challenges, drew 700 and 769 responses respectively. The survey was conducted anonymously, with responses aggregated and reported in ways that protect individual privacy.

Who Responded

Respondents reported more than 500 distinct job titles, organised for analysis into 15 broad role categories. The distribution reflects the diversity and specialisation of the screen industry. The top six categories were:

- Camera and Cinematography: 20.4 per cent
- Production: 15.2 per cent

- Post-Production: 12.1 per cent
- Directing: 10.2 per cent
- Sound and Audio: 10.2 per cent
- Writing: 9.3 per cent

Camera and cinematography is the largest single role category in the sample, reflecting the distribution channels used to recruit respondents and the strong representation of camera professionals across ASIG member organisations.

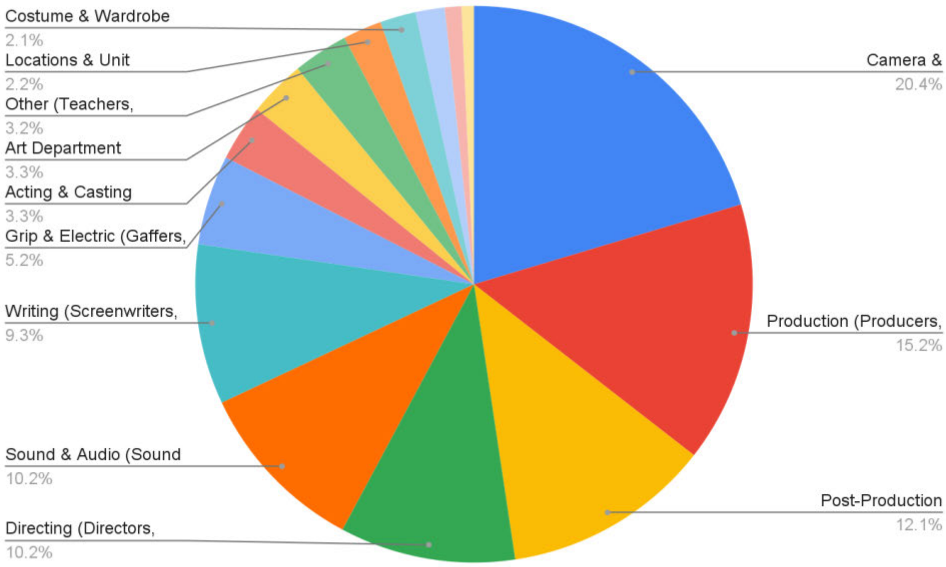

Figure 1: Breakdown of screen industry roles (n = 1,247). Top six categories: camera and cinematography, production, post-production, directing, sound and audio, writing. Source: Australian Screen Industry Workforce Impact Assessment, October 2025.

Respondents reported working across multiple sectors. Feature film was the most common (45.0 per cent), followed by television drama (42.3 per cent), commercials (32.6 per cent), documentary (31.7 per cent), post-production (17.6 per cent), and unscripted television (13.9 per cent). The total exceeds 100 per cent because respondents were able to select multiple sectors. Most screen professionals work across different types of production throughout their career. The pie chart immediately below normalises these figures to a 100 per cent total so the relative composition of the sample by primary sector can be read at a glance.

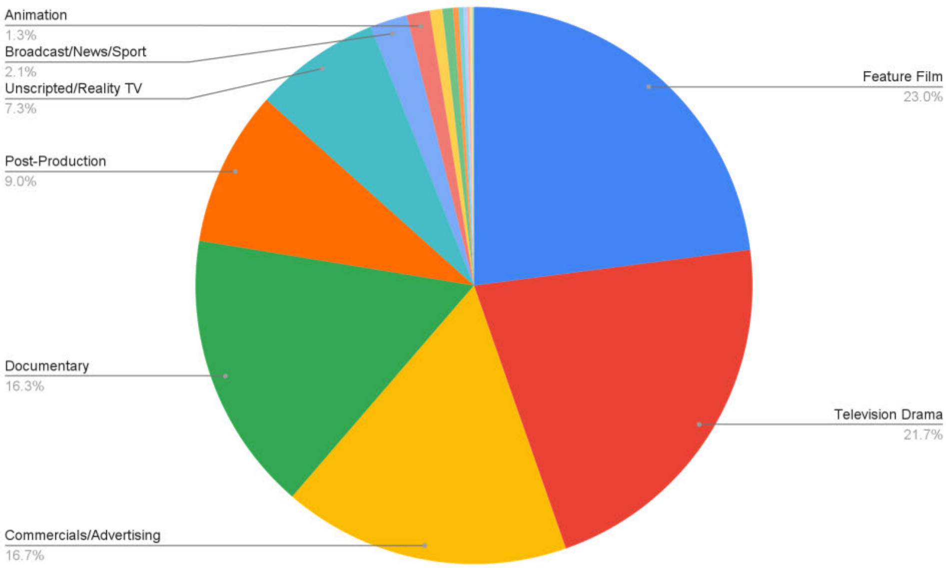

Figure 2: Sector representation, normalised to 100 per cent (2,466 selections from 1,250 respondents; multi-select). Source: Australian Screen Industry Workforce Impact Assessment, October 2025.

Industry Workforce Composition

Screen Australia's analysis of the 2021 ABS Census identified 52,901 people in the audiovisual sector, distributed across the following sub-sectors:

- Film and Video Production: 26,808 (approximately 51 per cent of the total).
- Cinema Exhibition and Distribution: 12,422 (approximately 24 per cent).
- Commercial Free-to-Air Broadcasting: 6,389 (approximately 12 per cent).
- Subscription Broadcasting: 3,877 (approximately 7 per cent).
- Post-Production and Visual Effects: 3,405 (approximately 6 per cent).

These sub-sectors face different pressures from the structural shifts documented in this submission. Film and Video Production, together with Post-Production and Visual Effects, is most directly affected by reduced commissioning of Australian content. Cinema Exhibition and Distribution is exposed to the cinema-side decline documented in Pillar 5. Commercial Free-to-Air Broadcasting is most directly affected by reduced advertising revenue; Subscription Broadcasting by competition from SVOD services and the audience migration documented in Pillar 5. The 1,250 survey respondents are drawn from across these sub-sectors, with the heaviest concentrations in Film and Video Production and post-production roles.

Geographic Coverage

Responses were received from all Australian states and territories, distributed across 135 federal electorates. The highest response concentrations were in Sydney (120 respondents), Grayndler (76), Melbourne (68), Warringah (43), and Macnamara (40). New South Wales and Victoria together accounted for approximately 81 per cent of respondents, reflecting the concentration of film and television production in these two states.

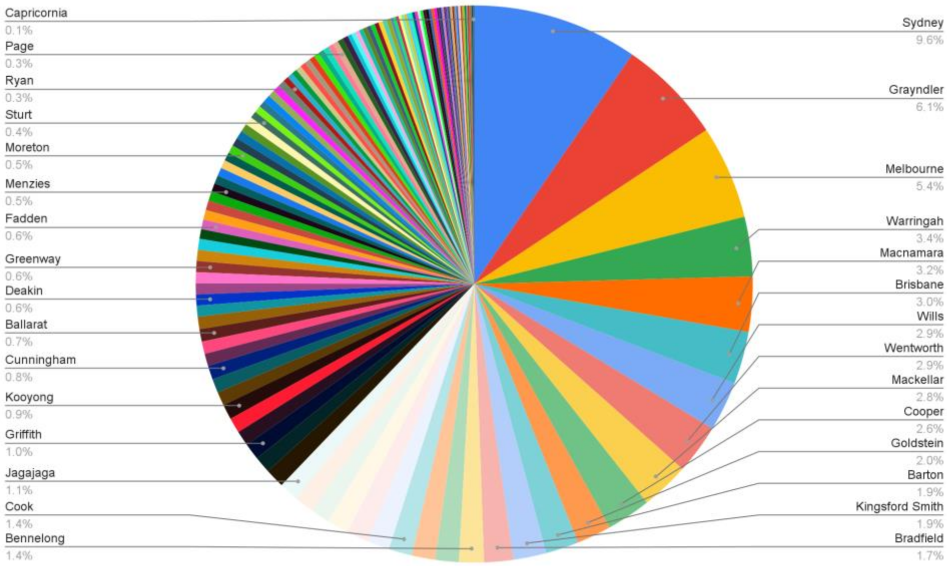

Figure 3: Federal electorate distribution of respondents (n = 1,250; 135 electorates across all states and territories). Source: Australian Screen Industry Workforce Impact Assessment, October 2025.

Solutions Identified by the Workforce

When asked what would improve conditions, the 700 respondents who provided written solutions most often called for more Australian content and the support to produce it. Increased government funding or investment and more local content production were together the dominant theme, raised by 263 respondents (37.6 per cent), and content quotas on streaming and broadcast platforms followed at 170 respondents (24.3 per cent). More than half of all written solutions, 395 respondents (56.4 per cent), called for content investment, content quotas, or both.

Other recurring themes raised by respondents were:

- Training and career development: 8.9 per cent
- Tax incentives and rebates: 7.4 per cent
- Better working conditions: 6.0 per cent
- Rebalancing of international production incentives: 4.6 per cent
- Increased ABC and SBS funding: 3.9 per cent

- Private investment schemes such as a revived 10BA: 3.4 per cent

The survey's numerical figures are counted directly from the raw survey responses, and the written answers were grouped into a fixed set of categories. The full method, including how each question maps to the data, the number of responses behind each figure, the categories used and how each response was classified, is set out in the Evidence Register's Survey Analysis Methodology, with the per-response classification held in companion files available on request, so any figure can be independently reproduced.

How to Read This Data

Throughout this report, different questions are reported against different base sizes. All questions were asked of all 1,250 respondents, but the three open-ended questions were optional. The personal statement drew 782 responses, the base for the mental health and financial hardship statistics; the solutions question drew 700, and the future-challenges question 769. When reading the tables and figures, the base size (n =) is always indicated, which matters for statistical reliability and when comparing figures across sections.

Pillar 1: First Nations First

Pillar 1 of the Revive framework recognises the central place of First Nations stories in Australia's arts and culture. The 2026 consultation paper asks how cultural policy can continue to reflect First Nations priorities, strengthen recognition of cultural rights, recognise the centrality of language to culture, and support pathways for First Nations leadership across the cultural landscape.

Two First Nations issues have come into focus for the Australian screen workforce since Revive was launched. The first is the continuing case for investment in First Nations storytelling and First Nations-led production companies, and for the elimination of differential treatment of Indigenous workers within the broader industry. The second is the rapid rise of generative AI and the specific risks it presents to Indigenous Cultural and Intellectual Property and to the representation of First Nations stories on screen.

The First Nations Board within Creative Australia, established under the Creative Australia Amendment (Implementation of Revive) Act 2024 with members appointed in September 2024, is the federal institutional vehicle through which several of the Pillar 1 recommendations would be implemented.

Workforce Perspectives on First Nations Storytelling

While the 1,250-respondent survey conducted between July and October 2025 did not include questions on First Nations issues, four respondents raised them in the open-ended responses. Three called explicitly for greater investment in First Nations storytelling, for example:

> *More investment & promotion of First Nations stories.*
>
> *Writer and Producer*

The fourth respondent, an Extras Casting Director in Television Drama with extensive experience on First Nations-led productions, identified differential treatment of Indigenous workers within mainstream streaming productions as part of broader workplace inclusion problems:

> *...they will always push our wages down discriminate indigenous people and not pay them as well.*
>
> *Extras Casting Director*

The same respondent distinguished that experience from the experience on First Nations-led productions:

> *Working on [a First Nations drama series] and with [a First Nations-led production company] on over 6 productions [they] are so inclusive on and off camera and with all behind the scenes practitioners.*
>
> *Extras Casting Director*

This account carries particular weight because of the respondent's role. Extras Casting Directors maintain extensive working relationships with First Nations performers and broker much of the on-screen First Nations representation that reaches Australian audiences; the differential treatment they observe across productions is therefore a substantive workforce account rather than an isolated impression. The implication for cultural policy is that government production funding directed toward First Nations-led companies and First Nations-led productions strengthens both First Nations cultural authority on screen and industry-wide practice on inclusion.

These four responses are individual workforce observations from people who chose to write about First Nations issues in their personal statement; they should not be read as a representative survey of First Nations perspectives across the screen industry.

First Nations Perspectives on AI

Recent qualitative research by the Relational Futures project at Macquarie University (Relational Futures: Indigenous sovereignty and the governance of artificial intelligence) is among the first structured studies to record Aboriginal and Torres Strait Islander perspectives on AI in Australia. The research used surveys and yarning circles to centre Indigenous voices on how AI systems are encountered, governed, and resisted. Participants expressed limited trust in AI and, in many cases, a clear willingness to refuse using it. As one participant told the researchers, AI comes with 'no accountability, no checks and balances, no responsibility'.

Participants identified that AI systems do not enter neutral environments: they enter institutions that already have uneven distributions of power, trust and accountability, and the harms are not evenly felt. The participants identified concerns well beyond privacy and data breaches: environmental costs, the appropriation and flattening of Indigenous knowledge, and the lack of transparency in how AI systems are built and deployed.

The research speaks directly to the cultural policy question of AI representation. One participant stated: 'There are times when AI doesn't quite grasp the depth of First Nations experiences, cultural nuance or community dynamics. It can miss the emotional weight or the context, which reminds me that cultural authority must always sit with mob, not technology.' When the researchers tested the concept of an 'AI Elder', the reaction of participants was that Elders are not only knowledge-holders; they are part of community, and they are trusted because of their relationships, responsibilities, and accountability over time. AI cannot enter into those relationships, cannot be held accountable in that way, and cannot stand in connection to Country or community.

AI governance, in the words of the Relational Futures project, cannot be limited to technical standards or compliance frameworks: it has to engage with authority, responsibility, harm, and care. Cultural authority over how Indigenous knowledge, stories, and imagery are represented in AI systems must rest with community.

Indigenous Cultural and Intellectual Property

AI systems present specific risks to Indigenous Cultural and Intellectual Property (ICIP). The Australian Cinematographers Society AI Policy requires that AI use in industry activities respects cultural sensitivities, including the representation of Indigenous Australians and culturally significant communities. AI-generated content depicting Indigenous Australians, Indigenous cultural practices, sacred sites, or culturally significant imagery must not be produced or distributed without appropriate consultation and consent.

Generative AI systems trained on publicly available data may reproduce or imitate Indigenous artistic styles, sacred imagery, language, and cultural knowledge without any understanding of the protocols that govern their use. There are currently no standalone laws to protect ICIP in Australia, although standalone ICIP legislation is in active development under the Revive commitment, with community consultation in 2024 (365 stakeholders, 43 sessions, 32 written submissions) and a first-stage bill on fake art foreshadowed alongside second-stage consultation on the broader ICIP framework. Dr Terri Janke's True Tracks framework establishes ten principles for protecting ICIP, including respect, self-determination, consent, and benefit sharing. AI systems that scrape and reproduce Indigenous cultural material without consent violate each of these principles.

The Revive framework places First Nations priorities at the centre of cultural policy through Pillar 1. Any cultural policy response to AI must give priority to ICIP protection and to First Nations cultural authority over how Indigenous knowledge and stories are represented.

Recommendations: Pillar 1

- Increase investment in First Nations storytelling and in First Nations-led production companies, strengthening First Nations cultural authority on screen and employment for First Nations practitioners.
- In any cultural-policy response to AI, protect Indigenous Cultural and Intellectual Property (ICIP) and keep cultural authority over how Indigenous knowledge and stories are represented with First Nations communities (consistent with the Relational Futures research).
- Require the prior and informed consent of the relevant First Nations community before AI-generated content reproduces Indigenous knowledge, cultural expression or artistic styles, sacred or culturally restricted imagery, or the likeness of identifiable Indigenous people or communities.
- Support and expedite the standalone ICIP legislation currently in development under Revive, including the foreshadowed first-stage bill on fake art.

Pillar 2: A Place for Every Story

Pillar 2 of the Revive framework reflects the breadth of Australian stories and the contribution of all Australians as creators of culture. The 2026 consultation paper asks how cultural policy can continue to recognise diverse forms of cultural expression and participation, including local and place-based practice and emerging modes of expression, while responding to changing patterns of participation and supporting inclusion.

For the Australian screen workforce, this pillar matters because the formats that historically allowed the broadest range of Australian stories to be told (mid-budget drama, authored documentary, and children's content) have contracted most in the current commissioning environment, removing entry points for emerging practitioners and consistent employment for mid-career professionals. The volume and hours of Australian production are themselves Pillar 2 questions: a place for every story requires that stories are actually being commissioned and made. This submission addresses Pillar 2 from a screen-sector workforce perspective; the broader cultural-sector considerations of the pillar are best answered by other submitters.

The Volume Decline in Australian Stories

The challenges facing the Australian screen workforce are not the result of an industry in financial decline. The Screen Australia Drama Report 2024/25 recorded $2.7 billion in total drama expenditure, an increase of 43 per cent on the previous year and a new all-time high. In current prices, this is approximately 13 per cent above the previous peak of $2.38 billion in 2021/22; on an inflation-adjusted basis, 2024/25 is approximately 2.5 per cent below the 2021/22 peak. The headline figure aggregates two trends with different implications for Pillar 2: the majority of that spending went to international productions and post-production services for international clients. Only 40 per cent ($1.07 billion, down from 50 per cent the previous year) was spent on Australian stories. The number of Australian titles fell from 89 to 71.

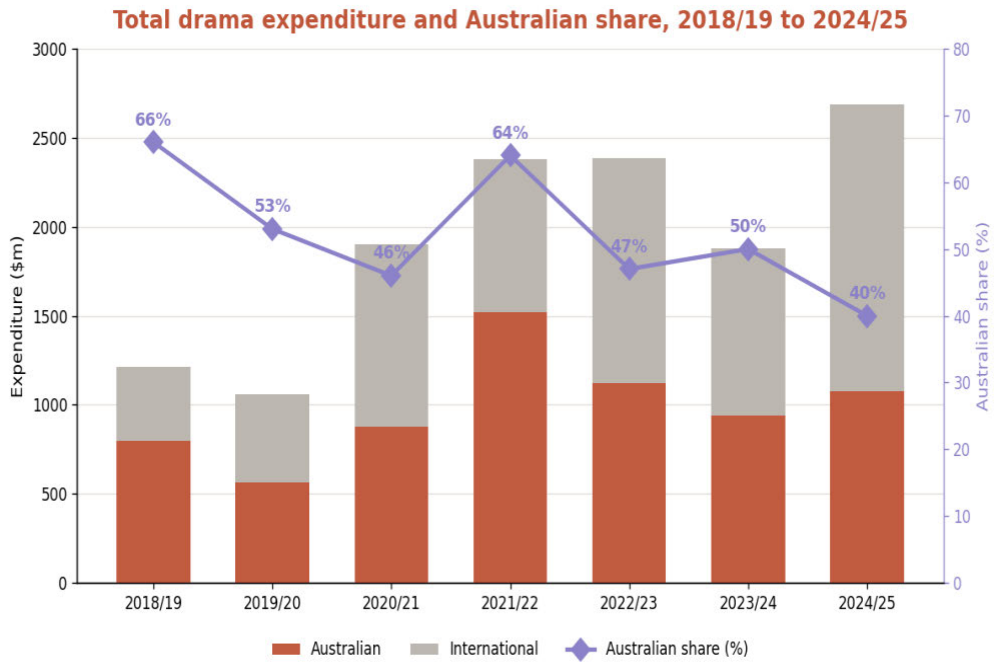

Figure 4: Total drama expenditure in Australia, 2018/19 to 2024/25 ($ millions, stacked bar), with Australian share (per cent, purple line). Australian share fell from 66 per cent to 40 per cent while total expenditure reached a record $2.7 billion. The 2023/24 Australian share and total are shown on the 2024/25 Drama Report's restated basis (50 per cent). Source: Screen Australia Drama Report.

