

Imagining the Future

***STRATEGIES FOR THE DEVELOPMENT
OF 'CREATIVE INDUSTRIES'
IN THE NORTHERN RIVERS REGION
of NSW***

Photo of 160 people at Clunes

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Commissioned by Northern Rivers Regional Development Board
in association with the Northern Rivers Area Consultative Committee

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Cover photo by Stuart Owen Fox, The Silent Picture Show

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Imagining the Future: The Report

EXECUTIVE SUMMARY AND STRATEGIES FOR FUTURE DEVELOPMENT

The Australian film, television and multimedia industries are experiencing the effects of globalisation and the onset of the new information-based economic order. Changes in digital technology and communications are dramatically altering the way the film, video and multimedia industries operate. These changes have made it possible for a wider sector of the community to have access to audiovisual production and post-production facilities, and for these facilities to be located outside the capital cities. The markets and outlets for product are changing and so is the way programs are made, funded and distributed.

Telecommuting and specifically the Internet and email are making it possible for practitioners to operate their businesses outside capital cities in regional centres such as Northern NSW. Over the past five years there has been a significant increase in the number of industry professionals moving to the region, mainly for lifestyle and cultural reasons. With this influx has come a growth in services, facilities, suppliers, related industries and specialised institutions with a focus on audiovisual industries. A significant industry cluster is now evident in the Northern Rivers region, representing a new competitive advantage that requires recognition and support.

This Study was commissioned by the Northern Rivers Regional Development Board in association with the Northern Rivers Area Consultative Committee (NRACC). The Board believes that the opportunities presented by this industry are compatible with the needs and aspirations of the area as a **lifestyle and learning region**. This Study set out to:

1. Identify the extent of the industry by conducting a survey of participants in the industry;
2. Assist in the creation of networks by developing a web-site and database for the local industry that practitioners can access and update;
3. Identify the issues that the industry faces by holding an Industry Forum;
4. Detail the current size of the industry and identify problems that have local solutions;
5. Propose a series of strategies arising from the data and information collected to assist in the future growth of the industry.

The Study identified a total of 1621 people involved in audiovisual industries in the region, and a further 2278 involved in creative industry organisations in the region, representing writers, musicians, performers, theatre practitioners and multi-media/new media artists and businesses. The total number of people involved in 'creative industries' in the region in 2000 is conservatively estimated to be 3500, which is 4.1% of the local work force. This marks a growth of 104% since 1992 and 214% since 1996. The term "creative industries" is used to describe the traditional arts, cultural and media sectors and the new emerging enterprises resulting from the convergence of these sectors.

The Study has produced valuable information about the growth of this sector and its potential for the region. It sheds light on the question of why industry professionals are moving to the region in large numbers. It provides information about where these professionals are clustering, the nature of the activity taking place, the destination markets for their product, and the advantages and disadvantages of living and working in this region. The Study provides the first asset register for the region in the audiovisual sector and identifies a set of strategies for future development.

The challenge facing the entire audiovisual sector is to find and establish niches in the new global economy and to develop sustainable practices in the creation of fresh, high quality content for the emerging outlets and new world markets.

Since the launch of the Study and the Industry Forums, there has been a notable increase in industry networking activities and events in the region. Connections have been made and a dialogue commenced between previously disparate sectors of the industry. Examples of the types of activities taking place are outlined in the Conclusions section of the report. They include:

- Developing a Location Centre for the Northern Rivers Region,
- The formation of Northern Rivers SCREENWORKS,
- Northern Rivers IT&T Industry Development,
- Plans for the development of regional centres of activity.

The report concludes that the Northern Rivers region has an active, significant and growing creative industries sector with an opportunity to make a major contribution to the economic and cultural life of the region. Specific measures need to be taken urgently to add momentum to this growing sector and to provide the infrastructure and mechanisms needed to ensure that the current growth is sustainable. The following strategies were developed from the data and information collected during the Study and they point the way forward for creative industries in the Northern Rivers region.

PHOTOS OF NORTHERN RIVERS REGION

Strategies for Future Development

Knowledge and skills will be the key source of sustainable competitive advantage in the 21st Century. Successful regions are, virtually without exception, those that have highly skilled work forces and entrepreneurial managers (Labour Market Report). Demand for content creation will increase with further advances in digital technology opening up new markets and outlets for content and programs. Producers, writers and creators of content based in the region can meet global demands for new sources of content for the new economy if the development of a sustainable industry is supported.

To these ends the following strategies are proposed for the development of creative industries in the region:

- 1 That a physical and virtual Centre for Creative Industries be established, through which individuals and organisations involved in the creative industries in the region can work together to initiate projects and attract more production. The long-term vision for this Centre is a series of creative industry regional or village centres networked together to form one large industry centre for the Northern Rivers region. It is proposed that this Centre be established according to the following stages:
 - 1.1. Due to the concentration of film, video and multimedia professionals in the Byron region that a regional Centre be established in Byron Bay as a hub for the industries throughout the Northern Rivers area. This Centre would provide space and communal office facilities to support local productions, and would foster and promote the development of creative industries and a vibrant screen culture in the Northern Rivers region of NSW.
 - 1.2 That specific purpose centres be established in Lismore and Ballina to support the needs of the industries in those centres for research, training, production facilities and industry related e-commerce and business initiatives.
 - 1.3 That smaller networked village centres be established according to local demand and the needs of developing clusters in areas such as Nimbin, Clunes and Mullumbimby.
- 2 That specific mechanisms be set up to help stimulate work opportunities and generate more projects in the region. These measures also aim to encourage producers to inject a greater proportion of their budgets into the local economy. These mechanisms include:
 - 2.1 Establishing regular networking and communication events for local practitioners to meet and talk, share resources and ideas. These events could allow local producers to make contact with local facility and service providers and encourage them to utilise these services and facilities within the region.
 - 2.2 Developing and maintaining the industry web-site to promote and facilitate production and provide a cast and crew database and referral service. Promoting the website to production companies and producers to encourage them to utilise the services and facilities available in the region.
 - 2.3 Fostering links between the established business sector and audiovisual and multimedia content creators to develop new ways of utilising new media technologies to promote and support local businesses.
 - 2.4 Establishing links and connections with production and animation companies, producers and funding bodies outside the region to highlight the benefits of relocating their businesses and projects to the Northern Rivers region.
 - 2.5 Establishing links with QPIX and Varsity Lakes and other organisations in Queensland to foster mutual support between this region and practitioners in Southern Queensland.
 - 2.6 Supporting the establishment of an Indigenous video and multimedia group in the region with access to skills, mentorships and training

- 2.7 Lobbying federal and state government agencies involved in creative industries to acknowledge the Northern Rivers region as a significant enclave of artists and creative industry practitioners and to provide appropriate funding, information and support for the region. In particular, to encourage the Australian Film Commission and the NSW Film and Television Office (FTO) to establish a presence in the region and provide support and information for the local industry.
- 3 That a full time coordinator be employed to manage the Creative Industries Centre and provide information, referrals and support for practitioners generating work in the region.
 - 4 That support be given to training and mentorship schemes in the region to upgrade the skills of those working in the Creative Industries. In order to maintain the highest quality in all aspects of audiovisual production, training providers should be encouraged to examine accredited training options and methods of maintaining standards in the industry.
 - 5 That support be given to the development stage of productions; in particular, support for writers and producers in developing ideas and scripts. This can be achieved through
 - 5.1 Support for the Northern Rivers Writers Centre in setting up screenwriting courses and having a specific film and multimedia section at their annual writers festival.
 - 5.2 Support for North Coast CAMERA, Southern Cross University and TAFE to conduct further courses, industry training and workshops in all aspects of writing, developing ideas and producing.
 - 5.3 Setting up a mentorship program for new and aspiring writers, producers and content creators to work with experienced practitioners, particularly at the development stage of projects.
 - 5.4 Providing readily accessible information (via the web-site) on international festivals, markets and exhibitions of new media and the latest in technological developments.
 - 6 That support be given to the development of a strong Northern Rivers IT&T industry through the following measures:
 - 6.1 Establish a Northern Rivers IT&T and multimedia association or industry body to represent the needs and aspirations of people working in new media, telecommunications and information technologies.
 - 6.2 Establish a regional IT Resource Centre as an office/ work Centre for the local IT&T industry.
 - 6.3 Strongly link this local industry association with the Gold Coast regional IT forum (GCRITF), who are actively promoting creative industries and the IT&T industry on the Gold Coast, including the creation of the Pacific IT corridor in S/E Queensland.
 - 6.4 Help facilitate regional access to plentiful, cheap broadband services and infrastructure.
 - 6.5 Aggregate the skills and services of the local IT&T industries through a well managed commercial entity.
 - 6.6 Promote the image of the region as a "lifestyle and learning" region with a vibrant and active cluster of IT&T, film, video and multimedia industries. This promotion could take many forms and should include major international industry expositions and festivals e.g. CeBit, COMDEX, to attract new industry as well as top professionals to the region.
 - 6.7 Forge strong links with IT&T education providers such as SCU and TAFE, as well as vendors and carriers like Microsoft, CISCO Nortel, Powertel and Intel.
 - 6.8 "Position" the Northern Rivers IT industry in the global market place and develop IT&T export opportunities.
 - 6.9 Collaborate with other major regional development initiatives.

- 7 That specific measures be taken to attract projects, clients and industries into the region to generate greater employment and cultural opportunities for people in the Northern Rivers. These measures include
 - 7.1 Establishing a Locations Centre for the region.
 - 7.2 Promoting the region as a 'film friendly' locations base for national and international productions. This promotion should focus on showcasing the natural beauty and physical diversity of the region and the supply of industry professionals, cast and crew. The form of the promotion may be colour brochures, a CD ROM and use of the region's web-sites or a combination of all three.
 - 7.3 Employing a part time co-ordinator to research and develop a cohesive regional policy and protocol for ALL the councils in the region to adopt, so that a unified approach may be established regarding the use of locations in the region. In addressing fee structures and ways of dealing with production companies, the protocol should aim to establish the region as "film friendly" to attract more production to the area.
 - 7.4 Compiling a locations register for the region, and establishing links with the NSW FTO to provide a free-flow of information and contacts.

- 8 That support mechanisms be set up for the development of screen culture in the region. These include:
 - 8.1 Providing support and seeking funding for North Coast CAMERA to continue providing screen culture services in the region such as workshops, training courses, screenings, discussions, expos, an industry newsletter and circulation of information.
 - 8.2 Providing active support and promotion for all Northern Rivers film, video and multimedia festivals and efforts to showcase locally produced work and work that is not screened by mainstream broadcasters or cinema outlets.
 - 8.3 Establishing a short film fund in the region consisting of a series of small grants to develop and fund the production of short films in the region. In addition to the grants, the scheme would involve consultation with leading local industry professionals at all stages of the project, from script development through production, post-production and distribution. The short films produced could become a learning ground for local film-makers, as well as a valuable regional resource of local talent and locally produced work.
 - 8.4 Establish an on-line exhibition space hosting local work and talent.
 - 8.5 Facilitate a monthly gathering of the local industry, either as a social event or as a series of face-to-face monthly forums using the Sydney-based 'Popcorn Taxi' model.

9. That support be given to the planning and organisation of the Australian International Documentary Conference in Byron Bay in 2003, which will be a major stimulant to the local industry.

10. That a creative industries network be established through partnerships with a range of other screen and arts organisations in the region, including North Coast CAMERA, NCEIA (North Coast Entertainment Industry Association), NORPA, the Northern Rivers WRITERS CENTRE and the IT&T and Multimedia association or industry body (yet to be formed).

Part 1. Summary of Findings

Background

The Northern Rivers region, the area from Grafton to Tweed Heads, is the fastest growing region in NSW. It is an area characterised by natural beauty and attractive lifestyle attributes. It comprises native rainforests, vast river systems, large areas of coastline, and a diverse collection of towns, villages and rural hamlets scattered throughout the region. The environment and lifestyle have attracted large numbers of people who work in the audiovisual, multimedia and arts industries to the region.

A report on Labour Market Information and Analysis conducted in the region in 1999 found that a major determinant of employment growth over the next 10 years will be the capacity of the region to capture and respond to the advantages of globalisation and the digital revolution. According to this report, the main drivers of economic growth are population growth, the maintenance of competitive industries and the attractiveness of the region to visitors and tourists. The growth of digital technology was highlighted as having a major effect on future employment.¹

Changes in the global economy and digital technology are linking the region more fully into the national and global economy, giving birth to new enterprises and new global market opportunities. Internet usage is growing in Australia at 40% p.a.¹ This explosive growth is dramatically altering the way people work, shop, bank, entertain and communicate. One indicator of the changes is the growth of new knowledge industries and information related services such as software development, multimedia services and corporate knowledge services.

The developments in communication technologies and information have altered the locational options for companies and individuals. No longer do businesses have to be located physically close to markets or production houses. Self-employment and home-based businesses are growing rapidly. The number of people working from home is growing by around 17% p.a. and Telstra predicts that within 10 years, 25% of workers will be based at home.

Purpose of this Study

Over the past five years, there has been a noticeable growth in the film, video and multimedia sectors in the Northern Rivers region. This study was commissioned by the Northern Rivers Regional Development Board in association with the Northern Rivers Area Consultative Committee (NRACC). It set out to:

1. Identify the extent of the industry by conducting a survey of participants in the industry.
2. Assist in the creation of networks by developing a web-site and database for the local industry that practitioners can access and update.
3. Identify the issues that the industry faces by holding an Industry Forum
4. Propose a series of Strategies arising from the data and information collected to assist in the future growth of the industry

¹ Labour Market Information & Analysis: Report commissioned by the Northern Rivers Area Consultative Committee, August 1999

5 Detail the current size of the industry and identify problems that can be solved on a local level.

The emphasis for the NRACC is to change perceptions and practices in the Northern Rivers and transform it into a **lifestyle and learning region**. In this scenario, knowledge and skills formation become the central element of the regional economic development strategy, and supporting the growth of new industries and the attraction of investment become major objectives. The effects of digital technology and the growth of audiovisual industries in the region have been observed by these organisations. As no data has previously been collected on these industries, they commissioned this study in order to obtain the first asset register of this growing sector and to encourage the development of work opportunities in the industry.

The Study has revealed that there is, in fact, a significant and growing industry or cluster of industries in the Northern Rivers region that fall under the umbrella of creative industries. The term creative industries is used to describe the convergence of traditional media and arts sectors and the creation of new enterprises resulting from this convergence. It is part of a global change that has been described by a number of terms. "New economy" is the one used in this Report.

At a national level, the audiovisual industries are undergoing dramatic changes. These include changes in the way content (film, TV programs, multimedia, etc.) is created, funded and distributed. All of the producers interviewed for this study reported that the changes in technology had profoundly altered their working lives and ways of doing business.

The shift to digital systems and the changes in the global economy are opening up new and, as yet, unexplored markets for content creators. As a result the role of independent producers is changing. Australia has a comparative advantage as suppliers to these new markets, primarily because we are an English language country and because we have gained a reputation for creativity and high production standards in film and television. However, there are also new risks and uncertainties in the Australian industry. There is evidence of a shift to more foreign production and international co-productions, and the recent federal government legislation in relation to data casting and new broadcasting regulation has placed severe limitations on the Australian domestic production industry. Defined shifts are also taking place in location choices away from the traditional Sydney/Melbourne focus of the industry.

On the international stage, the American and particularly Hollywood domination of the film and television sectors are beginning to shift, and new players and new ways of marketing product are emerging. The challenge for the local industry is how it responds to these changes and whether local 'content creators' can find niches in the global market to sustain local production.

Opportunities for Independent Producers are widening all the time. There's been such a broadening of the market since I came into the business 30 yrs ago The distribution of our work was extremely narrow and that's really been revolutionised over the last 10 years. The opening up of the Internet is internationalising production opportunities for us. At the moment a little company in Chicago is putting together a trailer for me (for my latest IMAX film) . That company could just as well be in Tweed Heads or Murwillumbah or Grafton. We're not limited by geography any more.

John Weiley, IMAX Producer

In this shifting and changing national and international landscape, many experienced practitioners are moving into the Northern Rivers region. At the same time, there is a commitment on the part of regional development organisations to place the region on a sustainable development path as a lifestyle and learning region. The audiovisual /multimedia industry was targeted for this Study

because it was perceived as having a competitive advantage in the global media markets from its growing base in this region.

Summary of Key Findings

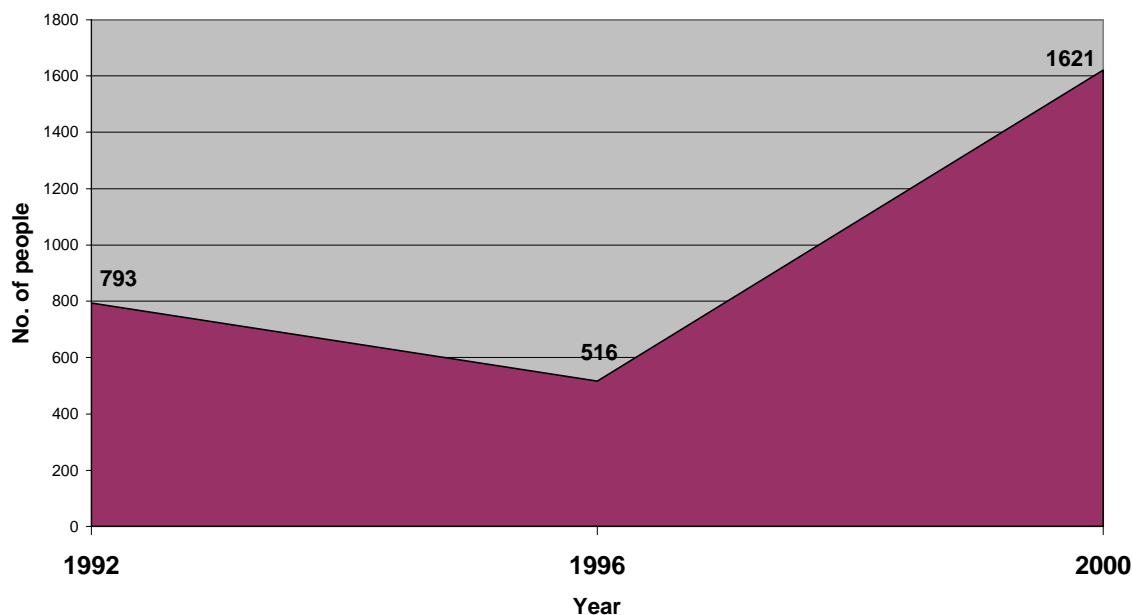
One of the major tasks of this Study was to quantify the number of people 'working' in the film, video and multimedia (audiovisual) industries. This was done by compiling a consolidated database from a range of existing sources; industry directories, local telephone directories, membership of North Coast CAMERA, a multimedia database provided by MAP (Mullumbimby Access Point), delegates to the local industry forums, the FILMWORKS web-site and people who responded to media coverage about the survey. The database was divided into a Primary production or 'content creation' sector; a Secondary distribution and retail sector; an Ancilliary sector of cinemas, video outlets, traditional and new media organisations, festival and screening organisers. A fourth sector consisted of those who had participated in training courses and interested members of the community.

THE TOTAL NUMBER OF INDIVIDUALS ASSEMBLED IN THIS DATABASE WAS 1621.

In order to assess whether there had been a growth in audiovisual industries in the region over the past decade, the Australian Bureau of Statistics figures for 1992 and 1996 were compared with the data collected in 2000. The table and graph below show the results.

Year	Description	Number
1992	Number of professionals in audiovisual industries in the region - - from 1992 ABS (Australian Bureau of Statistics) data for the region	793
1996	Number of professionals in audiovisual industries in the region - - from 1996 ABS (Australian Bureau of Statistics) data for the region	516
2000	Number of people identified in audiovisual industries - from the 2000 Study	1621

Growth of Audiovisual Industries since 1992



The audiovisual sector in the region has grown by 104% since 1992 and 214% since 1996.

To gain a more complete picture of the size and scope of creative industries in the region, additional data was collected from a number of related professional organisations:

- Northern Rivers Writers' Centre: estimated membership of **268**
- NCEIA (North Coast Entertainment Industry Association) and Chris Gibson's 1999 Study of the Music Industry: the number of people estimated to be involved in the Music Industry: **1500**
- Professional performers, theatre workers and NORPA contract workers estimated to be **100**
- Northern Rivers IT: number of organisations and individuals listed on their data base is **410**

Note: Details of these organisations and how these figures were obtained appear in Part 3 of this Report under "Existing Data".

TOTAL NUMBER FROM RELATED CREATIVE INDUSTRY ORGANISATIONS: 2278

If this figure is added to the 1621 individuals from the consolidated database, this gives an estimate of 3899 people involved in creative industries. This is however considered to be a conservative estimate. The reasons for this are outlined in Part 3, and include the fact that the 410 organisations and individuals listed on the Northern Rivers IT database include many organisations that employ in excess of 10 people, and some even as many as 40 people. There may also be many more individuals and organisations working in the region who were not captured by this Study. On the other hand, there may be some overlap between the data collected for the audiovisual industries and the membership of the above listed organisations.

For the purposes of this Study, therefore, the number of people identified in creative industries in the region in 2000 is conservatively estimated to be 3500. This represents 4.1% of the region's workforce.

In addition to the quantification of the number of people involved in creative industries, a comprehensive survey consisting of 20 questions was also distributed widely throughout the region and 162 completed survey forms were collected. This was done to obtain qualitative data and extend the meaning of the quantitative data collected through the database. These findings have contributed largely to the strategies outlined in this report.

For example, one of the main outcomes of the survey was identifying the significant role played by producers or content creators in the growth and development of creative industries in the region. In total there were 36 credited producers identified as living and working in the region. It can be argued that the presence of these producers in the region have a greater economic impact and stimulate more employment and growth in the local industry than 100 actors, writers or musicians. It is the producers who initiate the projects that form the basis of the industry. They provide the creative stimulus for the projects, bring in the money, employ the people, manage the projects and redirect the inputs from these projects into the local economy. For this reason, a series of interviews with 14 leading producers from the region were conducted to obtain detail on the perspective these producers hold on creative industry development requirements in the region. Represented in the interviews were producers of feature films, wide screen films, television drama, documentaries, corporate productions, commercials, multimedia productions, as well as those involved in distribution and exhibition.

We might have a lot of fanciful dreams that cannot make their way to the screen but now the screen doesn't have to be full cinema feature film or even television. Once we have a full stream computer television interface we'll see little broadcast television channels running out of Byron Shire and out of the rainbow region, and I think there's no predicting how far it will go. I think this area is one of the spearheads for the new creativity in Australia and therefore the world.

