

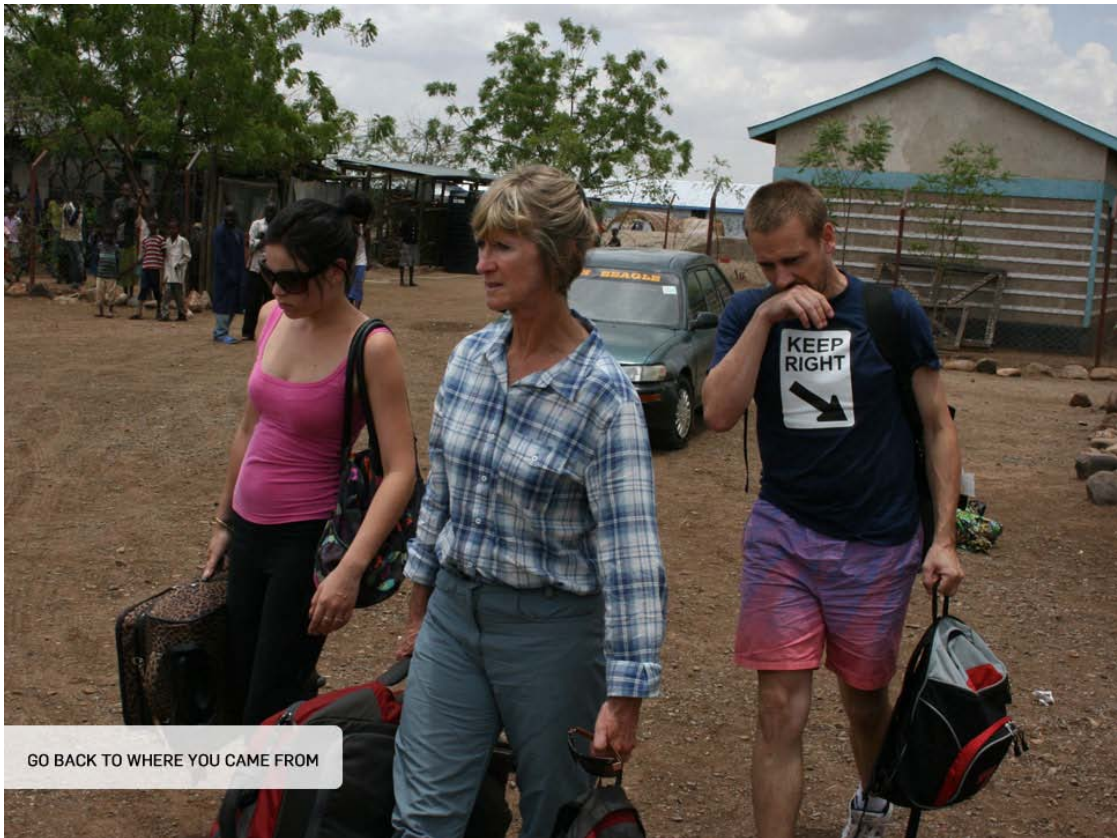


PART 1 – INTRO

- Thanks Sandy. And thank you Joost for inviting me to present this Key Address.
- The Australian International Documentary Conference brings together the best of the documentary community from all over the country each year, as well as our many wonderful international guests.
- Congratulations, Joost, for putting together such a terrific line-up again this year.
- It's a pleasure to be here to talk to you all today.
- What a great year for Australian documentaries.



- *Mrs Carey's Concert* was a sensation.
- Not only at the box office, but going on to attract around 1.5 million viewings across cinema, DVD and TV by the end of the year.



- *Go Back to Where You Came From* trended number one globally on Twitter during its first episode
- And topped SBS's ratings for the year
- It also picked up mentions in the International Herald Tribune and the New York Times.



- *Wide Open Road* averaged over a million viewers per episode on the ABC.
- And I learnt that the car we grew up with was an F9.



- *The Bombing of Darwin: An Awkward History* screened a few weeks ago on the anniversary of the WW2 bombing of Darwin.
- It now stands as the highest rating programme of all time on The History Channel.
- So that's what's been happening on the local front



- Australian docs also participated strongly in the major international festivals in 2011.
- *Shut Up Little Man! An Audio Misadventure* had its world premiere as part of Sundance's World Cinema Documentary Competition last January.



- We had four titles at Hot Docs - two in competition and two pitched at the forum - with *Something to Tell You* winning an Honourable Mention.



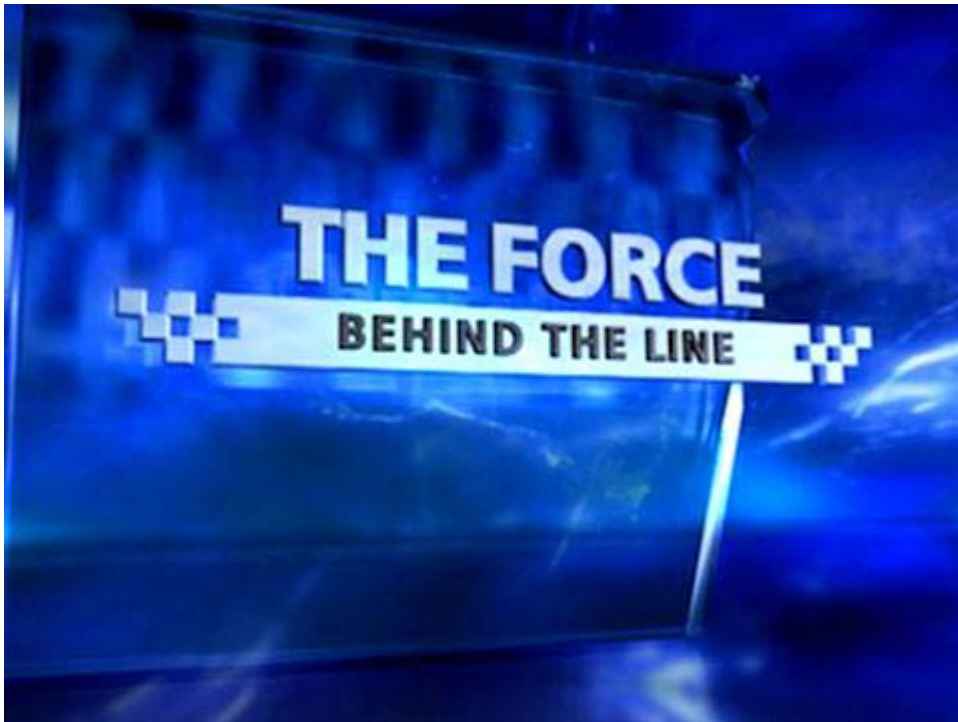
- *The Tall Man* was selected for screening at Toronto
- And achieved an Australian theatrical release, which was not part of the original plan, but it was available to the film because of its quality.



- *Mad as Hell: The Peter Finch Story* screened at Busan.
- And six Australian docs were screened at IDFA.



- And one of my personal favourites from 2011 was *Life in Movement*, the winner of the Sydney Film Festival documentary prize.



- As usual Australian documentary series were popular with TV audiences.
- The top Australian doc this year was Seven Productions' *The Force - Behind the Line*, on channel 7, averaging over 1.6 million viewers per episode nationally.



AGENDA

1. Year in Review:

Research on audiences and production

2. Culturally significant docs:

Screen Australia's role

3. Convergence

- So, yes, it has been another great year for documentaries
- I'm going to have a look at 3 topics this morning.
- We're going to start with some data looking at recent audience and production activity.
- Then we're going to talk about documentaries in the context of cultural significance, and in particular, Screen Australia's role in supporting these docs.
- And we're going to have a look at where things are up to with Convergence.