One respondent linked the falling Australian share to how public investment is allocated:

> *The criteria for investment in Australian films is almost exclusively 'market-driven'... Too much Australian taxpayers' funding goes to overseas productions. This is greatly to the detriment of those who produce IP including writers, producers and directors. This is a very short term view of our cultural sector.*
>
> *Writer/Director/Producer (Documentary)*

Free-to-air television drama fell to 191 hours across 14 titles in 2024/25, down from 276 hours the previous year. Subscription TV and SVOD drama fell to 105 hours across 18 titles, down from 135 hours across 28 titles. Children's TV/VOD drama hours fell to 21 hours across 5 titles, down from 33 hours across 7 titles the previous year. The cost per hour of SVOD drama rose 44 per cent to $5.1 million in 2024/25, up from $3.6 million in 2023/24 (Screen Australia Drama Report 2024/25), far outpacing inflation of about 2 per cent. The platforms are commissioning fewer Australian titles and spending more on each, concentrating investment in a small number of higher-budget productions rather than a broader slate.

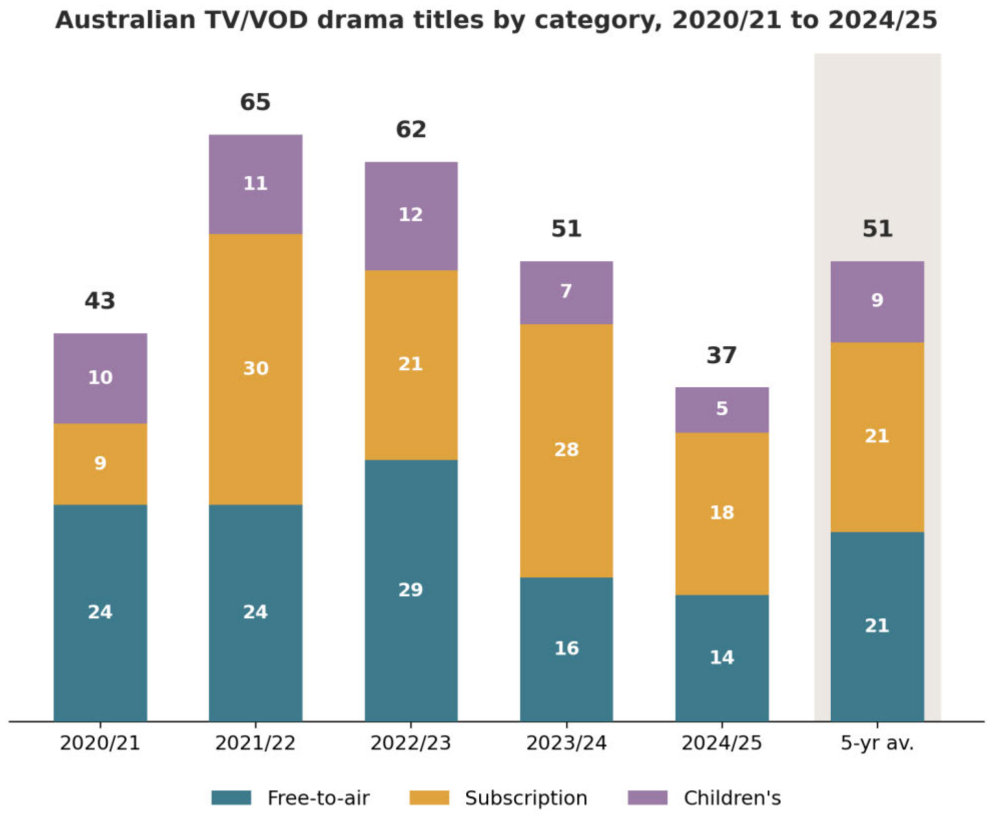

Figure 5: Australian TV and VOD drama titles by category (free-to-air, subscription and children's), 2020/21 to 2024/25. 37 titles in 2024/25, down from 51 the previous year (27 per cent fall) and from a peak of 65 in 2021/22 (43 per cent fall from peak). Source: Screen Australia Drama Report 2024/25 dashboard.

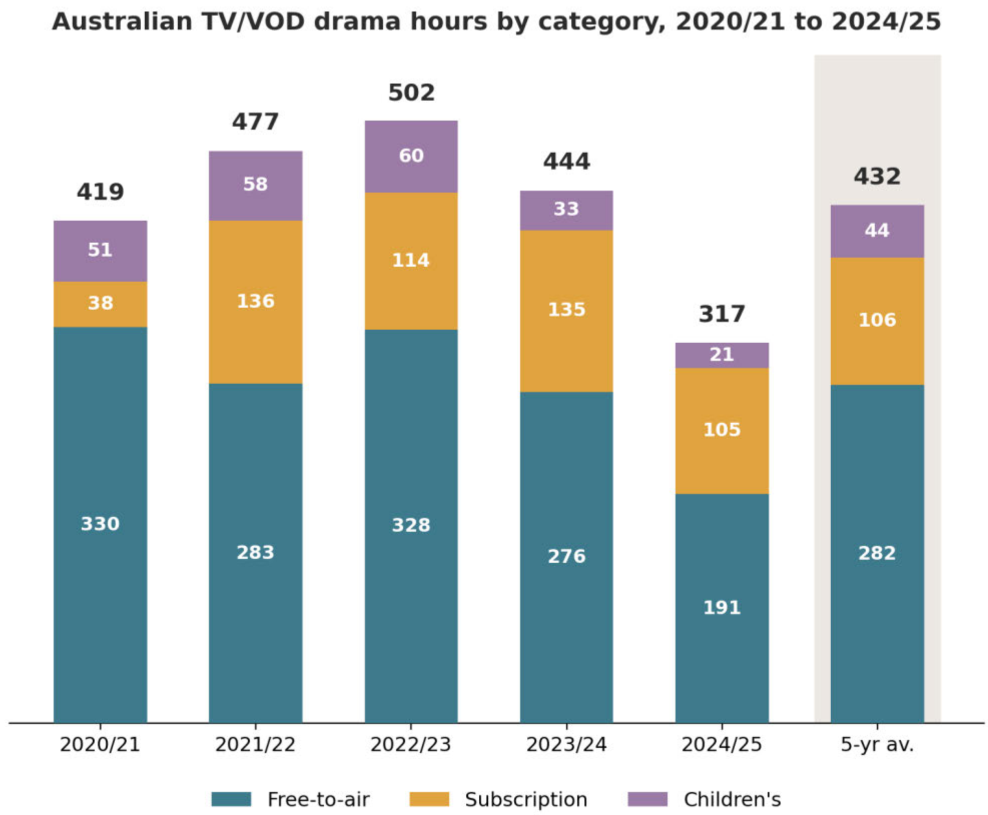

Figure 6: Hours of Australian TV and VOD drama by category (free-to-air, subscription and children's), 2020/21 to 2024/25. Free-to-air 191 hours, subscription 105 hours and children's 21 hours in 2024/25, totalling 317, down from 444 the previous year. Five-year average: 432 hours. Source: Screen Australia Drama Report 2024/25 dashboard.

A generation ago Australian audiences accessed content through a handful of channels, and Australian stories made up a significant share of what was available. Today audiences choose from dozens of streaming platforms, social media feeds, YouTube, podcasts, and international libraries. YouTube alone has roughly 500 hours of new video uploaded every minute: 720,000 hours a day, or about 263 million hours (approximately 30,000 years) of video uploaded each year. The total amount of content available to audiences has grown much faster than the amount of Australian content being made, so Australian content now makes up a smaller share of what audiences can watch. This submission recommends substantially increasing Australian production across formats, genres, budgets and platforms, so Australian stories retain a meaningful presence in what audiences watch.

Mid-Budget Drama

The structural shift toward fewer, larger productions has disproportionately affected mid-budget drama, the format that historically provided the most consistent employment for mid-career professionals and the broadest range of storytelling. The 2024/25 Drama Report shows free-to-air drama fell 14 per cent year-on-year to $162 million across 14 titles in 2024/25 (approximately 16 per cent on an inflation-adjusted basis). With commercial broadcasters' drama commissioning substantially reduced since the genre sub-quotas were removed in October 2020 (with subsequent commissioning concentrated in sport, news, and reality programming), mid-tier production volumes are lower than they were five years ago.

The number of Australian commissioned or co-commissioned titles on SVOD platforms peaked at 67 in 2022/23 and fell to 41 in 2024/25, a 39 per cent decline, even as total SVOD expenditure rose 28 per cent over the same period (ACMA SVOD spending data). Adult drama expenditure on SVOD grew from $73.7 million in 2019/20 to $309.7 million in 2024/25, now accounting for 75 per cent of total SVOD spend. The result is that streamers concentrate spending on a small number of high-budget adult dramas rather than a broader slate of mid-budget titles, which is the main reason volume has fallen so sharply.

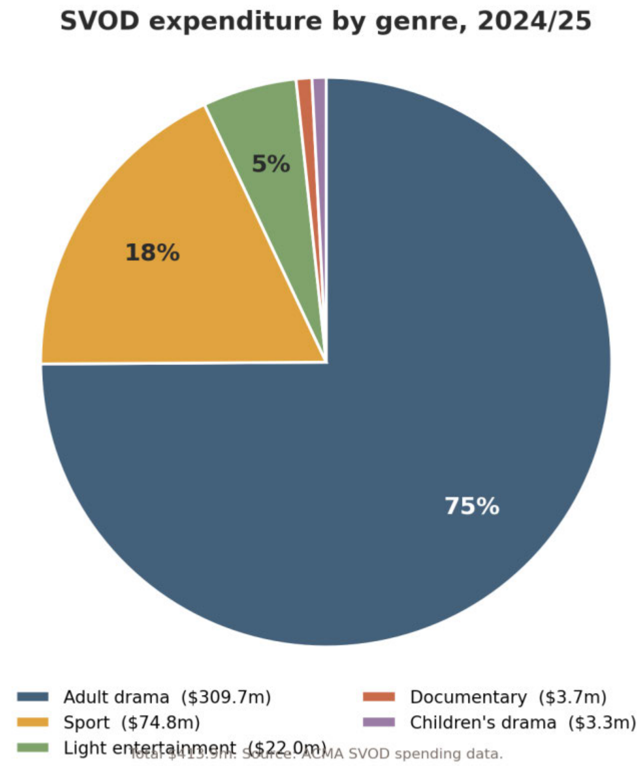

Figure 7: SVOD expenditure by genre, 2024/25 ($ millions). Adult drama $309.7 million (74.8 per cent); sport $74.8 million (18.1 per cent); light entertainment $22.0 million (5.3 per cent); documentary $3.7 million (0.9 per cent); children's drama $3.3 million (0.8 per cent). Source: ACMA SVOD spending data.

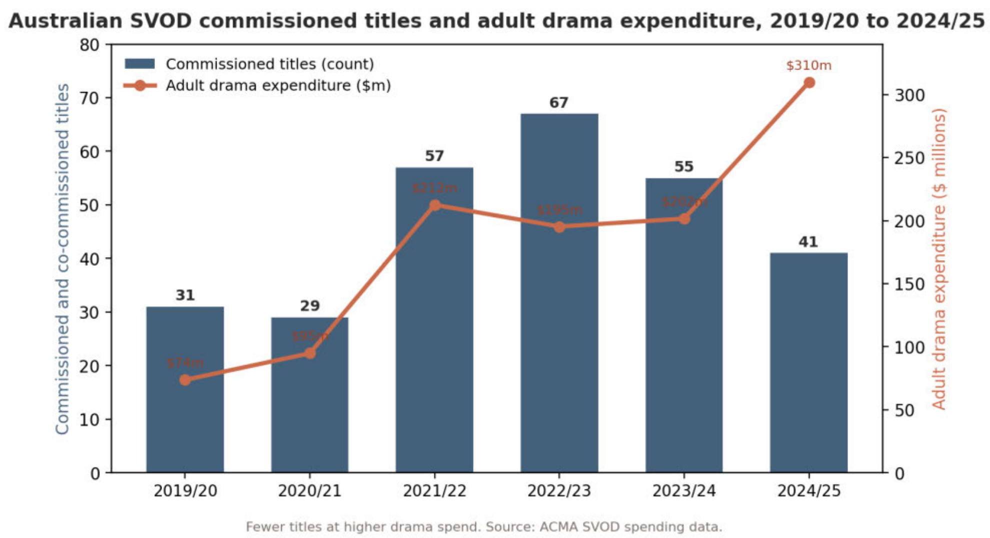

Figure 8: Australian commissioned and co-commissioned SVOD titles (bars) and adult drama expenditure (line), 2019/20 to 2024/25. Titles peaked at 67 in 2022/23 and fell to 41 in 2024/25 (39 per cent decline) while adult drama spend rose to $309.7 million, illustrating fewer titles at higher budgets. Source: ACMA SVOD spending data.

> *Funding for Australian procedural TV specifically, encouraging Australian networks to go back to telling narrative stories, not just reality. Think of iconic shows like A Country Practice, Water Rats, All Saints, Blue Heelers... Australian storytelling like this is being lost.*
>
> *Director (Feature Film/Television Drama), Future Challenges question*

Documentary

Documentary investment has declined across both streaming and Screen Australia's own funding. The SVOD content in Australia: Spending on Australian programs by SVOD providers report shows documentary spend fell from a 2021/22 peak of $38.5 million to $3.7 million in 2024/25, a 90 per cent fall in current prices (91.6 per cent on an inflation-adjusted basis). Screen Australia's own documentary investment fell from $15.14 million in 2019/20 to $11.21 million across 107 projects in 2024/25, a 26 per cent decline in current prices (39 per cent on an inflation-adjusted basis). Screen Australia's Documentary Production activity summary and ACMA's Broadcaster compliance with TV content standards data lag by one or more reporting periods and cover different reporting cycles, which precludes a consolidated current view of the format.

This submission recommends, alongside the substantive Pillar 2 policy proposals below, that Screen Australia publish an annual Documentary Report covering documentary commissioning across all distribution channels (ABC, SBS, NITV, commercial free-to-air, theatrical and streaming), in a similar capacity to its existing Drama Report and on the same annual financial-year reporting cycle. The cultural-policy significance of the documentary format warrants reporting parity with drama, on a parallel reporting cadence.

A further issue is how the ACCTS defines documentary. It treats all documentary as a single genre earning the lowest rate (1 point per broadcast hour, capped at 50 points), and the ACMA Documentary Guidelines 2021 are broad enough to count non-competitive observational factual, the guidelines' own example being the workplace series Paramedics. As a result, most first-release documentary hours on commercial television in 2024 were workplace, animal and crime observational franchises rather than authored documentary. The Pillar 2 recommendations address this by splitting the ACCTS documentary genre into authored documentary and observational factual, with a tighter authored-documentary sub-test, a budget-weighted minimum in place of the flat 50-point cap, and one consistent documentary standard across the ACCTS, the streaming obligation and the Producer Offset.

> *The criteria for investment in Australian films is almost exclusively 'market-driven'... Too much Australian taxpayers' funding goes to overseas productions. This is greatly to the detriment of those who produce IP including writers, producers and directors. This is a very short term view of our cultural sector.*
>
> *Writer/Director/Producer (Documentary)*

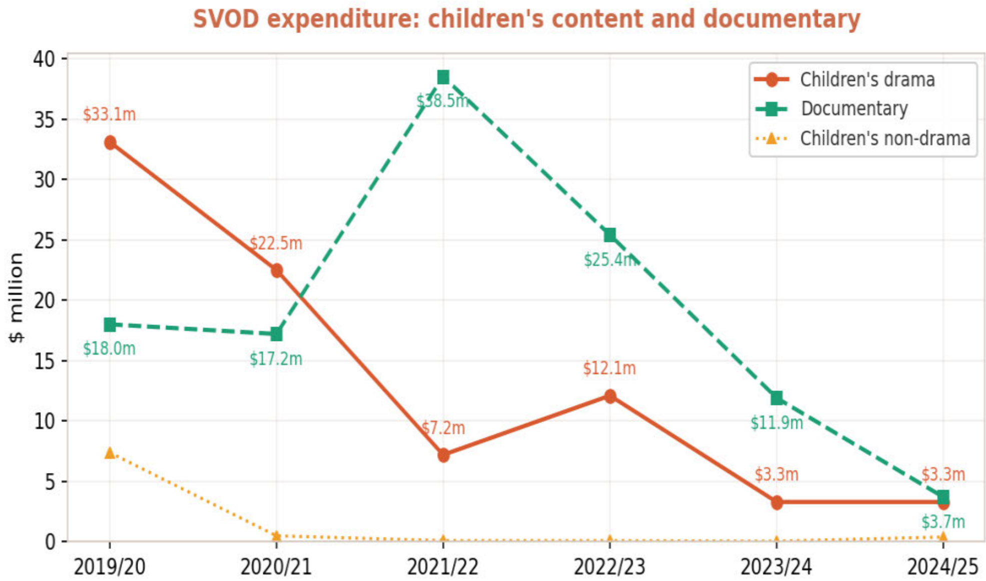

Figure 9: SVOD expenditure on children's drama, children's non-drama and documentary, 2019/20 to 2024/25 ($ millions). Children's drama fell 90 per cent ($33.1 million to $3.3 million); documentary fell 90 per cent from its 2021/22 peak. Source: ACMA SVOD spending data.

Children's Content

Under the previous Australian Content Standard and Children's Television Standard, each commercial network broadcast approximately 130 hours of first release Australian children's programs per year (about 390 hours across all three networks), every year from 2012 to 2019, with negligible variation across the eight-year period. Under the ACCTS, which commenced on 1st January 2021, this fell to 93 hours combined in 2021 (Seven 6, Nine 47, Ten 40). By 2024 the combined figure had fallen further to 48 hours. The fall was sudden rather than gradual, beginning the year the ACCTS replaced the children's quotas ([ACMA compliance reports 2021 and 2024]()).