Wayne Young (Feature film and Television Producer).

A number of significant conclusions may be drawn from the interviews with producers including

- technological change is creating new opportunities for some producers in the region.
 - the advantages outweigh the disadvantages of living and working in the Northern Rivers region. Most producers saw the need to live and work in capital cities declining.
 - demand exists for access to plentiful, cheap broadband services and infrastructure.
 - the role of the independent producer is changing. Up-to-date knowledge, skills and flexibility are required for the producer to adapt to the new role of 'multi-tasking entrepreneur' and to survive and flourish as a content creator in the new economy.
-

In the future there's going to be multiple opportunities for people who can handle the new technology. There's going to be a huge number of new outlets. There's a thinning down now, but after that with the development of the Internet and other distribution formats, people are going to be able to go out and make, master and distribute their own work and it's going to be a whole new ball game. **Michael Murray (Documentary Producer).**

The Study also reveals important information regarding the nature of 'work' in the audiovisual industries. With the exception of the traditional media organisations (newspapers, radio, television), cinemas, retail outlets, some service providers, and a few large production companies, the industries do not operate on the basis of permanent full/time employment, but rather exist on a project-to-project basis.

A survey of 65 projects undertaken by 18 local producers over the past 10 years had total budgets of **\$95,693,500**. Some of the larger projects only had very small percentages of their budgets spent in the region. From these 65 projects, a total of **\$18,839,070** was injected into the local economy. In total these projects employed **1414** people of whom **533** were local people.

Part 2. Overview

Why this study is being undertaken; background to the project

The motivation for this study comes from questions being asked at a federal, state and local level in regard to the economic development and potential of regional centres and in particular the Northern Rivers region. The questions that this study explores are:

1. How can the economic base of the Northern Rivers region be expanded?
2. Have the creative industries in the region reached a critical mass and do they have the makings of a significant cluster that can bring new income and prosperity to the region?
3. What are the major assets in the region in the creative industries sector and what are the competitive advantages in a growing digital media environment.
4. Where are the clusters occurring and how can they be optimised and supported to develop the economic base of the region?
5. Is the recent growth of creative industries in the region sustainable and what strategies are needed to foster this growth?

Where is the Northern Rivers region?

The Northern Rivers region encompasses the area from the Clarence Valley to the Queensland border and includes 10 local council areas: Ballina, Byron, Copmanhurst, Grafton, Kyogle, Lismore, Maclean, Pristine Waters, Richmond Valley and Tweed.

Two amalgamations of local council areas took place in 2000: Richmond and Casino joined to form the Richmond Valley Shire and Nymboida and Ulmarra combined to form Pristine Waters. However, the survey form was compiled and distributed prior to these amalgamations and so this Study uses the names of the 12 original council areas.

The economic base of the region originally developed around its natural resources with strong agriculture and forestry industries. Population growth and lifestyle opportunities have increased employment opportunities in retail, community services, building and construction. Tourism and hospitality activities have grown strongly. Substantial population growth has occurred over the past 10 years in regions with attractive lifestyle attributes, such as good climate, clean water, affordable housing and a beautiful natural environment.²

Although high unemployment is a major concern for the region, an important finding of the Labour Market report is that over the past decade the region's capacity to create jobs has improved

² Labour Market Information & Analysis: Report commissioned by the Northern Rivers Area Consultative Committee, 1999.

substantially. The unemployment rate declined from 16.4% in 1994 to 13% in 1998 and jobs are growing faster than the labour force.

The area has a number of regional centres, including Tweed Heads, Lismore and Grafton and emerging centres such as Byron Bay and Ballina. The population of the region is currently estimated to be 269,000 and growing at a rate of 2.6% per annum. The labour force is growing faster at around 3.1% p.a. (Labour Market Report).

The regional economy has evolved around its natural resource base and its lifestyle attributes. The region remains an important primary producer for the state with beef, dairying, horticulture, forestry and fishing industries. Manufacturing is relatively small by national standards, while the construction industry is booming. Growth industries such as tourism and hospitality, business and finance services are leading to increased demand for hotels, motels, sporting and commercial facilities. Wholesale and retail is the largest sector in the region, providing 17,136 jobs or 20.5% of all jobs in the Northern Rivers. This sector is likely to be dramatically affected by the growth in e-commerce over the next 5 years, both in a positive and negative sense. Programs, individuals and organisations designed to assist businesses with e-commerce strategies, Internet-based trading and on-line business management will become critical during this period.

The region's second largest sector is education, health and community services employing around 16,000 in the region. Other significant employment sectors in the region are transport and storage, finance and business services, government administration, tourism and hospitality.

Increasingly the region is emerging as an international destination for tourism. Byron Bay in particular, is a popular destination for backpackers. The natural and cultural assets of the region and its outstanding coastal resources have the potential to significantly expand its share of the global tourist market. However, the region must compete with other lifestyle regions, and the links to South-East Queensland need to be strengthened to provide easier access to Coolangatta International Airport. Road, rail and air infrastructure are critical to the region's ability to capitalise on its advantage.

Digital information and communication technologies are also facilitating changes to life in the Northern Rivers region in many significant ways. Increasing Internet access is changing the way people communicate, shop, bank, and operate their businesses. Home-based employment is growing and there is an increase in out-sourcing, contracting out, and a rise in part-time and casual work, forcing or encouraging workers to become more adaptable and flexible. All of these trends are affecting people who work in creative industries.

The study began as an examination of the growth of audiovisual (film, video and multimedia) industries in the region, and remains predisposed to these industries. This is the first time any research has been done on this sector in the region, or any attempt made to quantify its size and scope. The Study also sought to assist in the creation of networks by developing a web-site and database for the industry and facilitating a series of meetings and forums. All of these activities contributed to the strategies proposed in the Report to assist the future growth of the industry.

During the course of the Study, it became evident that the growth of audiovisual industries was not an isolated occurrence but was taking place in the context of changes in the global economy. The boundaries and modes of production of the sector are widening with the impact of convergence, and the overlap with traditional arts and the cultural sector is becoming apparent. Following an industry forum in July 2000 and a series of meetings with local producers, it was felt

necessary to place the findings of the Study in a broader context of activities in the region, collectively called creative industries.

Why Creative Industries?

Creative industries is a term used to describe the convergence of traditional media and arts sectors and the creation of new enterprises resulting from this convergence.

Creative Industries have to be viewed in the context of the new world of social and commercial interaction facilitated by advances in information technology. A major shift is occurring in the way we live, learn and work in Australia. It is part of a global change, known as the coming of the 'Information Economy'.³

Creative Industries represent an international and global development rather than a national one. They are the application of new economy principles, as opposed to neoclassical economics. They are about small and medium enterprises rather than larger ones. Creativity has a major input into the sector. The economic role of knowledge is changing, and information rather than labour is becoming the central factor of production in a knowledge economy. Service and information jobs are increasing and there is a spatial shift from integrated national economies to networked cities and regions. All of these developments and shifts have major implications for the economic development of the Northern Rivers region.

What are Creative Industries?

Debate still surrounds an agreed definition. The cultural industries definition is too narrow, so new boundaries have to be established. . "We have to create the creative industries". (Prof. Stuart Cunningham, Head of School of Media and Journalism at Queensland University of Technology)

Creative industries comprise the traditional arts, cultural and media sectors and the new emerging enterprises resulting from the convergence of these sectors. For the purposes of this study, they may be said to include: advertising, arts and crafts, film, television, radio, print media, the performing arts, music, writing, publishing, multimedia production and interactive software creation. They could also be broadened to include architecture, design and designer fashion, and the antiques market. However these areas are beyond the scope of this report.

The national picture

On a national level, the Australian film, television and multimedia industries are experiencing the effects of globalisation and the onset of the Information Age. Academic and industry literature suggest that the changes in digital technology and communications are dramatically altering the

³ Towards an Australian Strategy for the Information Economy, July 1998, Ministerial Council for the Information Economy.

way the film, video and multimedia industries operate (Scott McQuire 1997). This is confirmed by all the producers interviewed as part of this study.

These changes have made it possible for a wider sector of the community to have access to audiovisual production and post-production facilities, and for these facilities to be located outside the capital cities. The markets and outlets for product are changing and so is the way programs are made, funded and distributed.

Telecommuting and specifically the Internet and email have also made it possible for practitioners to operate their businesses from rural and regional centres such as Northern NSW. With the move of industry professionals to the region, there has been a growth of services, facilities, suppliers, related industries and specialised institutions with a focus on audiovisual industries. A significant industry cluster is now evident in the Northern Rivers region representing a new competitive advantage that requires recognition and support.

Within Australia the audiovisual industries at the beginning of the new century are more creatively diverse and technically skilled than ever and the total dollar value of film and TV production continues to grow (AFC/FFC Report on the Film and Television Production Industry, 1999). Major changes are taking place in international audiovisual markets, and the balance of trade is slipping away from the US (Cunningham and Jacka 1996 and Amdur 1993.) Australia does have a comparative advantage as suppliers to these markets because we are an English language country and we have acquired a reputation for high quality production in film, television and multimedia. The challenge facing the entire audiovisual sector is to find and establish niches in the new global economy and to develop sustainable practices in the creation of fresh, high quality content for the emerging outlets and new world markets.

The remainder of this Report consists of a description of the data collected, a summary of the findings, and conclusions and development pathways that can be drawn from these findings. The methods used in the collection and compilation of data are outlined Appendix 1. A summary of the qualitative data obtained from the FILMWORKS Expo, the industry Forums, the producers' interviews and the producers' data sheets are included in Appendix 2. Appendix 3 contains acknowledgments and further supporting information.

The Study has produced valuable information about the growth of creative industries and its potential for the region. It sheds light on the question of why professionals from the audiovisual and arts sectors are moving to the region in large numbers. It provides information about where these professionals are clustering, the nature of the activity taking place, the destination markets for their product, and the advantages and disadvantages of living and working in this region. The Study provides the first asset register for the region in the audiovisual sector and identifies a set of strategies for future development.

Part 3. Existing data

In order to quantify the size and scope of creative industries in the region, a range of sources of existing data were consulted. These are reviewed in detail in this section.

Very little research has been done to quantify the number of people involved in the arts and creative industry sectors in the Northern Rivers region. Apart from a very comprehensive Study into the Art Industry undertaken by Peter Wynn-Moylan in 1991, there have been no further attempts made to gather statistics on the changes in these industries over the past 10 years. A major study was made of the music industry by Chris Gibson from Sydney University in 1999, which identified 2068 people involved in some aspect of the music industry in the region. Some of these figures overlap other aspects of this Study, but his thesis provides some very useful insights into this sector of creative industries. The 1992 and 1996 ABS (Australian Bureau of Statistics) data are included, as they provides the only other source of information on people working in audiovisual industries. The ABS figures are very low compared with the in-depth studies done in 1991 and 2000. One reason for this is that many people identified by these studies are only working part-time or on a voluntary basis in these industries or are investing their time and energy in developing skills in these industries. On their census form they may have listed another occupation as their prime source of income. Further research is required into what constitutes 'work' in the creative industries sector. The ABS has also been slow in responding to the new occupation categories that are emerging as a result of new media and the digital revolution.

The 1991 Arts Study

"**Making Art Work**" was a comprehensive Report into the Art Industry of the Northern Rivers region compiled by Peter Wynn-Moylan in 1991. The Report concluded then that the Northern Rivers region had become the liveliest and most exciting arts area in Australia with more artists and craft workers per head of population than anywhere else, including the cities. The Report canvassed artists and arts organisations in all the art forms, which included visual arts, fine art, all the crafts, writing, performing arts, dance and music. The study also included film and video makers and photographers.

The artists of the region were divided according to principal art forms into three main groups: Producers of artworks, Performers and Teachers. The Study found the following:

Producers: An estimated **745** people producing artworks as their primary occupation.

Performers: A more difficult group to estimate, as it included many types of performers whose employment was sporadic and inconsistent. However **450 to 550** professional performers were identified in the region, excluding TV and radio.

Teachers: An estimated **90** people were identified as being involved in full-time art education both public and private, and a further unidentified number were practising artists who supplement their income by teaching in their art form.

In total **1285** professional 'artists' were identified in the region.

A further breakdown of these figures revealed that:

2.6% of these were photographers (34)

1.5% were film and video makers (19)

3.1% were writers (40)

22.9% were musicians (294)

The largest percentage identified in this study were visual artists: 25.7% (330).

The Report also provided significant data on the income and expenditure of artists, their training needs and profiles, arts organisations, galleries, retail outlets and arts funding. The development of the area as an artist's mecca was tracked back to the mid-seventies, when the migration of artists from the cities began.

"Drawn by the climate, environment and a creative lifestyle, they began establishing a vibrant arts community that has now become an important contributor to the region's economy and a major part of its tourism appeal.....In fifteen years, the Arts has expanded its economic value to the region from a relatively small base to approximately \$27.7 million per annum in goods, produced, jobs created and services used". Peter Wynn-Moylan, 1991 Arts Study.

However, the report concluded that *"The true potential of the Arts as an important INDUSTRY in this region has not been realised. The Northern Rivers is regarded by experts as the richest region in artistic talent and activity in Australia, with the potential to create a major, self-sustaining art industry that would be a substantial economic boost for the region. It should reduce unemployment, be a significant secondary tourist attraction and provide a desirable cultural climate for old, new and future residents"*. Peter Wynn-Moylan concluded the Report by saying: *"The benefits which would flow from a vigorous, integrated art industry are considerable and extensive and the opportunity to take advantage of its potential has never been greater."*

Ten years later, when asked to comment on the long-term outcomes of the Report and the state of the arts industry, Peter Wynn-Moylan had the following to say, in November 2000:

"Not many of the recommendations were acted upon. We were made to jump through numerous hoops by the existing regional development bodies at that time, and when we emerged from the bureaucratic mire, all the money had gone. We were seen as an adjunct to other industries such as the Tourism industry and we participated in the 1995 Cultural Tourism Plan. However, once the area lost its arts development officer, much of the impetus that had driven the study was gone. The arts industry in the region has since gone into decline. Visual arts has contracted enormously and would only have 60% of the activity we reported in 1991. There are far less galleries, and craft production has dropped off considerably. Performing arts has consolidated around NORPA and there would be fewer professional actors, performers and dancers now than were recorded in 1991. Of the top 50 earning artists in the region, only about 5 remain. The rest have left the region. The music scene has changed considerably and activity has contracted. The only growth has been in the film, video and multimedia sectors."

No subsequent study of the arts industry in the region has been undertaken. The Tweed Arts Network recently announced that they were exploring ways of funding a new regional arts survey. Tweed Arts Network president Tony King said the population of the region had increased considerably since 1991 and he hoped that a new regional arts survey would open the industry up "in a highly refreshing way and provide us with a host of advantages in the economic and social development of the Tweed, Clarence and Richmond Shires" (Northern Star July 2000).

The 1992 and 1996 ABS data

Australian Bureau of Statistics data was requested for 1992 and 1996. The parameters sought were the postcodes for the Northern Rivers region and a list of occupations that closely matched those described in "Creative Industries". The 1992 list of occupations was a lot shorter than those

provided for 1996. This was because the ABS revised their occupation lists in this period, and drew up more refined categories to accommodate new occupations such as "Media Producer" and "Desktop Publishing Operator".

The **1992 data** provided by the ABS included the categories "Production Managers" and "Street Vendors and canvassers". These were deleted, bringing the total number of professionals identified in the region to **793**. (The term Production Managers in ABS terms was used to describe managers who worked in the production sector and street vendors and canvassers do not fall under the umbrella of "Creative Industries" as described in this Report).

1992 ABS Data: Number of people in listed professions.

Actors & related professionals	10
Film, TV & stage directors	8
Designers and illustrators	104
Photographers	38
Authors & related professionals	26
Musicians and composers	74
Performing arts support workers	28
Dancers and choreographers	2
Journalists	86
Announcers	14
Computing professionals	103
Word processing operators	74
Painters, sculptors, etc	33
Jewelry/precious metal tradespeople	29
Craftworkers	82
Ushers & door attendants	50
Animal trainers	32
TOTAL	793

Note: The ABS has a policy that, when there are only 1, 2 or 3 people listed in a particular category; they will record the figure as a 3. In order to reflect a more accurate picture, in this study these figures have been revised to a 2 in all cases.

The **1996 ABS data** provided a far wider range of professions, but again some of the categories fell outside the scope of "Creative Industries". These were deleted from the list provided and the total number of professionals identified in the 1996 data for the region had declined to **516**.

This decline in numbers conforms with statements made by Peter Wynn-Moylan regarding the decline in the number of artists in the region between 1991 and 1996.

1996 ABS Data: Number of people in listed professions.

Actors	2
Animal Trainers	0
Illustrators	4
Art Directors (Film, TV or Stage)	2
Authors	18
Ticket Collectors or Ushers	33
Camera Operators (Film,TV,Video)	4
Dancers or Choreographers	14
Directors of Photography	2
Performers, Dancers & Related professionals	13
Composers	6
Computing Professionals	14
Performing Arts Support Workers	2
Copywriters	8

Fashion Designers	14
Journalists & Related Professionals	8
Desktop Publishing Operators	20
Editors	20
Graphic Designers	80
Media Producers	22
Print Journalists	62
Television Journalists	0
Radio Journalists	4
Film, TV, Radio & Stage Directors	4
Make Up Artists	2
Artistic Directors	0
Visual Arts & Crafts Professionals	75
Musicians & Related Professionals	0
Photographers	46
Program Directors (Radio or TV)	4
Production Assistants (Film, TV, Radio)	4
Production Assistants (Theatre)	0
Script Editors	4
Sound Technicians	25
TOTAL	516

PhD Thesis by Chris Gibson

Chris Gibson's 1999 PhD thesis provides a comprehensive analysis of the music industry in the region. In particular, his Chapter 6 examines developments which include the digitisation of music production and links between music producers and those in information, desktop publishing and design industries and the increasing amount of musical activity targeted at tourist markets, in particular at Byron Bay.

*"With an emphasis on mobility and the erosion of geographical distance and barriers, these strategies attempt to go beyond the 'local as resistance' paradigms and aim to integrate local musicians in wider networks of influence and dissemination beyond 'conventional' systems of provision. With these changes come new sets of linkages between music and place, and an emerging political economy of music production connected to the wider social geography of the region."*⁴

Gibson argues that the North Coast region of NSW has been, at times, integrated with the wider Australian music industry, as a consumption arena, and intermittently as a source production region. In tourist promotional brochures, the region is described as a 'Mecca for music fans... the booming pub and club circuits showcase a wealth of red-hot talent... Lismore has a growing reputation as a nursery for exciting alternative and 'indie' bands' (Northern Rivers Regional Economic Development Organisation, 1997:34). To date, a range of bands and solo artists from the North Coast area have had success beyond the region, including Grinspoon, solo performers Diana Ah Naid and Troy Cassar-Daley, and 'indie' bands The Simpletons and The Mabels.

⁴ Chris Gibson, "**Decentred sounds? Systems of provision for popular music and a regional music industry**"; School of Geosciences, University of Sydney, January 2000

"Regional areas and rural locations are residual consumption arenas and largely overlooked as sources of production. Yet, despite this geography of production, discussions surrounding flexible corporate strategies and the advent of new technologies, media and consumption patterns suggest that regional areas such as the North Coast are well positioned to become the new 'breeding grounds' for bands and artists for the national and international market (see for example McCormack, 1991; Hesmondhalgh, 1998; *The Northern Star*, 1998; *Time Off*, 1999)"⁴

Chris Gibson provides the following table on employment in the North Coast music industry. Some of these figures, such as the NORPA and community radio estimates have been included elsewhere in this report, but his estimates of the number of employees in the other activities related to the Music Industry have been included as part of "Industry Organisations in the region" under "NCEIA and the local Music Industry". These activities include Retail, PA hire, recording studios, education, live venues and working musicians. These estimates are important not only for the music industry but for the growth of creative industries in general in the region.

<i>Activity/employer</i>	<i>Type of work</i>	<i>Sector</i>	<i>Number of employees</i>
NORPA	Part time/full time	Social economy	100
NCEIA	Volunteer	Social economy	100
Community radio	Volunteer/part time	Social economy	240
Retail	Full time/part time	Formal economy	156
Other activities (PA hire, recording studios, education)	Full time	Formal economy	153
Live venues	Part time	Formal/informal economy	471
Musicians (live performances)	Part time	Informal economy	848**
Total			2068

* See Appendix 11 for an explanation of the rationale for estimating these amounts
 **This figure represents the number of musicians in paid performances advertised in *The Northern Star*, July – Nov 1999 (Lismore-Ballina-Byron Bay area). NCEIA estimates that it has approximately 600 members; while there are anywhere up to 4,000 active musicians in the wider region (including Tweed Heads, Coffs Harbour).

Regional and National directories

In compiling the consolidated database of people working in audiovisual industries, this Study made use of a number of existing directories. These included the regional White and Yellow Pages Phone directories, Encore directory (which lists people working in the film and television sectors), the Production Book (an on-line directory, also for the film and television sectors), a database compiled and provided to this Study by Alan Grey from Mullumbimby Access Point, and the delegates who attended both the May Industry Forum in Lismore and the July Forum in Clunes. Figures were also included from the membership of North Coast CAMERA and the people who joined the FILMWORKS website database, as well as people who responded to media coverage about the survey. Data was also sourced from:

⁴ Chris Gibson "**Decentred sounds? Systems of provision for popular music and a regional music industry**"; School of Geosciences, University of Sydney, January 2000

The Australian Film Commission, including "Get the Picture"
NSW Film and Television office
Australian Film, Television and Radio School.

Industry organisations in the region

Creative Industries in the Northern Rivers region are already represented by a number of industry organisations. These organisations were contacted to gain a picture of the overall size of creative industries in the region. The following data was revealed:

- Northern Rivers Writers' Centre: estimated membership: **268**
- NCEIA and the local Music Industry: estimated number: **1500**
- NORPA and professional performers, theatre workers & contract workers: estimate **100**
- Northern Rivers IT: number of people listed on their database: **410**

This provides a total estimate of 2278 people involved in creative industry organisations in the region. These organisations are described in further detail below along with information about the estimates used for each organisation.

Note: No data exists for the current number of visual artists or craftspeople, arts administrators or teachers, and although these sectors fall under the umbrella of 'creative industries', they were out of the scope of this Study.