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1. Year in Review:

Research on audiences and production

2. Culturally significant docs:

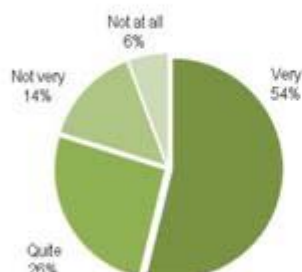
Screen Australia's role

3. Convergence

- Let's start with the year in review

THE LANDSCAPE - AUDIENCES

Importance of Australia having a local film and television industry that produces Australian stories, 2011

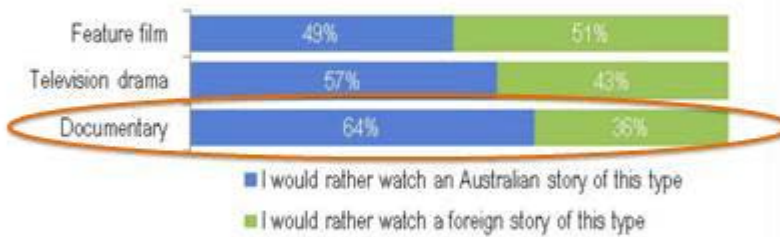


Source: Compiled by Auspoll on behalf of Screen Australia.

- No doubt about it: Australians want to watch Australian stories. We can see this from the daily TV ratings.
- What's harder to measure is how Australians feel about these stories and the value they place on them
- So last year we asked Auspoll to conduct some research.
- And we found that 91 per cent of people believed it was quite important or very important that Australia had a film and television industry that produces local content.

THE LANDSCAPE - AUDIENCES

Preference for Australian versus foreign content, 2011



Source: Compiled by Auspoll on behalf of Screen Australia.

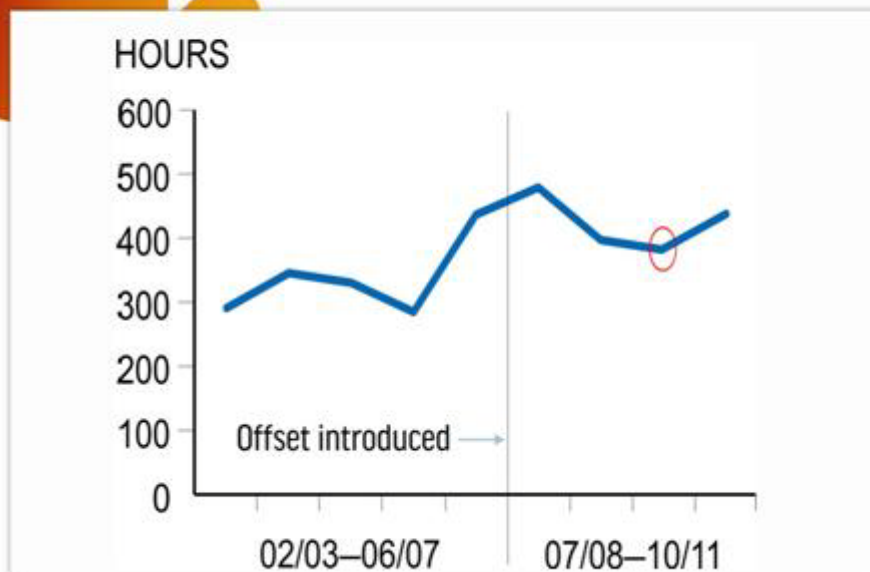
- And more than any other narrative form, there was a preference for Australian docs.
- 64 per cent of people said that they'd rather watch an Australian documentary than a foreign one

LATEST DOCUMENTARY PRODUCTION DATA



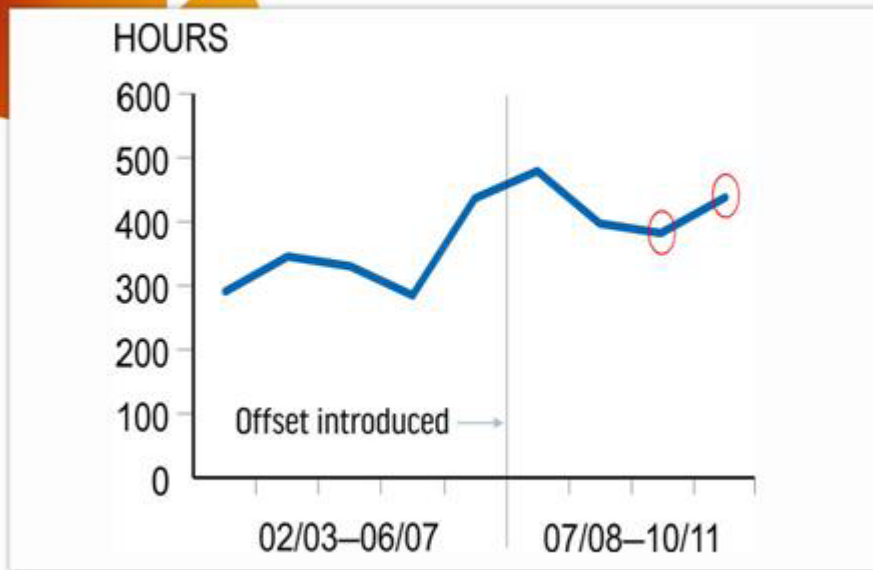
- As usual we have also updated our documentary production data in time for AIDC.
- And you'll find this brochure in your satchel outlining the results.
- Let's have a look at a few highlights.
- Both hours and total budgets rose in 2010/11.

LATEST DOCUMENTARY PRODUCTION DATA



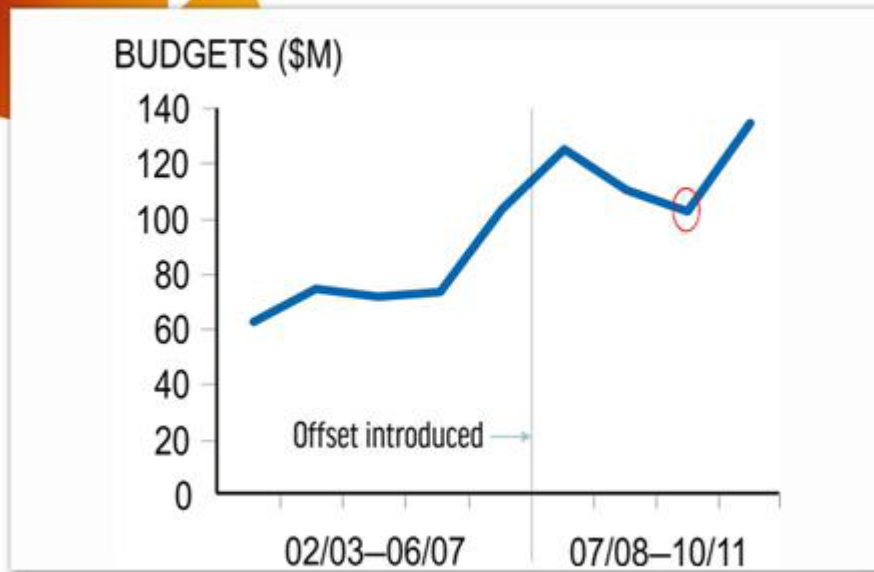
- Hours rose from 382 last year...

LATEST DOCUMENTARY PRODUCTION DATA



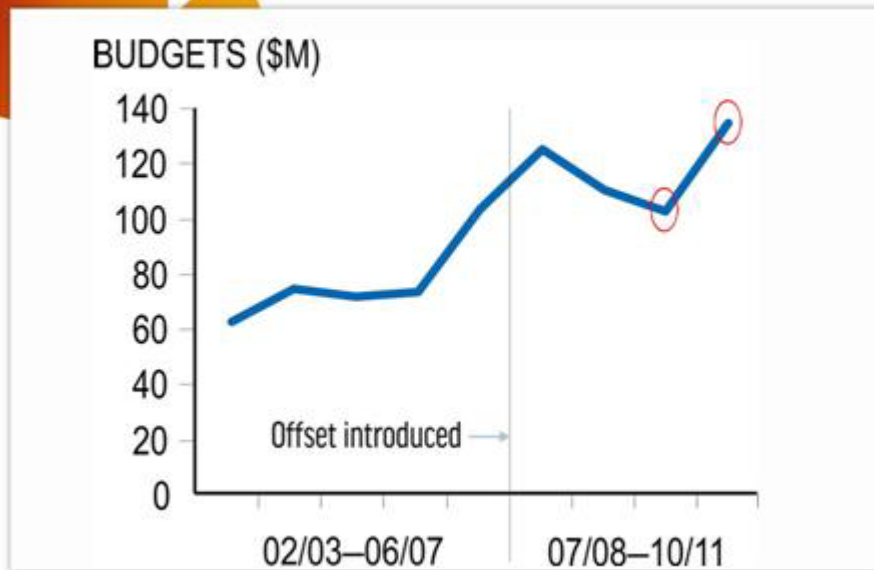
- to 430.