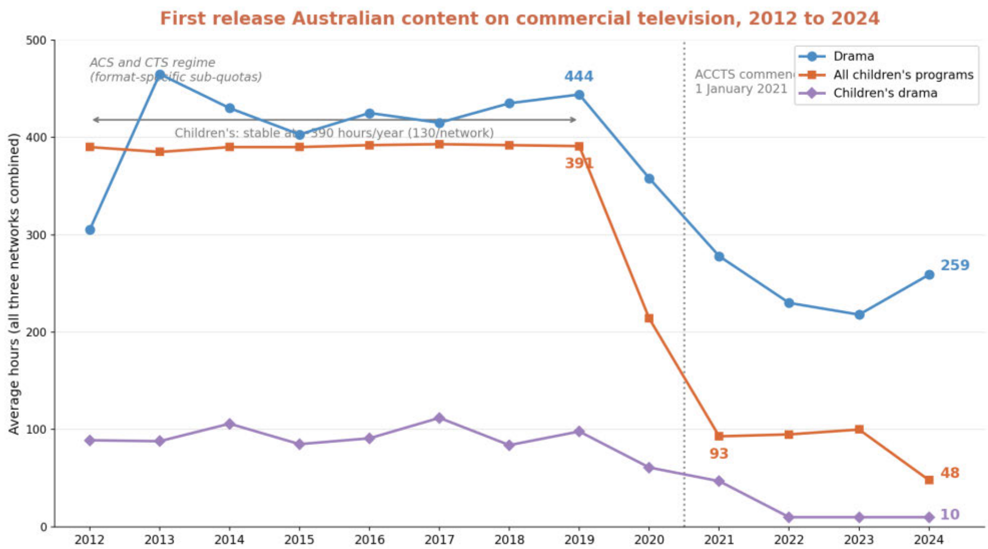

Figure 10: First release Australian drama, children's programs and children's drama on commercial television, 2012 to 2024 (average hours, all three networks combined). Children's programs held stable at approximately 390 hours per year for eight

years (2012-2019) under the Children's Television Standard, then collapsed under the ACCTS. Source: ACMA compliance reports 2021 (figures 3, 4 and 5) and 2024 (figures 13 and 14).

The ACCTS replaced the previous format-specific minimums (separate annual quotas for drama, documentary, children's drama, all children's programs and preschool) with a single 250-point pooled quota, after which the formats that had held dedicated minimums declined as the networks met the pooled quota with lower-cost, higher-volume content, mainly continuing adult drama serials and observational documentary.

Children's drama hours fell from 98 to 10 over the same period, a fall of 89.8 per cent. Children's TV/VOD titles fell from a peak of 15 in 2018/19 to 5 in 2024/25, a 67 per cent decline, and expenditure from a peak of $106 million in 2018/19 to $34 million in 2024/25, a 68 per cent fall in current prices (about 75 per cent on an inflation-adjusted basis). Children's content hours of new production also fell to 21 hours, down from 33 hours the previous year. Multiple survey respondents working in children's television reported complete loss of work in this area. Screen Producers Australia has described the result as 'a collapse of the Australian children's content industry' (Matt Deaner, SPA CEO, in TV Tonight, 7th September 2022).

The decline is consistent across SVOD as well as commercial free-to-air. SVOD children's drama expenditure fell from $33.1 million in 2019/20 to $3.3 million in 2024/25, a 90 per cent fall in current prices (91.8 per cent on an inflation-adjusted basis).

The ABC is now the primary commissioner of new Australian children's drama across all platforms. Screen Australia's 2022/23 Drama Report recorded that the ABC's share of children's TV and VOD drama titles rose from 45 per cent to 75 per cent over the preceding five years; by 2024/25, the ABC commissioned four of the five new children's TV/VOD drama titles that entered production, with Stan commissioning the fifth. Two of the five were Official Co-productions (one with Canada, one with Canada and Singapore). Four received Screen Australia funding and three received funding from the Australian Children's Television Foundation.

Children's content also shapes the cultural identity of the next generation, and the Pillar 2 commitment to a place for every story extends to the stories Australian children grow up with. Children are most shaped by what they see and experience in their early years, and Australian stories let them see their own lives, communities and country reflected back to them. This shared reflection builds social cohesion and a stronger sense of national unity and Australian values.

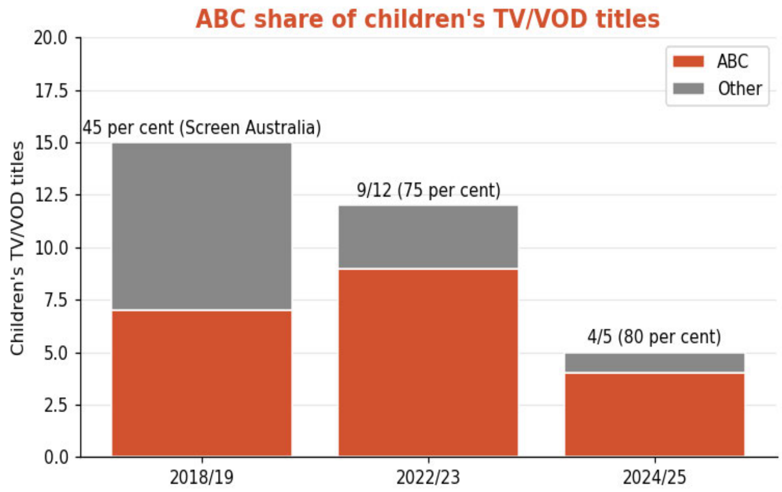

Figure 11: ABC share of children's TV/VOD titles, 2018/19, 2022/23 and 2024/25. ABC's share rose from 45 per cent to 75 per cent (9 of 12) to 80 per cent (4 of 5). Source: Screen Australia Drama Report 2022/23 and 2024/25.

Recommendations: Pillar 2

- Substantially increase Australian production across formats, genres, budgets and platforms, so Australian stories retain a meaningful presence in what audiences watch.
- Treat the volume and hours of Australian production, alongside total expenditure, as a measure of success.
- Restore mid-tier production volume by addressing the structural reduction in commissioning of mid-budget drama and documentary.
- Strengthen children's content requirements through quotas, direct funding, or commissioning targets, recognising children's content as a matter of cultural identity for the next generation.
- Acknowledge the workforce support for streamer content obligations: 89.8 per cent of respondents agree a 20 per cent streamer content quota would benefit the industry, which the November 2025 streaming legislation partially addresses.
- Have Screen Australia publish an annual Documentary Report covering commissioning across all channels (ABC, SBS, NITV, commercial free-to-air, theatrical and streaming), as it already does for drama.
- Reform the commercial free-to-air points system under the ACCTS: restore format-specific minimum points for drama, documentary and children's content as separate sub-obligations; differentiate authored documentary from observational factual; and lift the overall points requirement to increase volume in each format.

- Encourage broadcasters to make fuller use of the international co-production framework to lift Australian production volume. Official co-productions already qualify as Australian programs under the ACCTS (where the broadcaster makes a material financial contribution) and as Australian for the Producer Offset under Division 376 of the Income Tax Assessment Act 1997, so the gap is in commissioning practice, not classification.
- Review the 2025 Documentary Production Program against the outcomes the Producer Equity Program previously delivered for low-budget documentary.

Pillar 3: Centrality of the Artist

Pillar 3 of the Revive framework supports the artist as worker and celebrates artists as creators. The 2026 consultation paper asks how cultural policy can respond to changing conditions for creative work, including safer and fairer workplaces and the protection of creative rights in the digital environment.

For the Australian screen workforce, this pillar matters because the survey of 1,250 screen professionals documents the day-to-day working conditions of artists as workers: the financial security of a freelance workforce, the mental health impacts of reduced commissioning, and the protection of creative rights in the digital environment.

The workforce evidence in this pillar is drawn from the 1,250-respondent Australian Screen Industry Workforce Impact Assessment, July to October 2025. Methodology, role-category distribution, sector representation, and geographic coverage are set out in About This Survey at the front of this submission and are not repeated here.

Work Availability and Workload Change

Survey respondents rated current work availability at a mean of 3.52 out of 10 (median 3), heavily skewed to the low end, with 82.7 per cent rating work at 5 or below. Workload has fallen sharply, with 44.5 per cent (556 respondents) reporting their work cut by more than half, effectively halving income in a predominantly freelance workforce, against 5.6 per cent reporting any increase, a decline-to-growth ratio of 14:1.

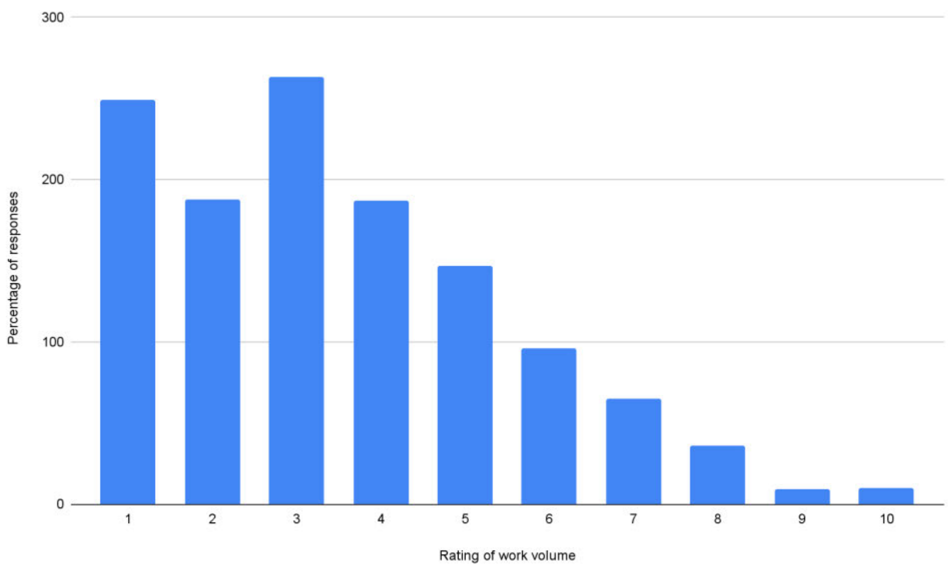

Figure 12: Work volume rating distribution, 1 to 10 (n = 1,250; mean 3.52, median 3.0). Source: Australian Screen Industry Workforce Impact Assessment, October 2025.

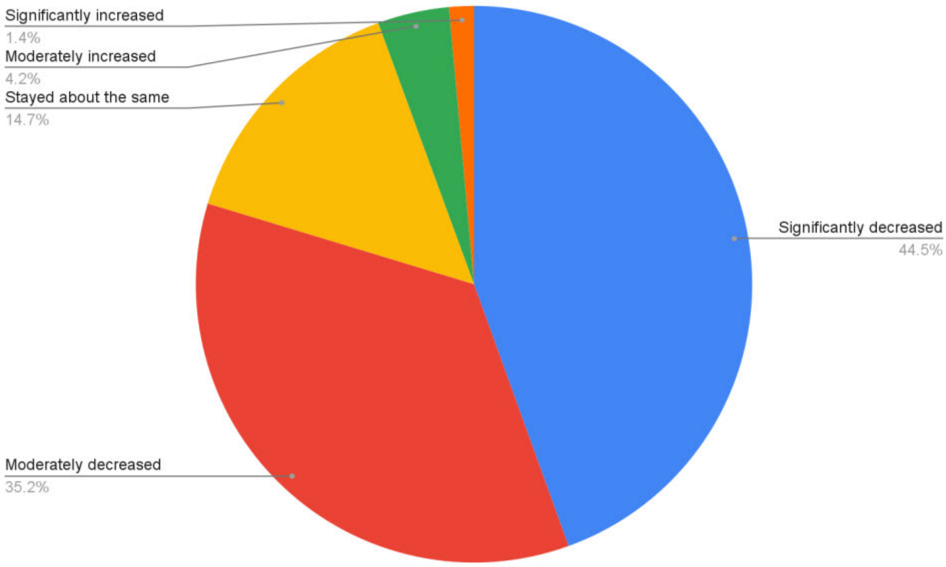

Figure 13: Workload changes, 2024/25 (n = 1,250): significant decrease 44.5 per cent, moderate decrease 35.2 per cent, about the same 14.7 per cent, increase 5.6 per cent. Source: Australian Screen Industry Workforce Impact Assessment, October 2025.

Note: *Respondents who reported significant decreases rated average work volume at 2.30 out of 10, compared with 5.22 for those whose workload stayed the same.*

> *I find the biggest issue in Victoria being that we seem to put all our eggs in one international basket at a time. If that falls through, we then end up with no work to lean back on. It needs to be more competitive and be capable of having more than one big production at once, because it has now been twice this year we have ended up being disappointed due to work having to go interstate or being left with nothing.*
>
> *Best Person Grip (Feature Film)*

> *I have worked for 3 decades in the industry building a successful career in post-production, up until 7 months ago when everything just died off and projects were not getting funded or green lit. Contracts being suddenly cancelled and promises of work not eventuating. For too many years now our industry has neglected to protect our most vulnerable, the freelancer, who have been keeping the industry alive.*
>
> *Offline Editor and Post Producer (Documentary/Unscripted TV/Post-Production)*

Financial Hardship

782 respondents provided personal testimony about financial hardship, mental health deterioration, career disruption, and family strain. Among those who stated their years of experience, respondents with 20 or more years' industry experience reported reduced work availability and financial stress, several describing conditions they had not previously encountered.

These impacts sit alongside the structural transformation documented across this submission. The combination of project-based employment and a declining pipeline of projects means the consequences of reduced commissioning are not absorbed by employers through redundancy provisions or redeployment. They fall directly on the workforce, which has no income continuity and no employer-funded leave. Some respondents reported falling back on personal savings or superannuation, government support such as Centrelink, or help from family.

The language used by respondents reporting the most acute hardship differs measurably from those less affected. Workers who rated work availability between 1 and 3 out of 10 used words such as 'stress', 'mental', 'financial', 'career', and 'outside' (referring to work outside the industry) at higher rates than those who rated their situation more favourably.

About a third of respondents who shared personal statements (34.0 per cent, or 266 people) described some form of financial distress, broken down below.

Note: a respondent may be counted in more than one row, so the sub-category figures can add up to more than the total, which counts each respondent once.

Financial Impact	Count	% of 782
Income reduction / financial stress	169	21.6 per cent
Mortgage / rent / bills stress	33	4.2 per cent
Business closure / redundancy	6	0.8 per cent
Depleted savings / superannuation	12	1.5 per cent
On Centrelink / government support	8	1.0 per cent
Lost home / housing / relocation	8	1.0 per cent
Any financial impact mentioned	**266**	**34.0 per cent**

Mental Health Impacts

The survey did not ask about mental health directly, but respondents volunteered details about it in their personal statements; the true prevalence is therefore likely higher than the figures recorded. Mental health pressures appear closely interconnected with financial stress: 79 respondents (10.1 per cent) described both financial hardship and mental health deterioration in the same statement; many also linked their mental health to a lack of work (114 statements) or to weighing leaving the industry (19).

Mental Health Indicator	Count	% of 782
Stress (explicit mention)	49	6.3 per cent
Mental health (general / wellbeing)	54	6.9 per cent
Loss of confidence / demoralised	16	2.0 per cent
Depression (explicit mention)	15	1.9 per cent
Anxiety (explicit mention)	18	2.3 per cent
Fear / uncertainty about future	15	1.9 per cent
Suicidal ideation / crisis	2	0.3 per cent
Any mental health impact mentioned	**159**	**20.3 per cent**

Destroying my life. From 70k in savings to Centrelink. Struggling to maintain relationships, sleep at night. Other big life decisions have been put on hold indefinitely.

Cinematographer/Camera Assistant (Documentary/Commercials/Advertising)

I have had to sell my house.

Supervising Post Producer (Post-Production)

I have had to close my business after 25 years.

Location Sound Recordist (Documentary/Commercials/Advertising/Post-Production)

Career Disruption and Workforce Attrition

Respondents described a spectrum of responses to industry contraction. The most common was actively weighing leaving the screen industry (79 respondents, 10.1 per cent); smaller numbers had taken work outside the industry, found supplementary work, or had already left or changed careers. Actual exits remain a minority, but the share contemplating departure is a leading indicator of attrition risk. The departure of experienced practitioners represents a loss of skills, mentorship capacity, and institutional knowledge whose rebuilding would take time and investment.

Career disruption	Count	% of 782

Considering leaving the industry	79	10.1 per cent
Took work outside the industry	44	5.6 per cent
Had to find supplementary work	28	3.6 per cent
Already left / actively leaving	15	1.9 per cent
Changed career / retraining	7	0.9 per cent
Any career disruption mentioned	**161**	**20.6 per cent**

> *After 35+ years in the industry I love I now cannot find work. I am facing the possibility of leaving. Now in my 50s, it's too late for me to retrain for another industry. I'll need to access Centrelink soon, and meanwhile my decades of skills and experience will be lost to the screen industry.*
>
> *Post Producer*

> *I've had to lay off staff. They've mostly left the industry. Significant damage to our sector has already happened. Skills have been lost and won't return, it will take years to retrain.*
>
> *Gaffer (Television Commercial and Advertising)*

Challenges Identified by Respondents

Respondents were able to select more than one challenge, so percentages in the table below sum to more than 100 per cent. Percentages are calculated against the full 1,250-respondent base. Respondents reported an average of 3.7 concurrent challenges, and 29.2 per cent selected five or more, suggesting compounding pressures rather than a single identifiable problem.

Challenge	% Citing	Count
Lack of consistent work / job insecurity	**76.8 per cent**	960
Streaming platforms not investing in Australian content	**72.0 per cent**	900
Reduced commissioning by Australian broadcasters	**69.7 per cent**	871
Funding / financing difficulties	**49.0 per cent**	612
Changes in audience consumption habits	**29.4 per cent**	367
Impact of artificial intelligence	**22.2 per cent**	277
Impact of international productions	**19.6 per cent**	245
Distribution / exhibition difficulties	**14.0 per cent**	175

The 700 respondents who rated work availability lowest (1 to 3 out of 10, 56 per cent of the sample) pointed to the lack of commissioning more than to technology. Compared with those who rated work availability highly (7 to 10), they cited streaming platforms not investing in Australian content far more often (77.7 against 46.7 per cent), along with reduced commissioning by Australian broadcasters (74.6 against 45.8 per cent) and job insecurity (83.9 against 50.8 per cent, the biggest gap between the two groups).

AI was cited more frequently by those with the lowest work availability (24.7 per cent) than those with the highest (11.7 per cent), suggesting that workers already under pressure from reduced commissioning also feel more exposed to technological displacement. However, the workforce predominantly attributes its current condition to the contraction of commissioning by both streaming platforms and traditional broadcasters.

> *In 30 years as a film and television editor, I have never seen such low levels of production. It feels like our industry is dying right before our eyes.*
>
> *Picture Editor (Television Drama/Post-Production)*

Safer and Fairer Workplaces

The 2026 consultation paper asks how cultural policy can respond to changing conditions for creative work, including safer and fairer workplaces. Revive 2023 established Creative Workplaces for this purpose, and the survey evidence indicates the conditions it was set up to address remain ongoing. Of the 700 respondents who proposed a solution, 42 (6.0 per cent) named 'better working conditions'; their responses, and the 782 personal-impact statements, point to specific structural issues.

Stagnant or falling rates were raised by respondents in camera, post-production, advertising and commercial production, with rates reported as not keeping pace with cost of living.

Long hours are a recurring theme, with turnaround time, weekend work and 14-hour days described as routine, and crew sizes reduced for budgetary reasons at a safety as well as a creative cost.

> *Standard rates of pay, consistent work, REAL HR and mental health support, support when not working, financial advice for freelancers.*
>
> *Focus Puller (Camera Department)*

Working 10+ hour days means crew are more tired on a regular basis than it's safe to be. Especially for offset crew, our working weeks need to be 40 hours rather than the standard 50.

Assistant Property Master (Feature Film/Television Drama)

Enforce MEAA standards for safety, wages, and working hours across all levels of production.