1. The Northern Rivers Writers' Centre

The Northern Rivers Writers' Centre is a non-profit, incorporated organisation receiving its core funding from the NSW Ministry for the Arts. This is one of eight such centres in NSW, all of which are part of a network called Litlink which has been in existence since 1994.

As a regional writers' centre, it is responsible for the promotion of Australian literature and the development of skills for readers and writers in the Northern Rivers. The region stretches from Taree to Tweed Heads and west to Kyogle. In order to fulfil this, the organisation is foremost an information and resource base, open 10-4pm Mon to Fri.

The centre is responsible for a year round program of readings, courses, workshops and writer visits to various parts of the region. A major project for the Northern Rivers Writers' Centre is the annual Byron Bay Writers' Festival. This is now the major regional literary event in Australia with a 4 day program and an audience of 7000.

The centre is an active and vital arts organisation within the community. It endeavours to assess and address the needs of its members and the wider community and, in so doing, provide a much needed resource in skill development, artistic opportunity and awareness of the Australian and regional literary scene.

Presently the Writers Centre has a membership of 268 individuals and organisations. These members have ready access to information and skill development and receive many benefits including a newsletter every 6 weeks, member gatherings, and discounts to the centre's activities. This membership figure is used as the estimate for the Northern Rivers Writer's Centre.

2. NCEIA (North Coast Entertainment Industry Association)

The North Coast Entertainment Industry Association was formed in late 1989 as the North Coast Music Industry Association (NCMIA) with the purpose of rewarding excellence in original North Coast music and entertainment. Initially the primary purpose was to present the North Coast Music Industry awards, which were first presented in 1990.

In 1992 the Association was incorporated under its present name and organisational structure and the Awards became known as the Dolphin Awards. NCEIA is made up of an executive committee of President, Vice President, Secretary and Treasurer and a group of four general committee members who take responsibility for the necessary functions of the Association.

NCEIA is membership based with annual dues of \$20.00. The number of financial members varies each year and is heavily dependent on the number of Dolphin Awards entries and special projects conducted in that year. However, the constitution of NCEIA makes it clear that membership is only terminated upon receipt of a written resignation. Therefore, everyone who has been a member of NCEIA and who hasn't resigned remains a member.

Precise records of membership do not exist prior to 1997. In 1997 the number of membership receipts was 148. In 1998 there were 240 financial members and in 1999 membership renewals and applications numbered 133. The figure so far in 2000 is 174 and this is also the average membership over the last 4 years.

The study conducted by Chris Gibson into the Music Industry in the region identified the number of employees in that industry and related activities as follows:

Retail (Musical instruments/product):	156
Other activities (PA hire/recording studios):	153
Live venues:	471
Musicians (live performers):	848
This provides a total of	1628

As some of these people may have been captured in the database of audiovisual industries collected as part of this Study, the number of people involved in the Music Industry is conservatively estimated to be **1500**.

NCEIA also has a list of honorary memberships each year. These include judges, sponsors and NCEIA volunteers numbering about 90 per year and comprising both individuals and corporate entities making the total number difficult to quantify.

The activities undertaken by NCEIA include:

- Producing the Dolphin Music Awards for 10 years (28 categories)
- Conducting Industry Forums
- Promoting local training opportunities through ACE and TAFE
- Event management (Lismore Fun Festival, Lismore Torch relay)
- Founding member of the Australian Music Industry Network (AMIN)
- Liaising with and advising government funding bodies on behalf of their members
- Providing local industry advice to members and the general public
- Promotion and support of SCU, TAFE (Lismore, Murwillumbah and Grafton,) & NR Conservatorium
- Youth and all ages concerts
- Compilation albums of North Coast music
- Cultural exchanges with other AMIN members

- Sending bands to Pacific Circle EXPO 2000
- Compiling an Entertainment Industry database (in progress).

3. NORPA (Northern Rivers Performing Arts inc.)

NORPA is a multi-arts organisation established in 1993. It is the flagship performing arts organisation for the Northern Rivers region and the only professional not-for-profit performing arts company remaining between Hornsby (Sydney) and South-East Queensland. NORPA is based in Lismore and produces and presents performing arts that reflect the aspirations and conflicts in contemporary Australia. Each year NORPA produces a varied subscription season, presenting it throughout the Northern Rivers region. In March 1999 the internationally acclaimed composer and then vice-chancellor of Southern Cross University, Professor Barry Conyngham, described NORPA as "the most dynamic arts organisation in Australia".

Under Lyndon Terracini's artistic direction, the subscription series is designed to appeal to a wide local audience, encompassing diverse ages, interests, incomes and life-styles. The company's own productions aim to create work of importance locally, and to commission and create work of lasting value relevant to all Australians, establishing the basis for a repertoire of music theatre for future generations.

“NORPA is unique in that it presents an extensive and ambitious program made up of its own, locally commissioned work, as well as performances available on the national touring circuit. The locally produced work is increasingly of national significance.”

Bob Carr, Premier, Minister for the Arts and Minister for Citizenship.

Since 1993, NORPA has produced twelve original works crossing all art-forms, and presented nearly 140 productions in the region. The company has employed over 1000 artists and arts workers. With a full-time staff of seven (in 2000) and a wages bill (in 1999) of \$246,811 (for NORPA employees part and full-time) and artists' fees of \$130,283, NORPA is a significant local employer. The company's turnover in 1999 was \$700,000.

Having been awarded the contract to manage Lismore City Hall since 1993, NORPA has been instrumental in securing over \$700,000 in capital grants and donations for improvements to this community venue, including a lift for people with disabilities, the addition of retractable tiered seating and new stage lighting.

The other venue managed by NORPA, the Star Court Theatre in Lismore, would have been lost to the community without NORPA and the Volpato family. NORPA invested over \$40,000 of its own capital into building the stage and dressing rooms, converting the former cinema into a quality theatre seating 390 people. Both venues are utilised by the community for social, business, entertainment and artistic events.

NORPA is actively exploring the potential of the cross over between performance arts and new media. One of its goals for the coming year is to convert the Star Court Theatre in Lismore into a new media venue. They see this as a potential venue for projects arising from the interaction between performers, dancers, film and video makers and all types of new media. No such venue yet exists in the region. The type of events this new venue could host include multimedia events or a web-page design festival. They would also like to explore the use of audiovisual material in performing arts further.

"Traditional set design and construction may be becoming a thing of the past. Now we can project images and create virtual sets and the possibilities for the performing arts are endless"

Greg Aitken, Acting General Manager - NORPA

Estimating the number of performers and theatre artists in the region is difficult. The 1991 study identified **186** people as follows:

Actors/performers:	117
Dancers:	37
Theatre production workers:	32

There are a number of indicators that this number has reduced in the past 10 years. Peter Wynn-Moylan, who undertook the 1991 study, has claimed that the number of arts professional in all sectors except film, video and multi-media have declined. Greg Aitken supported this claim, but said that more research needs to be done in this regard.

"You have to be a gypsy if you want to survive as a professional actor or dancer. It's the nature of the business. You have to travel to the capital cities or other regional centres that produce work and there aren't many of those if you are serious about working professionally. Unfortunately, there isn't enough work in our region to sustain a company of actors or dancers.

Theatre is very expensive and very hard to make profitable. If you're paying people, that is, and NORPA pays people. It costs at least \$50,000 to mount a theatre production and generally you won't make that back on door sales. We rely on sponsorship or subsidies to attempt to break even.

It is more difficult to run an ambitious theatre/arts company in regional Australia than it is in the capital cities because of the smaller population. NORPA has survived because of the quality of subscription season and the dedication of our staff. We are serious about our intention to explore the possibilities of new performance works arising from the cross-over with digital technology and new media. **Greg Aitken, Acting General Manager**

In 1998, NORPA employed 111 local artists and 89 local technicians; a total of 200 contract workers. The full-time staff employed by NORPA in 1998 totalled 12.⁵

For the purposes of this Study, the number of performers (dancers, actors, comedians), theatre technicians and theatre production workers in the region has been estimated conservatively at **100**. Further research is needed in the region in the area of theatre and performance arts.

4. NRIT (Northern Rivers IT)

NRIT provides a wide range of IT&T and new media related services by using a strategy of managing and developing a regional network of specialised IT&T service providers. Their network draws on a wide range of new media related services, containing many highly skilled and experienced people who have chosen to live and work in the region for the lifestyle this beautiful area offers.

The Northern Rivers IT&T skills and services database currently contains **410** information technology and telecommunications related individuals and businesses that are currently operating in the region. This is, however, a private database and Glen Schaefer from NRIT estimates the actual numbers to be 2-3 times this amount. He also has indicated that of the 410 listings, many

⁵ Northern Rivers Performing Arts Inc. 1998 Season. Number of artists and technicians employed.

are organisations that employ a number of people ranging from 2 to 40. Further research is required to obtain a more accurate picture of the number of individuals working in the new media and multimedia industries in the region. The figure of 410 is therefore a very conservative estimate.

Part 4. The size and scope of creative industries

Summary of findings: quantitative data

A consolidated database of people working in audiovisual industries in the region was compiled from a wide range of sources, including local and national directories, the web-site, membership records of North Coast CAMERA, a database compiled by Mullumbimby Access point (MAP) and people located through the extensive media campaign conducted as part of the Study. The database produced the following figures:

Individuals: Primary Sector: Production or content creation	Totals
1A Producers, Directors, Media Producers	36
1B Production and Post-Production crew	144
1C Cast and other key creative roles	71
1D Individuals in professional media - Television, Radio & Press	10
1E Multimedia, Advertising, Graphics	39
1F Fashion Designers (Costume artists), Visual Arts & crafts (sets and props)	10
TOTAL PRIMARY SECTOR	310
Businesses: Secondary Sector: Distribution and Retail	
Distributors, Dubbing services	7
Retail and hire of equipment and services, (eg. sound, lighting, camera or computer retail stores; equipment hire and supplies)	19
Repair and maintenance services, (eg. camera/sound equipment or TV antennae repair)	26
TOTAL SECONDARY SECTOR	52
Businesses: Ancillary Sector: Exhibition	
Cinemas, screening venues	9
Video rental stores	27
Traditional Media - (TV stations, radio stations, newspapers, community TV and radio.)	33
New Media - (Pay TV, public Information outlets, telecentres, Internet service providers and Internet cafes.)	2
Festival and screening organisers	6
TOTAL ANCILLARY SECTOR	77
Individuals: Hobby/Aspiring/Observers	
Participants in training courses	31
Interested members of community	26
TOTAL HOBBY/ASPIRING/OBSERVER SECTOR	57

In total the database revealed the following:

TOTAL INDIVIDUALS IN PRODUCTION OR CONTENT CREATION	310
TOTAL HOBBY/ASPIRING/OBSERVERS:	57
TOTAL BUSINESSES:	129

All 129 businesses were contacted by telephone to determine the number of people working in these businesses. The employees were divided into full/time, part/time and voluntary staff.

THE TOTAL NUMBER OF PEOPLE WORKING FOR THE 129 BUSINESSES IS 1254

Status	Number
Full-time	613
Part-time	239
Volunteer	402
TOTAL	1254

If the number of individuals ($310 + 57 = 367$) from the database is added to those working for local business and service organisations (1254), the estimated total for those 'working' in audiovisual industries in the region is **1621**

Notes on these figures:

1. Of the total of 1621, the number identified as working without pay or in a voluntary capacity is 459. This produces a total number in the paid workforce of 1162 which is still an increase of 46.5% since 1992 and 125% since 1996. The concept of what constitutes 'work' in the audiovisual industries requires further study and analysis. The people working in unpaid or voluntary positions in this industry are often working in excess of 30 hours per week and are positioning themselves for future employment. Many of them are doing training and skills development and investing in equipment and professional development to enable them to generate projects and employment for themselves in the future.
2. The figures for New Media organisations (Pay TV, Public Information outlets, Telecentres, Internet service providers and Internet cafes) did not receive adequate attention and further research is required in this area.

The membership of North Coast CAMERA was incorporated into the consolidated database, and the majority of the 57 people listed as "aspiring/hobby/observers" are members of North Coast CAMERA.

North Coast CAMERA

North Coast CAMERA was established in 1995 to encourage and support film-makers in the Northern Rivers region. It is a volunteer-run community media group that organises film screenings and monthly workshops with industry professionals and provides networking and co-ordinating services for the film, video and multimedia industries in the region. North Coast CAMERA is based in Lismore and now represents over 140 people throughout the region, from Grafton to Murwillumbah. CAMERA provides a screen culture service through its regular screenings of local and alternative national work, which includes short film festivals. It also offers training workshops with industry professionals in Lismore and Byron Bay on a monthly basis. CAMERA produces a regular newsletter and supports many other activities aimed at the development of the industry in the region.

The survey results

Six hundred copies of the survey forms were circulated throughout the region. The prime methods of circulating forms were: the FILMWORKS EXPO; the two Industry Forums; a phone survey by North Coast CAMERA; meetings with managers of local media organisations, media promotion and on-line distribution from the FILMWORKS web-site

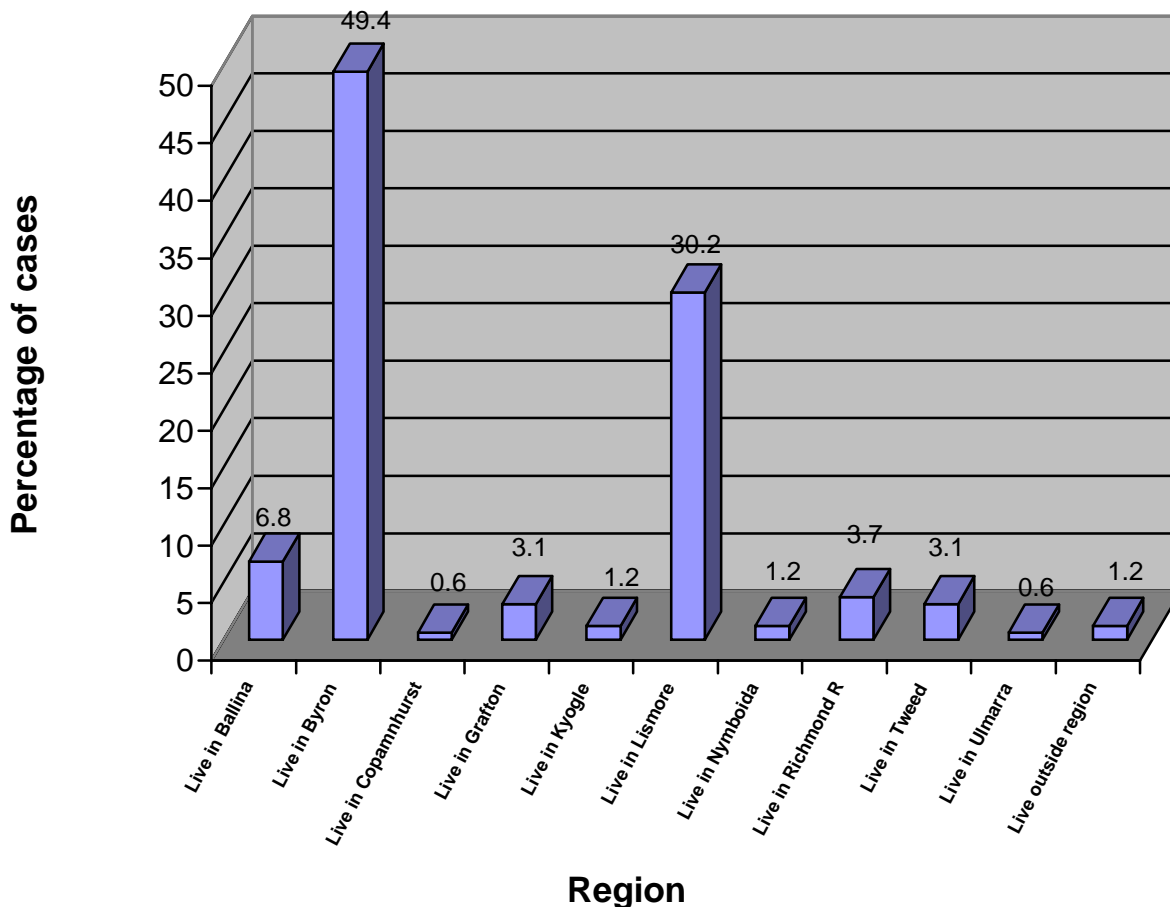
A total of 162 surveys were completed and returned by people working in audiovisual industries in the region. A full copy of the survey form appears in Appendix 2.

SURVEY RESULTS

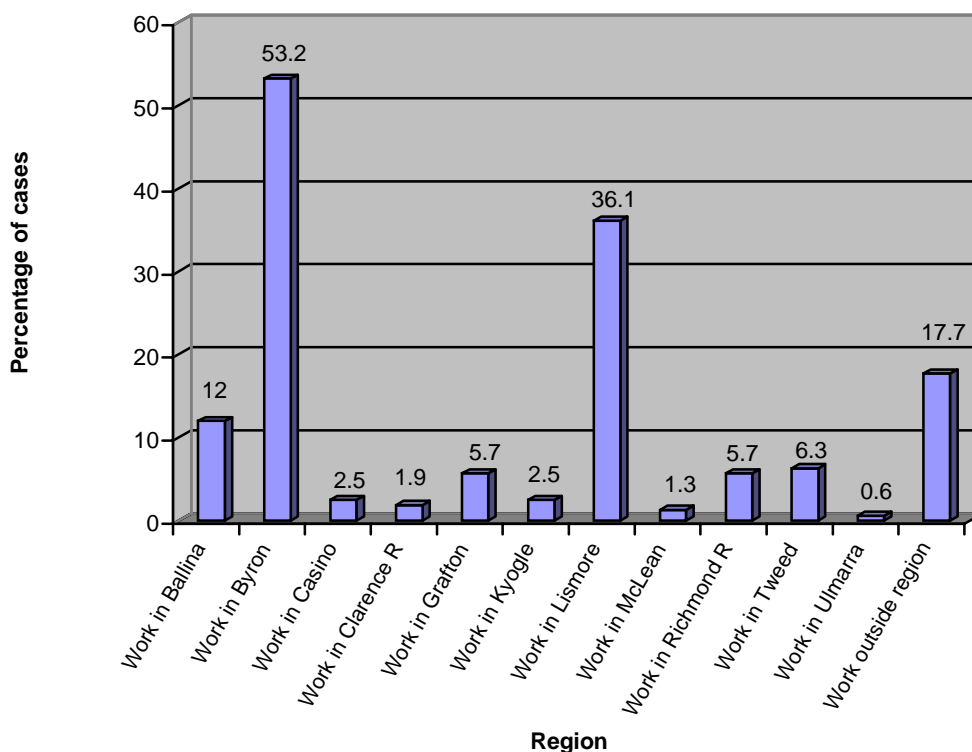
1. Industry clusters - where people are living and working:

The survey asked participants to tick the box next to the region where they lived and where they worked. The significant finding was that the major cluster of people working in audiovisual industries live in the Byron Shire (**49.4%**). The second largest cluster was Lismore with **30.2%** and then Ballina with **6.8%**.

Percentage of surveyed people living in each region



Percentage of people working in each region



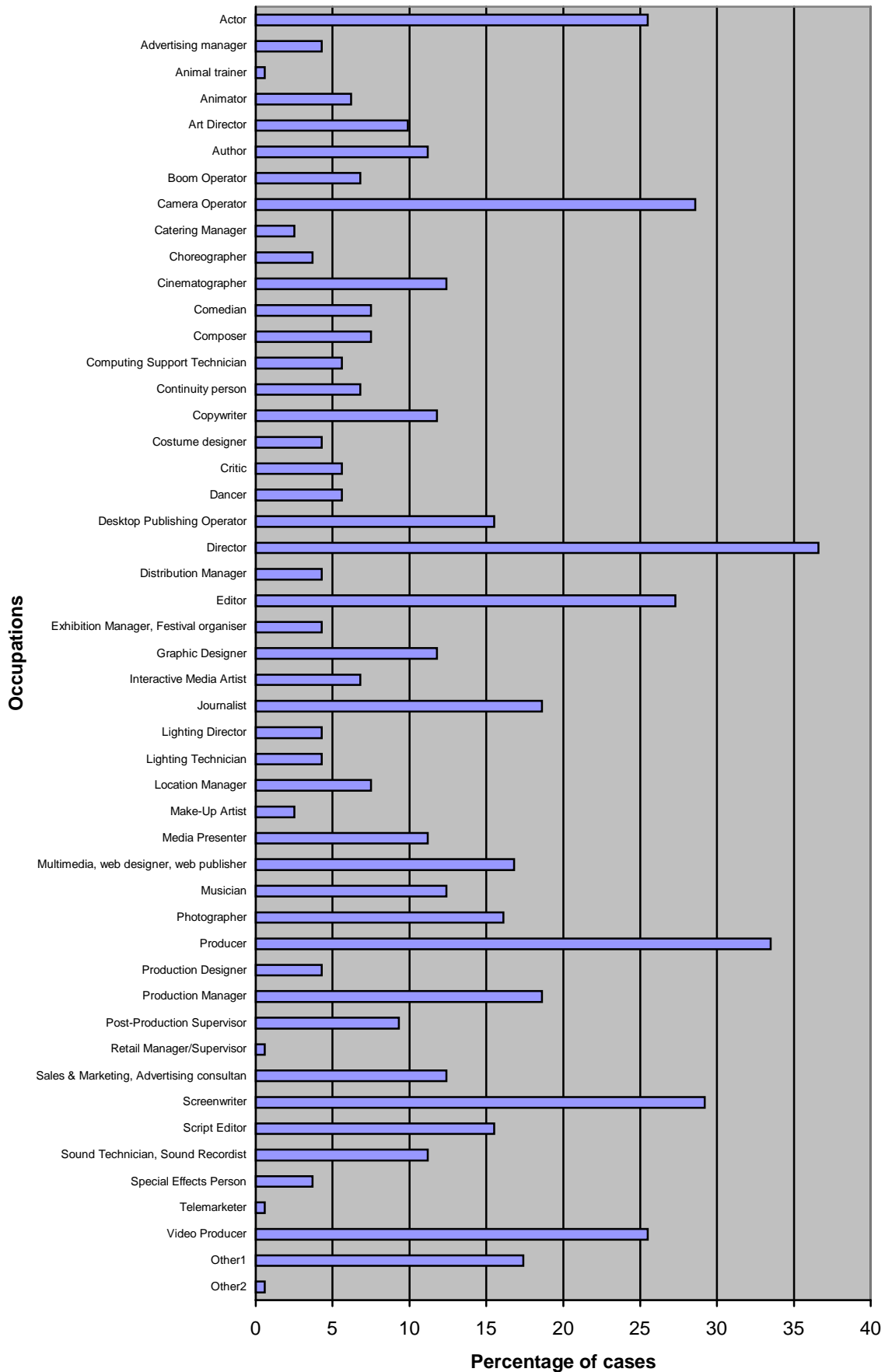
This table shows that the majority of the people surveyed work in the Byron Shire area (**53.2%**). The second largest work cluster is Lismore (**36.1%**) followed by people who live in the region but work outside the region (**17.7%**). Ballina was the third largest work cluster in the region with **12%**.