LATEST DOCUMENTARY PRODUCTION DATA



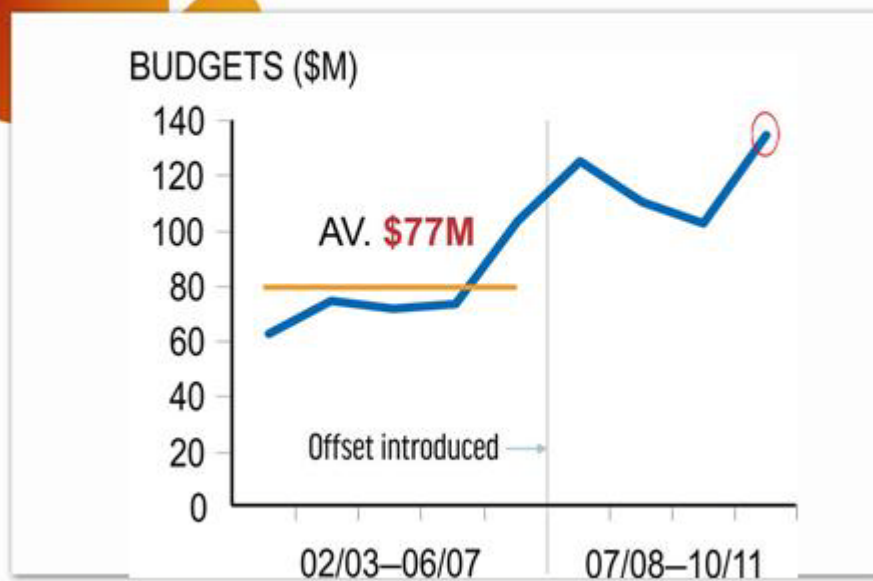
- More significantly, total budgets rose from \$102 million

LATEST DOCUMENTARY PRODUCTION DATA



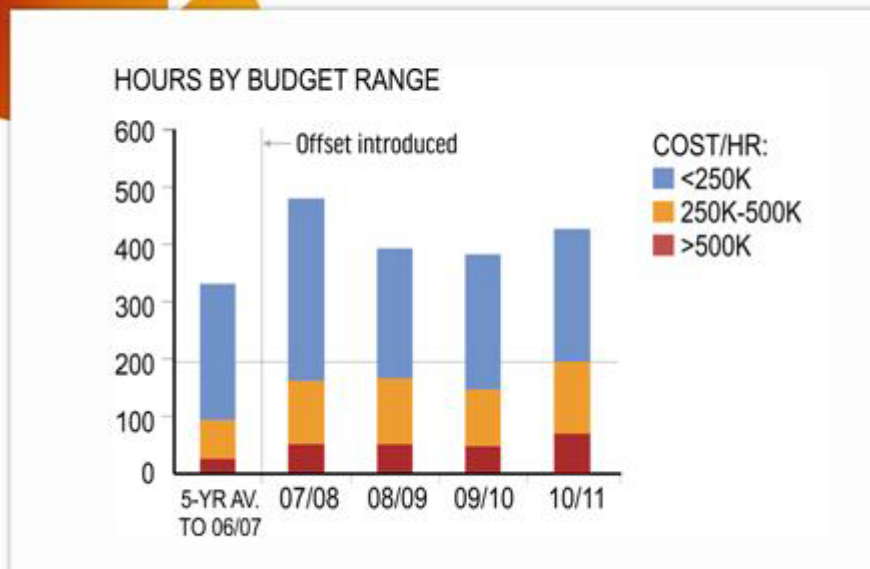
- to \$133 million
- That's a 30% increase, and well above the five year average of \$118 million.
- And it's the highest level to date.
- What we can clearly see is that the producer offset has been effective in buoying the industry and driving growth in the documentary sector.

LATEST DOCUMENTARY PRODUCTION DATA



- Prior to the introduction of the producer offset, the annual five year average for documentary production was \$77 million. Now we're seeing almost double that figure.

LATEST DOCUMENTARY PRODUCTION DATA

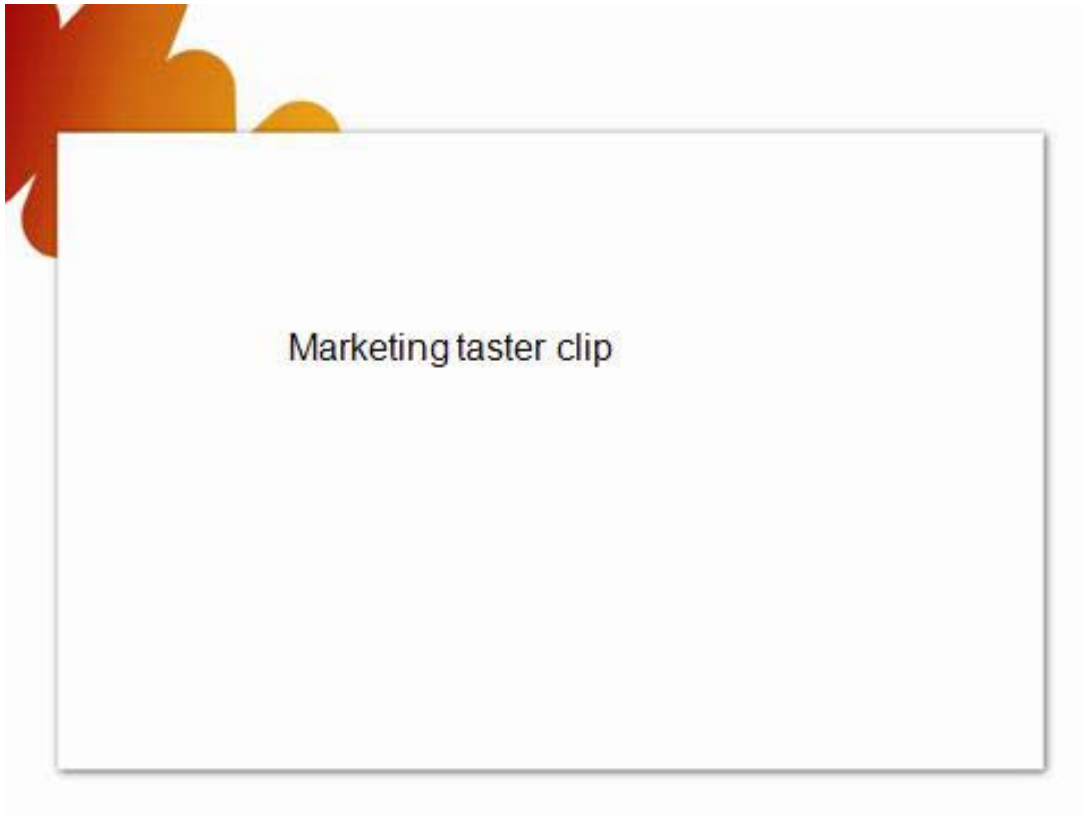


- The record level was largely driven by an increase in high-production-value series. And by high-production-value we mean above \$250,000 per hour.
- They're indicated in red and yellow on this chart.
- This shows us that the offset is also driving an increase in premium content.
- Have a look at the brochure and our website for more details

\$17 million in documentary finance

\$54 million in total production

- So that's the latest on overall documentary production.
- Screen Australia funded 135 docs during the 2010/11 financial year, with a mix of arts, science, history, Indigenous and social contemporary stories.
- Through our documentary production programs, Screen Australia provided \$17 million in finance, leveraging \$54 million in total production spend.
- Documentaries were also financed through the Feature Film, Indigenous and All Media Programs, adding another \$2.6 million in finance in 2010/11.
- Here's a taster of some of these new titles that will be coming down the line over the next few months.



- Marketing taster clip



AGENDA

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- Moving onto agenda item 2, culturally significant docs.

INDUSTRY NEWS

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AIDC 2012: muscled up to make some history?

by: [David Tiley](#)

Screen Hub

Friday 3 February, 2012

Joost den Hartog is about to deliver his sixth documentary conference, in Glenelg at the end of February. Each year, the conference mirrors developments inside Australia, and participates in the ongoing international discussion about the sector. This time, it could be different.