Stunts Coordinator

The freelance structure creates a second category of issues, including superannuation arrears, sick leave that does not carry between productions, unpaid overtime, and worsening casualisation.

Security for crew like sole trader builders have to cover superannuation, long service leave, annual leave.

Coordinator

A third category is safety-critical roles. Respondents reported unit nurses and medics cut as budgets tighten, and intimacy coordinators not engaged because the role is not mandatory. Several argued these roles should be mandatory on government-funded productions above a defined budget threshold, in line with international best practice. Workforce discrimination (ageism, sexism, disability access and representation, raised by ten respondents) also remains an ongoing concern for Creative Workplaces.

This is such an important role that other global film industries have taken more seriously, welcomed and implemented with mandatory hiring and union best practice.

Intimacy Coordinator

Training, Career Development, and Lifelong Learning

The 2026 consultation paper asks how arts education, creative skills and lifelong learning fit changing conditions for creative work. 62 respondents (8.9 per cent of those who proposed a solution) named training and career development, a leading theme alongside content investment and quotas. Their responses describe a training pipeline breaking down at successive stages, from education and first jobs through to the mentors who would train the next generation.

The historical entry-level training ground was continuing daily drama, the serials that took new cast and crew through their first jobs. Of these, only Home and Away remains in production, Neighbours having ended in 2025. The returning drama series that sustained the wider workforce, such as A Country Practice, SeaChange, Underbelly and Offspring, have also largely ended, part of the reduction in mid-budget drama, authored documentary and children's content documented in Pillar 2. Together these losses have removed the workplace-based training environment that produced a generation of actors, directors, camera professionals, sound recordists, designers and writers.

> *Loss of training productions like Neighbours.*
>
> *Costume Designer*

> *For example, TV shows such as Neighbours, Blue Heelers, McLeod's Daughters, and All Saints were great stepping stones for training new and emerging crew. Personally, I'd like to see more TV shows made specifically to provide opportunities for emerging crew to get on-the-job training and build their skills.*
>
> *Production Secretary and Production Assistant*

A second issue is the closure of entry-level positions. AI is being adopted earliest in the junior tasks that historically introduced new entrants and built the experience that supports advancement: transcription, which respondents report has already largely moved to AI; note-taking; research; the logging and syncing that assistant editors handle; and storyboarding and previsualisation in the art department. If AI absorbs this work before new entrants can use it to get a foothold, the pipeline narrows further.

> *These should include structured entry-level programs that allow people to build careers without resorting to unpaid internships or 'exposure' work, which disproportionately harms newcomers without financial safety nets.*
>
> *Editor and Director*

A third category is mid-career retention. As veterans with 20 or more years' experience leave, documented earlier, the industry loses the mentors who would train the next generation.

> *The people with experience aren't able to employ people to train.*
>
> *Key Grip (38 years) and Gaffer (12 years)*

A fourth category is the alignment of formal education with industry conditions. Respondents raised the gap between what film schools and universities prepare graduates for and what the industry now offers, with AFTRS, NIDA and university programs continuing to produce graduates while the industry that would absorb them has contracted.

A fifth category is the insurance and compliance barrier to informal mentorship. Productions must carry public liability and workers' compensation insurance covering everyone on set, and adding unfunded shadow or trainee placements carries cost and complexity that smaller productions cannot absorb; Fair Work rules also require that a shadow doing actual work be paid. As a result, informal shadowing, which historically built first-job exposure, has become much harder to arrange on commercial productions. A federally-funded insurance facility for placements on government-funded productions, with clear Fair Work-compliant terms, would re-open this pathway.

AI and the Creative Workforce

Since the survey closed in October 2025, AI model quality has improved substantially, and as of this writing (June 2026) AI use has expanded markedly across the screen sector, with generative video, audio, image and text tools now being used in place of work that would previously have engaged production crews. The full effect on screen employment is not yet understood, and further displacement is likely as generative AI and AI tooling continue to improve over the next one to two years.

AI was cited by 22.2 per cent of respondents as a current challenge and was the most-cited future concern, raised by 31.2 per cent of the 769 respondents who answered the future-question; concern was spread relatively evenly across levels of current hardship, suggesting it was seen as a sector-wide future risk rather than a symptom of current conditions. 19 respondents called explicitly for AI regulation in the screen sector.

Respondents raised specific concerns about AI displacing voice actors, writers, visual effects artists, and post-production workers. The advertising and commercial production sector was identified as already experiencing AI-related displacement, with several respondents reporting that AI-generated content had replaced work that would previously have required production crews.

This matters for the wider screen workforce because many freelancers work in both advertising and drama, documentary or children's content. Of the 1,250 survey respondents, 411 (32.9 per cent) work in commercials and advertising; of those, 312 (76.5 per cent of advertising workers, or 25.0 per cent of the full sample) also work in feature film, television drama, documentary, or children's content. For many freelancers, advertising income contributes to an annual wage that drama, documentary, and children's work alone do not sustain.

As AI displaces advertising production, these freelancers will need to rely more heavily on drama, documentary, children's content, and other formats supported through the screen-cultural funding system to sustain a year of work. If commissioning in those formats does not expand to absorb the shift, there is a material risk that experienced practitioners will exit the screen industry permanently. Cultural policy does not regulate commercial advertising production, but the volume of drama, documentary, and children's commissioning is the policy lever that determines whether the freelance workforce remains in the industry as advertising production is substantially replaced by AI.

> *AI can generate my voice and image. I no longer have a job.*
>
> *Actor (Commercials/Advertising)*

> *As budgets shrink and AI becomes a viable source of creative output, I am noticing salaries and rates are plummeting across the industry.*
>
> *Producer (Documentary/Post-Production)*

As of the time of writing, AI is being used as a starting point for an increasing share of Australian advertising campaigns, with many in the commercial sector adopting an 'AI First' approach and production teams engaged only where AI cannot produce the required result. Australian examples include Menulog's Bliss n Eso campaign 'What's Good in Your Hood', amaysim's 'Mega Data Deal', and the Liberal Party's 2025 election campaign advertisement on the fuel excise pledge, reported as an AI-generated production. Applications include automated content creation, mass personalisation, and changes to how advertising production is budgeted and creatively developed.

AI adoption goes a further step when the creative agency layer is removed from the workflow and the client uses a digital advertising platform's own AI content-generation tools. TikTok's Symphony suite, launched in May 2024 and expanded through April 2026, generates video, images, voice-overs and digital avatars from text prompts and uploaded product images. Google has added AI video creation inside the Performance Max workflow, allowing advertisers to build video assets within Google Ads. Meta is building toward a similar model; Mark Zuckerberg's May 2025 interview on Stratechery with Ben Thompson sets out the direction:

we're going to get to a point where you're a business, you come to us, you tell us what your objective is, you connect to your bank account, you don't need any creative, you don't need any targeting demographic, you don't need any measurement, except to be able to read the results that we spit out. I think that's going to be huge, I think it is a redefinition of the category of advertising.

Mark Zuckerberg, Meta Chief Executive, Stratechery interview with Ben Thompson, May 2025

The Role of AI in Production

Screen Australia's AI Guiding Principles, published in September 2024, prioritise the human talent, creativity and culture that are the heart of Australia's screen industry. Generative Artificial Intelligence is trained on large historical data sets, and its outputs are backward-looking, reflecting a statistically weighted average of what appears frequently in the underlying data, whereas human creativity is forward-looking and collaborative, drawing on diverse ideas to produce work that speaks to today's audiences and the cultural moment they live in. The most effective use in professional practice involves experienced professionals directing AI tools toward specific creative goals, in what Dr Kate Gwynne describes as 'human-machine symbiosis'.

Dr Gwynne's broader framework of human-centric AI adoption applies here. The principle is that AI tools serve human creativity, human cultural authority, and human judgement, with the technology adapted to the work rather than the work adapted to the technology. For cultural policy, this translates into a workable rule: AI assistance is appropriate where it accelerates the work of human creators; it is not appropriate where it replaces them on government-funded or offset productions.

The ACS supports hybrid workflows that combine traditional craft with AI-assisted elements where appropriate, rather than fully AI-generated production. The ACS AI Policy notes that single-person AI production tends toward average results and lacks the diversity of thought and creative perspective that comes from individuals collaborating together.

Tasks often described as 'tool uses' of AI (writing, pre-visualisation, storyboarding, concept art) correspond to roles historically performed by writers, pre-vis artists, storyboard artists, and concept illustrators. Government-funded and offset productions should keep the substantial creative work human and continue to capture real performers, locations, and creative input, and funding acquittals should record the share of total production expenditure attributable to AI tools and the roles in which they have been used.

Copyright, Training Data, and Fair Compensation

A central ethical issue is the use of copyrighted works to train AI models without the consent or compensation of creators. The Australian Senate Select Committee on Adopting AI characterised the use of copyrighted material for AI training without consent as a significant policy concern. The Media Entertainment and Arts Alliance, the Australian Writers' Guild and AWGACS, and other creative guilds made joint submissions opposing a broad text-and-data-mining exception. The Australian Government confirmed in October 2025 that it will not introduce such an exception.

The Copyright and Artificial Intelligence Reference Group (CAIRG) is considering responses to the use of copyrighted works, including audio visual works, in AI, including considering licensing pathways and guidance on AI-generated content, though final frameworks have not yet been released to its Steering and Reference Groups, nor yet legislated. Creative Australia's 2024 submission to the Review of AI and the Australian Consumer Law noted that the scale of datasets used in generative AI is challenging the effectiveness of copyright to protect creative intellectual property.

Copyright in AI-assisted works should be established through demonstrable human authorship, encompassing both intellectual direction and manual input. Courts in several jurisdictions have ruled that works generated solely by AI, without substantive human creative input, are not eligible for copyright protection.

AI and the Australian Content Definition

The Broadcasting Services (Australian Content and Children's Television) Standards 2020 (ACCTS) define an Australian program by reference to the creative control of Australians: an Australian producer, an Australian director or writer, at least 50 per cent of the leading actors (including voice actors) or on-screen presenters being Australian, at least 75 per cent of the major supporting cast being Australian in drama, and production and post-production occurring in Australia. The definition is built entirely around human creative roles.

The standard does not currently address whether AI-generated content can satisfy these requirements, and streaming services subject to the new content obligations will reference this or an equivalent definition when reporting compliance. In the absence of explicit treatment, the eligibility of AI-generated dialogue, AI-generated performances, or fully synthetic characters under the Australian-content tests is currently uncertain. The ACCTS, and the Australian content definition under the November 2025 streaming services framework, should be amended to make clear that the creative roles must be filled by Australian humans, and that AI-generated material does not satisfy this test. Hybrid productions may include AI-assisted elements provided the human-Australian creative roles continue to satisfy the definition independently of any AI contribution.

Government Production Funding and Human Labour

Cultural policy exists to protect, sustain, and develop the conditions in which human creative expression can flourish. Government production funding mechanisms, in particular the Producer Offset, the Location Offset, and the PDV Offset, should accordingly be reserved for productions in which the substantial creative work is performed by humans engaged in real production activity. AI-generated material should not satisfy the Australian creative control test under the Producer Offset, and AI subscription and usage fees should not replace Australian human creative labour expenditure under the Location or PDV Offsets, whose purpose is to support the Australian production and post-production workforce.

This submission proposes three corresponding rules for AI use in publicly funded productions. First, productions claiming the Producer Offset, the Location Offset, or other publicly funded production incentives should disclose, as part of acquittal, the share of total production expenditure attributable to AI tools, the share attributable to human creative labour, and the roles in which AI has been used. Second, where productions can choose between AI-generated content and the capture of real Australian performers, places, languages, and creative input, the funding framework should weight assessment toward the latter; hybrid approaches remain eligible where the substantial creative work is human-performed. Third, productions in which AI is the principal source of generation for the majority of creative output sit outside the purpose of these incentives.

The Post, Digital and Visual Effects (PDV) Offset warrants specific consideration. Total PDV expenditure in Australia reached $762 million in 2024/25, with 67 per cent attributed to international PDV-only titles whose principal photography did not occur in Australia. Generative AI is being adopted in PDV departments for compositing, clean-up, rotoscoping, upscaling, generated environments, and crowd replication. If AI-generated work qualifies on the same basis as human-performed work, total PDV expenditure may continue to grow while human PDV roles decline. PDV Offset eligibility should weight toward human-performed work, and the treatment of AI-generated content within qualifying PDV expenditure should be clarified.

Transparency and Provenance

Screen Australia's AI Guiding Principles and the Senate Select Committee on Adopting AI both call for transparency about the use of AI in production and support the development of content provenance standards. In an era of increasingly convincing synthetic media, the ability to verify the origin, integrity, and authorship of visual content is a matter of public importance. Transparency and provenance carry particular weight in news and documentary, where audiences are entitled to know whether what they are seeing is captured, reconstructed, or generated. Provenance disclosure should be mandatory for any news, current affairs, or documentary content that uses AI-generated or AI-modified imagery, audio, or text, regardless of the platform on which it appears.

Recommendations: Pillar 3

- Recognise that the financial hardship, mental-health impacts and workforce attrition documented here are connected to reduced production volume, linking Pillar 3 outcomes to the volume measures in Pillars 2 and 4.
- Extend the Creative Workplaces remit to rates, hours, leave and casualisation; conclude the current SPA-MEAA bargaining round on the Motion Picture Production Agreement (crew) and the Actors Feature Film and Television Collective Agreements (performers); and mandate safety-critical hiring (unit medic, safety supervisor, intimacy coordinator) on government-funded productions above a budget threshold.
- Restore training pathways: condition government funding on paid entry-level positions (additional to crew, not replacements) above a budget threshold; use the Pillar 5 streaming reforms to encourage long-running Australian drama; continue funding AFTRS, NIDA and other national training organisations, with periodic alignment review; and provide mid-career retention support through Screen Australia and the state agencies.
- Establish a federally funded insurance facility for shadowing, mentor and trainee placements on government-funded productions, removing the insurance barrier to unfunded mentorships.
- As AI replaces advertising and commercial production, expand drama, documentary and children's commissioning so the freelancers who depend on advertising income can sustain a year's work within the screen industry.

- Strengthen creative rights in the digital environment: copyright protection, licensing, attribution and fair compensation, including where Australian creative works are used to train AI systems.
- Direct cultural-policy and production funding (including the Producer Offset, Location Offset and PDV Offset) toward human creative labour rather than AI-generated content, with acquittal disclosure of any AI tool use as a share of total expenditure and the roles affected, and clarify that such content does not qualify as human-performed work under the PDV Offset.
- Amend the Australian content definition under the ACCTS and the November 2025 streaming framework so that AI-generated material does not satisfy the requirement that creative roles be filled by Australians.
- Mandate provenance disclosure for news, current affairs and documentary content that uses AI-generated or AI-modified imagery, audio or text.

Pillar 4: Strong Cultural Infrastructure

Pillar 4 of the Revive framework provides support across the spectrum of institutions which sustain our arts, culture and heritage. The 2026 consultation paper asks how Australia's cultural infrastructure can remain resilient, adaptable and fit-for-purpose, including how existing partnerships, investment, infrastructure and systems could be used more effectively to support long-term sustainability.

For the Australian screen workforce, this pillar matters because federal policy levers (the Producer Offset, the Location Offset, the PDV Offset, the streaming services obligation, the ACCTS commercial free-to-air points obligation, and direct Screen Australia funding) determine the volume and hours of Australian production on which workforce sustainability depends. State governments have separately committed more than $1.1 billion to studio infrastructure over the past five years; the utilisation of that investment is a downstream consequence of the production-volume conditions that federal policy creates.

The Production Pipeline

This submission's own estimate, derived from the workforce survey and set against the 2021 to 2022 post-COVID production peak, is that production volumes have contracted by approximately 45 to 55 per cent from that peak. That peak was inflated by temporary factors (Australia's COVID-safe filming status in 2021/22, historically low interest rates supporting elevated streamer commissioning, and lockdown-era audience demand for premium content) that have since unwound.

Much of the work that remains is internationally driven, so Australian production volumes rise and fall with commissioning and production decisions made in the United States. When the United States production cycle turns, the effect in Australia is direct and immediate. The 2023 US Screen Actors Guild and Writers Guild of America strikes, alongside rising US interest rates, were an early trigger of the contraction, standing down SAG-AFTRA productions then shooting in Australia, including Mortal Kombat 2 and Apples Never Fall, both on the Gold Coast in Queensland. Australian-controlled productions, by contrast, kept filming through the strike, because the Global Rule One arrangement between SAG-AFTRA and the MEAA let them keep engaging performers, including United States members, under Australian contracts while the offshore studio productions were shut down. The larger the locally controlled base of production, the more the workforce is insulated from disruption originating in the United States.

The Screen Australia Drama Report 2024/25 shows a record $2.7 billion in total drama expenditure, of which 40 per cent ($1.07 billion) was Australian (down from 50 per cent the previous year) and 60 per cent ($1.62 billion) was international, including a record $1.3 billion across 22 international shoot projects. A further $762 million was spent on post, digital and visual effects (PDV) services in Australia, $510 million of which was for international titles whose principal photography occurred elsewhere.

Because screen employment is project-based, volume matters more than total dollars: the number of Australian titles fell from 89 to 71 in 2024/25 (down from a peak of 98 in 2022/23). Across platforms, free-to-air drama fell to 191 hours across 14 titles, subscription TV and SVOD to 105 hours across 18 titles, and children's TV/VOD to 21 hours across 5 titles in 2024/25 (Screen Australia Drama Report Key Findings 2024/25). Together these categories are down 43 per cent in titles, from a 2021/22 peak of 65 to 37, and 37 per cent in hours, from a 2022/23 peak of 502 to 317. Production volume, measured by titles and hours, is therefore the central Pillar 4 indicator this submission proposes the next iteration of the National Cultural Policy should track. The headline figures above are referenced rather than restated in the subsections below.

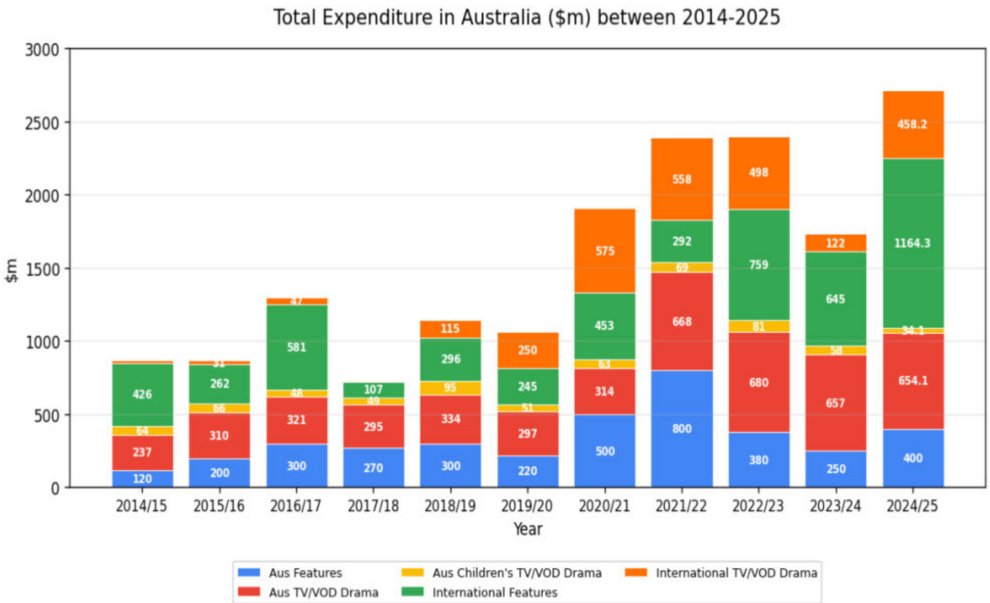

Figure 14: Total drama and feature expenditure in Australia, 2014/15 to 2024/25 ($ millions). Record $2.7 billion in 2024/25, with the Australian share falling to 40 per cent. Source: Screen Australia Drama Report 2024/25.