It should be noted that the media organisations in Lismore and Byron Bay were more successful in returning completed survey forms than those from any other regions. This would impact on the large clusters showing in the two leading regions.

2. Occupations - the number of people working in the various sectors of audiovisual industries.

The survey asked people to select all the occupations in a list of 48 choices that reflected the work that they do. Ninety five percent of people listed more than one occupation category. The purpose of this question was to identify the range of occupations that comprise the audiovisual industries. The results indicate that most people are multi-skilled and have a wide range of interests and occupations under the broad banner of audiovisual industries. The following table details all the occupations listed and the percentage of people who listed that occupation as part of their work.

Occupations of surveyed people in region



The category that was selected most was Director (59 people or 36.6%), followed closely by Producer (54 people or 33.5%). Video Producer was also frequently selected as a category (41 people or 25.5%).

As directors and producers are the main initiators of work in the audiovisual industries, this finding indicates that the majority of people are self-employed and creating or wanting to create their own work. The consolidated database for the region identified only 36 credited producers in the region. The survey result may be an indicator that many people wish or aspire to be producers.

A significant number of people surveyed also identified as screenwriters (47 people or 29.2%) and script editors (25 people or 15.5%) and authors (18 or 11.2%). These findings indicate strong interest in the region for the development or script writing stage of projects.

The other key creative roles in production that were listed frequently were actor (41 people or 25.5%) and musician (20 people or 12.4%) The other production support roles that appeared often were camera operator (46 people or 28.6%) editor (44 people or 27.3%) and production manager (30 people or 18.6%).

In the fields of traditional and new media, the roles that featured most often were journalist (30 people 18.6%), desktop publishing operator (25 people or 15.5%) and multimedia/web-designer/web publisher (27 people or 16.8%).

A separate question asked participants to select all the occupations whose services they require in the course of their work. The following occupations were listed:

Occupation required	% of cases	No. of cases
Require Actor	44.9	53
Require Advertising Manager	14.4	17
Require Animal Trainer	5.9	7
Require Animator	19.5	23
Require Art Director	22	26
Require Author	11	13
Require Boom Operator	20.3	24
Require Camera Operator	42.4	50
Require Catering Manager	14.4	17
Require Choreographer	11	13
Require Cinematographer	33.1	39
Require Comedian	11	13
Require Composer	27.1	32
Require Computing Support Technician	22.9	27
Require Continuity Person	20.3	24
Require Copywriter	15.3	18
Require Costume Designer	25.4	30
Require Critic	9.3	11
Require Dancer	12.7	15
Require Desktop Publishing Operator	21.2	25
Require Director	28.8	34
Require Distribution Manager	25.4	30
Require Editor	44.9	53
Require Exhibition/Cinema Manager	8.5	10
Require Graphic Designer	29.7	35
Require IMAX Producer	5.1	6

Require Interactive Media Artist	13.6	16
Require Journalist	18.6	22
Require Lighting Director	22	26
Require Lighting Technician	31.4	37
Require Location Manager	18.6	22
Require Make-Up Artist	25.4	30
Require Media Presenter	13.6	16
Require Multimedia Artist	16.9	20
Require Musician	29.7	35
Require Photographer	37.3	44
Require Producer	41.5	49
Require Production Designer	22	26
Require Production Manager	32.2	38
Require Post-Production Supervisor	26.3	31
Require Retail Manager/Supervisor	6.8	8
Require Sales & Marketing Manager	22.9	27
Require Screenwriter	22.9	27
Require Script Editor	30.5	36
Require Sound Technician	41.5	49
Require Special Effects person	24.6	29
Require Telemarketer	8.5	10
Require Video Producer	21.2	25

These results indicate that the services most required by those surveyed in the region were those of Actors (44.9%) and Editors (44.9%). Other services in high demand were Camera Operator (42.4%), Cinematographer (33.1%), Sound Recordist or Technician (41.5%), Photographer (37.3%), and Production Manager (32.2%). The number of people requiring the services of Directors (28.8%) and Video Producers (21.2%) was low, as presumably the majority of people felt that they could or would like to undertake these roles themselves.

3. Income and percentage of work originating in the region:

Of the 162 people surveyed, only 108 completed the section regarding income. The majority of people who left this section blank were those in the higher income brackets - ie working for traditional media organisations or operating successful business or production and service companies in the region. This survey found that 50% of those who responded had incomes under \$5,000 and only 20% were earning more than \$30,000. These results should allow for the fact that the missing 54 income figures could fundamentally alter the picture reflected in the table.

Income range	No. who responded	Valid Percent
0-\$5,000	54	50
\$5,000-\$10,000	9	8.3
\$10,000-\$15,000	4	3.7
\$15,000-\$20,000	10	9.2
\$20,000-\$25,000	3	2.7
\$25,000-\$30,000	7	6.4
\$30,000-\$35,000	4	3.7
\$35,000-\$40,000	3	2.7
\$40,000-\$45,000	3	2.7
\$45,000-\$50,000	5	4.6
\$50,000-\$100,000	5	4.6
More than \$100,000	1	0.9
Total responded	108	100
Missing	54	
Total surveys	162	

In conclusion, income was not satisfactorily assessed by this survey and considerable further research needs to be done into the economic impact of the creative industries in the region. The questions regarding the percentage of work, finance and control that comes from within the region yielded the following results:

Percentage of work originating in the region:

37% said that all of their work originates from within the region

6% said that none of their work originates from within the region

For the rest, the majority said that over 90% of their work originates from within the region.

Percentage of finance from within the region:

40% said that all their finance or income comes from within the region

21% said that none of their income comes from within the region

The majority of the rest said that 20 - 50% of their income comes from within the region.

Percentage of control of the work coming from within the region:

50% said that all control of their work comes from within the region

15% said that none of the control of their work comes from within the region

The majority of the rest said that 80 - 98% of control came from within the region.

One very useful question that was not asked in this section of the survey was whether the person being surveyed was a salaried employee or self-employed. This would have provided very useful data in interpreting the above results. Without it, all that can be concluded is that for approximately half of those surveyed, finance and control of their work comes from outside the region. This result has an interesting parallel when the production data sheets of 18 local producers were examined. There it was found that on average 52.2% of the income from their productions was being spent outside the region. A number of the strategies proposed in this report aim at addressing the question of bringing more projects and finance into the region and keeping more income from locally initiated work within the region.

The whole question of income, financing and control of projects, and the nature of work in the creative industries sector needs considerably more research and examination.

4. Where the work takes place and destination markets for local product

Production stages and where they occur.

Stage of Production	% occurring within NR region	% occurring outside the region	Combination of both	N/A
Research	46.4	4.6	24.2	24.2
Writing	60.1	2.6	9.8	27.5
Development	47.4	4.6	9.2	38.8
Pre-Production	51	3.3	11.8	34
Production	42.5	9.8	20.3	27.5
Off-line	36.6	5.9	5.9	51.6
On-Line	28.8	15	5.9	50.3
Sound Post-Prod.	32	13.1	4.6	50.3
Graphics	34	7.8	5.2	52.9
Special Effects	22.9	7.8	5.2	64.1
Animation	17.6	3.9	3.3	75.2
Music	35.9	6.5	11.8	45.8
Narration	28.1	3.9	9.2	58.8
Translations	4.6	5.9	2.6	86.9
Sub-titles	9.9	7.9	2	80.3
Marketing	26.1	12.4	14.4	52.9
Distribution	20.3	12.4	14.4	52.9

Destination markets for work

People surveyed were asked to mark all the relevant destination markets for their work. 95% of people marked more than one market. The Internet was not listed as a destination market (a major oversight), but 11 people (7.2%) listed it under the section marked "Other". Clearly the ABC and SBS were the most frequently sought after and used markets by those surveyed (46.1%). They were followed by national festivals (41.4%), festivals in the Northern Rivers region (38.2%), national commercial TV (34.9%) and national education markets (30.3%).

Markets	% of Cases	Count
ABC/SBS	46.1	70
Commercial TV Northern Rivers	17.8	27
Commercial TV National	34.9	53
Commercial TV International	25	38
Cinema Northern Rivers	14.5	22
Cinema National	22.4	34
Cinema International	17.1	26
Festivals Northern Rivers	38.2	58
Festivals National	41.4	63
Festival International	27.6	42
Community TV Northern Rivers	19.7	30
Community TV National	11.8	18
Community TV International	6.6	10
Markets Corporate Northern Rivers	16.4	25
Corporate National	19.1	29
Corporate International	7.2	11
Educational Northern Rivers	23	35
Educational National	30.3	46
Educational International	12.5	19
CD/DVD NR	11.8	18
CD/DVD National	15.8	24
CD/DVD International	15.8	24
Commercial Radio, Press	10.5	16
Community Radio, Press	11.2	17
Internet	7.2	11
Other	9.9	15
Don't know	2	3
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10 missing cases; 152 valid cases

5. Training profile.

Those surveyed were asked to describe the training they had undertaken and where this training had been provided. A summary of the findings are listed below.

Where training was undertaken	% of Cases	Count
National broadcaster	5.2	7
University/TAFE - Northern Rivers	27.4	37
University /TAFE - Outside Northern Rivers	40	54
Community - Northern Rivers	31.9	43
Community - Outside Northern Rivers	14.8	20
On the job - Northern Rivers	34.8	47
On the job - Outside Northern Rivers	23.7	32
Commercial TV (Ch 7,9,10)	1.5	2
None	3	4
Other1	3.7	5
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27 missing cases; 135 valid cases

This survey indicates that over 65% of people working in the film, video and multimedia sectors in this region are university or TAFE trained. Of those surveyed, 40% received University or TAFE training outside the region and 27.4% from within the region.

The other significant findings from this question are:

- 34.8% of people did their training on-the-job and in this region.
- 31.9% of people had received their training from community based organisations in this region. The largest training provider in this group was North Coast CAMERA, followed by ACE and the Northern Rivers Writers' Centre. (This result may be a reflection of the fact that the largest number of surveys were obtained from the telephone survey undertaken by North Coast CAMERA).
- Only 5.2% received their training from the national broadcaster (ABC) and only 1.5% from a commercial television network.

Training required

The following table outlines the training needs of those surveyed.

Training required	% of Cases	Count
Scriptwriting	17.7	20
Pre-Production	10.6	12
Cinematography	22.1	25
Sound	13.3	15
Other Production	29.2	33
Directing	32.7	37
Post-Production/Editing	25.7	29
Marketing/Distribution	19.5	22
Multimedia, computers	29.2	33
Performing	9.7	11
Producing	27.4	31
Other1	12.4	14
Other2	0.9	1
	-----	-----

49 missing cases; 113 valid cases

In view of the fact that the categories of occupations most selected by those surveyed were director, producer, and screenwriter, it is therefore no surprise that the areas where training was most sought was in directing (32.7%), producing (27.4%) and other aspects of production (29.2%). The number of people seeking training in multimedia and all aspects of computer skills was also very high (29.2%). The numbers seeking training in scriptwriting (17.7%) and performing (9.7%) were surprisingly low.

Where training was sought	% of Cases	Count
Northern Rivers - Media org/professional	15.2	10
Northern Rivers - SCU	22.7	15
Northern Rivers - TAFE	7.6	5
Northern Rivers - Community	34.8	23
Northern Rivers - Working with professionals	37.9	25
Northern Rivers - Other	9.1	6
Sydney	40.9	27
Brisbane/Gold Coast	15.2	10
Outside NR/Other	12.1	8
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96 missing cases; 66 valid cases

A large percentage of those surveyed felt that their training options lay in Sydney (40.9%). The second largest group (37.9%) wanted to be trained by working with professional in the Northern Rivers region. This need was also raised at the July Forum and is reflected in the Strategies in terms of setting up mentorship programs in the region. A significantly high proportion (34.8%) wanted their training needs met by community based organisation in the region, such as North Coast CAMERA and the Writers' Centre. 22.7% were seeking to have their training needs addressed at SCU and only 7.6% from TAFE.

When asked "if the training were available in the Northern Rivers region, would you utilise it?", the responses were as follows:

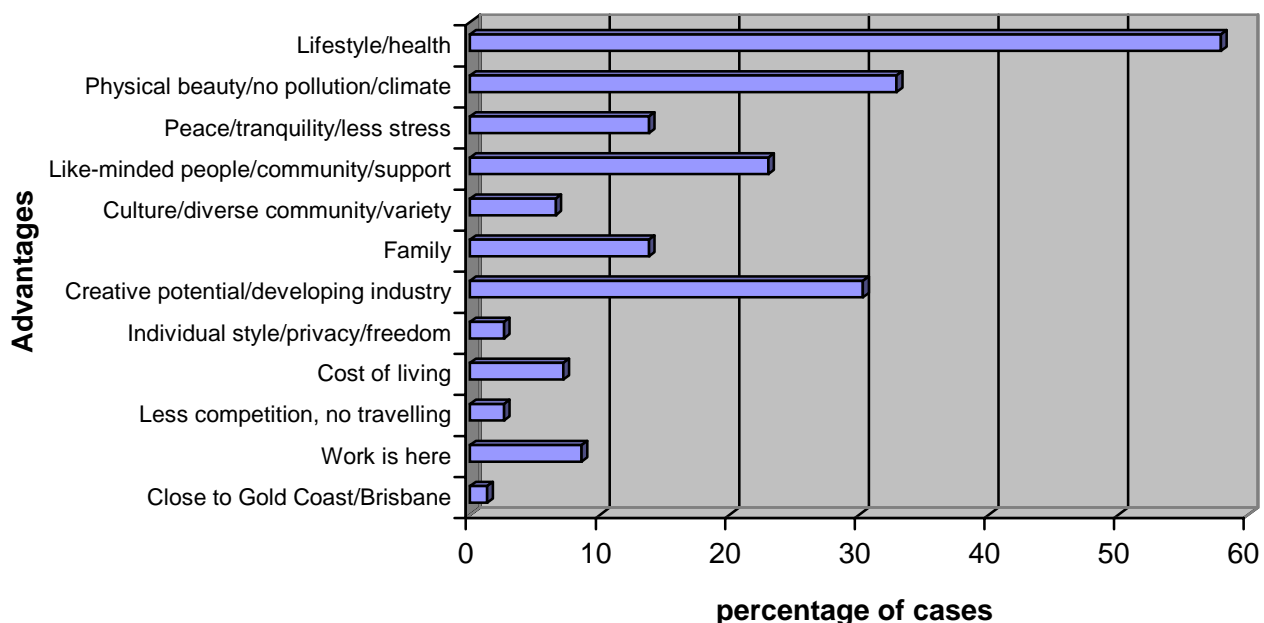
Yes:	83.8%
No	3.8%
Maybe	4.6%
N/A	7.7%

The vast majority of those surveyed would undertake their training in the Northern Rivers region if it were available.

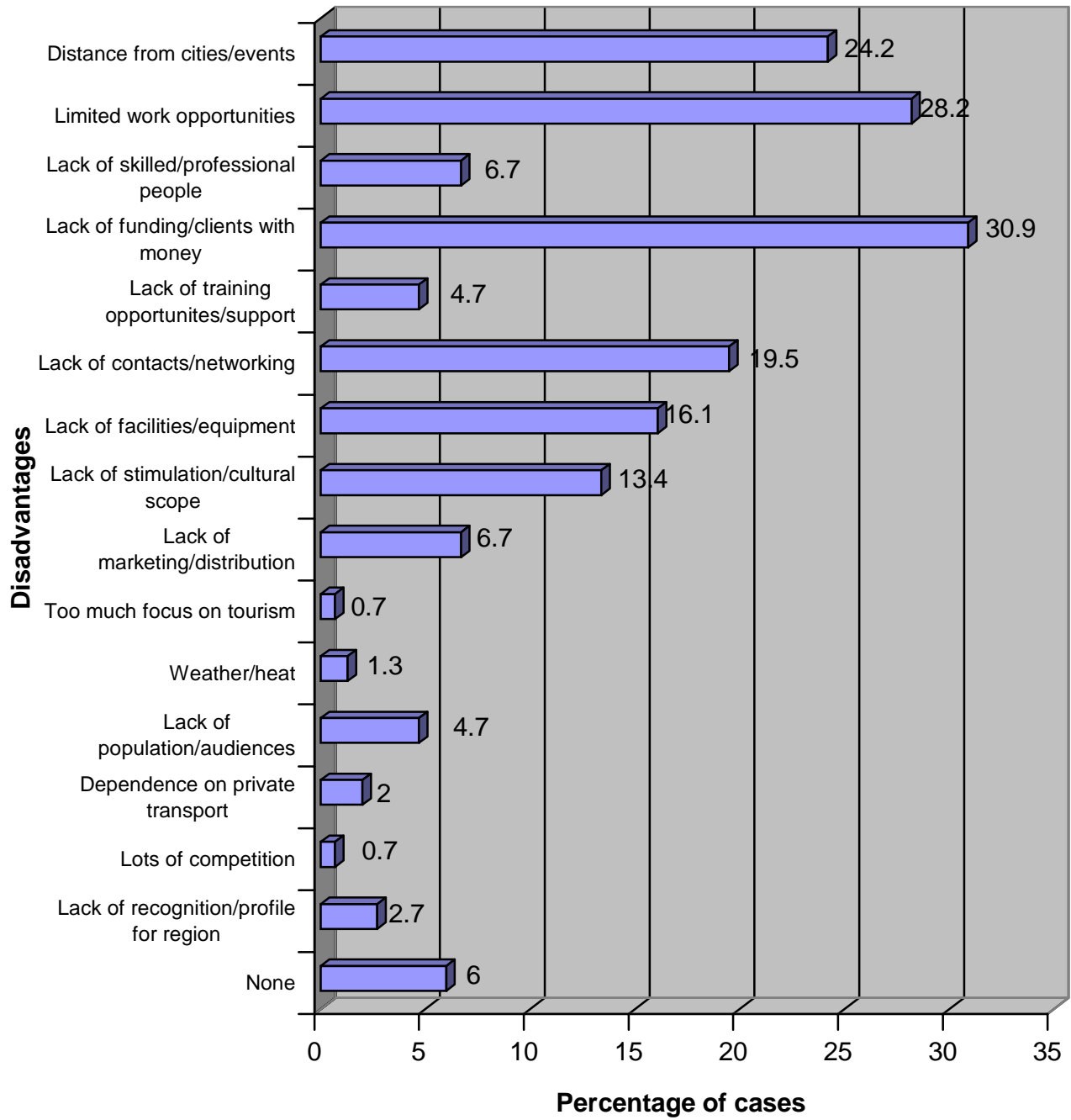
6. Advantages and Disadvantages of living and working in the Northern Rivers region.

When asked what the major advantages were in living in the Northern Rivers region, the largest percentage of replies (57.9%) may be summed up as citing 'lifestyle and health'. People described the personal benefits of living in this region and the factors contributing to 'quality of life'. The second major set of responses (32.9%) may also be described as 'lifestyle', but referred to the physical beauty of the region, the lack of pollution, the climate and the positive benefits of the local environment. Following that, the next greatest attraction was the 'creative potential of the region' and a sense of 'excitement and anticipation' around the developing industry.