PART 2: JOOST / CULTURAL DISCUSSION

- Many of you will have read Joost's interview with David Tiley for Screenhub on 3rd February.
- Joost and I have talked about this, and I'd like to take a moment to address some of the concerns he raised, in relation to Screen Australia's documentary programs.
- Joost talked about the dual roles of documentary funding being economic development, and the creation of a culturally valuable body of work.
- He acknowledged that the broadcasters' focus is on attracting audiences here and now, not necessarily on creating a long-lasting body of culturally significant work. That's the funding agencies' job.
- Joost's concern was that the old Film Australia achieved its cultural aims by curating a coherent set of films in the national interest, and that Screen Australia is only running with the economic bit.
- Now I understand his concern, but I don't agree with it.
- The first time I spoke at AIDC 3 years ago, I noted that one of the main things I admire about the Australian industry is the quality of documentaries. This is still the case, and that's why I want to address Joost's questions with care.

The logo for Screen Australia, featuring a stylized orange and red leaf-like shape on the left side.

SCREEN AUSTRALIA

“...ensure the development of a diverse range of Australian programs that deal with matters of national interest or importance to Australians, or that illustrate or interpret aspects of Australia or the life and activities of Australian people.”

- I want to go back to basics for a moment, and have a look at the Screen Australia Act.
- In performing its functions, Screen Australia is to:
- *ensure the development of a diverse range of Australian programs that deal with matters of national interest or importance to Australians, or that illustrate or interpret aspects of Australia or the life and activities of Australian people*
- As you can see, our cultural remit is front and centre there.



SCREEN AUSTRALIA DOCUMENTARY PROGRAMS

Production finance:

National Documentary Program (NDP): curated slate
General Documentary
International
Signature Documentary

Documentary Development

Special Initiatives (eg Open Shot)

All Media Fund narrative content, linear and non-linear, that pushes the envelope of creative storytelling

Features including theatrical documentaries

Indigenous Department documentary support

Enterprise Program funding for production companies

Marketing support including funding for P&A, innovative distribution, travel grants, international festival and markets support

Funding for **screen resource organisations** in conjunction with state agencies

- The slide behind me shows the full range of our programs that support documentaries.
- Production finance is available through the four Documentary production programs: NDP, General, International, and Signature.
- We also have documentary development finance, and special documentary initiatives;
- Further production funding for docs is available through the All Media Fund, Features and the Indigenous Unit;
- The Enterprise Program funds production companies. A number of these are focused on factual;
- The Marketing department provides support for distribution and marketing activities;
- And we also provide funding to the Screen Resource Organisations, which provide various programs for new entrants and developing filmmakers.
- **ALL** of our programs that support documentaries are concerned with fulfilling our cultural remit.



SCREEN AUSTRALIA DOCUMENTARY PROGRAMS

Production finance:

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- However its main manifestation is through the National Documentary Program, which invests \$7 million in 20 to 30 hours of programming each year.
- The National Documentary Program of course grew out of Film Australia's National Interest Program and History Initiative.
- Its core purpose is to create a culturally significant body of work for future generations:



NATIONAL DOCUMENTARY PROGRAM

NDP

The National Documentary Program (NDP) aims to provide a comprehensive and strategic slate of projects across time, involving a diversity of styles and formats, and encompassing a broad range of themes of national and cultural significance with heritage value.

- Special terms of trade apply to the National Documentary Program, including meaningful consultation to ensure the core content remains consistent with the original intentions of any one program.
- This helps enable the National Documentary Program to capture an annual snapshot of Australian life, appealing both to contemporary audiences and enhancing the Film Australia collection held by the National Film and Sound Archive.



NATIONAL DOCUMENTARY PROGRAM

CORE CONTENT AREAS

Art and culture

Contemporary and social issues including social history

Science and the environment

National history and identity

- There are core content areas, covering art and culture; contemporary and social issues (including social history); science and the environment; and national history and identity.
- These help to ensure the overall diversity and cultural significance of the program.
- Of course, this can be a challenging task, in the current environment. Joost is right about that.
- We're working with the marketplace to fulfil our cultural obligations, and their needs may have a different focus to ours.
- That's one of the reasons why the vast majority of National Documentary Program funds are allocated to working with the national broadcasters, whose charters also indicate cultural obligations.
- So what's the actual fallout of the transition from the Film Australia to Screen Australia? A fair question. Let's have a look.

NIP AND NDP

Abortion, Corruption and Cops	DIY Doco	Lost and Found	Rare Chicken Rescue
Addiction	Downunder Grads	Lost in Flanders	Reckoning
An Unstoppable Force	Every Family's Nightmare	Love, Lust and Lies	Remembering Rain
Art and Soul	The Fabric of a Dream	Making Australia Happy	Roller Derby Girls
The Art of War	Family Confidential	The Man Who Jumped	Rosa's Journey
Aus. Bio Online 4	Feral Peril	MobiDocs	A Royal Romance
Australian Biography 10	Forgotten Australians	Mother of Rock: The Life and	Science of Self Harm
Australian Biography 11	Founders & Survivors	Times of Lillian Roxon	Singapore 1942
Ballets Russes	Storylines	Moving History	Sporting Nation
Big Stories, Small Town 2	Gone to a Good Home	Multicultural Interactive	Tackling Peace
Big Stories, Small Towns	Hidden Treasures 2	Documentary	The Tall Man
Black Panther Woman	History Department	National Treasures series 3	A Thousand Different Angles
The Bombing of Darwin: An	Honeybee Blues	Ned Kelly	Trafficked
Awkward Truth	The Hunt for HMAS Sydney	Ned's Head	Trafficked: The Reckoning
Bombora	I'll Call Australia Home	Once Upon a Time in	The Trial
Captain Cook: Obsession and	Immigration Nation	Cabramatta	Vietnam
Discovery Pacific Stories	Immortal	One Street at a Time	Vietnam Symphony
Catching Cancer	Inside the Firestorm	Operation Babylift	Who Do You Think You Are?
Change the World	Kapyong	Out of the Ashes	Who's Afraid of Designer
Charles Bean's Great War	Leaky Boat	Outback Kids	Babies
Community Cops	Life at 2 website	Peter Berner's Loaded Brush	Wide Open Road
Croker Island Exodus	Life at 3	Policing the Pacific	Winners' Guide to the Nobel
Darwin's Brave New World	Life at 5	The Prime Ministers' National	Prize
Divorce Stories		Treasures	

- Here we're looking at titles from the final 3 years of the National Interest Program under Film Australia;
- And the first 3 years of the National Documentary Program under Screen Australia.
- In terms of cultural value, I think it's pretty hard to distinguish which titles came through which funding program.
- Well, we'll help you out..

NIP AND NDP

Abortion, Corruption and Cops	DIY Docs	Lost and Found	Rare Chicken Rescue
Addiction	Downunder Grads	Lost in Flanders	Reckoning
An Unstoppable Force	Every Family's Nightmare	Love, Lust and Lies	Remembering Rain
Art and Soul	The Fabric of a Dream	Making Australia Happy	Roller Derby Girls
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Discovery Pacific Stories	Immortal	One Street at a Time	Vietnam Symphony
Catching Cancer	Inside the Firestorm	Operation Babylift	Who Do You Think You Are
Change the World	Kapong	Out of the Ashes	Who's Afraid of Designer
Charles Bean's Great War	Leaky Boat	Outback Kids	Babies
Community Cops	Life at 2 website	Peter Berner's Loaded Brush	Wide Open Road
Croker Island Exodus	Life at 3	Policing the Pacific	Winners' Guide to the Nobel
Darwin's Brave New World	Life at 5	The Prime Ministers' National	Prize
Divorce Stories		Treasures	

- The titles in blue came through Film Australia's National Interest Program, and those in red through Screen Australia's National Documentary Program.
- Over the last 3 years, the NDP has produced around 23 hours each year.
- And you'll notice that a number of titles that started their life under Film Australia have continued with Screen Australia, such as:

NIP AND NDP

Abortion, Corruption and Cops	DIY Docs	Lost and Found	Rare Chicken Rescue
Addiction	Downunder Grads	Lost in Flanders	Reckoning
An Unstoppable Force	Every Family's Nightmare	Love, Lust and Lies	Remembering Rain
Art and Soul	The Fabric of a Dream	Making Australia Happy	Roller Derby Girls
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Captain Cook: Obsession and	Immigration Nation	Cabramatta	Vietnam
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Trafficked and its sequel *Trafficked – The Reckoning*

It continues the story of a young Thai girl sold as a sex slave to a Sydney brothel, by following her quest for justice as an adult.