Government Investment Architecture

Federal support reaches the sector through two mechanisms: direct funding via Screen Australia and three screen tax incentives under Subdivision 376-B of the Income Tax Assessment Act 1997, administered jointly by Screen Australia, the ATO and the Office for the Arts. The three screen offsets are the Producer Offset (40 per cent for Australian theatrical features and 30 per cent for other Australian formats under section 376-65, certified against the significant Australian content (SAC) test in section 376-70 under the Producer Offset Rules 2018), the Location Offset (30 per cent from 1st July 2023, up from 16.5 per cent), and the Post, Digital and Visual Effects (PDV) Offset (30 per cent).

The ATO Annual Report 2024/25 records the Australian Screen and Digital Games Production Incentive at $1.1 billion on an accrual basis (Note 13A), with $906 million in actual payments (Appendix 9, Table 7.28), up from $597 million in 2023/24 and $486 million in 2022/23. These figures combine all four offsets, including the Digital Games Tax Offset (introduced 2023/24), in a single line item and are not broken down by offset.

The Screen Australia Annual Report 2024/25 records three figures for the year: $35.01 million in direct grants paid to screen projects; $74.82 million in total project approvals (covering grants, equity investments, loans and other initiatives); and $713.05 million in Producer Offset certificates issued (213 final and 187 provisional). A Producer Offset certificate confirms that a production qualifies for the offset, not the amount the ATO actually returns; the difference between certificates issued and offsets paid is not published. The Office for the Arts administers the Location Offset, the PDV Offset, and the Digital Games Tax Offset, but does not publish the list of recipients or the dollar value of each offset.

The 2024/25 Drama Report recorded a 163 per cent year-on-year increase in international production spending under the Location Offset, reflecting the cost savings the 30 per cent rebate provides international productions relative to comparable shooting destinations.

The Location Offset is calculated on Qualifying Australian Production Expenditure (QAPE, the base used across all three federal offsets: Producer, Location, and PDV). The 30 per cent rebate covers Australian crew, facilities and services and generates local employment, but secures no equity stake in the production: downstream commercial returns (distribution, licensing, broadcast and other long-term revenue) accrue to the international parent.

Where the Money Goes: Australian vs International, Screen vs Games

Office for the Arts correspondence dated 2nd October 2025 (reference MC25-017649), from the Screen and Arts Workforce Development Branch, replying on behalf of the Minister for the Arts, confirms: 'In 2024/25, a total of $1.2 billion was invested in the screen sector by the Australian Government through direct funding or tax incentives. This included over $883 million to support local Australian productions.'

The Digital Games Tax Offset (introduced 2023/24) supports game-development companies and is bundled into the same reporting category by both the ATO and the Office for the Arts. Film, television and digital games draw on different skills, workforces, distribution channels and cultural outcomes; reporting their public investment together limits the ability to assess whether the cultural or local-employment objectives justifying that investment are being met in either sector. Disaggregated reporting by sector and by offset type is therefore the precondition for evidence-based policy on appropriate support levels.

Public Transparency and a Full Independent Audit

Public confidence in the offset architecture depends on clear reporting of how each component of the headline totals is spent.

This submission recommends a periodic independent audit of the Producer Offset, the Location Offset and the PDV Offset, with summary findings published annually. Screen Australia already publishes direct-funding decisions through its Funding Approvals pages and Annual Report appendices; the audit gap is on the ATO- and Office-for-the-Arts-administered offsets.

The audit should report: (1) recipients by production company and ultimate parent entity, with foreign-ownership disclosure; (2) Australian-content compliance by production; and (3) what proportion of expenditure paid Australian creative roles (writers, directors, performers, cinematographers, editors, designers), and whether the intellectual property in the production remained with an Australian rights-holder. The Australian National Audit Office, or a standing audit function within the Office for the Arts answerable to Parliament with ACMA contributing on content compliance, are the candidate vehicles. Transparency at this level would strengthen the evidence base on which cultural policy is set and reviewed.

The Location Offset and Australian Lead Casting

The Location Offset (increased to 30 per cent from 1st July 2023) keeps Australian crews employed on large, technically complex productions and is, for some departments such as visual effects, camera and construction, the most consistent source of work available. The cultural return is more limited: the offset does not require Australian actors as leads and in practice they rarely are, and international productions can bring senior heads of department across camera, sound, art, post-production, stunts and specialty roles from overseas, reducing Australian crew exposure to large-scale work. Actor David Field, in an interview with Umbrella Entertainment titled 'Have we lost our filmmaking identity?', argued that the value of the Location Offset, if redirected toward Australian productions, could fund a substantial slate of Australian films and provide opportunities for emerging Australian actors.

This is not an argument to eliminate the Location Offset. Many freelancers earn their living primarily on inbound international work, and any rebalancing must avoid leaving them without work in transition. The objective is to grow the Australian production pipeline so the workforce depends on international work only as a smaller portion of total employment. The training value of international productions depends on the existence of a domestic Australian production base into which those skills can transfer. The current balance between attracting international production and funding Australian stories is a policy choice; the current settings favour international production support over Australian production support at a ratio that warrants periodic review, and disaggregated offset reporting (see Public Transparency, above) would let that judgement be made on evidence.

State Investment in Screen Infrastructure

State and territory governments have committed more than $1.1 billion to screen production infrastructure over the past five years (the figure referenced in the Pillar 4 opening). The major commitments are:

- New South Wales: $380 million package including $100 million for a second major film studio in Sydney. Screen NSW launched a new Screen and Digital Games Strategy 2025-2027 with updated funding programs.
- Western Australia: $233.5 million for Perth Film Studios at Malaga, with $57 million for operational support. The facility reached practical completion in January 2026 and is expected to be operational in the first half of 2026, with four sound stages across 8,200 square metres of interior production space.
- Victoria: $552 million committed to creative industries over five years through the VICSCREEN strategy and 2025/26 State Budget, including $46 million Docklands Studios expansion.
- Queensland: Studios in Brisbane (opened 2019) and Cairns (opened April 2024, $12.6 million state funding), alongside Village Roadshow Studios on the Gold Coast. Shadowbox Studios on the Gold Coast approved for further development as a 51-hectare production precinct.
- South Australia: Adelaide Studios as an established production facility.

These investments represent a public commitment to production capacity, committed during COVID when Australia's open filming conditions drove record international bookings and demand exceeded available studio space. Inbound production remains strong (the $1.3 billion inbound spend documented above). Large sound stages are designed for productions that book extended stage time, and in Australia these are predominantly inbound international shoots; Australian drama, documentary and children's productions are typically made at smaller budgets that use stages less continuously. The exposure is forward-looking: if proposed US tariffs of up to 100 per cent on films produced outside the United States, or a production slowdown in the United States, reduce inbound bookings, Australian commissioning at current volumes is not at the scale to fill the gap.

Studio utilisation also faces a structural headwind from AI-assisted hybrid production, which can sharply reduce the physical space a production needs. Doug Liman's 2026 feature Bitcoin: Killing Satoshi was shot not on a large soundstage but in a converted car showroom fitted out as a neutral grey-screen box with simple lighting, with backgrounds, locations and even the light on the actors' faces generated by AI in post-production, reportedly cutting the budget from about US$300 million to US$70 million. Lifting Australian commissioning volume is the main lever within Australia's control to reduce that exposure and sustain a domestic production base.

Workforce Retention as Investment Protection

As documented in Pillar 3, 24.5 per cent of respondents who provided personal statements described career disruption or steps toward leaving, and multiple respondents with 20 or more years of experience reported unemployment for the first time. Screen production relies on highly specialised skills developed over years on the job: focus pulling, colour grading, sound mixing, location management, production design. When experienced professionals leave the industry, the available pool of practitioners able to crew productions for both Australian and inbound international markets is reduced. The studio investment described above depends on a workforce that can crew those productions. Lifting Australian commissioning volume retains that workforce in the short term; workforce retention is what allows studios to remain production-ready when inbound demand softens, and is therefore the protective measure that secures the state studio investment in the medium term.

> *I worked on two independent Australian productions in the past 18 months that have subsequently been postponed, due to funding difficulties. I had an on-set and assistant locations person that was enthusiastic and really great and after our first project I was keen to keep them together as a team and work with them on the next project, but there was not the next project and I could not give them work and they left the industry.*

10BA: A Modern Private Investment Incentive

The central policy need is to lift the volume and hours of Australian production. Public-investment levers (direct Screen Australia funding, the federal offset architecture) and the streaming services obligation act on the public side and on commissioned private spend. A modern investor-side incentive, modelled on the 10BA scheme that operated from 1981 to 2007, would draw new private capital into Australian production. Division 10BA of the Income Tax Assessment Act 1936 provided a 150 per cent tax deduction to investors in qualifying Australian films plus a 50 per cent exemption on income from the investment for two years; it was wound back from the mid-1980s and replaced in 2007 by the Producer Offset (currently 40 per cent for Australian theatrical features, 30 per cent for Australian television and other formats).

The Producer Offset and the historical 10BA scheme operate at different points in the financing chain. The Producer Offset is a refundable offset claimed by the production company after Screen Australia issues a Final Certificate; it returns a share of qualifying production expenditure to the producer after certification, reducing the net cost of production. 10BA was an investor-side deduction taken at the financing stage, drawing private capital in before production. The structural gap 10BA addressed remains.

Among the 700 survey respondents who provided a written solution, 24 (3.4 per cent) specifically called for reinstatement of a 10BA-style incentive or a modern equivalent. The theme recurs across roles and electorates, with respondents arguing that grants and the existing offset architecture are necessary but not sufficient to lift production volume.

> *Re-establish a revised form of the 50/50 10BA tax incentive scheme.*
>
> *Producer/Director*

> *Revisiting a 10BA type investment encouraging private investment in Australian productions with market commitments.*
>
> *Cinematographer*

A modern iteration must be designed to deliver investment in Australian production specifically, not to operate as a tax shelter. The original scheme was wound back in part because the deduction was used by some high-income investors primarily as a tax-minimisation arrangement, with Australian-production output not proportional to the revenue cost. Integrity safeguards accordingly require: a capped maximum deduction per investor per year; eligibility limited to productions satisfying the ACCTS section 10 definition of Australian content (with the AI exclusion recommended in Pillar 3); a completion requirement before the deduction can be claimed; and a sunset or review clause after a pilot period. The 10BA-style investor deduction and the Producer Offset would be alternative paths at the per-production level (one or the other, not both), expanding the financing architecture across the cohort of filmmakers.

Producer's Offset Less Than $500,000

The Producer Offset pays 40 per cent of Qualifying Australian Production Expenditure (QAPE) for Australian theatrical features and 30 per cent for Australian television, with a minimum QAPE threshold of $500,000. The threshold was introduced under the Australian Screen Production Incentive framework.

The Producer Offset threshold creates a problem the Location and PDV thresholds do not. The Producer Offset is the Australian-content offset, certified against the SAC test under sections 376-65 and 376-70 of the Income Tax Assessment Act 1997 and requiring the level of human-authored Australian creative control set out in ACCTS section 10. The threshold renders early-career independent filmmakers ineligible regardless of whether their production satisfies SAC. A filmmaker funding a feature for less than $500,000 receives no benefit from an offset designed to support exactly the kind of Australian production they are making.

Under current settings the early-stage filmmaker carries the full financial downside: the offset is closed to them, grant funding is competitive, and private investment is rare without an investor-side incentive. Because early-stage filmmakers are concentrated in formats and demographics under-represented in current commissioning, excluding them from the offset compounds that under-representation. The proposed reform shares risk with public investment under the same logic the Producer Offset already applies above the threshold; the filmmaker retains skin in the game (time, creative reputation) while the financial downside is moderated.

Removing the QAPE threshold from the Producer Offset alone would open the offset architecture to micro-budget Australian filmmakers, with the SAC test continuing to apply so only Australian content benefits. The Location and PDV Offset thresholds should remain: those offsets exist to attract international productions and large post-production jobs for the Australian workforce, carry no Australian-content test, and lowering their thresholds would dilute their workforce-attracting purpose without any Australian-content benefit. The Producer Offset and the 10BA-style investor deduction (set out in the preceding subsection) are alternative paths for any given production: a filmmaker chooses one or the other, not both.

Compliance Platform

The Compliance Platform is a software-based platform that makes the new Producer Offset and 10BA settings administrable at scale by structuring production-accounting evidence against the statutory tests. It integrates with existing production accounting systems via a defined output schema and connector. Production accountants tag qualifying expenditure during production under Subdivision 376-B of the Income Tax Assessment Act 1997 and section 10 of the Australian Content and Children's Television Standards, and the platform records this categorised data as audit evidence. The Producer Offset claim becomes a back-end reconciliation against the Final Certificate; a 10BA-style investor deduction is supported by the same record at the investor level.

The regulator sees statutory-test outputs only (QAPE percentage, Australian key-creative-role count, residency split, and exceptions). Commercial detail (vendor names, day rates, contract values) stays private on the platform under statutory confidentiality. Producers review the data and can add context before it reaches Screen Australia. The Australian Taxation Office, which administers payment of the refundable Producer Offset and any modern 10BA-style investor deduction, has equivalent read-only access to the same statutory-test outputs through the platform. The platform is mandatory for productions using the modern 10BA incentive and for Producer Offset productions under $500,000 (the cohort newly eligible after the QAPE-threshold removal). Producers claiming the existing Producer Offset above $500,000, the Location Offset, or the PDV Offset continue under the current acquittal model unchanged, with opt-in availability.

The platform allows producers and Screen Australia to check, as production progresses, whether each expenditure meets the offset eligibility tests. Existing integrity and certification rules still apply: a production that does not deliver what it was certified to make does not receive a Final Certificate. The structured record makes eligibility questions easier to resolve at certification, and addresses one compliance weakness in the 1980s 10BA: limited visibility over how investment money was actually spent.

The Compliance Platform can be built within a short timeframe at modest cost relative to the offset funding it would administer, using AI-assisted software development (with tools such as OpenAI Codex, Anthropic Claude Code or Google Antigravity). Integrating with existing production-accounting and payroll systems, in the way Single Touch Payroll reports payroll to the ATO, keeps the implementation burden on producers low.

Digital Assessment Platform

The Digital Assessment Platform is separate from the Compliance Platform: it addresses Screen Australia's funding application and assessment process, not offset compliance. 18 survey respondents identified opaque or inconsistent funding decisions as a barrier to production. A platform that standardises application requirements, provides plain-language guidance, and supports consistent assessment across the assessor pool would benefit both applicants and assessors: applicants would have clearer guidance on what is being assessed and how to present their projects, and assessors would have shared decision-support tools that improve consistency across the cohort of assessments. The platform is the Pillar 4 cultural-infrastructure measure proposed in this submission to support efficient and consistent administration of Screen Australia's funding programs.

For applicants, the platform would use AI to present requirements in plain language, provide examples and templates, and give qualitative feedback on draft applications before submission, helping applicants strengthen their case against the assessment criteria. For assessors, AI is a decision-support tool rather than a replacement for human judgement: producing preliminary summaries of each application, supporting consistent evaluation across the assessor pool, and providing the same review guidance to every assessor. The combined effect is two-fold: applications submitted are stronger and better aligned with the assessment criteria because applicants have had plain-language guidance and pre-submission feedback, and assessment across the cohort is more consistent because every assessor works from the same decision-support tools.

The platform can be built within a short timeframe at modest cost relative to the funding it administers, using AI-assisted software development.

Recommendations: Pillar 4

- Treat the volume and hours of Australian production as the central Pillar 4 measure of success, and set the federal levers (the Producer, Location and PDV Offsets, the streaming obligation, the ACCTS points obligation and direct Screen Australia funding) to fund more productions rather than fewer, larger ones.

- Disaggregate federal screen-sector reporting by offset type (Producer, Location, PDV, Digital Games) and by sector (film and television versus digital games), so the outcomes of each can be assessed on evidence.
- Commission a periodic, publicly reported independent audit of the Producer, Location and PDV offsets, answering who receives public investment (including ultimate parent entity and foreign ownership), what is made, and what the public gets back (the share of spending on Australian creative roles and the IP retained by Australian companies).
- Rebalance the Location and Producer Offset settings to support the broader Australian production pipeline while preserving the workforce currently dependent on international shoots.
- Develop a modern 10BA-style private investment incentive for Australian production, with integrity safeguards, sitting as an alternative to the Producer Offset on a given production (a filmmaker chooses one, not both); the next step is to commission Treasury and the Office for the Arts to develop and consult on it.
- Remove the $500,000 QAPE threshold from the Producer Offset so early-career filmmakers can access it for micro-budget Australian productions, with the significant-Australian-content test continuing to limit it to Australian content; the Location and PDV Offset thresholds remain, since those offsets exist to attract international work.
- Pair the QAPE-threshold removal and the 10BA incentive with a software-based compliance platform that integrates with production accounting and reports only statutory-test outcomes to the regulator, keeping commercial detail confidential; mandatory for the 10BA incentive and Producer Offset productions under $500,000, optional for others.
- Develop a Screen Australia Digital Assessment Platform to support stronger applications and more consistent assessment, with AI as a decision-support tool for assessors and a plain-language guide for applicants, not a replacement for human judgement.
- Recognise the US trade-policy exposure of inbound production: proposed US tariffs of up to 100 per cent on films made outside the United States would directly affect the $1.3 billion in international production Australia attracted in 2024/25, a further reason to grow the domestic Australian production base.

Pillar 5: Engaging the Audience

Pillar 5 of the Revive framework focuses on making sure Australian stories connect with people at home and abroad. The 2026 consultation paper asks how cultural policy can respond to changing audience behaviours, discovery pathways and modes of engagement, including innovation in presentation and discovery to sustain participation, as well as marketing and distribution.

For the Australian screen workforce, this pillar matters because Australian audiences' engagement with Australian content depends on a continuing pipeline of commissioned and discoverable Australian stories. The supply-side conditions documented in this submission, including the cinema partial-recovery, the declining Australian share of the domestic box office, the reduced commercial-broadcaster commissioning of mid-budget drama and children's programming, and the international ownership of all major SVOD platforms operating in Australia other than Stan, are also the conditions in which Australian audiences encounter Australian stories.

Commercial broadcasters reach Australian audiences using public spectrum, and streaming services reach them largely over the publicly funded National Broadband Network (NBN). In return, a minimum investment in Australian content is their social licence to operate.