Advantages of Living in the Northern Rivers region



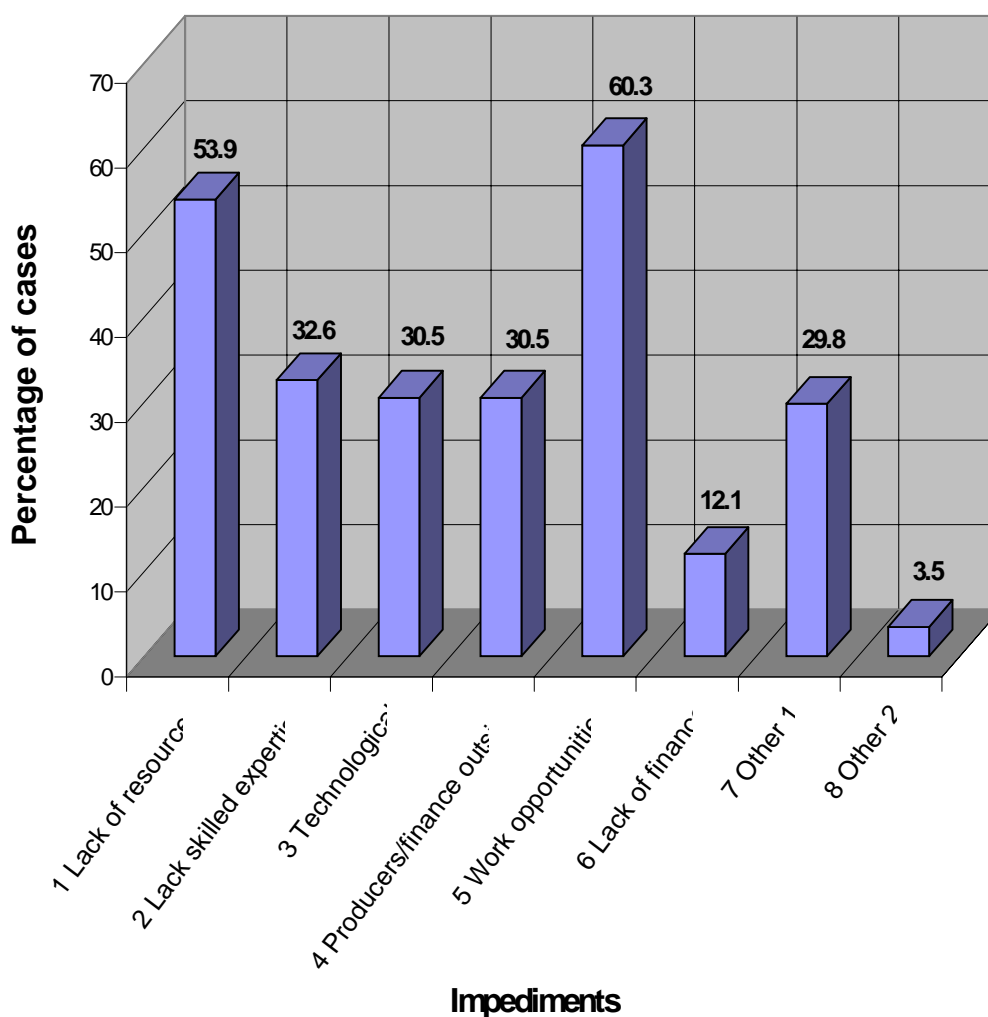
Disadvantages of living in the Northern Rivers region



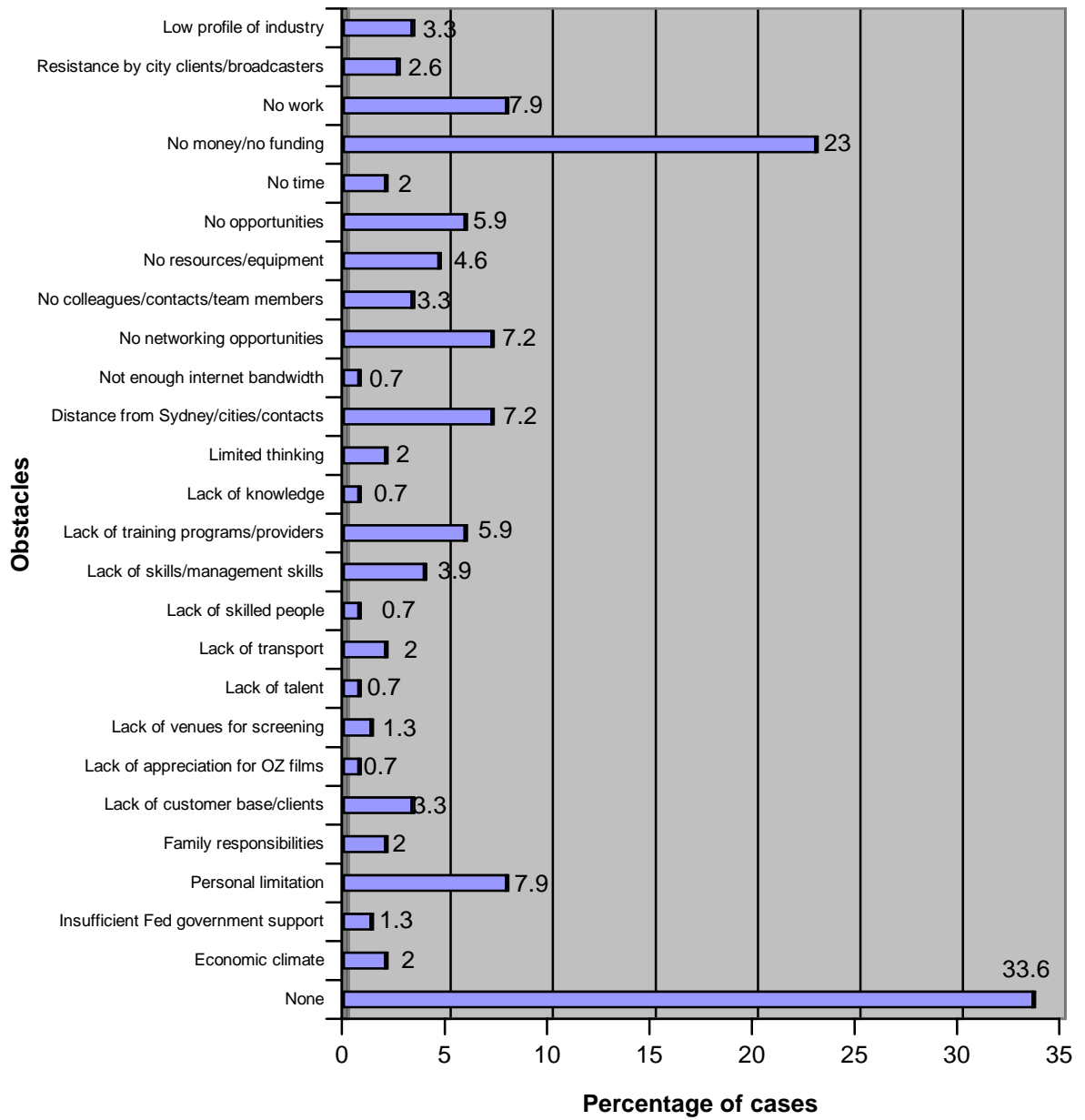
The major disadvantages were perceived as being lack of funding or clients with money (30.9%) and limited work opportunities (28.2%). This issue was also raised by the producers in their interviews; several commented that they would go out of business if they relied only on local work or local clients for their income. One measure to counteract this problem is to find mechanisms to attract more clients and businesses into the region, and this issue is dealt with in the Strategies proposed in this Report.

Distance from cities was also seen as a major problem (24.2%) and this encompassed the need to meet face-to-face with clients, funding authorities, broadcasters and others in the industry. Also lacking in the region were the opportunities to attend industry functions and festivals and to keep a profile amongst their city-based colleagues. A significant proportion (19.5%) also felt the lack of opportunities to network within the region and meet other like-minded people to share ideas and resources. Lack of facilities and equipment and lack of stimulation and cultural scope were the other disadvantages. A few people commented on transport problems within the region, and also the lack of public transport and shortage of roads of good quality leading into the region.

Impediments to doing business



Obstacles to achieving work goals



The major impediments to doing business in the region were perceived as being lack of work opportunities (60.3%). This is also reflected in the large number of people surveyed who earned under \$5,000 p.a. from their involvement in the industry. Of those surveyed, 23% said that the largest obstacle to achieving their work goals was a lack of money and/or funding. 30.5% felt that a major impediment to doing business in the region was that producers and/or finance for projects came from outside the region and remained outside the region. Measures to counteract this have been grouped under Strategy 2 in this report. They aim to stimulate work opportunities and generate more projects in the region, and to encourage producers to spend more of their budgets in the region.

The other major impediments to doing business were lack of resources (53.9%) and lack of skilled expertise (32.6%). These impediments may be overcome through further emphasis on training in the region, and measures for encouraging new businesses and new capital into the region. Technological obstacles, particularly lack of bandwidth and problems with telecommunications, are dealt with in Strategy 6 and measures to develop the IT&T industries in the region.

It is worth noting that 33.6% of those surveyed said that they faced no obstacles in achieving their work goals.

7. Services and facilities in the region.

The survey asked people to list the services and facilities they require in the region to assist them in their work. The purpose of this question was to assist in creating a priority of services and facilities needed in the region. The following is a summary of responses.

Services and facilities needed	Count	% of cases
Specialised training/teachers/mentorship	30	23.6
Low cost edit facilities/equipment	26	20.5
More networking/contacts	24	18.9
Regional funding body/local grants/funding	19	18.9
More projects/larger industry/bigger budgets	18	14.2
State-of-art equipment/high end/on-line editing	17	13.4
Film centre/local hub/business centre	15	11.8
Film/video agency/Industry liaison person	10	7.9
More advertising/promotion/marketing/distribution	9	7.1
More Producers	8	6.3
Database of people/services/outlets	7	5.5
Large client base/more pro-active business	6	4.7
Larger cash flow into region/stronger economy	6	4.7
Cultural centre/resource centre	5	3.9
Computer support services	5	3.9
Sound stage/large studios/live venues	4	3.1
On-line facilities/web-site/bulletin board	3	2.4
Access to ISDN/high speed communication	3	2.4
Grant writing expertise	1	0.8
Reliable power supply	1	0.8
Annual film festival/incl docos/national	1	0.8
Technical repair centre	1	0.8
Visit to region by funding bodies	1	0.8
Cinema venues	1	0.8

35 missing cases; 127 valid cases

People were also asked what services and facilities they had that they could contribute to the region. The largest majority listed their skills (64.7%) and area of expertise (34.5%) in the industry, indicating the region has a large human resource available that can be utilised.

Services and facilities to contribute	Count	% of cases
Skills in area of expertise	90	64.7
Experience in area of expertise	48	34.5
Potential/enthusiasm/energy	18	12.9
Facilities for hire	14	10.1
Equipment for hire	11	7.9
Services for hire	11	7.9
Professional attitude/well organised	11	7.9
Knowledge of area/industry	9	6.5
Training/teaching skills/mentor role	6	4.3
Collaboration	3	2.2
Web-site creating/hosting	3	2.2
Producing/creating projects	2	1.4
	-----	-----

23 missing cases; 139 valid cases

8. Other ideas and suggestions

In this section, people were given the opportunity to make other comments and provide ideas or suggestions. The major ideas that arose in this section were:

- The most frequently occurring suggestion in this section (29.1%) was for more **networking opportunities and regular industry functions** and events.
- 20.4% of those who answered this question suggested or strongly urged the establishment of some kind of **film centre/central hub or communal space** for the local industries. Most saw this as a business centre, but a few suggested a community-owned co-operative space.
- **More training and mentorships** was the suggestion of 17.5% of those who responded.
- 14.6% suggested that there should be more **support for local producers** in the region.
- The need for **cohesive marketing of the local industry** and a sense of a united front was expressed by 12.6% of those who responded.
- The other most commonly occurring suggestions (11.7% each) were for more funding and support for North Coast CAMERA; a resource list, directory or database for the region; and easier access to equipment, facilities and information.

All of these suggestions have been incorporated in some form into the strategies proposed in this Report.

Part 5. Conclusions and Development Pathways

With the development of new technologies and the opening up of new outlets for communication and expression, the demand for ideas has increased. Supply, however, has remained static, and that is where future opportunities exist in creative industries. Currently many of the brightest young minds are going into games or software production rather than film and television and a central need is emerging for the creation of new ideas. Writing and the production of ideas is central to content creation and so the support of creative writing projects and initiatives should be at the centre of the wheel. The Northern Rivers region has a flourishing and vibrant community of writers, producers and directors; the creators of content in the new knowledge economy.

For some time now, practitioners in the audiovisual sector in the Northern Rivers region have been making estimates and predictions about the size and scope of the industries in the region. This Study provides the first researched and documented picture of the current size and extent of creative industries in the region. It has also assisted in the creation of networks by holding a series of forums and meetings and developing a website and database for local industry practitioners. The web-site is currently being supervised by North Coast CAMERA, but will be handed over to the new regional centre once it has been established. From the data and information obtained through the project, a series of strategies have been formulated for the future development of the industries.

The Study identified a total of **1621** people involved in audiovisual industries in the region, and a further **2278** involved in Creative Industry organisations in the region. These organisations represent writers, musicians, performers, theatre practitioners and multi-media/new media artists and businesses.

The total number of people involved in creative industries in the region in 2000 is conservatively estimated to be 3500, which is 4.1% of the local work force. This marks a growth of 104% since 1992 and 214% since 1996.

Although there has clearly been significant growth in these industries over the past decade, it is also clear from these findings that some element of this critical mass may have been hidden from ABS statistics in 1992 and 1996. This would be partly due to the ABS categories not reflecting the new economy employment categories, and because some industries may not have been the prime source of income for many of these practitioners. In their Census forms, some people may have listed other occupations as their prime source of income. However, when it comes to time and energy expended and a sense of commitment and future direction, they may regard the creative industries as their primary source of 'work'. Further research is required into the nature of work in this industry, the budgets of projects and how they are spent and the income generated by practitioners. The economic and social impact of creative industries on the Northern Rivers region also requires further investigation.

The people identified in this Study are involved in a wide spectrum of film, video and multimedia activities, from the directly related roles of producing, writing, cinematography, directing and multimedia production etc, to affiliated roles of performing, creating music or graphics, marketing and distribution. The sample also includes people working for media organisations (radio, TV, press), related retail and service businesses, cinema and video outlets and people undertaking training in the audiovisual sector.

The film, video and multimedia practitioners in this area include some of the best in Australia, and the economic benefit they bring to the region may be measured in many millions of dollars.

Already a number of production and post-production facilities have been established in the Northern Rivers region which have generated a great deal of employment and contract work in an otherwise employment depressed region.

There is a burgeoning screen culture and short film industry in the region being fostered by events such as the Byron Bay Buzz Film Festival and the Byron All Screens Celebration. North Coast CAMERA has been in existence since 1995 and now represents over 140 people throughout the region from Grafton to Murwillumbah. CAMERA is a volunteer-run community media organisation that organises film screenings and monthly workshops with industry professionals and provides networking services for the audiovisual industries in the region.

Local documentary film-makers have made a successful bid to host the Australian International Documentary Conference in Byron Bay in 2003. This international conference of over 600 people will be the largest the region has seen to date. It is the first time this conference has been held outside a capital city. The enormous boost to the development of the Queensland film industry, after Brisbane held this conference in 1997, has been well documented.

Activities and outcomes in the region arising from this Study

Since the launch of the Study and the FILMWORKS EXPO, there has been a notable increase in industry networking activities and events in the region. Connections have been made and a dialogue commenced between previously disparate sectors of the industry. Film and video makers are talking to the IT sector; experienced technicians and crew who live in the region have been making contact with local producers; people from the business community have been finding out about the growing multimedia sector; and Southern Cross University have formed some strategic links within the local industry. Attempts to document and monitor these connections have so far been limited, but this is a role that the new regional centre and/or North Coast CAMERA may wish to pursue.

What follows is a sample of the type of activity that has occurred in the region over the past 8 months as a direct result of the Study and the two Industry Forums, as well as the interest shown by regional development bodies in the growing creative industry sectors. This summary highlights the progress on "film friendly" location policies; screen culture initiatives; IT & T infrastructure planning and development; and planning for regional centres of creative industry activity.

1. Developing a Location Centre for the Northern Rivers Region

A location register is being created to facilitate the use of places in the Northern Rivers as film locations. Attracting production into the area has a measurable flow-on effect in generating employment for actors, extras, technicians and local crew and in the hospitality and catering industries. All ten of the Northern Rivers councils have pledged support in principle for a cohesive Northern Rivers Filming protocol.

On Wednesday, November 8th 2000, a meeting entitled "**Planning Local Government Filming Policies**" was held in the Lismore Council Chambers. The focus of the forum was to discuss the recently legislated Local Government Amendment (Filming) 2000 and the

subsequent Department of Local Government's Filming Protocol, a document outlining recommended guidelines for local government filming policies.

North Coast CAMERA hosted the event and members, Kathryn Meehan and Aliison Kelly, both active in the Northern Rivers FILMWORKS networking group, said that it is important for Northern Rivers to consider a regional policy on this issue. They would like to see the region make a commitment to being known as a "film friendly" region and follow the lead established by other regions.

The forum was attended by representatives from nine out of the ten Northern Rivers general service councils. Regional council staff and councillors present were enthusiastic and positive towards the FILMWORKS presentation. All welcomed the opportunity to participate in discussions relating to an industry with great promise for promoting the region and generating employment opportunities.

Speakers at the meeting included:

- Geraldine Hilton, of Melsa Films, an independent film and major events producer
- Cathy Henkel, also an independent producer, and researcher in the region
- Catherine Marciniak, an independent documentary producer and director, well known both locally and nationally for her documentaries on ABC and SBS
- Dr Jim Gallagher from The Northern Development Task Force

The main objectives of the forum were to:

- Complement the recommendations set out in the Department of Local Government's Filming Protocol document by focusing on the specific needs of Northern Rivers
- To offer councillors and council staff the opportunity to consult with Northern Rivers film industry professionals when planning their filming policies
- To offer an insight into the film world and introduce film practitioners from the region.

There was general support by those present for the investigation, formulation and introduction of a regional approach to filming policies. To realise this goal, the councils gave general support for the immediate investigation of Federal Government funding for the appointment of a Regional Film Liaison Officer. The Liaison Officer would research and formulate a cohesive and consistent policy to be considered by the ten Council areas in regard to the administration of council managed locations and fee structures.

The categories of film-making activities that would be prosperous for the Northern Rivers include the use of locations in feature films and advertisements. Productions encouraged into the region can mean employment for local technicians, crews, and actors; have an immediate flow-on effect to the hospitality industry; and, once the production "airs", provide long-term promotional benefits to the tourism industry through location exposure.

The second category is the lower budget production - usually documentary, low budget features and educational programming. Many of these types of projects are being generated within the Northern Rivers area and are developing the talents of the local film-making community. They employ talents and skills from this region and use local production and post-production facilities. Additionally, there is a flow-on effect from the employment of musicians, graphic artists, office supplies and catering businesses, transport, set-design and numerous other sectors.

Thirdly there is the no-budget film category. This provides fertile training ground for the many creative Northern Rivers film-makers attempting their first film or video for events like the Byron Bay Buzz Film Festival; Byron Shorts; Northern Women - a video competition for local women; and the Mini-Docs festival to be held in conjunction with the upcoming Australian International Documentary Conference in Byron Bay in 2003.

In viewing the current growth of the industry in the region and the benefits seen to date, there was in-principle agreement from the attending councils that the Film industry was potentially an industry with enormous cultural and economic significance for the future development of the region.

2. Northern Rivers SCREENWORKS

A group of local producers have been meeting regularly in Byron Bay since the Clunes Forum in July to set up a regional Centre and implement some of the strategies from the Forum. As a result of these meetings, a not-for-profit company limited by guarantee is being set up, called Northern Rivers SCREENWORKS Ltd, as an information and networking group. Once established, it is anticipated that SCREENWORKS will become the host organisation for the industry web-site developed as part of this Study and located at www.nrfilmworks.com.

Northern Rivers SCREENWORKS is being incorporated as a company to implement the Strategies identified in this Report and to promote the Northern Rivers as an acknowledged regional centre for creative industries. SCREENWORKS will develop short and long term plans to foster this growth and create new employment and cultural benefits for the entire region.

Due to the concentration of film and video professionals in the Byron region the company will be located in Byron Bay, but will be a hub for screen and creative industries throughout the Northern Rivers region.

Northern Rivers SCREENWORKS is currently preparing a submission for the federal government's Regional Solutions funding program to look at ways of implementing some of the most urgent Strategies proposed in the NRRDB 2000 Study.

3. Northern Rivers IT&T Industry Development

Numerous meetings and discussions have been taking place throughout the year by stakeholders in the IT&T sectors. Meetings have been held with regional development bodies and interested stakeholders in Southern Queensland. The following is a summary of the recent developments by Glen Schaefer from NRIT. Glen Schaefer also contributed the IT&T focus of the Strategies outlined in this Report.

The local IT&T industry is a vibrant industry sector which is quickly expanding in the Northern Rivers. The rapid advancements in Internet and telecommunications technology are encouraging more flexible work practices. IT professionals are moving to this region and taking their work with them. The Web development and multi-media sectors are growing rapidly. The skills exist in the region for competing internationally and the region has the lifestyle and environment that will attract some of the best programmers, new media and Internet people in the world. The key challenge is in finding enough local demand so that a thriving IT&T industry can continue to develop.

This region can become a world leader in the IT&T industry. Two things are required:

- 1) access to broadband at competitive rates
- 2) an organisation that is able to bring in National and International contracts for the local industry to work on until the Industry reaches a critical mass. This point will be reached when the industry is able to grow by itself ie. local companies are able to successfully win large contracts on their own.

The Northern Rivers IT&T Skills and Services database currently contains 410 IT&T related individuals and businesses that are currently operating in the region. This is, however, a private database and actual numbers are estimated to be two to three times this amount.

Growth in the local IT&T Industry is dependent upon access to affordable broadband Internet access. There are some IT&T related employment opportunities with local organisations, such as Telstra, Optus, SCU, TAFE, Local Councils, Hospitals, Government Departments, ISPs and within the local IT and multimedia industry. However, without stimulation, very few opportunities currently exist for employment growth within the local IT&T industry.

Another key factor in creative industry growth for the Northern Rivers is the ability for these new industries to aggregate their skills and services into a commercial entity that has clear competitive advantages in the Global IT&T and new media market places. NRIT is an IT services company that provides a wide range of IT&T and new media related services by managing and developing a regional network of service providers. There are approx 500 IT&T related services currently operating in the Northern Rivers, and many other related new media and creative businesses and individuals operating out of the region.

The first step for the IT&T industry is to establish a Northern Rivers IT&T and Multimedia association or industry body and a resource centre to act both as an office and an administration/work centre for the local IT&T industry. Strong links with the Gold Coast regional IT forum are essential as is the need to facilitate regional access to plentiful, cheap broadband services and infrastructure. Given these initiatives and the objectives outlined in the strategies of this report, the IT&T sector could become a major Northern Rivers industry in the global market place and succeed in developing IT&T export opportunities.

4. Plans for the development of regional centres of activity

Since the Clunes Forum, a number of moves have been made to develop the concept of a series of networked regional centres for the area. These include:

- a. A collective of industry practitioners in Lismore is developing a proposal in conjunction with LINC TV for the establishment of a production, broadcast and research centre to be located in the Lismore Central Business District. This Centre will be called the North Coast International New Media Centre and will combine film, video, broadcasting and web development with particular emphasis on training in new and emerging digital technologies. The initiative has the support of North Coast CAMERA and Southern Cross University.
- b. Dr. Gerard Goggin from the School of Humanities, Media and Cultural Studies at Southern Cross University has joined the board of North Coast CAMERA, a move that will foster stronger links between the university and the film, video and multimedia communities.
- c. A proposal is being developed by Christopher Dean, Chairman of Thursday Plantation Laboratories for a multi-million dollar film facility on the land owned by Thursday Plantation

at Ballina. In an article in the Northern Star (October 2000) Mr Dean said: "There is a need for such a facility in the Northern Rivers and recent research into industry growth covering Lismore, Byron and Ballina has indicated that this particular area in Ballina would offer an ideal location for this facility". The proposal could involve the further development of a film and television school at Southern Cross University as a talent 'incubator', a marketing arm in Byron Bay and a production centre at Ballina.

- d. In a paper written by Arthur Pike of Nimbin (6th August 2000) entitled "Nimbin's Cultural Development", he argues that in defining a perspective for Nimbin's cultural development, the town has to take stock of its resources, talents and needs, and focus on the many positive elements of Nimbin's creative life. Following the EXPO and the Forum at Clunes, he sees a role for Nimbin in the development of the region's film, video and multi-media sectors and is calling on the community to consult further with regional development bodies to look at ways that this can be facilitated. The Nimbin Community Development Association has written a letter in support of the SCREENWORKS initiative and the employment of a co-ordinator.
- e. The Clunes Technology Centre was officially opened at the Clunes Village Common on October 28th 2000. The aims of the centre are to create a user-friendly environment for Internet access and to provide training courses in all aspects of computers and the most commonly used software. A long term goal is to help create new businesses using the Internet and to help existing businesses expand through e-commerce. The Centre is currently running a survey to determine the technology needs of the local community in order to devise appropriate training courses and activities. The Technology Centre is using the FILMWORKS web-site to promote its activities, and has established links with film and video practitioners in the region.