NIP AND NDP

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- And the *Life At* series.
- Starting with *Life at 1*, the latest instalment, *Life at 7*, will continue the largest-ever longitudinal study on child development in Australia.

NIP AND NDP

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Oraker Island Exodus	Life at 3	Policing the Pacific	Winners' Guide to the Nobel
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- You'd be familiar with many of these outstanding National Documentary Program titles.

NIP AND NDP

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Bombora	The Hunt for HMAS Sydney	Operation Babylift	Trafficked: The Reckoning
Captain Cook: Obsession and Discovery Pacific Stories	I'll Call Australia Home	Out of the Ashes	The Trial
Catching Cancer	Immigration Nation	Outback Kids	Vietnam
Change the World	Immortal	Peter Berner's Loaded Brush	Vietnam Symphony
Charles Bean's Great War	Inside the Firestorm	Policing the Pacific	Who Do You Think You Are
Community Cops	Kagyang	The Prime Ministers' National Treasures	Who's Afraid of Designer Babies
Croker Island Exodus	Leaky Boat		Wide Open Road
Darwin's Brave New World	Life at 2 website		Winners' Guide to the Nobel Prize
Divorce Stories	Life at 3		
	Life at 5		

- I've already referred to Wide Open Road

NIP AND NDP

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- and *The Bombing of Darwin*.
- A couple of recent titles include:

NIP AND NDP

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The Bombing of Darwin: An	Honeybee Blues	Ned Kelly	Trafficked
Awkward Truth	The Hunt for HMAS Sydney	Ned's Head	Trafficked: The Reckoning
Bombora	I'll Call Australia Home	Once Upon a Time in	The Trial
Captain Cook: Obsession and	Immigration Nation	Cabramatta	Vietnam
Discovery Pacific Stories	Immortal	One Street at a Time	Vietnam Symphony
Catching Cancer	Inside the Firestorm	Operation Babylift	Who Do You Think You Are
Change the World	Kagyang	Out of the Ashes	Who's Afraid of Designer
Charles Bean's Great War	Leaky Boat	Outback Kids	Babies
Community Cops	Life at 2 website	Peter Berner's Loaded Brush	Wide Open Road
Croker Island Exodus	Life at 3	Policing the Pacific	Winners' Guide to the Nobel
Darwin's Brave New World	Life at 5	The Prime Ministers' National	Prize
Divorce Stories		Treasures	

- *Once Upon a Time in Cabramatta*



- A 3-part story of the Vietnamese community in Sydney, spanning 35 years. We saw it on SBS during January.

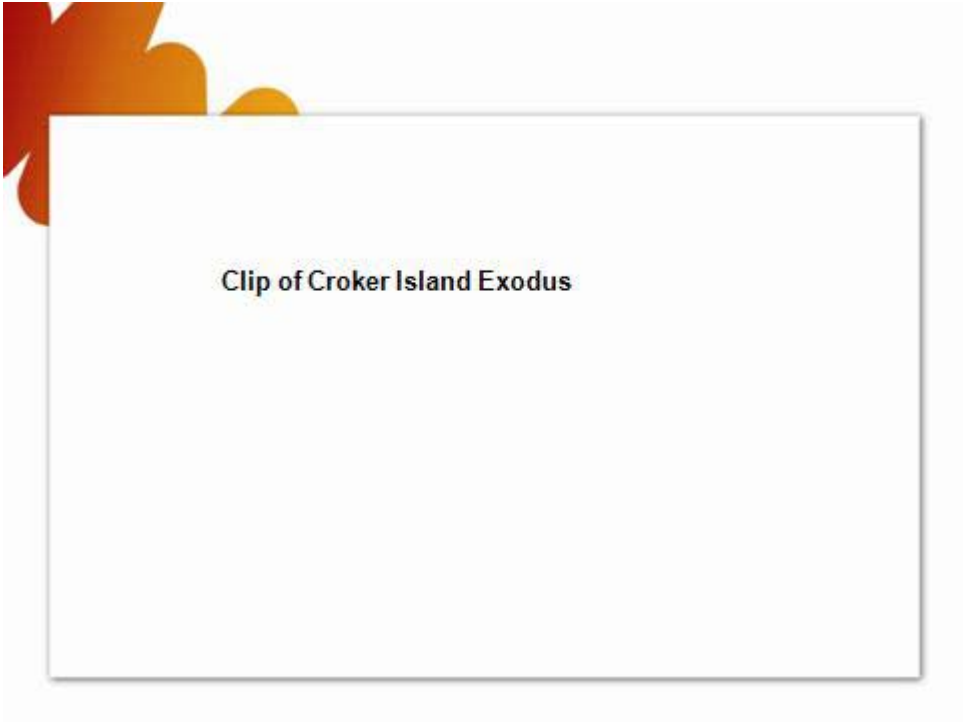
NIP AND NDP

Abortion, Corruption and Cops	DIY Docs	Lost and Found	Rare Chicken Rescue
Addiction	Downunder Grads	Lost in Flanders	Reckoning
An Unstoppable Force	Every Family's Nightmare	Love, Lust and Lies	Remembering Rain
Art and Soul	The Fabric of a Dream	Making Australia Happy	Roller Derby Girls
The Art of War	Family Confidential	The Man Who Jumped	Rosa's Journey
Aus Bio Online 4	Feral Peril	MobiDocs	A Royal Romance
Australian Biography 10	Forgotten Australians	Mother of Rock: The Life and	Science of Self Harm
Australian Biography 11	Founders & Survivors	Times of Lillian Roxon	Singapore 1942
Ballets Russes	Storylines	Moving History	Sporting Nation
Big Stories, Small Town 2	Gone to a Good Home	Multicultural Interactive	Tackling Peace
Big Stories, Small Towns	Hidden Treasures 2	Documentary	The Tall Man
Black Panther Woman	History Department	National Treasures series 3	A Thousand Different Angles
The Bombing of Darwin: An Awkward Truth	Honeybee Blues	Ned Kelly	Trafficked
Bombora	The Hunt for HMAS Sydney	Ned's Head	Trafficked: The Reckoning
Captain Cook: Obsession and	I'll Call Australia Home	Once Upon a Time in Cabramatta	The Trial
Discovery Pacific Stories	Immigration Nation	One Street at a Time	Vietnam
Catching Cancer	Immortal	Operation Babylift	Vietnam Symphony
Change the World	Inside the Firestorm	Out of the Ashes	Who Do You Think You Are
Charles Bean's Great War	Kagyoung	Outback Kids	Who's Afraid of Designer Babies
Community Care	Leaky Boat	Peter Berner's Loaded Brush	Wide Open Road
Crocker Island Exodus	Life at 2 website	Policing the Pacific	Winners' Guide to the Nobel Prize
Darwin's Brave New World	Life at 3	The Prime Ministers' National Treasures	
Divorce Stories	Life at 5		

- And the upcoming *Crocker Island Exodus*.




- The journey of 3 missionary women and 95 Aboriginal children, across Australia, to escape Japanese bombing during WW2. Told in their own words.



Clip of Croker Island Exodus



- Some pretty strong cultural titles there, all presenting a record of our time, or a contemporary perspective on history or identity.
- I believe we have carried the baton faithfully from Film Australia's National Interest Program.
- But I value Joost's having raised the question. And we wil continue to be accountable for the results of our funding programs.



SCREEN AUSTRALIA DOCUMENTARY PROGRAMS

Production finance:

National Documentary Program (NDP)

General Documentary

International

Signature Documentary

- And while we've been focused on the National Documentary Program, the General, Signature and International programs are also producing some outstanding films with cultural significance.
- For example, *Mrs Carey's Concert* came through the General program.
- The Signature program has financed titles such as *A Life in Movement*, which I mentioned earlier.



- *And Make Hummus Not War*, from veteran filmmaker Trevor Graham.
- This doc explores the politics of hummus in the middle east from an Australian perspective.