Cinema and Box Office

The Australian cinema market has not recovered to pre-pandemic levels. In the five years from 2015 to 2019, total box office averaged approximately $1.2 billion per year, with annual admissions of around 88 million. The pandemic depressed the market to $401 million in 2020 and $605 million in 2021. Partial recovery has followed, with $951 million in 2024 and $970 million in 2025, but box office has not returned to its pre-pandemic peak. Admissions in 2024 and 2025 were 55.4 million and 54.2 million respectively, well short of the 84.7 million recorded in 2019 (Screen Australia annual gross box office and admissions series, calendar years; data provided by the Motion Picture Distributors Association of Australia).

Australian films took a smaller share of their own domestic box office in 2025 than in 2024. Screen Australia's Domestic Box Office and Share Since 1977 series records Australian films at $25.1 million in 2025, a 2.6 per cent share of total box office, from 64 Australian releases among the 845 new releases tracked. In 2024, 84 Australian releases took $36.3

million and a 3.8 per cent share. In a single year, the number of Australian releases fell by 24 per cent and Australian box office takings fell by 31 per cent.

Across the 1977 to 2025 Screen Australia series, Australian films have averaged 3 to 4 per cent of domestic box office on a three-year rolling basis, with occasional peaks such as 23.5 per cent in 1986, the year of Crocodile Dundee. The 2025 result of 2.6 per cent sits below that long-term range.

In 2025 the top 10 Australian releases earned approximately $16.1 million, or 78 per cent of the $20.8 million taken by all of the year's Australian releases. The top five were Kangaroo ($5.6 million, Studiocanal), Bring Her Back ($2.5 million, Sony), The Travellers ($2.0 million, Sony), Together ($1.2 million, Kismet) and The Correspondent ($1.1 million, Maslow Entertainment) (Motion Picture Distributors Association of Australia data, lifetime gross to 18th May 2026).

The releases outside the top 10 shared approximately $4.7 million between them, with about three quarters earning under $100,000 and a median gross of approximately $43,000. Box office at that level does not repay a production budget, and subsequent licensing to streaming and broadcast typically does not close the gap. For most Australian films the money invested in making them is not returned by the market. The films still deliver real value: employment for crews, development of new talent and Australian stories on screen. But that value does not come back to the producer as revenue. This is why public support for Australian production matters as a cultural-policy choice rather than a commercial one.

DVDs and physical media once made up a substantial share of producer earnings from a film, with the cinema release working as a marketing campaign for the DVD and rental sales that followed. Streaming ended that model: an overnight new-release rental from the local video store cost up to $7.50 a night, while Netflix launched in Australia in March 2015 at $8.99 a month for a vast library available at home. Australian Home Entertainment Distributors Association figures trace the collapse, from approximately $950 million spent on physical discs in 2014 to $111 million in 2023, a fall of 88 per cent. In August 2023 Disney ceased DVD and Blu-ray releases in Australia altogether. With physical media effectively gone, producers have lost a key source of revenue to recoup their costs.

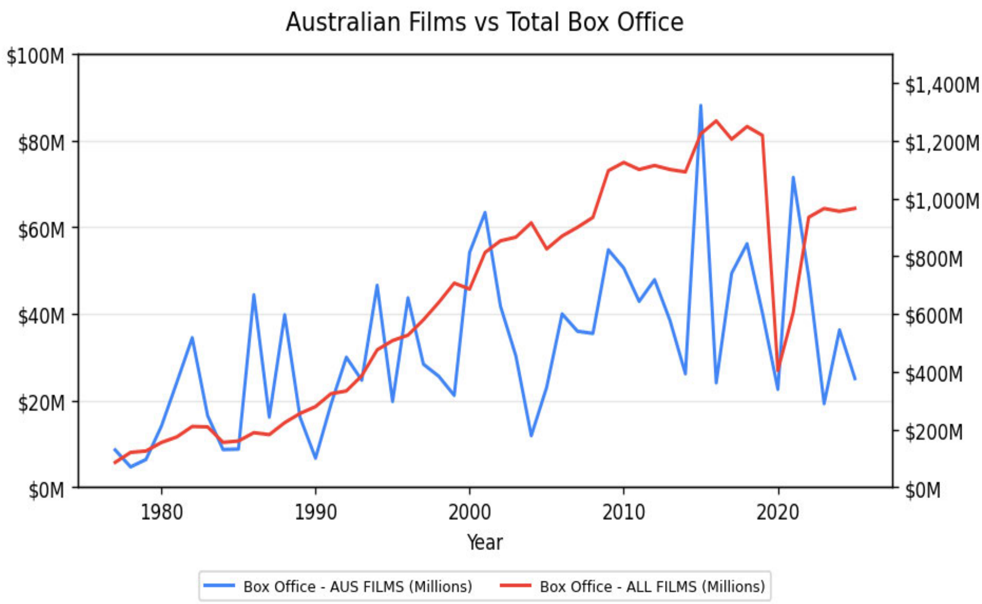

Figure 15: Australian films versus total box office, Australia, 1977 to 2025 ($ millions; dual axis). Source: Screen Australia, Domestic Box Office and Share Since 1977.

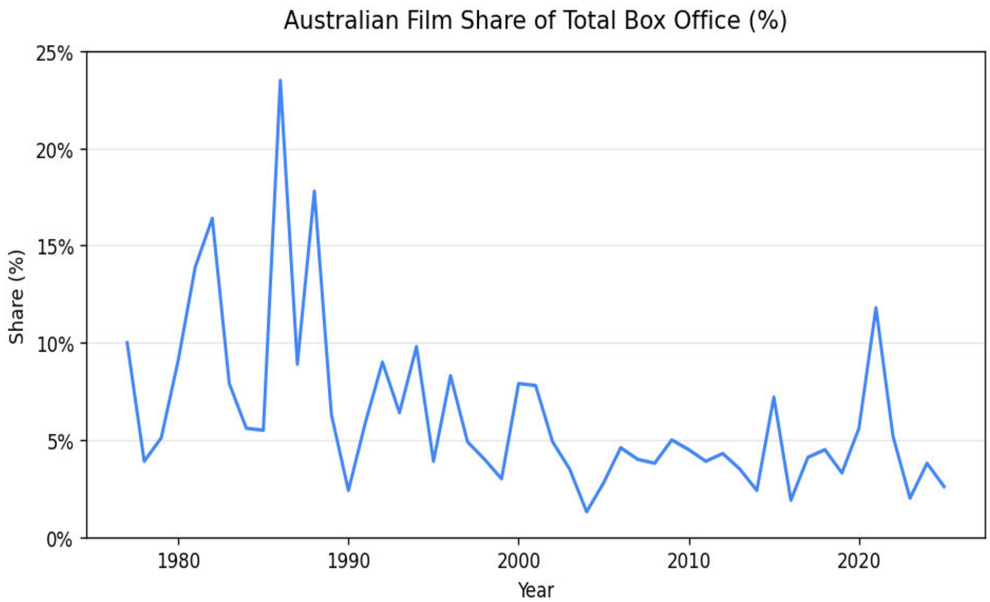

Figure 16: Australian film share of total box office, 1977 to 2025 (per cent of annual total). Source: Screen Australia, Domestic Box Office and Share Since 1977.

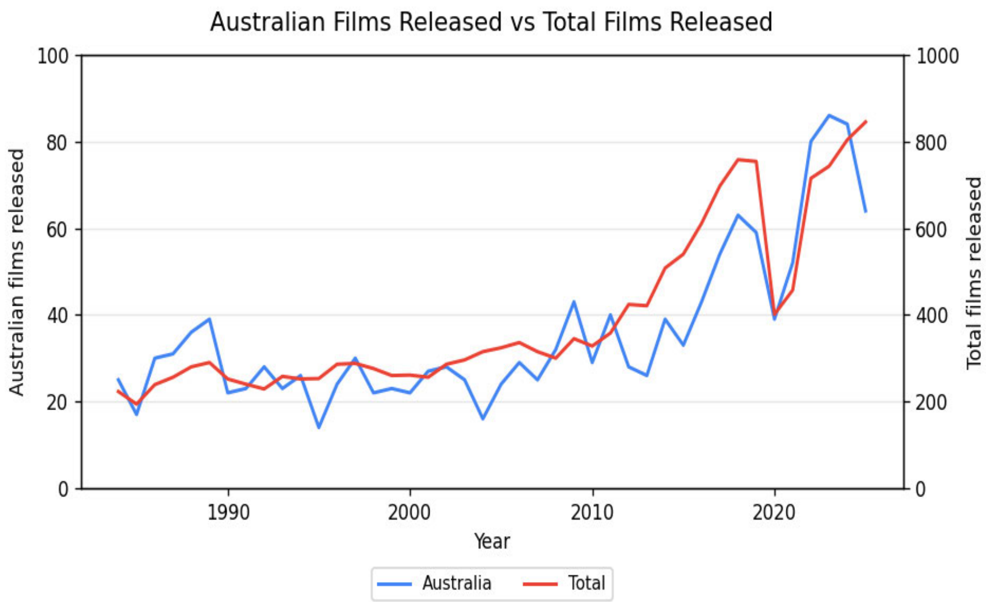

Figure 17: Australian films released versus total films released, mid-1980s to 2025 (dual axis: Australian 0 to 100, total 0 to 1,000). Source: Screen Australia, Domestic Box Office and Share Since 1977.

Australian films are finding it increasingly difficult to achieve major commercial success, the combined result of Australians going to the cinema less than before the pandemic and a smaller share of the remaining visits going to Australian films. The most recent entries in the top 20 highest-grossing Australian feature films of all time are Elvis (2022), Peter Rabbit 2 (2021) and The Dry (2021), of which The Dry is arguably the most recent unambiguously Australian title. Those entries also coincided with unusual conditions. International releases were delayed by overseas COVID stoppages, and Australian films took 11.8 per cent of the domestic box office in 2021, well above the long-term 3 to 4 per cent range. No title since has entered the top 20; the most recent addition to the broader top 100 is Kangaroo (2025), at #65.

Commercial Television: Reduced Commissioning of Drama

Commercial television and Australian content commissioning operate on a reciprocal relationship: advertising revenue funds programs, and programs draw the audiences that attract advertising. Both sides of that loop are now in decline. Total Australian advertising spend reached approximately $26.2 billion in 2024, with the majority captured by large global digital platforms. Total online advertising reached $18.4 billion in 2025, up 11.5 per cent on 2024. Advertising money that Australian media companies once used to commission Australian content is now going to those global digital platforms instead.

Within that shift, digital video, the segment most directly tied to screen production, has grown fastest. Australian digital video advertising close to trebled in five years, from about $1.9 billion in 2020 to $5.4 billion in 2025, and now accounts for 29 per cent of all online advertising; broadcaster video on demand (7plus, 9Now, 10Play) is only about $500 million of that, with the rest going to global platforms such as YouTube, Meta and TikTok. Advertising and marketing budgets span everything from search to outdoor, but the video slice is the one that matters for the screen industry. When video advertising flows to global platforms rather than Australian broadcasters, the money leaves the system that funds Australian content.

The platforms have also begun to generate advertising creative with AI at scale. Meta's Advantage+ tools have reached more than four million advertisers, including an image-to-video tool that generates video advertising from a single still image, and Google's Performance Max generates ad images and copy automatically. This favours high-volume, low-cost creative generated inside the platforms' own tools. Larger brands still commission crafted work, but at the performance and small-business end the demand for produced commercials falls. In the survey, 84 per cent of the 411 commercials and advertising respondents reported reduced workload, above the 79.7 per cent across the full sample. AI and its workforce impact are discussed in more detail in Pillar 3.

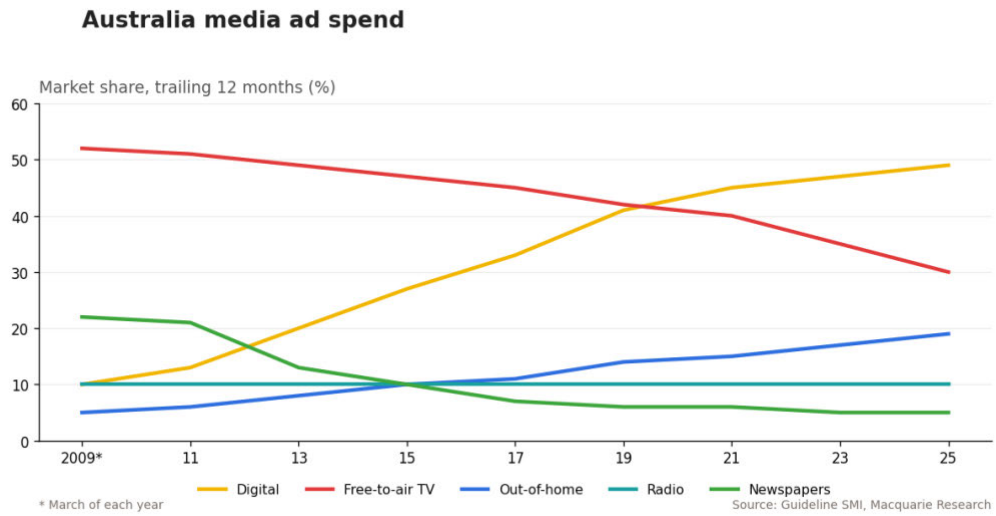

Figure 18: Australia media ad spend by medium, market share (trailing 12 months), 2009 to 2025. Source: Guideline SMI, Macquarie Research.

Total television advertising revenue (free-to-air and broadcaster video on demand combined) fell 8.1 per cent to $3.3 billion in FY2024. In calendar 2025, the market lifted 0.4 per cent overall: first-half growth was supported by federal-election advertising, then the second half fell 5.2 per cent once that election spend rolled off.

Seven West Media reported total revenue fell 5 per cent to $1.415 billion in FY2024. In FY2025, total revenue fell a further 4 per cent to $1.35 billion, with television revenue of $1.184 billion, down 5 per cent. Within that, linear TV advertising fell 8 per cent, from $995 million to $915 million, while 7plus digital advertising grew 26 per cent to $166 million. Seven

West Media was subsequently acquired by Southern Cross Austereo in a takeover completed on 8th January 2026, creating a combined commercial television, radio, and publishing entity with approximately $2 billion in annual revenue.

Nine Entertainment reported a fall of 3 per cent in FY2024, with TV revenue falling 10 per cent to $1.13 billion. In FY2025, TV revenue recovered 3 per cent to $1.16 billion, and 9Now streaming revenue grew 19 per cent to $225 million.

Network 10 has changed corporate hands multiple times since 2017. The network entered voluntary administration in June 2017 with CBS Corporation as the largest secured creditor (owed approximately $348 million), and was acquired by CBS in November 2017. CBS merged with Viacom in December 2019 to form ViacomCBS, which rebranded as Paramount Global in February 2022. Paramount Global subsequently merged with Skydance Media on 7th August 2025 to form Paramount Skydance Corp, the current owner.

Network 10 recorded losses of approximately $322 million in 2023 and $162 million in 2024 against industry-wide advertising pressure (2025 Ten Network Holdings Pty Limited figures had not been publicly reported at the time of this submission). Paramount's global TV Media advertising revenue (which includes Network 10) has been on a multi-year decline: $9.35 billion in 2022, $8.19 billion in 2023, $8.18 billion in 2024 (essentially flat, lifted by US election advertising), and $7.12 billion in 2025 pro forma (down 13 per cent as the election bump unwound).

Paramount Skydance has announced more than US$2.5 billion in run-rate cost efficiencies by year-end 2026, rising to at least US$3 billion by 2027, with Network 10 likely to be subject to those targets. Network 10 is therefore unlikely to commission significantly more Australian content while Paramount Skydance is pursuing those targets.

FTA drama hours fell to 191 hours in 2024/25 (Screen Australia Drama Report), from 444 hours in 2019 (ACMA benchmark) before the introduction of the ACCTS on 1st January 2021. The ACCTS replaced the separate drama, documentary and children's sub-quotas under the prior Australian Content Standard and Children's Television Standard with a single 250-point pooled quota drawn from drama, documentary, children's and Australian films.

All three commercial networks reported meeting the 250-point aggregate in 2024 (Seven 266.5, Nine 274.76, Ten 445.5), but two of three achieved this only through carryover provisions that allow up to 50 surplus points from the prior year. Without carryover, Seven scored 216.5 points and Nine scored 243.98 points, both below the 250-point minimum on their own 2024 output. Only Network Ten met the minimum on raw output (395.5 points), and Neighbours alone provided 102 of Ten's 172.5 first release hours (59 per cent) and 153 of Ten's 395.5 points (39 per cent). Neighbours ceased production in July 2025, with its final episode broadcast in December 2025; the 2026 ACMA compliance report will show the structural effect of its loss.

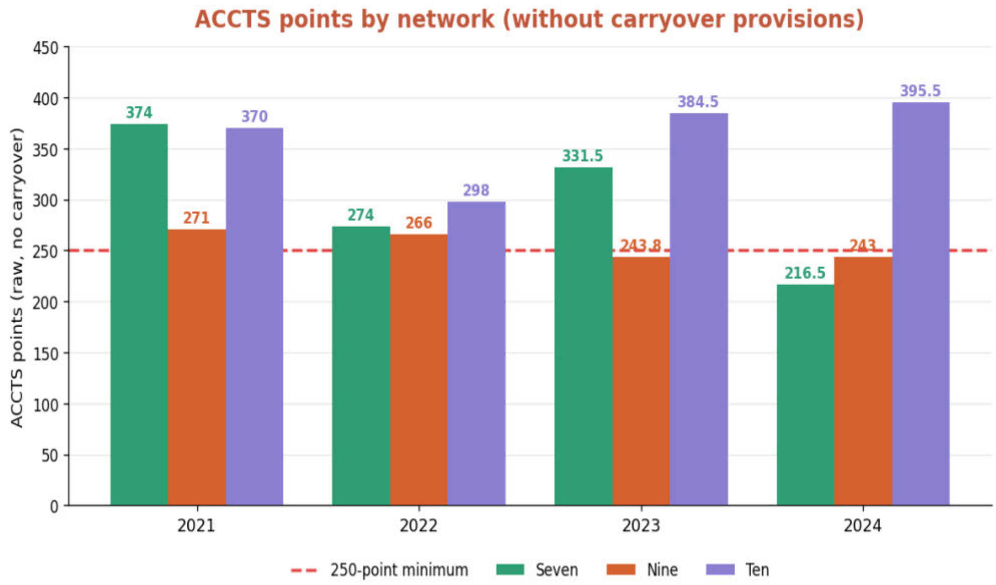

Figure 19: ACCTS points by network (raw, without carryover provisions), 2021 to 2024. Red dashed line = 250-point minimum. Seven (216.5) and Nine (243.98) both fell below the minimum in 2024. Source: ACMA 2024 compliance report.