Concluding comments:

The Northern Rivers region has an active, significant and growing creative industries sector with an opportunity to make a major contribution to the economic and cultural life of the region. Specific measures need to be taken urgently to add momentum to this growing sector and to provide the infrastructure and mechanisms needed to ensure that the current growth is sustainable. The Strategies outlined in this Report point the way forward, and it is hoped that this will serve as an impetus to regional development bodies, local, state and federal governments as well as individuals and businesses in the region to support this dynamic 'green and clean' new industry sector. It is very possible that, if supported, the current level of activity could increase and generate new sources of employment, prosperity and cultural richness for the Northern Rivers region, making it an even more vibrant regional centre and a world leader in creative industries.

Cathy Henkel
November 2000.

Part 6: Appendix

Appendix 1: Method

How the study was done

The research and data gathering stage of the study began in April 2000 and concluded in September 2000. There were a number of distinct phases and strategies involving the collection of quantitative and qualitative data. Key aspects of the study included:

- an examination of existing data and a review of what is currently known about creative industries in the Northern Rivers region.
- compilation of a consolidated database of all sectors in audiovisual industries to establish the size of the total sample for the local industries in the region.
- a survey of people working in the film, video and multimedia industries.
- the establishment of an industry website called the FILMWORKS website.
- two industry forums in May and July 2000.
- a series of meetings with producers in the region following the Forums.
- in-depth interviews with 14 local producers.
- collection of production sheets from 18 producers in the region for the period 1990 -2000.

Quantitative data

The major sources of quantitative data were the survey and a large industry-wide consolidated database that was compiled throughout the course of the research phase.

1. **The survey** took the form of a questionnaire consisting of 20 questions drawn up in consultation with people from both the audiovisual industries and academic backgrounds. The answers to the first 12 questions provided the quantitative data. 500 copies of the survey were distributed and 162 were completed and returned. A range of methods were used to distribute the survey. These included:

- **The FILMWORKS Expo.** An EXPO of the film, video and multi-media industries in the region was launched in Lismore on the 27th April 2000. The timing of the EXPO coincided with the launch of the survey, and proved to be a valuable means of gaining publicity and exposure for the survey. Over 150 survey forms were handed out directly to people who visited the EXPO, and Cathy Henkel accompanied the EXPO tour, visiting all the media organisations in the areas covered by the tour. The highest number of completed survey forms returned came from those media organisations visited during the EXPO tour. In total there were 42 forms returned by professional media organisations, and a further 23 were returned by individuals who had obtained their survey forms through the EXPO. (A full report of the EXPO appears in Appendix 6)
- **The FILMWORKS Website** was also launched at the opening of the EXPO in Lismore. The main purpose of the website was to create an Internet-based meeting place for the local industry and to provide an access point for the skills and experience available in the region. This was achieved through the creation of an interactive database for professionals and semi-professionals working in the industry that can be updated and maintained by individual practitioners. The website provides a network and information service through its news page,

which details events, workshops, screenings and other activities of interest to the industry in the region. The website also has a research section and this is where the questionnaire was located. This was not the preferred way of filling out the survey - 19 survey forms were filled out on-line. Those who had access to both the hard copy version and the on-line version preferred the hard copy version.

- **A telephone survey** was conducted by North Coast CAMERA utilising its membership base and this proved to be the most successful means of collecting completed survey forms - 76 completed forms were returned via this method.
- 2 In addition to the survey, **a consolidated database** was compiled of people who could be identified as working in the film, video and multimedia industries. This was an attempt to quantify the total sample for the region, and gain information on where the clusters of activity are occurring, and the scope of work occurring in the audiovisual sector. This database was compiled from industry directories, local telephone directories, membership of North Coast CAMERA, a multimedia database provided by MAP (Mullumbimby Access Point), delegates at local industry forums, the FILMWORKS website, and people who responded to media coverage about the survey.
 3. A further source of quantitative data was obtained from sixty-five **Production Sheets** collected from 18 producers in the region for the period 1990- 2000. These sheets provided information about the budgets that producers are working with, how much of these budgets are spent within the Northern Rivers region and the number of people they employ, both within and outside the region.

Sample: Production sheet for Producers

PRODUCTION SHEET FOR PERIOD 1990 - 2000

NAME OF PRODUCTION:

YEAR COMPLETED:

AWARDS OR FESTIVAL SCREENINGS:

BROADCAST HISTORY: (ie where and when broadcast)

WHERE THE PRODUCTION TOOK PLACE: (ie where each stage occurred)

Pre-Production:

Principal Shooting:

Post-Production offline:

Post-Production on-line:

Sound-mix:

TOTAL BUDGET FOR THE PROJECT:

% OF BUDGET SPENT WITHIN NORTHERN RIVERS REGION: (estimate if possible)

NO. OF PEOPLE EMPLOYED ON THE PROJECT:

OTHER RELEVANT INFORMATION ABOUT THE PRODUCTION:

Quantitative data

The sources of qualitative data were the survey, an industry forum and a series of interviews with leading producers in the region.

1. Questions 13 - 20 of the **survey** were one source of qualitative data that provided information about the advantages and disadvantages of living in the region; the obstacles to achieving work goals; the services or facilities practitioners need and can contribute to the region, and a general comments section.
2. **Industry Forums and meetings with local producers.** Two Forums were held, one in Lismore in May and the other in Clunes in July 2000. These forums were the prime means of gaining information about the audiovisual industries in the region. The Clunes forum was widely promoted and attracted 160 people from throughout the region. The participants represented a wide cross section of the local industry. The outcomes of the Forums and a series of subsequent meetings of local producers formed the basis of the Strategies compiled for this report.
3. A series of **interviews with producers** was the other means of gaining information on the local industries. 14 producers, representing a wide cross-section of audiovisual industries, were interviewed and their responses also played a major role in developing the Strategies for this Report. They were asked to comment on six main questions:
 1. How long have you lived and worked in the Northern Rivers region?
 2. How many projects have you completed since you came to this region?
 3. Can you describe the impacts of technological change, particularly digital technology on your work as a producer?
 4. Have you experienced any changes in the way you operate your business or locate clients and funding as a result of either technological changes or changes in the global economy?
 5. Do you think the role of Independent Producer is changing and, if so, in what way?
 6. What do you think is the potential of the industry in this region?

Appendix 2: Summary of findings: Qualitative data

The FILMWORKS Expo

The **NORTHERN RIVERS FILMWORKS EXPO** took place between the 27 April and 16 July 2000. This was the first time that the general public, the media and interested industry bodies had been offered the opportunity to view the wide array of film, video and multi-media projects and meet some of the talented practitioners who live and work in this region. Many award-winning locally produced films and videos were screened and members of the community were given the opportunity of attending workshops by some of the multi-talented professionals who call this region home. The EXPO opened in Lismore and then toured to Grafton, Tweed Heads, Murwillumbah, Byron Bay and Nimbin. Through extensive coverage and promotion in the media, the general public was made more aware of the growing film, video and multi-media industries in our region. The EXPO provided an invaluable platform for the collection of both quantitative and qualitative data for the Study.

How did it happen?

The Chairman of the Northern Development Task Force, Jim Gallagher, approached local filmmaker and researcher, Cathy Henkel, after hearing her speak on ABC radio in August 1999 about the growth of the film, video and multimedia industries in the region. Cathy was about to begin a Masters by Research Degree at Queensland University of Technology, and in this process the FILMWORKS project came into being. Through their discussions, the idea of a large showcase for film, video and multi-media projects was initiated. It was decided that the EXPO would be launched in the Strand Arcade in Lismore and then tour to other regional centres. North Coast CAMERA, a local association representing people who work in the film and video industries, was approached to help organise and promote the EXPO. Sponsors were sought from within the region, and the entire event was put together in a two month time-frame.

A full report on the EXPO is provided in Appendix 5.

The EXPO had three specific objectives:

1. To raise the profile of the industry in the region through:

- a. ***The screening program:*** A large array of locally produced films and videos were projected onto a large screen or monitor in all venues and in some instances the film-makers were on hand to talk about their work. The screenings were organised around themes such as short films, feature films, animations, documentaries (environmental, aboriginal, women's, social issues etc), educational, community and music videos and multi-media presentations. This provided the general public with the opportunity to see the range and quality of work produced, and proved to be a popular component of the EXPO.
- b. ***The displays:*** The EXPO also hosted displays, presentations and promotional materials from individuals and organisations working in the industry. These provided valuable information about the range of services and facilities in the region and provided background information on some of the major producers and directors located in the region. There was also information on companies and organisations who had sponsored and supported the EXPO.
- c. ***The workshop program:*** The most popular aspect of the EXPO was the workshop program held in conjunction with the screenings. These provided a doorway for individuals interested in this industry to learn more about what is taking place and its potential for the region. "Networking the Northern Rivers" was another project highlighted by the EXPO, and their workshop, held in Lismore, was extremely popular with the public.

2. To support the industry research project:

A major aim of the EXPO was to support the research being done into the growth of the film, video and multimedia industries in the region. The Northern Rivers Regional Development Board, in association with the Area Consultative Committee, had identified the need for research in this area and were about to launch their "Multi-Media Study". Cathy Henkel had already commenced a Masters by Research degree at Queensland University of Technology, and was preparing a large regional survey of the local industries. Cathy Henkel was subsequently appointed the consultant on the NRRDB project and given the task of producing a report on the size and scope of the film, video and multi-media activities taking place in the region. The EXPO provided the ideal platform to launch and promote the survey, access people working in the industry from throughout the region and promote the aims of the Study.

The industry web-site at www.nrfilmworks.com was launched at the EXPO. It was established to support networking in the region, and to facilitate the research project.

Currently the web-site provides:

- an Internet based meeting point for the local industry
- an interactive database for professionals and semi-professionals working in the industry
- a data collection service and the survey questionnaire for research purposes
- a page hosted by North Coast CAMERA to advertise news, special events, workshops, screenings and other events.

In the future the web-site will also include:

- a page to promote facilities, equipment and skilled professionals in the region
- a forum for discussion and feedback on topics of interest to the industry
- a place to promote the region as a film making centre and to showcase the locations available to film makers from around the world
- the development of a market place/distribution outlet for locally produced work.

The EXPO provided a high profile way of launching the FILMWORKS web-site and gave people the opportunity to access and be trained on how to enter their data and use the web-site.

The EXPO also provided an ideal platform for the distribution of the survey form. All media organisations in the regions where the EXPO toured were contacted and provided with survey forms. People attending the EXPO took advantage of the web-site to access the survey and the database.

3. To provide a networking and co-ordinating focus for the industry:

The EXPO brought together many diverse sectors of the film, video and multimedia industries and initiated a dialogue between different sectors who had not talked to each other before. Members of the IT & T industries met with film and video producers, and multi-media or new media creators talked to people working in the traditional media sectors. The EXPO succeeded in gaining wide media attention including television, radio, print media and community media coverage. Even if practitioners did not attend any or all of the FILMWORKS events, they were aware of them, and the EXPO and two Forums initiated a discussion within the industry regarding future directions. There were a number of individual practitioners who met during the EXPO and are now working on projects together.

The first Industry Forum was held in May 2000 as part of the Lismore stage of the EXPO and its purpose was to bring the diverse sectors of the industry together to explore new ways of working

together to develop the industries in the region. This forum provided a very important spring-board for the second Industry Forum held in Clunes in July 2000.

The Forums

May Forum

On Saturday 6th May, the first industry forum was held as part of the FILMWORKS Expo. Over 50 people attended, travelling from all parts of the region, with several significant participants who travelled from Brisbane. High profile speakers at the forum included:

Deb Cox, (on video) writer of the successful ABC drama "Sea Change"

David Bradbury, Oscar-nominated documentary maker

John Weiley, award winning IMAX producer

Prof. Steve Garlick, Director, Southern Cross Regional Research Institute

Jane Oliver and Keith Davidson, Norlink, Networking the Northern Rivers

Nicollette Boaz, music composer for many successful Northern Rivers productions

Dr. Gerard Goggin - convenor of the Media Studies Program at the School of Humanities, Media and Cultural Studies, Southern Cross University

Owen Johnson, Project Manager with the Australian Film Commission

Kerry O'Rourke, Director of QPIX.

- Apologies were received from **Wayne Young** - in London; **Michael Murray** - in Toronto; **Catherine Marciniak** - in Sydney; **Deb Cox** - in Melbourne; **Stella Kinsella** - in Sydney; **Paul Tait and Jeni Kendell** - in Nimbin shooting the Mardi Gras for German TV;

The forum brought film-makers and IT&T experts together for the first time to talk about the telecommunication needs of the region, and important strategic links were made.

The representation from SCU was also very good, and may lead to more productive collaborations between the industry and the university in the future. The forum clarified the need for the web-site and a Film-making Centre in the region. Decisions about the nature, size and location of such a Centre were deferred to the next industry forum to be held in July.

Some of the issues arising from the discussion were:

- There is a strongly perceived need for some kind of film-making Centre
- This could be a 'virtual' centre - or a physical place - or a combination of both
- It could there be a series of sub-centres
- There is a need for an office for AIDC (Australian International Documentary Conference)
- The Location advantage for Byron Bay is 'image'/home of numerous high profile producers/marketing
- The Location advantage for Lismore is resources/infrastructure/e-commerce centre/ collaborative research opportunities with SCU/a multi-tenancy building (Cellulose Valley - to begin construction this year.)
- There is a need for an intellectual 'think-tank'
- There is demand for more bandwidth/up-grade of telecommunications. Collaboration with Norlink and 'Networking the Northern Rivers' project was encouraged.
- Importance was stressed of strategic links with regional development organisations
- Research needed on implications of convergent technology
- Research needed on distribution of locally-produced work.

Updates were also provided on:

The Australian International Documentary Conference - Lois Randall

North Coast CAMERA - Aliison Kelly, President of CAMERA

LINC TV - Ian Slade and Lucy Cameron.

There was lengthy discussion on the future of North Coast CAMERA and the type of "Centre" needed in the Northern Rivers region. The QPIX model was discussed. It was decided that research should be done on all five existing resource centres in Australia in order to assess which aspects of these models best suited the needs of the Northern Rivers region. Cathy Henkel agreed to undertake this task with help from North Coast CAMERA.

July Industry Forum

Over 160 people attended the **FILMWORKS INDUSTRY FORUM** held on Saturday 29th July at Clunes Hall and Village Common. This was the largest gathering of the film, video and multimedia industries ever assembled in this region. The aim of this Forum was to bring together industry practitioners from throughout the region to explore the needs and aspirations of the local industry and to formulate strategies for future development. The delegates discussed a range of topics and ways of fostering the development of the local industry.

The following topics were discussed

- A. What are some of the factors that are limiting growth of the local industry and what are the drivers that enhance growth?
- B. Developing a model for a Film, Video and Multimedia Centre for the region
- C. Future directions for North Coast CAMERA
- D. Developing a Locations Centre for the region
- E. Fostering cultural development and screen culture in the region - assistance for short films, animations, features, documentaries, new media, community media, local film festivals and support for aspiring film and video producers
- F. The Australian International Documentary Conference in Byron Bay.

Appendix 6 contains details of these discussions.

FORUM OUTCOMES

A number of strategies and ideas were proposed for the future development of the local industry.

The main outcome was support for the concept of a series of **FILMWORKS VILLAGES**. Rather than a "capital city" approach of establishing one big centre, the forum recognised the importance and value of the village lifestyle in the region and supported the establishment of a number of small centres located in certain villages. Each would have a specific strength and role and all would be linked by networked computers and the website. The villages that have an interest in this include: Nimbin, Clunes, and Mullumbimby. There would also be larger centres in Byron Bay, Lismore and Ballina and perhaps a presence in Grafton and Tweed Heads.

In the afternoon there were three small groups which examined the following topics:

DEVELOPMENT OF A FILMWORKS CENTRE

DEVELOPMENT OF A LOCATIONS CENTRE

SCREEN CULTURE DEVELOPMENT

See Appendix 6 for the OUTCOMES OF THESE SMALL GROUP DISCUSSIONS.

In general terms, the Forum accepted the need for a regional film, video and multimedia Centre; the need for a Locations Centre and regional locations policy; and measures to be taken to support screen culture development in the region, particularly wider exhibition and festival opportunities and a short film fund.

The strategies developed at the July Forum have all been incorporated in some form into the Strategies proposed in this Report.

Producers' Interviews

Fourteen producers from the region were interviewed in their own home or studio environments. The interviews were recorded on a DVCAM camera using a blue screen backdrop. In this section of the Report, the producers speak for themselves on their current activities, the impacts of technological change, the advantages and disadvantages of living in the region and the potential of the local industry. The producers represented the 'top end' of a wide range of work that is taking place in the region. Most are operating successful production companies with larger than average budgets for the region. The Producers represented the following sectors:

Sector	Producers
Features and Television Production	Wayne Young; Di Morrissey; Gerry Hilton; Troy Planet
Documentaries	Catherine Marciniak; Michael Murray; Jeni Kendell
IMAX films	John Weiley
Corporate and commercial productions	Peter Murray; Richard Wooley; Graham Quigley
Multimedia Productions	Karey Patterson; Kym Gilham
Exhibition	Peter Castaldi

The following table summarises the length of time that the producers interviewed have lived in the region.

Wayne Young	moved to Byron Shire and began working here in 1977
Di Morrissey	moved to Byron Bay in 1989
Gerry Hilton	has lived and worked in the region since 1996 - works from her home office near Bangalow around 50% of the time
Troy Planet	has a lifetime association with this region- came here as a child for holidays. Has been living here since 1993
Catherine Marciniak	has lived and worked in Clunes since 1997. Still works mainly out of the region.
Michael Murray	first came here in the late 1980's but was then still based in Sydney. Gradually moved most of his work to Byron Bay
Jeni Kendell	has lived and worked in Nimbin since 1978.
John Weiley	was born around here and went to school at Woodlawn . Spent most of his working life out of the country, working in the UK, then moved back to Byron Bay in 1997
Peter Murray	moved here in 1993
Richard Woolley	was born here, and has lived and worked in the Northern Rivers region his whole life
Graham Quigley	has lived and worked here since 1997
Karey Patterson	moved here in 1991 initially to study, but started working here from the moment he arrived.
Kym Gilham	has lived here since 1992
Pete Castaldi	moved here in 1996. Still works in Sydney although he lives here

Brief descriptions by the producers of their work

Wayne Young - "Fern Gully; the Last Rainforest" was released in 1992. All the initial writing was done on our property at Goonengerry down at the Fern Gully Water hole. All the original art work, the presentation materials, the script and pre-production was done here in Byron Shire. The rest was produced in America and in other parts of the world. Following that we produced "The Last Whale" which was a television special in two parts. That was all created and edited here, the music was created here, and the whole film was post-produced here in Byron Shire. We also initiated a series called "Wild Life" (called "Human Nature" in other parts of the world). We did 52 episodes of that. A few of them were filmed around the Byron Shire, and all of the segments that Olivia Newton-John did to introduce the show were all shot in Byron. Since then we've been working on a couple of feature films, a television series and an Imax film. They've all been developed here. One of those films, a feature film, is to be shot entirely here in Byron. The film is called "Feral Flynn" and is about the lifestyle of so-called 'feral' kids here who fight to save the rainforest. All the work we do at Youngheart Productions is connected with the environment, or human rights or social renewal of some sort.

Di Morrissey - I have just published my 10th novel and I've written them all in Byron Bay. I grew up in a world of film - my mother was Australia's first commercial female producer and director working in a man's world. So it seems a natural progression for me to want to work in film as well. I want to bring these elements together. My core talent is writing but I know my limits - I'm not a screenwriter. I'm a good storyteller, and I'm a good novelist. I think in a visual way so my books are visual. I'm also a very good networker and good at recognising talent in others. For me that's what a Producer does - recognises a project, when its time is right, and what will make it work in a commercial sense. A lot of people have been wanting to make my novel "Tears Of The Moon" into a film, but I want it to be done properly. We are looking at a major motion picture of \$30million at least. I'm actually getting quite close with some German money. We are now looking for a director. Bruce Beresford loves it but feels he's clumsy with romance as he put it. I would like someone with some sensitivity when it comes to Australian subject matter, so if it takes 8 or 10 yrs, so be it. It's an on-going learning process. I'm also working on a reconciliation film, a couple of TV projects and I'm out there talking to people.

Gerry Hilton - The main projects that I've been working on since I've been in the region are a documentary entitled "Einstein's Wife" that has received funding from the AFC and the Goat Island film festival. The film festival involved open air screenings of retrospective Australian films as part of a City of Sydney initiative to position Sydney as major film centre. I was doing the marketing for it. That involved going to Sydney for 2 to 3 weeks at a time and convincing them that although it was a Sydney festival I could do the marketing and publicity from a regional area. I was also involved in event management of the Olympic Arts Film Festival this year and have a feature film in development based on a novel for which Melsa Films has optioned the film rights. In 1998 I worked on a Melsa Films/ABC TV television co-production of a pilot called 'Two Bald Blokes & a Blonde'. I am currently organising a major film festival for this region.

Troy Planet - I've got 2 feature scripts in development which are quite advanced. One has just got a Producer attached to it so hopefully they will get some funding and we can shoot it up here. I've had to go back to Sydney a lot because there's not enough work up here for me. When I was here I was doing a lot of MC, theatre, comical carrying on but underneath all that I was working on feature scripts and major theatre productions. I was in the team that made "TransPlanet" - the first feature I know of made in this region in the 1990's. We've also made a lot of short films and things like that. Transplanet was the first feature; it's a sci-fi, comedy spoof for want of a better description. It was shot on tape and really it's a very weird movie. You can see the trailer on the Wollumbin studios website. There hasn't been a serious effort to market it though; it was meant for the web.

Catherine Marciniak - I've completed 5 documentary projects as a director since I've lived here and 3 as a DOP (Director of Cinematography). The projects include two episodes in a series on gambling made by Film Australia under the national interest program. I was DOP and a consultant director on a documentary called "The Ashtons". I was director and DOP on "Auto Stories" a 4 part series made out of Melbourne on the car and its relationship to our lives. I did the environmental episode on how we use our freeways. Late last year and this year I was involved in two episodes of a series called "Grey Voyages"; one I directed and shot in India and Nepal and the other was in East Timor. I was also DOP on a documentary about Chris Doyle who is an Australian Cinematographer who made his name working on non-mainstream, Asian films in Hong Kong. I have just completed "Steel City" which I wrote and directed. It screened on ABC in November 2000. It is about the closure of the Newcastle Steel works. I was filming for several weeks last year in Newcastle before closure and then followed 4 of the workers after closure.