- The upcoming *Australian Wine Revolution* has come through the International program.
- This film tells the recent history of the Australian wine industry and reveals how a small group of enterprising Australian winemakers took on the world and won.
- And funding through the International program has just been approved for *Kakadu*, a ground-breaking 8 part series going behind the scenes of world famous Kakadu National Park.



SCREEN AUSTRALIA DOCUMENTARY PROGRAMS

DOCUMENTARIES SPECIAL INITIATIVES

OPENING SHOT AN 'OPENING SHOT' FOR EMERGING FILMMAKERS An initiative of ABC TV Documentaries and Screen Australia

- And today I'm pleased to be able to announce that Screen Australia will again be working with the ABC on the second round of Opening Shot.
- This program will support another 6 emerging documentary makers to create prime time series for ABC2.
- We are thrilled to be continuing our partnership with the ABC in giving opportunities to young Australian talent, to tell contemporary stories in their own voices.
- The Opening Shot Program follows on from our 5-year collaboration with the ABC on JTV Docs.
- This program resulted in several successful titles such as:
 - *Orchids: My Intersex Adventure*, which screened at the Brisbane and Adelaide Film festivals; won the audience award at BIFF, an ATOM award and several international awards.
 - And *Rock 'n' Roll Nerd: The Tim Minchin Story*, which achieved a theatrical release through Madman.



AGENDA

1. Year in Review:

Research on audiences and production

2. Culturally significant docs:

Screen Australia's role

3. Convergence

PART 3 – CONVERGENCE

- Now I want to move to some more general issues of our time – those being dealt with by The Convergence Review.

**CONVERGENCE REVIEW:
CHALLENGES
AND
OPPORTUNITIES**

- We know that the rapidly changing media landscape presents our industry with both challenges and opportunities
- Challenges in adapting business models, and opportunities for engaging an evolving audience that's hungry for more and more content.
- And the Convergence Review has been charged with the job of addressing many of the current issues.
- The Review has a wide remit but we are most interested in the issues around content, so we'll be concentrating on that.
- So what are the challenges, specifically?
- The first one is technology, which has changed our society in some pretty fundamental ways.

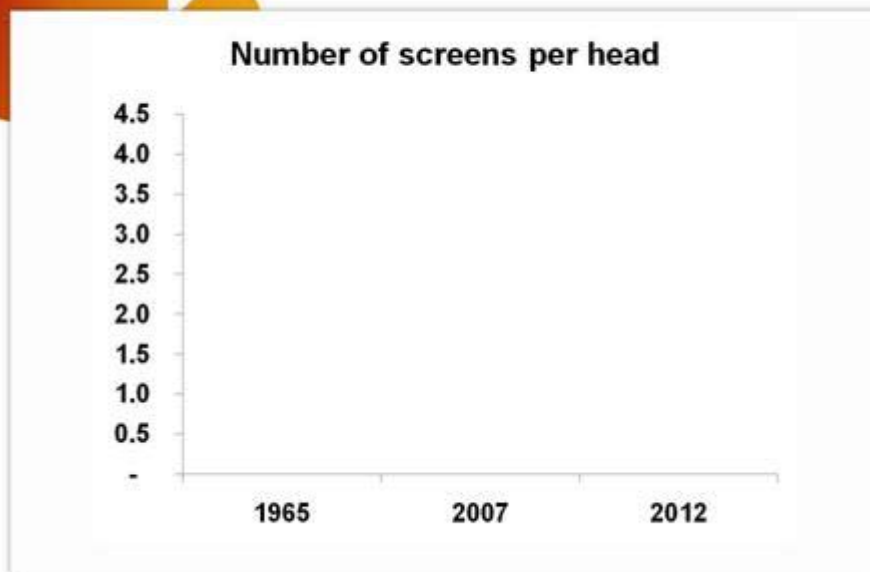


- In a recent article in Vanity Fair, Kurt Anderson noted that for most of the last century, the cultural landscape changed dramatically every 20 years or so.
- That is: fashion, art, music, architecture, design and entertainment.
- But for the last 20 years, he contends, popular style has been stuck on repeat.
- The only way to distinguish a 1992 hipster from the 2012 version...
- ...is by the ipod headphones



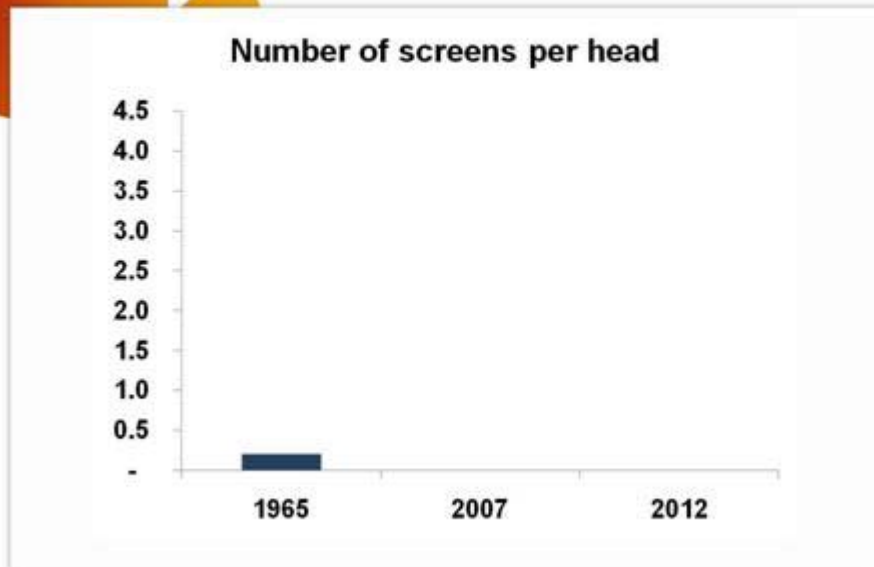
- The point being that technology has become the new signal of evolution in style.
- Anderson calls this the First Great Paradox of Contemporary Cultural History.
- The world has become radically and profoundly new, and the political economy has been transformed, through technology.
- At the same time, the appearance of the world has hardly changed at all. Cars, buildings and fashion all look pretty much the same now as they did in 1992.
- Everything except computers, TVs, telephones, and music players.
- These have changed drastically, and continue to do so at an ever-accelerating pace.

SCREENS PER HEAD



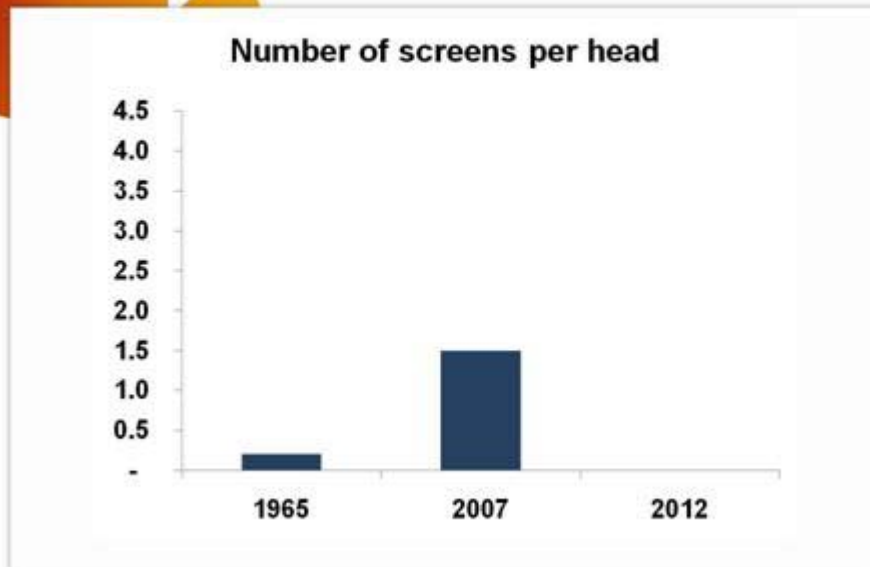
- On a micro level, I conducted a little research of my own at home.