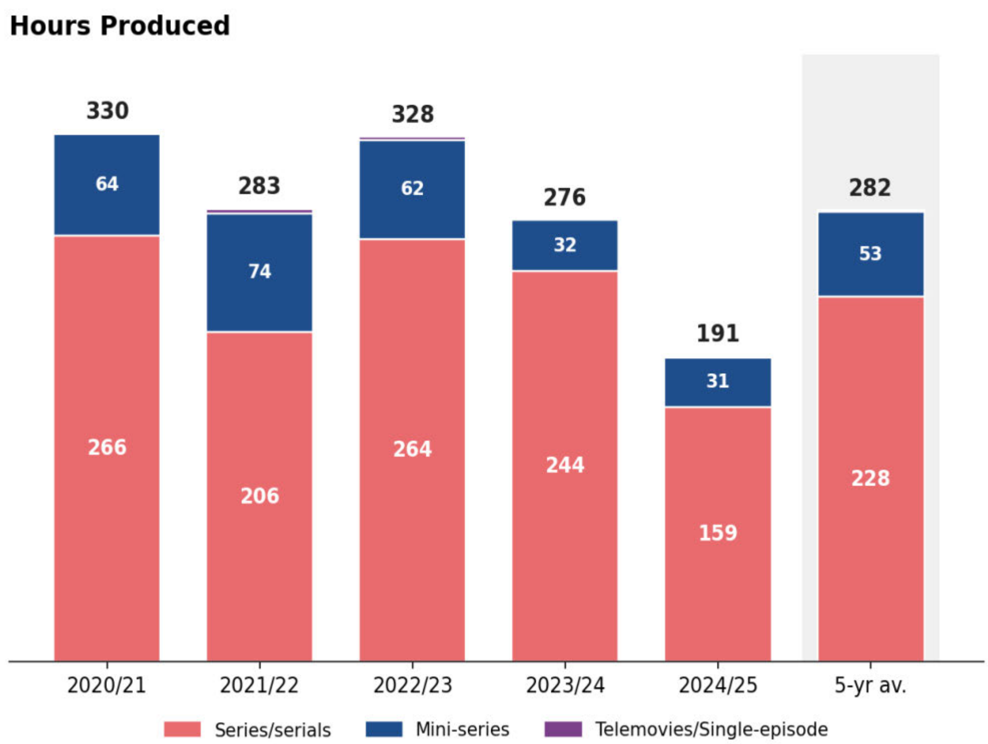

Figure 20: Free-to-air TV drama hours produced, 2020/21 to 2024/25 (series/serials, mini-series, telemovies/single-episode). Total hours fell from 330 (2020/21) to 191 (2024/25), with the five-year average at 282. Source: Screen Australia Drama Report 2024/25.

The longer historical record shows the scale of the change. ACMA compliance data records first release Australian drama across the three metropolitan networks holding a stable 403 to

465 combined hours for the eight years from 2013 to 2019, never below 400 in any year under the Australian Content Standard. Under the ACCTS (from 2021) the figure has not exceeded 278 hours, reached a low of 218 in 2023, and stood at 259 in 2024, 42 per cent below the 444 hours of 2019.

The fall extends beyond drama. Children's content fell by 88 per cent between 2019 and 2024, from 391 hours to 48. Children's drama fell from 98 hours to 10, where it has stayed since 2022. The sharpest network-level decline was at Nine, where drama fell from 76 hours in 2019 to 14 in 2024, touching 3 hours in 2023 (ACMA broadcaster compliance with TV content standards).

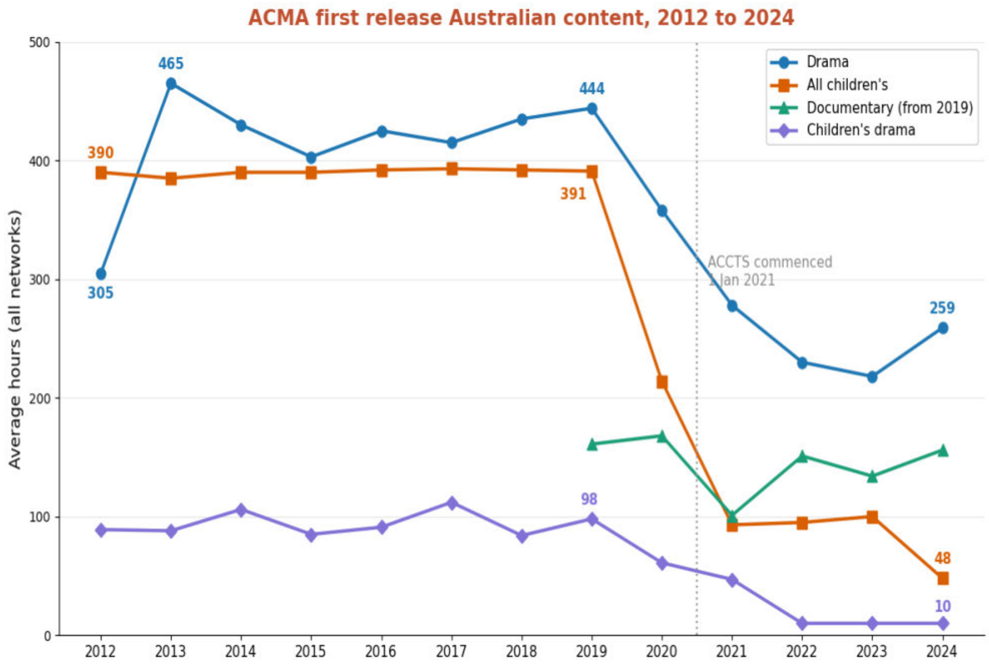

Figure 21: First release Australian content hours (all metropolitan networks), 2012 to 2024. Drama and children's hours were stable for the eight years to 2019. Between 2019 and 2024 drama fell 42 per cent (444 to 259), all children's fell 88 per cent (391 to 48) and children's drama fell to 10 hours, where it has stayed since 2022. The documentary series is shown from 2019. Dashed line = ACCTS commencement. Sources: ACMA compliance reports 2021 (Figures 3 to 5) and 2024 (Figures 13 and 14).

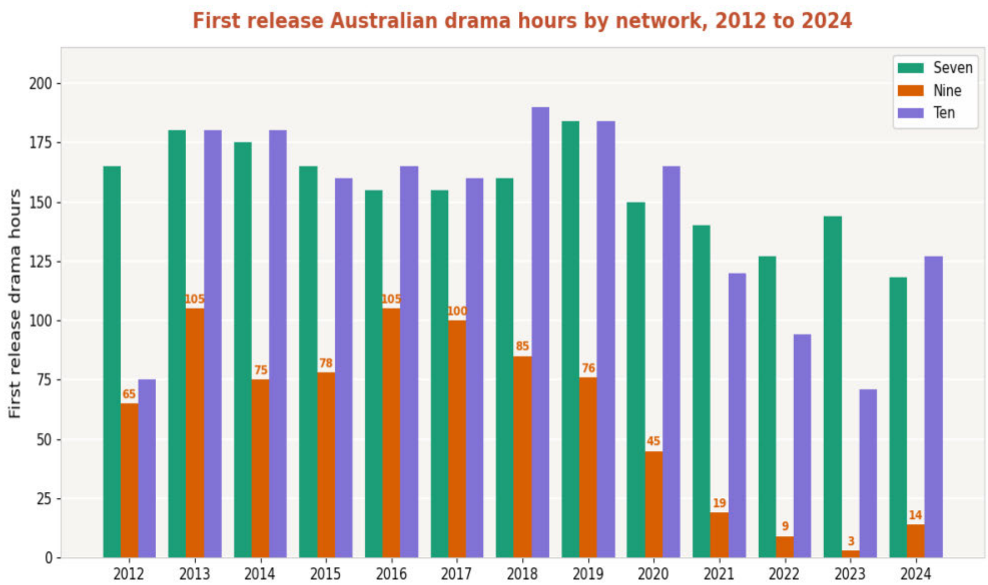

Figure 22: First release Australian drama hours by network, 2012 to 2024. Nine held 65 to 105 hours through the 2010s before falling to 3 hours in 2023 (14 in 2024). Sources: ACMA 2021 compliance report (2012 to 2018) and ACMA 2024 compliance report (2019 to 2024).

Outside the long-running serials Home and Away (Seven) and Neighbours (Network 10 with Amazon), the three commercial networks commissioned six Australian dramas in 2024, and broadcast just 48 hours of first-release children's content combined, of which 10 were children's drama. Neighbours ceased production in July 2025, removing one of the last two scripted serials.

In TV Tonight's ranking of the 100 highest-rating programs of 2025 to mid-year (to 12th July), only one was a first-release Australian scripted drama, Home and Away (95th). By genre, sport accounted for 51 of the 100, reality 25, news and current affairs 16, and scripted drama two. The list predates the spring grand finals and the summer cricket; when they ran, the NRL and AFL grand finals drew 4.56 million and 4.19 million viewers, the two biggest television audiences of 2025, ahead of everything in the mid-year ranking.

A commercial network makes its money by selling its audience to advertisers, and sport, reality and news deliver large audiences at a lower and more predictable cost than scripted drama. Sport also enjoys a regulatory moat: under the anti-siphoning scheme, subscription and streaming services cannot acquire the rights to listed events, from the AFL and NRL to the Olympics, unless a free-to-air broadcaster already holds a right to televise them. The biggest events on Australian television are, by law, free-to-air first.

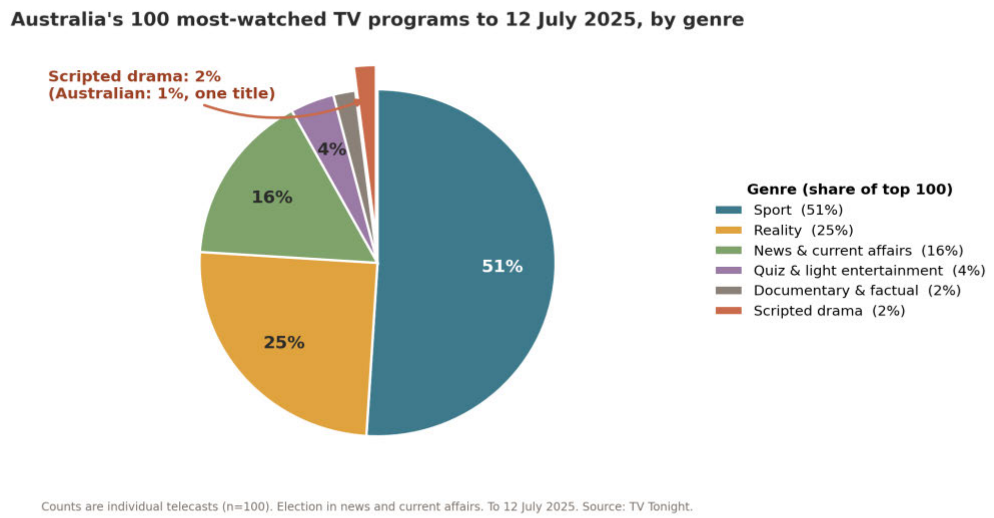

Figure 23: Australia's 100 most-watched television programs to 12th July 2025, by genre. Sport 51 per cent, reality 25, news and current affairs 16, quiz and light entertainment 4, documentary and factual 2, scripted drama 2 (one Australian, Home and Away at 95th). Source: TV Tonight.

The absence of mid-budget drama is not a lack of audience appetite; it is cost and risk. The year's two most-watched first-release Australian dramas, Seven's RFDS and Home and Away, averaged 1.12 million and 856,000 in prime weeknight slots (OzTAM Total TV). A returning serial is inexpensive per hour by comparison and its audience is proven, so the safest commercial decision is to keep renewing it. Network investment therefore flows to sport, reality and news, and away from mid-budget scripted drama and children's content, where audience numbers are uncertain. To maximise advertising returns, prime-time slots go to the content that delivers higher and more reliable numbers. Public funding and content requirements exist to produce the Australian drama and children's content that commercial incentives alone will not deliver.

In 2014, thirteen Australian scripted titles drew metropolitan audiences of one million viewers or more, among them Love Child (1.47 million), The Killing Field (1.41 million), Fat Tony and Co (1.21 million), A Place to Call Home (1.15 million), House Husbands (1.06 million) and ANZAC Girls (1.03 million), spread across Seven, Nine, Ten and the ABC (OzTAM five-city metro, reported by TV Tonight). Those figures counted metropolitan broadcast only, a narrower measure than today's national Total TV reporting. What has changed in the decade since is not the audience but the rules and the competitive market around it. The networks are no longer required to broadcast set amounts of new Australian drama, and they now compete with streaming and social media platforms for the same audiences and advertising revenue.

> *With networks making less money, they are commissioning less content which means less jobs available. That means a higher number of people*

> *going for one job and in multiple instances people going for jobs they are over qualified for just to get paid.*
>
> *Production Coordinator (Documentary/Post-Production)*

> *The streaming model has disrupted the demand for TV advertising and so demand for high quality TV commercials has decreased, so my work has diminished markedly.*
>
> *Director (Film and TV Commercials)*

> *I have been successfully self-employed my entire working life, over 16 years in the Australian Film and TV industry. Most recently, I have lost more than half of my contract work following the cancellation of Neighbours. Amazon had acquired the show in anticipation of meeting Australian content quotas, but with the streaming legislation as it has been written, Neighbours was abruptly disbanded, leaving over 300 crew members, myself included, out of work.*
>
> *Sound Recordist/Boom Operator*

ABC and SBS as Audience-Facing Commissioners

With commercial commissioning of scripted drama and children's content now reduced, the ABC and SBS are the only publicly funded broadcasters with Australian content commissioning as a primary remit, and much of what remains of those genres now depends on them.

ABC total government funding, including transmission, rose from about $1.06 billion (2019/20) to $1.10 billion (2024/25); adjusted for consumer price inflation, that is about 15 per cent below its 2019/20 value (it would need about $1.29 billion to match). SBS base funding rose from about $295 million to $317.9 million over the same period, about 12 per cent below its 2019/20 value in real terms. Budget cuts between 2013 and 2022 cost the ABC more than $800 million.

In real terms, ABC funding has been falling for forty years and is down about a quarter from its 1985/86 peak. Today's operating budget of $990 million is about $335 million a year short of that peak, which is worth about $1,325 million in today's dollars, while the ABC produces far more than it did then, across television, radio and online (Dr Michael Ward, University of Sydney, for ABC Alumni, Following the Money, March 2025).

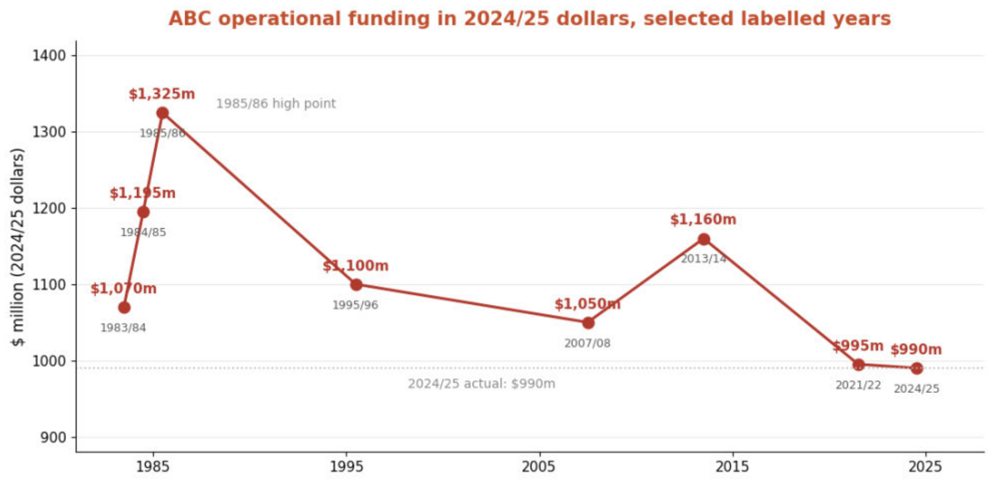

Figure 24: ABC operational funding in 2024/25 dollars, selected labelled years, 1983/84 to 2024/25. The 1985/86 peak equals approximately $1.33 billion in today's dollars; the actual 2024/25 operating budget, excluding transmission, is $990 million. Derived from Figure 1 of Dr Michael Ward, University of Sydney, for ABC Alumni, Following the Money, March 2025.

The $50 million in additional ABC funding secured through the streaming legislation, for children's programs and drama, partially addresses the decline but does not restore the volume the workforce requires.

A May 2026 Deloitte Access Economics report, released by the ABC, found that ABC-commissioned screen productions generated $772 million in economic value between July 2022 and June 2025, supporting 7,700 full-time-equivalent jobs.

Public broadcasters provide a commissioning pathway not subject to the commercial pressures driving private networks away from mid-budget drama, authored documentary and children's content. Strengthening the ABC and SBS as commissioners in these genres would directly address the production-volume challenge and ensure a baseline of Australian commissioning is undertaken in Australia.

Streaming Investment and Platform Ownership

Subscription video on demand providers' investment in Australian content reached $414 million in 2024/25, an increase of 21.2 per cent on the previous year (per ACMA SVOD spending data). Of this, $316.6 million was commissioned content and $97.4 million was acquired. Streaming platforms now account for the majority of television and online drama finance, contributing $238 million in 2024/25, 73 per cent of the total.

However, the number of Australian subscription TV and SVOD titles fell from 28 in 2023/24 to 18 in 2024/25, a fall of more than a third in one year, whilst the average cost of producing each hour of drama rose 44 per cent, well above inflation. The platforms are choosing to concentrate their Australian spend on a few premium productions rather than a broader range of stories.

As of 2024/25, eight major subscription video on demand platforms operated in Australia: Netflix, Disney+, Amazon Prime Video, Apple TV+, Stan, Paramount+, the Foxtel Group's Binge and Foxtel Now, and HBO Max. Stan, owned by Nine Entertainment, is the only Australian-owned platform and contributed 6 titles in 2024/25, the most of any single platform.

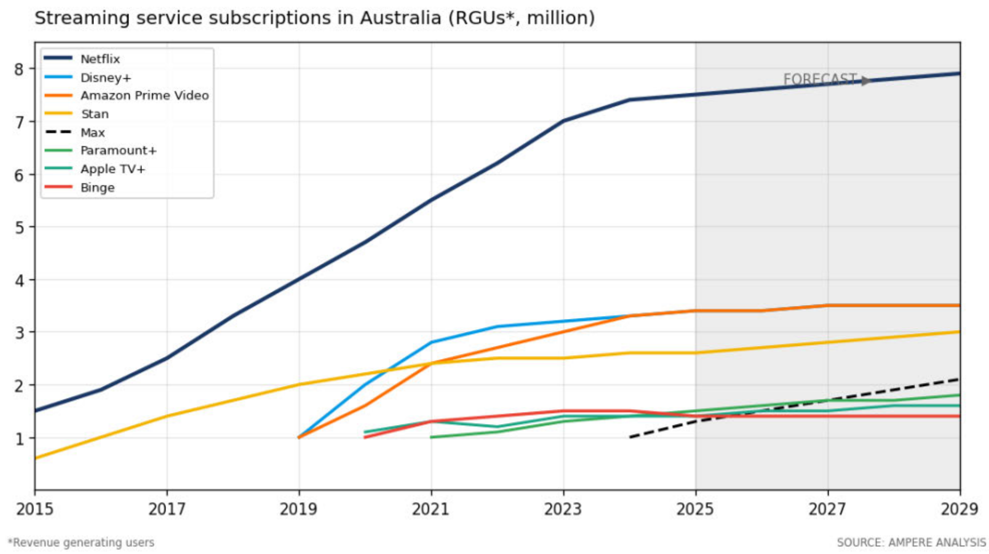

Figure 25: Streaming service subscriptions in Australia, 2015 to 2029 (revenue-generating users, millions; 2025-2029 forecast). Netflix approximately 7.5 million in 2025; Stan approximately 2.6 million. Source: Ampere Analysis.