Michael Murray - I mainly write, produce and direct documentaries. The first one I did in this area was "Going Tribal" which was completely shot and edited here. That was an SBS accord film made in 1993/94. It involved looking at the feral lifestyle which was based in Byron Bay. Since then I've made 4 documentaries up here - "Bronzed Aussie Gods" was the most recent which has been broadcast. It is a film that uses surf lifesaving as a window into Australian culture. That went to air last year and it was the biggest rating documentary on the ABC for 1999. Since then I've had a few projects in development. One is a film following a trial in Sydney next year using quolls, hopping mice, sugar gliders and other native species as household pets to replace cats and dogs. I also have a niche for marketing. Lightsource films has 40/50 different educational and speciality interests mainly concentrating on health and fitness. These programs range from aromatherapy to yoga and I distribute to outlets all around the world.

Jeni Kendell - I've lived in the region for the past 22 years. In that time I have completed 20 projects; these include 15 documentaries for television ranging in length from 23 minutes to 2 hours 56 minutes. They have been screened all around the world and between them have won many awards. I have also done two major public announcement campaigns for National Parks and Wildlife and also for the Wilderness Society. I once shot a 52 minute documentary in Nepal that ended up as a 9 minute trailer. I did a pop-clip "Leave it in the ground" with local musicians "Bahloo", and produced the Nimbin segment of an ABC documentary entitled "First Days".

John Weiley - I normally make one film about every 2 to 3 years. I had just started the IMAX film about the Sun when I moved up here. Now its complete and with a distributor and happily it is very successful. I was also the Executive Producer on a documentary for ABC TV with David Bradbury which overlapped over the last 3 years. Solarmax had a budget of around \$5million. It has opened already in Chicago, Copenhagen, London and Tokyo, and opens in New York very shortly. It will eventually make its way around the world. We've sold to 25 territories so far. It's a niche market. Happily for me, the first IMAX film I made, "Antarctica", was the most successful film of its kind ever which has enabled me to keep on doing it. All the films we've made have been successful and made money so that's rolled on to the next one.

Peter Murray - I've come from a background in broadcast television and over the last 15 years I've worked in four states. I trained initially as a cameraman and also a sound recordist and then moved into editing and post-production. This has really prepared me for work on the North Coast. Being able to wear a few hats has enabled me to earn a living here. At the moment I'm working in conjunction with Vision 21. When I came back to the North Coast from the Northern Territory, I met Richard Woolley and his organisation and we basically figured between us that we were much better working in conjunction with each other then working in competition with each other. I'm working mainly on commercial projects, approaching businesses and corporate houses, people who are looking for production facilities or need a product made to suit the nature and quality of their organisation. I also work as a contract broadcaster. This involves approaching major broadcasting companies and telling them that we have the equipment and the facilities, a high level of expertise and we can fulfil the work for them regardless of the fact that we live on the North Coast.

Richard Woolley - This business, now Vision 21, was established by my parents, about 30 years ago. It operated under a different name and worked mainly as a corporate video production house. When I partly finished my degree, my parents wanted to retire from the business so I purchased it from them, renamed it and since then have been trying to give it a new focus and new direction. Up until now, we've managed to survive locally which has been terrific. We operate a full-broadcast quality production suite, and we have a non-linear Avid post-production facility. We shoot on SP Betacam and we've got the ability to output onto either SP, 1", SVHS DVCAM - nearly all of the formats - but mostly we operate on SP Betacam for the moment. We mainly work on commercial projects and corporate video projects. I guess the majority of our work comes locally in terms of the television commercial work and we normally work for clients who want to produce commercials that are of high quality but can't afford to get the work out of the capital cities. That's where we slot in. In the corporate video market, there's not a great deal that comes from the local area. This work mainly comes out of Brisbane and Sydney.

Graham Quigley - I'm a hired gun; people bring work to me and I do my bit. The type of work I do is mainly television commercials and occasionally corporate work. Very rarely I do documentaries. I work as an editor and producer so the roles are quite varied. The various projects that I've worked on over the last few years are mainly corporate videos for larger companies in Sydney. I haven't been able to bring very much work up here, mainly because of lack of facilities and resources but also people skills. There's not a very cohesive network here yet. Hopefully one day there will be.

Karey Patterson - Wolftracks, the business, has been in existence in this form for about 12 months. We have 3 partners, 6 full-time staff, and a couple of casual people. Currently we're working on all kinds of projects. To give some examples - we recently put a company's classified newspaper on-line and streamlined the way that they work internally, saving them money at the back-end as well as giving them a bit of a marketing front-face. We're working with the SCU School of Naturopathy to develop some CD-Rom's for delivery of course materials. We work with the band Grinspoon coordinating projects and prize give-aways, updating their web-site and helping them with some of their corporate imaging. We've worked with CSIRO, and some other government agencies doing web-site work and database development.

Kym Gilham - Next Wave Media is a multi-media company. We cover Internet, CD Rom development, video production and we're even venturing into TV commercials. Basically we've come a long way in a couple of years. We have 6 people working for us now and everyone has their own skills. We have a 3D animator, a photographer, a programmer, graphic designers and marketing people and a sales person. So everyone sort of covers a few bases and we're really lucky to have found the people up here. We do a lot of web-sites. We try and choose our clients though. We just don't take any clients and throw a web-site onto the Internet. We try to choose only the web-sites that we feel are going to succeed for our clients. We do CD Rom development for a number of companies which is really exciting work. These projects are more time consuming - 3-4 months at a time - but obviously they are the lucrative projects too. As we grow I think we're going to attract more work along those lines. We also do a bit of graphic design and programming and we're working on e-commerce web-sites and advanced web-sites. We're trying to take it to the next level around here.

Peter Castaldi - The work that I do is event management and festival direction. I work for two different government organisations; the city of Sydney and Tourism NSW. For the City of Sydney I am the artistic director of the Goat Island Film festival and I'm on the Users Advisory panel for the Australian Museum of Art. For Tourism NSW I am working on a project called "Sunscreen" which is an archival celebration of Australian and international Cinema. I am also interested in the development of the film industry that is happening in this region and in particular the exhibition options. I think what's unique to this area is that we're free to form new markets, create unique small film festivals and combine them with music and drama and all of the creative elements. They're all here in this beautiful part of the world and we're free to bring them all together. Byron Bay is well known as a backpacking destination, but the more we can show our creative industries, the more we can attract new possibilities and form international relationships.

The impacts on Producers of technological change particularly digital technology.

"The advent of digital technology has changed the tyranny of distance into an advantage, so that we can sit here and post-produce our work creatively, without the bustle of the city around us. Creatively I think that's a giant advantage and the best of that is yet to come. The technology impacts on us in every way every day. Just the email alone, being able to send pictures around, being able to send presentations around. All of that has dropped the tyranny of distance until it doesn't exist now at all."

Wayne Young

All of the producers interviewed reported that technological change had profoundly affected the way they operate their business and their working life in general.

For most of them, this had resulted in positive change and pointed to new opportunities ahead. These opportunities included new marketing options, the development of niche markets, and easier access to international clients and broadcasters.

I think the whole shape of the market place is going to change and with it the traditional ways of doing the business. The way we receive information or entertainment is changing....I don't think we'll be stuck in the rigid TV format of 45 mins per hour. Distribution is going to be different as well. There will be more room for the independent Producer, and the traditional roles may morph somewhat into different things the producer/writer/director roles may merge. I don't think this a bad thing. **Troy Planet**

Technical changes have had a huge effect on my work. I find it a matter of jumping up and down and waiting for the ground that's shifting continually to settle. That might take another couple of years and I think its imperative to keep the learning curve really high at the moment. The way I now make films is completely different to what it was 5 yrs ago and it will be different again in another five years.

Michael Murray

For most of the producers, email and the Internet had transformed their working lives. Not only was communication so much easier, but it had liberated them from the cities and enabled them to operate successfully from their home office or studio based in the region.

Its great to be part of a generation that has had to embrace technology - especially if you want to go and work and live in a regional area. With the new economy you have people sitting on computers in remote areas who can get on the Internet, be sent bulletins and all the current literature and information from current funding bodies, updates and so on. You can access what you want, from where you choose. You can find out where the money is and how to access it. The other thing I enjoy about the new technology is that it provides a common ground to talk to younger people, so it crosses the generations.

Gerry Hilton

The new technology is helping with the day to day communication - email has just made the world of difference. You don't have to go through secretaries and telephones - the executives themselves respond to emails, which is great.

Di Morrissey

The technology really has made cities unnecessary, I think there is still some necessity for people to gather together, find partners, try new ventures, things like that, but it's not a mechanical necessity for getting work done. Quite literally today my distributor sent me a trailer from a specialist in Chicago for my latest film as a MPEG file. I've looked at it and made some changes and I'll send it back to him tonight. When he gets into the office in the morning, he'll have the changes and the music all there. Email is here - its not hype, its not an illusion. I couldn't stay up here without that development. It's changed everything and it's going to change it a bit more.

John Weiley

I doubt very much that I could be an independent filmmaker working from a regional base without email. Non-linear editing has revolutionised what we do. We turn over projects much faster and the quality is higher. We also now have the ability to show people exactly what our project is going to look like finished and that is something we could never do before. But I think bigger changes are yet to come. I'm thinking mainly in terms of being able to do little cuts and send them down the line to people. I know that technology exists already but for most of us its still inaccessible. But in the next decade that will start to be very accessible to all of us and something our home computers will be able to handle easily. That will make a huge difference even in my consulting work.

Catherine Marciniak

Many of the producers, particularly those working in the multimedia, corporate or commercial sectors, commented that the Internet and the new forms of communication had enhanced their ability to attract new clients to the region, especially international clients.

We are now able to market ourselves outside the area quite easily with the Internet and email, and be in contact with people not only nationally but internationally. It's almost to the point where people can see the work we're doing for them without actually sitting next to them which is fantastic for people who are working in the regions. In the past, that has been, or been seen to be, the reason why we don't get some of the better budget work. So definitely we now try to look at using any of those means like the Internet to market ourselves outside the region. We have been getting some work from international clients, freelance work, which has been really good to work on.

Richard Woolley

For the producers working in the multimedia sector the changes in technology were fundamental to their working life and, put quite simply, had created their jobs. For all of these producers, keeping up to date with new developments was an essential part of their working day, and most were extremely optimistic about the future for their type of work.

If we went back 7 or 8 years - these jobs didn't exist. Technological change has had a major impact. Basically we're creating new jobs for ourselves. I feel like we do a lot of research and development hunting out new technologies seeing how we can apply these to our client's needs. We've done some work with San Diego Museum of Contemporary Art. I suspect that opportunity

didn't exist a few years ago when the global economy was different. I think one of the reasons why our business exists is that we can take on business in capital cities and to a lesser extent overseas, and still satisfy our clients needs here. What I think will happen in the future is that there will be more people like us. That means we will be competing with low overhead businesses that are highly skilled and highly trained so we have to be sharp.

Karey Patterson

We got into it at the right time. We're all young, we're all really hungry and I think it's our age group that is really making the Internet happen at the moment. We get to trade on the fact that we're young, we live by the beach, that we've got long hair and that sort of thing. At the beginning this wasn't good. I got my hair cut and we were all out there wearing suits thinking impression really counts. I'm not saying it doesn't but once you have the work behind you, people are realising that to be creative, to come up with all this stuff, the chances are you're not in an office wearing a suit.

Kym Gilham

For a few producers the changes had not been welcome and had produced outcomes that they saw as detrimental to their work and to the industry in general.

There are less doors to knock on and those broadcasters are commissioning less films. Even though there is a growth in programming, there is a glut in documentaries at the moment. I think the new technology has brought a lot of new players into the field with digital cameras and non-linear editing suites. All these new players are creating product and flooding the market. There is going to be an economic rationalism shakeout of the market soon and the requirement is still going to be good storytelling and good quality filming and finding good subjects. I think the advantages have been that the digital technology has given the craft back to the filmmakers where it had been kidnapped by the technicians. Everyone was getting so anal about the resolutions when really it's about someone having the gall to go out there and shoot something, feeling they've got a story they want to tell and taking it out to the market. I think it's great but the issue we have to deal with is that there are a lot of new people entering the field at the moment and there's not the outlets yet for that quantity of product.....

Michael Murray

The biggest problem with technological change at the moment is that there's half a dozen formats on the market and everyone including the major broadcasters around the world are scratching their heads wondering which way it will go. The big problem for us is that we can't obviously afford to go out and buy 5 separate camera formats, because some formats will fall by the way, in two years time we're stuck with gear that nobody wants. And then there's the recent federal government broadcasting legislation... We've been hoodwinked, we've been royally rorted by Packer and Murdoch. Rather than having 120 possible broadcasting channels we're stuck with the same four. HDTV is a joke. Even Sony has stopped making HD televisions. We've been pretty well screwed and it's going to have a major impact on production companies coming to Australia to do work here. As an independent contractor its going to make a huge difference because its going to mean we have to go and buy HD TV cameras that no one else in the world is even considering running. That means we will have to have one set of cameras for the domestic market and one set for the international market.

Peter Murray

A lot of people assumed that digital was going to make everything very easy. I still like the quality of film to tell you the truth. I know the advantages of video but in the international market place you're still really talking film technology. And in publishing a lot of people thought e-commerce was going to be the answer, but I am finding people still want to read scripts on paper. And if you're talking serious money and serious negotiations you have to meet face to face. That's when the technology goes out the window. Tele-conferencing is not the same as sitting down face to face with people.

Di Morrissey

The technology hasn't necessarily been helpful because the systems are so much faster than what they used to be, that people expect they can rush things through. For example years ago if you worked on film and you wanted to put in something as simple as a dissolve, you would go to a lab and their optical printer would take maybe 6 hours to do one dissolve and that was a standard. People were used to the fact that you did not rush the job through.

Graham Quigley

We have \$100,000 of Super 16mm film equipment including editing equipment, camera lenses, sound equipment ... all this has become pretty much redundant as diary documentaries and then 'reality TV' have become fashionable. These documentaries have opened up opportunities for inexperienced people to go and shoot on Hi 8, DV and DVCAM cameras. Sometimes they see their cameras for the first time at the duty free shop on the way to start their project. A lot of these documentaries are shot using the automatic button and the top microphone and the end result is technically extremely poor in our judgement. Generally this has meant that our 30 years experience goes out the window. Our working standards and ideas of good craftsmanship are often not appreciated and understood by some new filmmakers. We guess this is to be the way of the world now.

Jeni Kendell

Advantages and disadvantages of living and working in the Northern Rivers region.

For most of the producers, the advantages of operating from the Northern Rivers region far outweighed the disadvantages. The major advantages were perceived to be lifestyle and more opportunity for creative output. The major disadvantages were the distance from the cities and key industry contacts and lack of infrastructure and networking in the region

I've found that if I lived in Sydney I would spend my entire life in meetings not doing anything and I would actually have to employ more people or have the organisations employ more people to administer the projects. Now I usually spend a week in town and a week to ten days at home. The week in town is lots of meetings with people to ensure everything is on track, and dealing with bureaucrats. I then leave town to come home to this office where all I do is administer and work. I'm at work in 1 minute and I can work 24 hours a day if I wish. I'm not distracted by the city. Cities are great places to live because of the facilities, the perceived advantages of public transport and all the great places that are available, but as for working I find it very inefficient. Up here I can work very efficiently. If I need to meet people, I'm on a plane and an hour and half later I'm in an office in town. It's almost the time that it would take me from my parent's house in Hunter Hill into the city in peak traffic.

Peter Castaldi

There's definitely disadvantages in being based in Byron. You're not in the loop so much. Your projects have to be kept in front of the commissioning editors. You have to keep a high profile.

That's why I still go to markets and conferences. You tend to get side-lined in Byron because you're not part of the hustle and bustle of the city. The advantages are you don't get on the treadmill as much. I'm trying to win as the snail not the hare because I think by not being on the treadmill..... your rubber band doesn't get drawn so tight.

Michael Murray

The only impediment is travel money. At some point you have to get on a plane and go and meet some people face to face whether they are in LA, London Sydney or Melbourne and that's one cost factor. You can operate from anywhere now, with email, fax and phone. Everyone knows about Byron Bay and people want to come here and many significant meetings have happened here. I tend to do a lot of my negotiations down on Rae's Terrace at Wategoes Beach.

Di Morrissey

A number of producers commented that the reputation of the region, and particularly Byron Bay, worked against them and their business, and stressed the importance of measures to change the negative perceptions of the region by city clients and broadcasters.

The disadvantages of operating from this region would be that people in capital cities think that if you're any good you would be in a capital city. I think that's a bit of a projection on their own values. Occasionally they may be less inclined to deal with us and we've had a couple of situations that we've really had to bend over backwards to prove to them that we're worthwhile dealing with. The largest difficulty is if you're not getting the respect from capital city clients, you're not getting those large jobs and you can't afford to keep on highly skilled people on the same wages. That's pretty much a major disadvantage.

Karey Patterson

The advantages of working up here are that we definitely get to trade off the cool factor of being in Byron Bay. But only sometimes. We find that's good say when we're working with surfing companies or generation x companies who know that a young person is needed to create their stuff. But we do find that when we deal with larger clients more often than not the reputation of Byron Bay does precede it. People think that we're all surfing, dope smoking hippies that sort of thing and so we have to get past that and as a community we are getting past that. We're changing the image and becoming a bit of a hothouse for IT, visual media and creativity. We're trying to promote a new identity for Byron.

Kym Gilham

One of the disadvantages is the reputation that Byron already has in the industry. To illustrate this - I got a call from a Disney company in the United States recently who wanted me to shoot beach locations for an upcoming feature that they were doing. They wanted me to shoot in the Tweed and Ballina regions. I explained that I live around the Byron Bay area and we've also got excellent locations here. But the perception they had was that it was going to cost them a lot of money to shoot in Byron Bay. Regardless of whether it was true or not, this was the perception they already had in Hollywood and that can be detrimental. This is something we need to address - location fees and the rest of the issues in relation to local councils. There's also a certain element of 'I live here but I don't want anyone else to come here'. How we deal with that is difficult. I don't have the magic answers. I had someone say to me recently when I was shooting for an international travel program that they were not going to help me because they didn't want more tourists coming here. That's an issue we're going to have to deal with.

Peter Murray

The changing role of the Independent Producer

Generally there was consensus amongst the producers that the role of the independent producer was changing, both as a result of the technological changes and the impacts of globalisation. Many commented on the changing influence of Hollywood, with several producers arguing that the dominant role of American, and particularly Hollywood, films was diminishing, presenting new opportunities for Australian product. Others were more focussed on the development of new media technologies around the world and the new marketing possibilities and new outlets this was creating for Australian product.

Several producers saw opportunities created by greater use of narrow broadcasting to specific audiences. For these producers, the future of marketing to specific audiences is going to be the way independent producers are going to go. They will have to be entrepreneurs in new media, rather than just producers who deliver their products to someone else to distribute.

My role as an independent producer is changing a lot. I think in the future, you won't just be a Producer, you'll need to be an entrepreneur in multimedia. You can't pigeonhole yourself, but you have to find a niche for distributing your product. I look at my documentary producing as an expensive habit only slightly more healthy than heroin, which keeps me enthralled - it's my passion. I can expect a production fee of \$25,000 a year if I do one film a year- if that can happen. In reality, I'm only having one film made every 2 to 3 years. And in the present market place this is quite good. People coming into the industry need to know just how tough it is. You may get your first film up and then wait 5 to 6 years to get another one up. What are you going to do in the meantime? If you don't have a skill like sound recording or editing, its going to be a long time between drinks. I distribute videos as a cash flow and I enjoy it and it's a good partner to my documentary work. I've concentrated on the niche as Australia's largest distributor of natural videos and I think in the new media that's a skill that's going to be necessary. The days in the past where I would give my film to a distributor and sit back and wait for the cheques to roll in are gone. There's not enough meat on the bone to be able to hand it over to other people.

One of the effects of globalisation is that a lawyer in Sydney is going to have more in common with a lawyer in Zurich than one 100 kms away in the bush. There are lots of different communities and they will become target audiences. They'll have a newsletter, a chat room and a web-page. People will be broken down not by their nationality or religion but by their special interests and speciality fascinations. For example, I just made a film about eco-villages in Europe and I'm going to be able to sell that film to cable, video, and to a special audience that I can access globally not just nationally. They will be able to turn on their computers and find there is a film about eco villages and how they can get to see it. We are going to see more and more narrow broadcasting to specific audiences. **Michael Murray**

I think there's a definite need for a producer to be a bit more familiar with the technological possibilities. That doesn't necessarily mean to be a technological expert but to have the information provided to them or to be reasonably skilled up enough to understand what can happen, what is possible, what they can work with and what they can create. I think the days of the Producer working in the old fashioned way of "I'll do it my way, I know, I've been doing it for 10 years; it works for me" are over; I think the market place will sort those people out pretty quickly.

Karey Patterson

Independent producers have a tough battle. It's a silly game to be involved in. In many ways money for films is the hardest money to get in the world. For feature films, it's totally independent money that gives you total creative control, and that's the only thing we're interested in, so we have to wait a long time to get projects up and find that individual funding. I think that the role of

independent filmmakers is going to become more important because Hollywood has so obviously lost the plot in the sense that they can't think up great plots that will entertain the world anymore. This is mainly because they are born and bred in Los Angeles which is a sterile environment. Australians are able to make English speaking films without sub-titles and Americans can almost understand what we're saying, so that gives us a giant advantage. We're all independent filmmakers in Australia, and I believe that independent films are going to make bigger inroads into the studio pictures because the world wants fresh ideas. **Wayne Young**

However, not all were so optimistic about the changing role of the producer and the impacts of global change on the life of the Producer based in the Northern Rivers region.

Over the 20 years that I have been an independent producer, it does seem that the content of programs has become more and more dictated by even straighter and more corporate narrow-minded executives who imagine they speak for an audience that they perceive as the lowest common denominator. So you may spend \$10,000 on a trip to the UK, Europe and America to meet the Commissioning Editors only to find by your next documentary 18 months later that they have gone and been replaced. There is no continuity for the filmmaker to build up relationships that last and grow and are built on mutual respect. It is constantly "now who are you?" And one good film for a network that has been well received and rated well does not mean you will get the next film with the same Network or that the same Commissioning Editor will receive your next submission. **Jeni Kendell**

The potential of the industry in this region

The producers interviewed had varied perceptions of the potential of creative industries in the region. The comment "if we build it, they will come" referring to some kind of Creative Industries centre in the region, was made more than once. There were some very ambitious schemes and some very cautious statements. The only consensus was that the region has enormous potential for the development of the industry here, but the views on what is needed and how this might be achieved were many and varied.