SCREENS PER HEAD



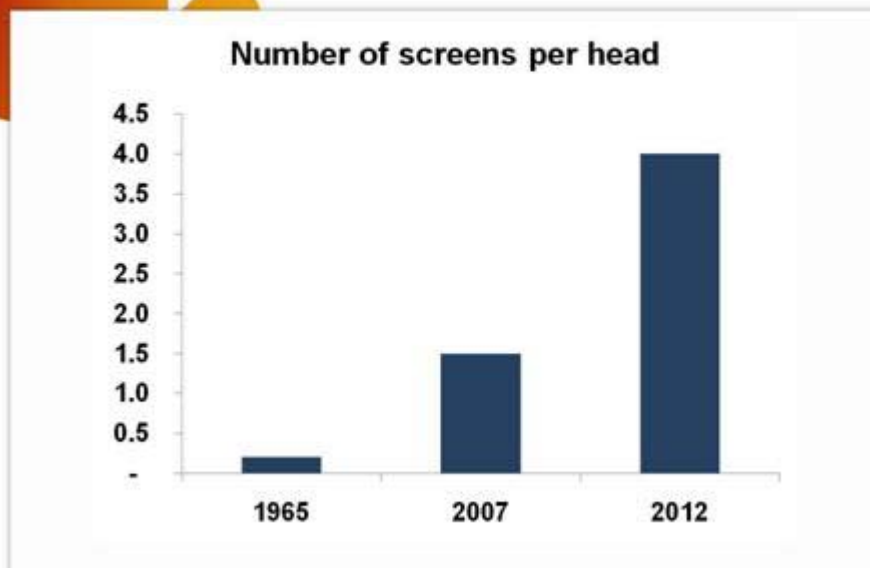
- In 1965 there was one screen in my home, shared among 5 people.
- That's Mum, Dad and 3 kids.
- And we got a TV.
- That's point 2 of a screen per person.

SCREENS PER HEAD

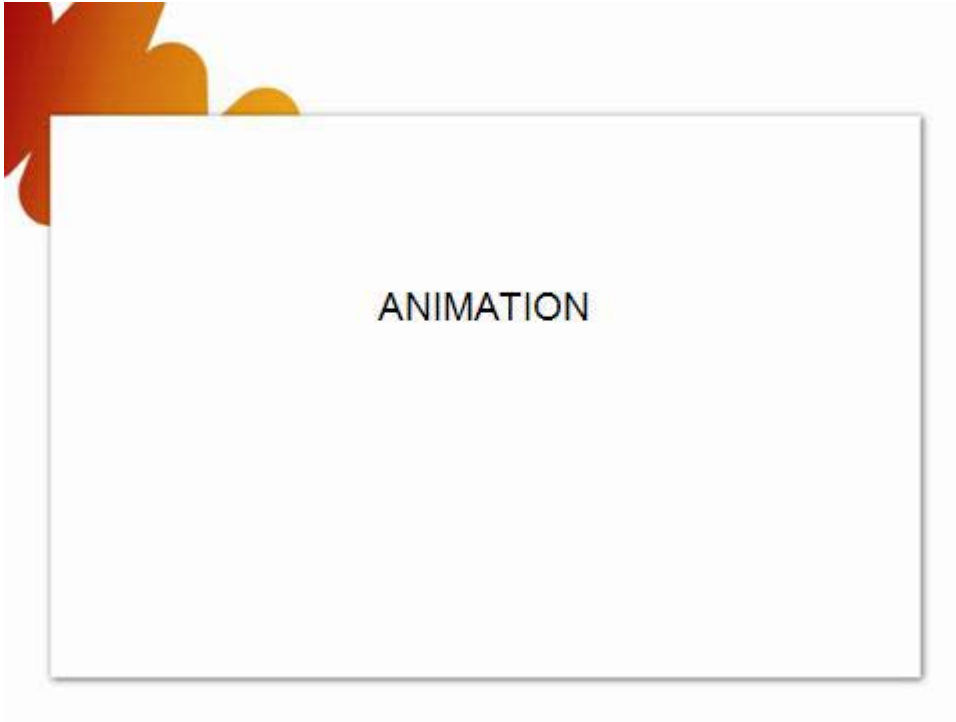


- In 2007, moving to my generation now, there were 6 screens in our house, shared among 4 people.
- That's Mum, Dad and 2 kids, with 2 TVs, a computer, a laptop, an iphone and an ipod.
- That's one and a half screens each.

SCREENS PER HEAD



- And in 2012 there are only 3 people in our household.
- But with the addition of various iphones, ipads and kindles to the mix, we now have 12 screens.
- That's 4 screens per head.
- I wonder what will it look like in another 5 years? I predict fewer screens performing more roles. I'll definitely have my Apple TV by then.
- On a more macro level, here's some research we conducted last year looking at audience trends more broadly.

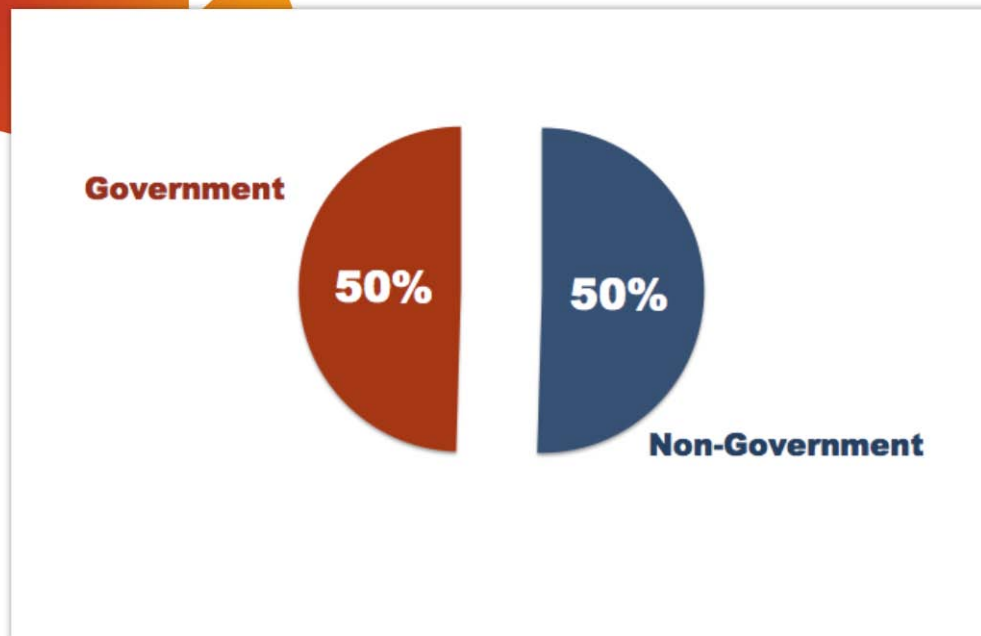


Animation

**CONVERGENCE REVIEW:
CHALLENGES
AND
OPPORTUNITIES**

- So we've looked at the challenges – what about the opportunities?
- We know Australians want to see more Australian stories on screen.
- But in the world we've just looked at, there's exponentially more content, and only a little bit more Australian content.
- So in order to meet the challenge of supplying Australians with the content they want, we need to produce more of it, and we need to ensure that audiences can find it.

FINANCE - DOCUMENTARIES



- The question is, who pays?
- Narrative content production in Australia, (that's documentary and drama), is characterised by a mixed economy, with a combination of government and non-government contributions.
- Half of the total finance to the 2010/11 documentary slate came from government sources, including direct funding through screen Australia and the state agencies, the Producer Offset, and the public broadcasters.
- The other half came from non-government sources. A large proportion of this came from the commercial broadcasters – free-to-air in particular, and subscription.
- If we want to keep this kind of mixed economy, how do we go forward?

THE POLICY LEVERS

- REGULATION
(CONTENT QUOTAS)
- DIRECT FUNDING
- INDIRECT FUNDING
(TAX INCENTIVES)

- The mechanism that has created and supported this mixed economy, is the combination of the 3 policy levers available to the government.
- Each lever is important and stimulates the marketplace to generate content quite differently.
- The regulation lever (that is, quotas) encourages the production of Australian programs that are popular with the broadcasters' audiences.
- Direct investment allows the government to target the creation of content that meets its cultural objectives, or to address market failure.
- Indirect investment helps generate market-driven content in vulnerable formats (including documentary), via tax incentives.
- In a converged environment, all of these levers need to remain, but they need adjusting.