Since 2022, streaming services have been the dominant way Australians watch screen content (ACMA, Trends and Developments in Viewing and Listening 2024-25), and they are now where Australians consume most of their long-form entertainment. Which stories get told depends largely on commissioning decisions made by the global parent companies behind these platforms. Aggregate annual content spending by the twelve largest global media companies grew from approximately $143 billion in 2020 to approximately $211 billion in 2024, and Australian commissioning by these platforms ($414 million in 2024/25) is approximately 0.2 per cent of that global content spend.

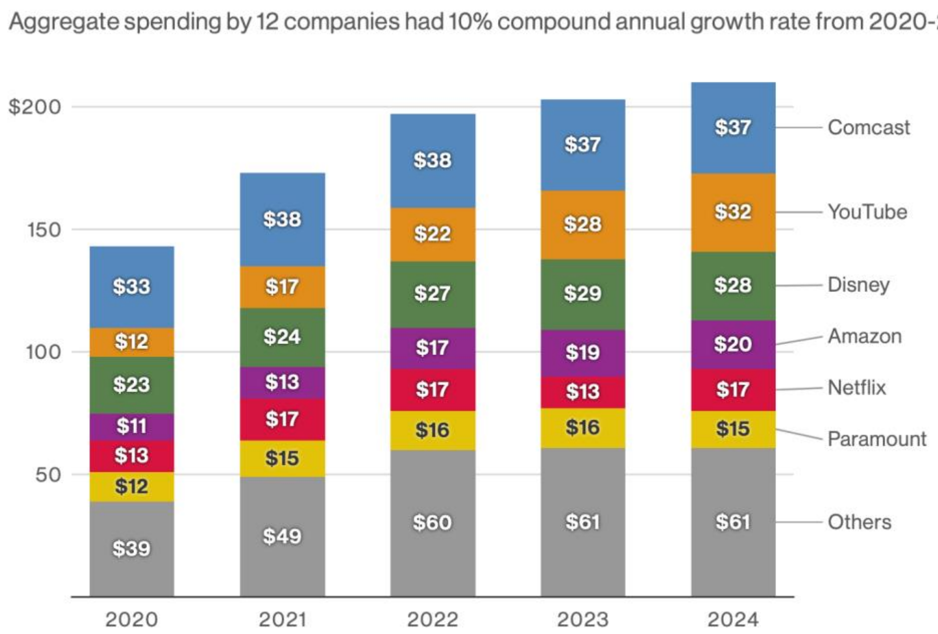

Figure 26: Aggregate content spending by the twelve largest global media companies, 2020 to 2024 ($USD billion). Source: industry analyst estimates.

The screen industry proposed that streaming services be required to spend 20 per cent of their Australian revenue on Australian stories, which 89.8 per cent of survey respondents supported. On a market of about $4 billion a year, that would have meant about $800 million a year in new investment.

The Streaming Regulation Framework

In November 2025, the Australian Parliament passed the Communications Legislation Amendment (Australian Content Requirement for Subscription Video on Demand Services) Bill 2025. The legislation imposes, for the first time, a local content obligation on streaming platforms with more than one million Australian subscribers. Netflix, Stan, Amazon Prime Video, Disney+, and Paramount+ are required to dedicate either 10 per cent of their total program expenditure for Australia, or 7.5 per cent of their Australian revenues, to the commissioning and production of Australian drama, children's, documentary, arts or educational programming.

The legislation lets streamers count the Producer Offset and state production incentives toward the obligation. Because those rebates cover an estimated 40 to 55 per cent of what a streamer spends on a new Australian production, the actual new cash required works out at approximately 4 to 5 per cent of expenditure, or 3 to 4.5 per cent of revenue, roughly $120 to $180 million a year.

It matches the existing New Eligible Drama Expenditure (NEDE) obligation that has applied to subscription television broadcasting services in Australia, most notably Foxtel, under the Broadcasting Services Act 1992. Australia's room to go higher is constrained by AUSFTA Article 10.2, which imposes a National Treatment obligation requiring Australia to treat US-supplied services no less favourably than its own. The Annex II reservation on Broadcasting and Audiovisual Services carves audiovisual sectors out of that default rule. Item (c) of the reservation sets the cap in the following terms:

> *Expenditure requirements for Australian production not exceeding 10 per cent of total program expenditure. Such requirements may be imposed on service providers making available services in the following program formats: the arts, children's, documentary, drama, and educational. Upon a finding by the Government of Australia that the expenditure requirement for the production of Australian drama is insufficient to meet its stated goal for such expenditure, this expenditure requirement may be increased up to a maximum level of 20 per cent. Such a finding shall be made through a transparent process that includes consultations with any affected parties including the United States. Any increase imposed shall be non-discriminatory and no more burdensome than necessary.*
>
> *AUSFTA Annex II, Schedule of Australia, item (c), Subscription television broadcasting services.*

Item (e), on interactive audio and/or video services, is the reservation that streaming services fall under. It is differently worded and more constrained than item (c):

> *Measures to ensure that, upon a finding by the Government of Australia that Australian audiovisual content or genres thereof is not readily available to Australian consumers, access to such programming on interactive audio and/or video services is not unreasonably denied to Australian consumers. Any measures addressing such a situation will be implemented through a transparent process permitting participation by any affected parties, be based on objective criteria, be the minimum necessary, be no more trade restrictive than necessary, not be unreasonably burdensome, and be applied only to a service provided by an enterprise that carries on business activities in Australia in relation to the supply of that service.*
>
> *AUSFTA Annex II, Schedule of Australia, item (e), Interactive audio and/or video services.*

The 10 per cent figure adopted in the November 2025 legislation is the level the government has assessed as defensible under item (e), with item (c) as the most comparable precedent at the per-platform level.

Parliamentary Proposals During the November 2025 Debate

In November 2025, the House of Representatives and Senate debates on the streaming content bill saw substantive amendments moved by Independent, Coalition, and Greens parliamentarians. Each amendment was opposed by the Government on trade-law or policy-design grounds, and the bill passed unamended. Several of these amendments match recommendations made in this submission, and the cross-bench support they attracted indicates parliamentary appetite for the workforce reforms the screen sector is seeking.

- **Tony Burke MP (Labor, Watson; Minister for the Arts and Leader of the House):** responsible minister for the bill. Burke led the policy work, with the Explanatory Memorandum circulated under his authority, and responded to Coalition and crossbench amendments at consideration in detail (Communications Legislation Amendment (Australian Content Requirement for SVOD Services) Bill 2025, Parliament of Australia).
- **Anika Wells MP (Labor, Lilley; Minister for Communications):** delivered the second-reading speech for the Government, setting out the audience-shift evidence (63 per cent of Australians using a streaming platform each week in 2024, 70 per cent free-to-air, 76 per cent of 25-34-year-olds on streaming) and framing the bill as the first time streaming services are required to invest in local Australian content (Hansard, 24th November 2025).
- **Dr Monique Ryan MP (Independent, Kooyong):** argued the obligation should be a content quota rather than an expenditure threshold, noting media reports that all but one streamer already meets the 10 per cent expenditure level. Called for the obligation to be doubled to 20 per cent of Australian revenue, citing the Australian Writers' Guild and Screen Producers Australia position and international comparators (France 20 per cent of local revenue; EU catalogues 30 per cent European works). Identified calculation risk in the proportionate-value methodology and called for regulator access to platform financial reporting (Hansard, 24th November 2025).
- **Kate Chaney MP (Independent, Curtin):** supported the bill and explicitly endorsed the Spender amendments on Producer Offset exclusion, intellectual property retention, and subgenre reporting (Speech, 24th November 2025).

- **Susan Templeman MP (Labor, Macquarie, Special Envoy for the Arts):** traced an eighty-year line of Australian-content quotas: Curtin's 1942 commercial radio quotas, Menzies' 1961 commercial television content requirements, Whitlam-era strengthening, and Keating's 1995 paid-TV 10 per cent drama expenditure obligation. The November 2025 bill extends that line into the streaming era (Hansard, 24th November 2025).
- **Allegra Spender MP (Independent, Wentworth):** moved three amendments. First, to exclude Producer Offset pass-through payments from qualifying Australian expenditure (Minister Burke acknowledged that excluding the offset would lift the effective obligation from 10 per cent to 13 or 14 per cent of expenditure). Second, subgenre reporting requiring streamers to provide annual data per subgenre (scripted drama, documentary, children's, comedy, animation, reality and factual entertainment), including the number of commissioned titles, total Australian production expenditure, hours of content produced, Australian content qualification status, and release dates and platform availability, with ACMA publication and ministerial tabling within 15 sitting days. Third, an IP reversion principle (primary licensing rights revert to the Australian production company after three years, or five years if a subsequent season is commissioned, ancillary and secondary rights retained), foreshadowed in the second-reading speech and withdrawn at consideration in detail to allow further consideration of writer-royalty implications. Spender characterised the contractual practice she sought to preclude as "a growing trend, particularly with Netflix, is for the streamer to cash flow production on the condition that this government offset, the taxpayer funded offset, is handed to them" (Hansard, 25th November 2025).
- **Zali Steggall MP (Independent, Warringah):** moved an Objects clause amendment requiring balanced genre investment across drama, children's, documentary, arts and educational content. In her second-reading speech, also argued that streamer expenditure should reflect net private investment only (excluding federal and state offsets), that ACMA must be resourced to investigate ownership structures, and that foreign-owned production companies operating in Australia should not capture commissioning at the expense of locally owned independent producers (Hansard, 24th November 2025 (second-reading speech); Hansard, 25th November 2025 (consideration in detail amendment)).
- **Julian Leeser MP (Liberal, Berowra; Shadow Attorney-General):** moved two Coalition amendments. The second-reading amendment noted the Coalition's record on industry support (Producer Offset, Location Offset, PDV Offset, location incentive,

more than $100 million in COVID-era support, and the February 2022 proposal of an Australian content guarantee for streamers) and concern at the four-sitting-day timeline. The consideration-in-detail amendment proposed a new Part 9F prominence framework for major SVOD services: ministerial requirements on display, accessibility and proportion of Australian programs through the main user interface; three-year sunset; mandatory consultation; civil-penalty enforcement (the greater of 10,000 penalty units, three times the benefit, or 2 per cent of annual turnover); four-year statutory review (Hansard, 25th November 2025 (second-reading speech); Hansard, 25th November 2025 (prominence amendment)).

- **Anne Webster MP (Nationals, Mallee; Shadow Minister for Regional Communications):** moved an amendment requiring streaming services to report annual Australian program expenditure disaggregated by ABS Remoteness Structure categories (major cities, inner regional, outer regional, remote, very remote), with mandatory ACMA publication and ministerial tabling in both Houses within 15 sitting days (defeated on division, Ayes 46, Noes 93) (Hansard, 25th November 2025).
- **Elizabeth Watson-Brown MP (Greens, Ryan):** Greens supported the bill in the House; party reserved its position for the Senate, where Senator Sarah Hanson-Young led the substantive negotiation (Hansard, 24th November 2025).
- **Senator Sarah Hanson-Young (Greens, South Australia; Communications spokesperson):** led Greens Senate negotiations and secured $50 million in additional ABC funding for children's content and drama, delivered over three years from 2026/27. Hanson-Young framed the funding as supporting children's representation on Australian screens, citing the role of Bluey, Bananas in Pyjamas, and Play School (IF Magazine coverage, 27th November 2025).
- **Senator Jonathon Duniam (Liberal, Tasmania):** moved three Coalition amendments in the Senate on 27th November 2025. First, a Selection of Bills Committee referral to the Environment and Communications Legislation Committee for inquiry by 3rd February 2026 (Senate Hansard, 27th November 2025 at 11:48 am). Second, a second-reading amendment mirroring the Leeser House amendment (Coalition industry-support record, four-sitting-day timeline concern) (Senate amendment document 3558). Third, a consideration-in-detail amendment proposing the Part 9F prominence framework, identical in substance to the Leeser House amendment above (Senate amendment document 3559).
- **Senator Fatima Payman (Australia's Voice, Western Australia):** translated the 20 per cent of revenue position (argued in the House by Monique Ryan, above) into

operative legislative text via thirteen consequential changes to the bill, replacing the program-expenditure pathway and the 7.5 per cent revenue threshold with a single 20 per cent of Australian-derived revenue obligation (Senate amendment document 3507).

Audience Data Partnership: Better Signals for the Pipeline

Free-to-air and broadcaster video on demand audiences are counted by one agreed industry measure, OzTAM's VOZ Total TV. The figures are published, so everyone, from broadcasters and advertisers to the people who made the work, can see how many viewers each title reached.

In May 2025, Netflix became the first global streaming platform to have its Australian audience independently measured by OzTAM (OzTAM, 26th May 2025), and its Streamscape service now reports viewing across the major streaming platforms, but those reports are designed for advertisers and media planners.

Streaming platforms hold detailed data on who watches what, for how long, and what viewers finish or abandon. Australian filmmakers cannot see any of it. Commissioning works best when both parties understand the audience; today, only the platforms do. Filmmakers need greater visibility of what Australians are watching.

This submission proposes an audience data partnership, mediated through Screen Australia or the ACMA under statutory confidentiality protections. The platforms would supply viewing data, and the mediating body would aggregate it and release it to Australian producers, writers and directors to inform development decisions. The released data would cover viewing by genre and format, demographic and regional breakdowns, completion rates, and how Australian content performs against international titles. Individual platform and title performance would remain commercial-in-confidence. The proposed partnership would extend to every streaming service operating in Australia and give the same visibility to the people who make Australian film and television.

Viewing data is backward-looking, and a title commissioned today may take 18 months to reach audiences, so the data should inform decisions, not make them or constrain creative instinct. Nor should shared metrics homogenise what gets made; each platform keeps its own data and editorial judgement, with the shared signals as a baseline. Both sides gain from the exchange. Platforms commission Australian stories with greater confidence and lower risk; writers, directors and producers learn what resonates with audiences.

Alternative Distribution Models

To qualify a feature film for a Producer Offset Final Certificate, a production must provide an executed Australian theatrical distribution agreement (Screen Australia, Producer Offset final certification). The test was designed when theatrical release, DVD, commercial free-to-air television and subscription video on demand were all viable ways to reach an audience. As documented earlier in this pillar, every one of those pathways has contracted at once, leaving an independent Australian production with fewer routes to an audience than at any point in the offset's history.

In practice the requirement is reported to work as a barrier for independents. Distributors prioritise commercially strong titles and engage selectively with micro-budget or first-feature work. Some distributors are also producers and can favour their own productions for offset access. There are also reports of distributors charging producers a fee simply to be named in the offset paperwork. A production can meet every other eligibility criterion and still be unable to complete the application. This submission recommends that the next offset review recognise direct-to-platform, festival and producer-led distribution alongside conventional distributor agreements, and preclude distributors charging producers for inclusion in the application.

Recommendations: Pillar 5

- Recognise that 2025 cinema admissions remain at 64 per cent of the 2019 baseline, and that Australian films take a share of that reduced market below their long-term range, driven by a fall in the number of Australian films being made rather than by lower attendance alone.
- Establish a coordinated national audience-building campaign for Australian cinema, run by distributors, exhibitors and creative agencies, with subsidised tickets for Australian films, event screenings, and consolidation of existing industry initiatives under one framework.
- Strengthen the ABC and SBS as commissioners of Australian content, addressing the audience-facing consequence of reduced commercial-network commissioning of drama, authored documentary and children's programming.
- At the legislated review, set the streaming obligation at 10 per cent of expenditure or 7.5 per cent of revenue with federal and state offsets excluded from the calculation (the Spender amendment), lifting the effective commissioning to about 13 to 14 per

cent of expenditure, and preclude commissioning arrangements that pass Producer Offset value back to the streamer.

- Ensure Australian IP is retained by Australian production companies across all commissioning relationships, including domestic broadcasters, streaming services and international co-production partners.
- Adopt balanced genre investment across drama, children's, documentary, arts and educational content, with annual reporting by subgenre, within the streaming obligation (the Steggall and Spender amendments).
- Require streaming services to report annual Australian program expenditure by ABS Remoteness Structure category, with mandatory ACMA publication and ministerial tabling (the Webster amendment).
- Establish a streamer-filmmaker audience data partnership, mediated through Screen Australia or the ACMA with statutory confidentiality protections, that aggregates anonymised cross-platform viewership and makes the signals available to Australian producers, writers and directors as a guide, not a constraint.
- Reform the Producer Offset distribution-eligibility requirement at the next offset review to recognise direct-to-platform, festival and producer-led distribution alongside conventional arrangements, and preclude distributors charging producers a fee to be included in the offset paperwork; the current rule is a barrier for independent productions.

Conclusion

The Australian screen workforce is contracting because the volume and hours of Australian production have fallen. The 1,250-respondent survey conducted between July and October 2025 documents the human cost: financial hardship reported by 34.0 per cent of personal-statement contributors, career disruption by 20.6 per cent, and mental-health impacts by 20.3 per cent. The freelance structure of the industry provides limited income continuity; the cost of contraction falls predominantly on the workforce. This submission proposes that the volume and hours of Australian production be measured and reported alongside total expenditure, since conditions track volume and hours more closely than they track dollars.

Workforce attrition is the long-term consequence of unaddressed contraction. When experienced professionals leave, they take decades of knowledge, mentorship and technical expertise with them. State governments have committed over $1.1 billion to production infrastructure, and lifting the volume of Australian production is the principal cultural-policy lever this submission identifies for sustaining studio utilisation if inbound demand softens, and for retaining the workforce on which Australian and inbound production alike depend.

The direction is consistent across every channel that commissions Australian production. Total drama expenditure reached a record $2.7 billion in 2024/25, yet the Australian share fell from 50 to 40 per cent. SVOD documentary expenditure fell 90 per cent over four years, Screen Australia's own documentary investment 26 per cent over five, and children's content expenditure 68 per cent from its 2018/19 peak. ABC and SBS funding remain about 15 and 12 per cent below their 2019/20 value in real terms. The headline dollars are at record highs; the Australian share and the volume of Australian stories are not.

This submission proposes five focus areas for the next National Cultural Policy, organised by Revive pillar: strengthen First Nations cultural authority on screen, including ICIP protection and Indigenous cultural authority in any response to AI (Pillar 1); substantially increase Australian production across formats, genres, budgets and platforms, with volume and hours treated alongside total expenditure as the measure of cultural-policy success (Pillar 2); address workforce conditions and reserve government production funding for human creative labour (Pillar 3); make public investment transparent through an independent audit and expand the incentive architecture, removing the QAPE threshold from the Producer Offset and developing a modern 10BA-style alternative (Pillar 4); and strengthen the audience-facing settings, reinforcing the ABC and SBS as commissioners, retaining Australian IP in Australian companies, and reforming the streaming obligation at the legislated review to a cash-investment basis (Pillar 5). The full recommendations appear under each pillar.

The Australian screen industry has a century of history and an established international reputation. The workforce that sustains it requires a cultural-policy framework that addresses the conditions documented in this submission. The next iteration of Revive can support that workforce and keep Australian stories made by Australian people reaching audiences at home and abroad.

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Research, analysis, and compilation assisted by Claude Opus 4.8 (Anthropic).