CONVERGENCE



- The Government charged the Convergence Review Committee with the task of working out, among other things, how the levers should be adjusted going forward.
- Submissions were received from throughout the sector in August, and the Committee released its interim report in December, covering a range of recommendations.
- The committee's final report goes to the Minister next month.
- Firstly, and importantly, the interim report acknowledges the importance of Australian content, and the need for continued government support. Indeed, it contemplates an increase.
- And with a particular focus on drama, children's and documentary content.
- The Interim Report, provided recommendations for adjustments to all of the policy levers.
- Let's start with the regulation lever – this is the way in which the industry is encouraged to contribute to the non-government side of the pie.



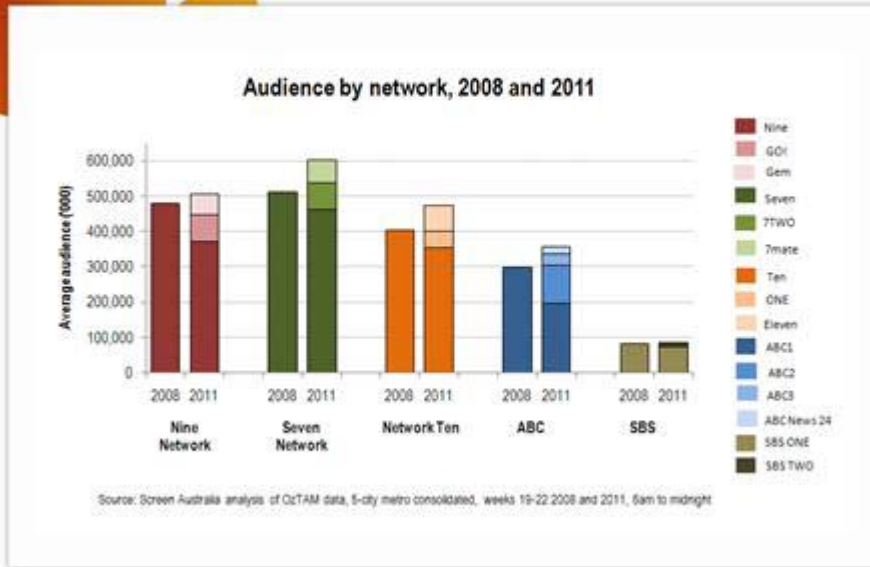
ADJUSTING THE LEVERS - REGULATION

Commercial free-to-air

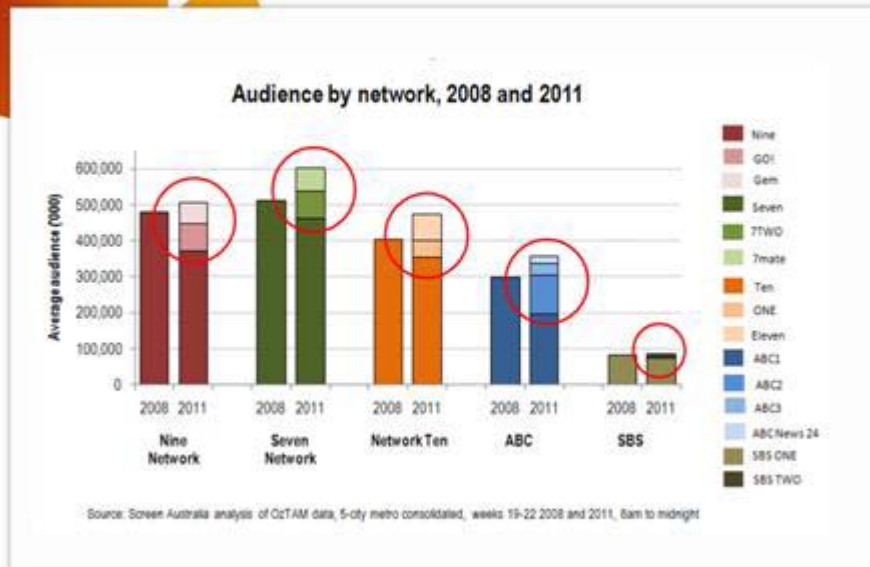
Short to medium term:
extend the sub-quota to multi-channels.

LEVER #1 - REGULATION

- The short term recommendation is the extension of the drama and documentary sub-quotas to the free-to-air multichannels.
- For documentaries, that would mean that the minimum of 20 hours of first release docos per year, which is currently required for the main channels, would be extended in some form to the multichannels.



- Since the multichannels have come on board, overall viewings across all free-to-air channels has increased by 14%.



- And revenues have also increased.
- The free-to-air broadcasters have also received a rebate on their licence fees. David Leckie in The Australian yesterday said he's confident the rebate will be continued.
- So while we don't yet know the scale of the proposed sub-quota extension, what we do know is that there's an opportunity for the television industry to contribute more to Australian documentaries.

ADJUSTING THE LEVERS - REGULATION

Longer term:
transition to expenditure/revenue model.

- Longer term, the Convergence Review is looking towards a technology-neutral approach to regulation, where some of the new distribution platforms could contribute to producing Australian content.
- Their recommendation, in the medium to longer term, is that all content businesses of a certain scale should be regulated in a similar way.
- And the contribution would be based on a set percentage of expenditure or revenue.

OPINION

Media needs a lighter touch **It's muzzle madness** **Regulation - a dated idea**

AGENDA

Labor wants to take media back to 1950s **Red tape will kill a brave new world**

EDITORIAL

Government plan to take away freedom

Regulation rules in new-media inquiry

AGENDA

It's time to switch off regulation

(These will come on one at a time during first and second point)

- As we've seen in the press over the last few weeks, this proposition created an immediate reaction.
- This isn't at all a surprising response, from content businesses anticipating a new form of regulation.
- And it will be interesting to see how it might work when the Committee's final report comes out.
- So that's the industry side of the pie potentially increasing. Let's have a look at the government side now.

ADJUSTING THE LEVERS – INDIRECT INVESTMENT

40% Offset for 'premium' TV content

20% Offset for games / interactive content

LEVER # 2 – INDIRECT INVESTMENT

- Moving to the second lever, indirect investment via tax incentives, the interim report has made two recommendations in this area.
- A 40% offset for what they call 'premium' television content, when it is produced in the independent sector.
- 'Premium' content has not yet been defined, other than to say that it would exceed a cost threshold.
- And that will be key to understanding the way in which this will benefit the industry.
- We're looking forward to seeing more detail in the final report.
- It also recommends a 20% offset for interactive content. such as games and other applications

ADJUSTING THE LEVERS – DIRECT INVESTMENT

Converged content production fund

The converged content production fund could be financed by the contributions of Content Service Enterprises consistent with the uniform scheme described above. This fund could also be supported by spectrum fees paid to government by commercial FTA television broadcasters, as well as through direct government funding.

The fund would support:

- > the production of key genres including drama, children and documentaries
- > the production of local, community and regional content
- > innovation in content and platforms.

LEVER # 3 – DIRECT INVESTMENT

- The third lever is direct investment, and the interim report acknowledges the need for an increase in direct funding for content.
- The recommendation is for a converged content production fund.
- The report suggests that it would be financed through a combination of sources, including alternative methods for platforms to meet their content obligations.
- Platforms would have the option of contributing to the production fund rather than meeting the content obligations through their own activities.
- The recommendation is that the fund would be focused on the key genres of drama, children’s programs and documentaries, as well as local, community and innovative content.



- All of this suggests that the future is looking good, and represents huge opportunities for the documentary sector, and the production sector in general.
- We have a talented industry, delivering products that audiences love, and production levels are solid.
- There are good signs that increased production is supported by the government, as suggested in the Convergence Review interim report.
- There will be a continued special focus on narrative content, including documentaries.
- Right now, we need to make sure we work collaboratively as a sector to ensure the opportunities ahead of us are maximised.



- And just to finish, I want to take a sneak peak at an exciting upcoming documentary project.
- *Storm Surfers 3D* was conceived for a number of different formats, so it offers the makers the opportunity to collect revenues from a single idea, realised on different formats.
- We obviously won't be watching it in 3D today as the hotel doesn't have that technology. But it looks terrific regardless.