Wayne Young - *We are hoping to put together the equivalent of an artistic animation studio in Byron and instead of using sweat shop labour from Asia, which people have done in the past for animation we'll be able to create the entire thing from a studio in Byron. We've been working on this for 10 years or more so sometime in the future we'll get it up. Hopefully that will run for at least 5 years in Byron and a lot of people will get employed and it will put an economic multiplier effect through this community. It will help define Byron for the creative place that it is. Of course if one project like that gets up many others will benefit by the fact that people who will be working on one project will be able to transfer to another one. This will provide the basis from which we can do other feature films and Imax films and documentaries and interactive projects all under one roof. Our biggest advantages are that we have a fresh point of view and we have a Celtic storytelling bloodline that runs through Australia and the Aboriginal people have been telling stories for 50,000 years or more. So this is a great source of story telling and as we flip into the new millenium people will want more stories.*

Di Morressey - *there's no reason why this area shouldn't become a Centre for filmmaking and attract more talent and support and add to what's already here in a more cohesive manner. It just needs an umbrella organisation or body that we're all under so that the world knows we're here and it can develop more from there.*

Troy Planet - *My dream for up here is to have a cottage film industry facility. If we had studios set up with some good editing equipment, they will come. We live in a unique place in the world*

and it would be great if that could be expressed in the media that was generated from here. I found myself doing stuff here that I couldn't do living in Melbourne or Sydney. I do think we need a global strategy for marketing because then you only need a small portion of the market to keep it floating. I think Byron Bay is an international place but not yet a big player on the stage... it would be good to have a place where professionals could meet and contribute something that would incubate development and create polished final product

John Weiley - *Australian independent producers need courage and optimism and a feeling that they're supported. They need to feel that whatever efforts can be made to support them are being made to help them succeed and that they're not being frustrated or suffocated. One area that really does need work is broadcast policy. There are a lot of opportunities in the creation of material for cable and other forms of media which are impossible for us to access simply because of broadcasting policy. That's almost unbelievably stupid and wouldn't cost any money to fix. Changes in government policy would generate a fortune in revenue. The outlook in the short to medium term is pretty grim. Successive governments have abjectly failed and the current government is not demonstrating the creativity or the guts to do anything about it. They're paying for years of gutlessness, and the longer they put off changing the monopolisation of the media, the harder it is going to be to change it.*

What we are trying to do isn't easy. It's a highly competitive field to operate in but there are people who want to do it and we have many opportunities up here. It's like how we garden up here. We plant the flowers next to the carrots in order to make a big healthy garden. I don't see the local industry as being structured like a pyramid with directors at the top. It's not that sort of thing. I think we are going to get enormously different activities. Some people are going to be making little tiny inserts for web-sites and they will be working in a small formats. Some people will be turning out documentaries for television or large scale IMAX films. ABC's most successful recent TV drama was written here in Byron Bay and indeed about Byron but because of the tyranny of distance wasn't shot here. My vision would be to see all of those things thriving, from the multi-million dollar productions to the little school shows a permaculture of movies.

Catherine Marciniak - *First and foremost I need this area to be acknowledged as a base for filmmakers, so that the people in the city can start to see this area as a vibrant and large filmmaking enclave outside of the city that is representative of regional filmmaking in Australia. I think that the documentary conference in Byron is going to have a huge impact on that, because at the moment I still think they see us as the people who dropped out. I think that once this area is acknowledged as a filmmaking centre, then a lot of the things that are provided in cities will start to be provided in this area.*

Michael Murray - *Having the documentary conference here in 2003 will I think make a difference. I think it could improve our profile. This is the first time the International Documentary Conference has been held outside a capital city. It is a big event involving 600-700 people from all around the world and there is a degree of negativity and scepticism about whether we will be able to pull it off in the style that a lot of the people expect. Just by focusing the world's documentary industry here, the input of energy and awareness will have a huge effect.*

I'm very optimistic about the long run but for the short term I'm not. I think the documentary industry is in for some difficult days. In fact the whole Australian TV and film industry is in for some difficult times. We're out of the loop. Europe and North America have sort of captured the cultural race globally. We're a long way away and we really don't figure. The only things we have to sell are the Barrier Reef and the desert and our wonderful cuddly animals. But that is

changing. We do have the advantage of being mid Atlantic - neither English or American. We can sell and make global product and we certainly are a creative nation. As for the Northern Rivers region, I think we will have the cream of the industry coming to live here in the near future. If there's an industry here and some infrastructure, more and more people will come. If we build it, they will come.

Karey Patterson - *I'm a definite optimist with regards to how the multimedia industry will progress primarily because the key word in multimedia is 'media'. Our clients and their clients are consumers of media and I think that there is not a human in Westernised society that isn't an avid consumer of media. So I feel there is a ready market here for media production of any kind and so I'm a very big optimist.*

Kym Gilham - *If we only had a Byron Bay focus we would be bankrupt by now. We have done some work with a number of international companies and we will continue to do so. One of our larger clients is a German life sciences company and they have branches all over the world and a South Pacific office in Sydney. We also had an exciting American company get in contact with us via the phone and via the email in the last week or so. They've been watching our work apparently for a couple of months and had the CEO call up the other day. They're very interested in setting up some sort of partnership between our two companies. There must have been some time earlier in my life when I wasn't thinking, but in the last three years my brain has not stopped. I think everyone in the company is the same way. There are so many opportunities, so many different things we can do, that there is no time to be pessimistic. We have an advantage over a lot of people in that we can work as many hours a day as we need to, or all night if we have to. And we are having so much fun too, which helps.*

Peter Murray - *To foster the industry in the Northern Rivers it really needs a slick public image. It also needs people who can do the job, people who have the runs on the board to do that particular work. There's no point in setting up the whole thing when people come here and maybe get let down by people who may not be up to the standard required. That's fairly important. Then it comes to a case of marketing. We as television and film people in the Northern Rivers have to figure out a strategy for expanding our horizons overseas, having an image that will stand up in New York or London or San Francisco or wherever. We have to have an image which is as good, if not better, for those people to say yes, we'll take our work there.*

Richard Wooley - *To make sure that we're viable in the future, we need to make sure we utilise all the skills that are available to us. Budgets are getting smaller generally for the type of work that we do, and so we have to become much more efficient. It's expensive to bring people in from outside the region. I think if we can source people from within a certain radius of ourselves that we can work with, then things will improve. We need to do more networking, because not every job is going to come in through our own door. We need an agency or booking centre or a database of skills and services - some sort of information centre that we can all be a part of. The networking side of this business is vitally important.*

Graham Quigley - *I think there is more potential to come out of Brisbane and the Gold Coast than Sydney given that we're only an hour and a half or two hours from those locations. Sydney is starting to price itself out of the market, partly because of the rental situations for the production companies. So the facilities there are not as attractive to work in as they are continually down-sizing space all the time. As things move away from Sydney and big businesses move towards Brisbane, there must be some sort of fallout from that in this area, because of our proximity. Of course I'm optimistic, I wouldn't be pessimistic otherwise I wouldn't be in this business.*

Jeni Kendell - *certainly what attracted us here as the first filmmakers in the area has also attracted others; the beauty, the friendship, the lifestyle and support. We treasure that. But when I went to the meeting at Clunes, I heard mention of making Byron a location centre and putting a Sound Stage at Ballina etc.....I'm not sure we're ready for that. I think I need another job and to regard being an Independent producer as an indulgent hobby.*

Peter Castaldi - *I think one of the unique things about this whole Northern Rivers area is that we have kids who are growing up here and are not choosing to run off. We have a core group that is looking into a vast array of industries and practices and they can see a future here. They don't have to fly the coop. ... they can stay and build experience here. We have to get together SCU, Mullumbimby High School, the Writers' Centre, North Coast CAMERA and work together and progress. Who knows what's possible. Why can't we develop exhibition strategies that support the video and film production that is going on in the whole catchment. If we're going to develop a filmmaking centre we have to look at how to develop the acting talent. If we're going to tell stories, we need writers, so we need to develop all these things. So many short films and great docos are made up here.*

Independent exhibition is dying. There's a few small entities left most of which are owned by large major distribution houses. It's only in a place like Byron Bay where we can subvert the dominant paradigm. We don't have a distributor here. We own the culture and we can build it and divide it in any way we see fit. That's phase two. Phase one is getting people together. Phase two is what do we want? It's a community process.

We're set and we're primed to create an amazing model not just for Australia but internationally as well. People are sick of the generic experience of being offered 40 screens but only 3 films. Even the video store model of rent one and get one free doesn't mean anything any more. Now we can produce for foreign markets and circumvent the major distribution and exhibition markets and create our own. We don't need to bother them or them to bother us. We can exploit our own product and we're lucky because we have the energy here that's right to do this.

Gerry Hilton *The wonderful unique thing about Byron Bay is that you have so many strongly individual stories here and a strong creative community. If you combine the strong political and personal will with that creative energy, we can make it happen. Byron Bay has a high proportion of people who have made an active decision to leave the city, and who have the courage to leap off into the unknown. If we can harness that energy by people working together and getting a infrastructure organised, we may be ahead of our time. But I think it's a unique community within the world. I've travelled a lot overseas and the mix here is really unique. You've got dairy farmers here, a literary community, working class people, artists, an extraordinary mix of people with the most unusual stories. Some of the stories I've been told you would have to question whether you could put them into a film because they are stranger than fiction. I think its time for Byron Bay to take its presence out into the world. We have some of the best filmmakers living here and the challenge for us I guess is to keep people here so that we can build on that community.*

Producer's data sheets

This region is home to the producers of the three highest grossing films ever made in Australia. The two highest grossing Australian films are John Cornell's "Crocodile Dundee 1 & 2" and the third highest was my IMAX film "Antartica" which has grossed \$100million. The producers of all three of these films now live in Byron Bay and the proceeds from those films can be seen in bricks and mortar and other follies in the region.

John Weiley

The Study also revealed useful information about the nature of work in the audiovisual industries. For all the producers interviewed, work is project based, self-generated and dependent on raising the finance. Expressions such as "doing the deal" or "getting it up" refer to projects that have successfully gained broadcast interest, a marketing deal or finance in some form. Even for the multi-media Producers who produce work for business clients, the work is project based and each one is different. People are hired on the basis of the project's budget, and work exists only for the duration of the project. Most work is on a short-term contract basis, and contracts range from one hour to one year. Most Producers are working on the project through-out the duration, and there is an accepted adage in the industry that the Producer is often the lowest paid person on the project. This is because of the huge amount of unpaid work that Producers need to do to develop projects to the point where they can seek funding, as well as marketing and distributing projects. Seeking clients and new markets is also the job of the Producer and this is usually unpaid. The reward is in finding the right client, a new outlet for product, or securing a project.

Richard Wooley - *Work in this industry, I think, is definitely not nine to five; it's about as far from it as you can get I think. We go from one job to another, from project to project, and I think the difficulty in this industry is smoothing out the lumps in the workload. It's either very busy or there's nothing at all, and that's very frustrating. We're a small operation and when the work is there you're out there you're doing it and when the project is finished you're sitting there twiddling your thumbs a little bit waiting for the next project. Or you're out there trying to source another one. So work is definitely not nine to five and it's definitely project-to-project. We work some late nights, some early mornings, many weekends, lots of sporting events and all sorts of things. It doesn't matter when or where, if it's got to be shot, we've just gotta go.*

Wayne Young- *We're not commercial filmmakers in the sense that we're just looking to get projects out. We have to wait many years to get our projects up, for a whole lot of factors to fall into place, and more than half the things we work on never get up. That's the nature of the film game; you can't get everything up. We only work on certain kinds of projects, therefore we've formed relationships with people like Yothu Yindi and Olivia Newton John. We haven't just made films and television but also advertising and political campaigns for the environment, and we're involved in a whole range of things like the Olympics and Paralympics because they are a vehicle for carrying these messages. When we get to do something like "Feral Flynn" the feature film, if we can get that up, we'll probably have 40-50 people working on it here. But filmmaking operates*

on a project basis so therefore those positions come and go. Some people work for 3 months and some for 6 months, a few of us for a year. That's the nature of the business.

Michael Murray - *The future of marketing to specific audiences is going to be the way forward for independent Producers. We will have to be entrepreneurs in new media rather than just Producers who deliver our products to some one else.....*

John Weiley - *I haven't earned any money in Australia for about a decade. My income comes exclusively from foreign sales and I regard it as fresh money, which is really nice to bring into the community. I think it's important to have industries like ours as it does inject new money from all around the world into the community. I employ people directly to work in the office and on productions and in the accounting side and all sorts of related things. I use local facilities that relate directly to the production side. And we are building a studio and we're employing builders and concreters and landscape gardeners and so on. Also we buy cars and local products and all those things that people do as part of the natural flow of things. All this adds to the economic capital of the shire.*

In addition to the interviews, all producers in the region were asked to fill out production sheets on their projects/productions for the period 1990 - 2000. Sixty-five production sheets were filled out representing projects that were initiated and carried out by 18 local producers, with some component of the project taking place in the Northern Rivers region. A sample production sheet appears in Appendix 1.

The total budgets of the sixty-five projects totalled **\$95,693,500**. Some of the larger projects spent only a very small percentage of their budgets in the region. A total of **\$18,839,070** was injected into the local economy. In total, they employed **1414** people of whom **533** were local people. On a single project, employment could vary from one month to three years.

As 18 of the 36 Producers identified in the region responded to this part of the study, these figures may be said to represent 50% of the project activity generated by producers in the Northern Rivers. If translated into annual figures, they provide the following estimated picture of income generated by producers in the region and the number of people they employ:

Total budgets per annum:	\$19,138,700
Budgets spent in NR region per annum:	\$3,767,814
Total number of people employed per annum:	282
Number of people employed in NR per annum:	106

Appendix 3: Acknowledgments

This project is supported by funding from the Commonwealth Government under its Regional Assistance Programme, administered by the Department of Employment, Workplace Relations and Small Business

The report was commissioned by the Northern Rivers Regional Development Board in association with the Northern Rivers Area Consultative Committee.

The Northern Rivers Regional Development Board is appointed by the State Government to assist in the economic growth of the region . The Board has supported the establishment of many new industries in the region and continues to work with existing companies to develop new market opportunities. Some of the key industries targeted by the NRRDB include aquaculture, plantation timber, regional cuisine and tourism development.

The Board, along with its partner organisations, North Coast CAMERA and the Department of State and Regional Development, believes that the opportunities presented by the film, video and multimedia industries are compatible with the needs and aspirations of this area.

The Northern Rivers Area Consultative Committee

Area Consultative Committees (ACCs) form a key regional network for the Commonwealth Government. Working in partnership with government, business and the community, ACCs identify and foster opportunities for job growth, skill development and regional growth and service delivery to find community-based solutions to these issues.

The strategies developed by ACCs provide direction and identify priorities for Government funding through the Regional Assistance Program (RAP). The Northern Rivers ACC covers the far north coastal region of New South Wales from Tweed Heads in the north to Corindi Beach in the south; from the east coast to the Great Dividing Range in the west.

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Appendix 4: Supporting quotes for Conclusions and Development Pathways.

In support of the International Documentary conference to be held in Byron Bay in 2003.

"The Brisbane Conference in 1997 acted as an explosive catalyst to the documentary sector which is reflected in the number of pre-sales here and within the international arena. The number of independent producers working in Brisbane has increased since that time and broadcasters have commented upon the range and standard of proposals received and more financial attachments are now coming from overseas partners for local programming proposals"

Melanie Guiney, Qdox Treasurer, Queensland Documentary Association

In support of the initiatives being taken in Ballina

A multi-million-dollar film industry site could be established on land owned by Thursday Plantation laboratories at Ballina, according to company chairman Christopher Dean.

Mr. Dean said his company was considering developing a film sound stage with digital imaging facilities, together with supporting offices, props rooms, editing facilities, costume and make-up rooms and an administration area. "There is a need for such a facility in the Northern Rivers and recent research into industry growth covering Lismore, Byron and Ballina has indicated that this particular area in Ballina would offer an ideal location for this facility" Mr Dean said. "Ballina is well serviced by the accommodation industry and we're just five minutes from the airport and half an hour to Byron Bay", he said. Mr Dean said it was time to 'put a toe in the water' to find out what sort of support such a venture would receive in the area.

Darren Coyne, Northern Star, October 2000.

In support of the establishment of SCREENWORKS from a community centre co-ordinator in Nimbin.

"Groups such as Screenworks are leading the way for us, helping to develop 'the big picture'. This will enable us to draw from their body of work as we ourselves begin the process of establishing a satellite media centre. We will need this regionally focussed group to guide and steer us in our own future projects".

Lizette Twisleton, Community Centre Co-ordinator.

In support of a creative industries initiative at Queensland University of Technology's Kelvin Grove campus.

"Creative Industries comprise a sector of the knowledge economy in which creative inputs are as important as information and technology. They include enterprises, such as the internet and broadcast media, computer games and animation, performance, writing, design and production.....we must encourage the development of creative industries such as digital and interactive production, new online and e-commerce services, and new electronic art forms. Industries such as these will help provide thousands of long-term, new-age jobs for Queenslanders and further diversify the Queensland economy."

Peter Beattie, Premier of Queensland, in launching the \$15M initiative to support a Creative Industries development at QUT.

Appendix 5:



NORTHERN RIVERS FILMWORKS EXPO The Report

Overview:

Between the 27 April and 16 July 2000, a very significant event took place in the Northern Rivers region: the NORTHERN RIVERS FILMWORKS EXPO. This was the first time that the general public, the media and interested industry bodies had been offered the opportunity to view the wide array of film, video and multi-media projects and meet some of the talented practitioners who live and work in this region. Many award-winning locally produced films and videos were screened and members of the community were given the opportunity of attending workshops by some of the multi-talented professionals who call this region home. The EXPO opened in Lismore and then toured to Grafton, Tweed Heads, Murwillumbah, Byron Bay and Nimbin. Through extensive coverage and promotion in the media, the general public was made more aware of the growing film, video and multi-media industries in our region.

How did it happen?

Jim Gallagher is Chairman of the Northern Development Task Force, an organisation committed to sustainable economic development and increasing prosperity and employment in the Northern Rivers region. He approached local film-maker and researcher, Cathy Henkel, after hearing her speak on local ABC radio about the growth of the film, video and multimedia industries in the region. Cathy had recently initiated the FILMWORKS project as part of her Masters by Research Degree at Queensland University of Technology. Through their discussions, the idea of a large showcase for the film, video and multi-media projects was initiated. It was decided that the EXPO would be launched in the Strand Arcade in Lismore and then tour to other regional centres. North Coast CAMERA, a local association representing people who work in the film and video industries, was approached to help organise and promote the EXPO. Sponsors were sought from within the region, and the entire event was put together in a two month time-frame.

The EXPO was organised and managed by representatives of Northern Development Task Force and North Coast CAMERA. The EXPO utilised the offices of the NDTF located in The Strand Arcade in Lismore. Aliison Kelly from North Coast CAMERA co-ordinated the EXPO between March and July 2000 and organised the venues, publicity, programs, screenings and workshops.

NDTF supported the EXPO through in-kind sponsorship in the form of telephone calls, photocopying, electricity, financial management and accounting services. Cathy Henkel played a major role in the publicity, as well as the organisation of the Forum in May and obtaining key sponsorship funding. CAMERA helped with equipment hire, advertising in their newsletter, extensive use of their members' database, personnel and funding.

What is the Northern Development Task Force?

The Northern Development Task Force (NDTF) pursues sustainable economic development in partnership with co-operating organisations, communities and individuals in the Northern Rivers region of NSW and others outside the region whose activities or decisions impact on the economic well being of the region. Its purpose is to increase regional prosperity and regional employment through attracting appropriate investment, through working together to implement regional priorities, and through co-operation and co-ordination in the continuous improvement and implementation of economic strategies across the region.

What is North Coast CAMERA?

North Coast CAMERA was established in 1995 to encourage and support film-makers in the Northern Rivers region. It is a volunteer-run community media group that organises film screenings and monthly workshops with industry professionals and provides networking and co-ordinating services for the film, video and multimedia industries in the region. North Coast CAMERA is based in Lismore and now represents over 140 people throughout the region, from Grafton to Murwillumbah. CAMERA provides a screen culture service through its regular screenings of local and alternative national work, which includes short film festivals. It also offers training workshops with industry professionals in Lismore and Byron Bay on a monthly basis. CAMERA produces a regular newsletter and supports many other activities aimed at the development of the industry in the region.

When It Happened!

March 15 – April 26 2000	Administration / organisation of the EXPO
April 27	The Launch of the Filmworks EXPO
April 27 – May 19 2000	EXPO runs in Lismore
June 14 – July 16 2000	Regional Tour of EXPO

What the EXPO set out to achieve.

The EXPO had three specific objectives:

1. To raise the profile of the industry in the region through:

The screening program: Showcasing the large array of films and videos that have been produced by film-makers who live here was a wonderful way of inviting the general public to experience the scope, quality and diversity of work taking place in the film, video and multimedia industries in their region. The films were projected onto a large screen or monitor in all venues and in some instances the film-makers were on hand to talk about their work. The screenings were organised around themes such as short films, feature films, animations,

documentaries (environmental, aboriginal, women's, social issues etc), educational, community and music videos and multi-media presentations.

The displays: The EXPO also hosted displays, presentations and promotional materials from individuals and organisations working in the industry. These provided valuable information about the range of services and facilities in the region and provided background information on some of the major producers and directors located in the region. There was also information on companies and organisations that had sponsored and supported the EXPO.

The workshop program: The most popular aspect of the EXPO was the workshop program held in conjunction with the screenings. These provided a doorway for individuals interested in this industry to learn more about what is taking place and its potential for the region. "Networking the Northern Rivers" was another project highlighted by the EXPO, and their workshop, held in Lismore, was extremely popular with the public.

2. To support the industry research project:

A major aim of the EXPO was to support the research being done into the growth of the film, video and multimedia industries in the region. The Northern Rivers Regional Development Board in association with the Area Consultative Committee, had identified the need for research in this area and were about to launch their "Multi-Media Study". Cathy Henkel had already commenced a Masters by Research degree at Queensland University of Technology, and was preparing a large regional survey of the local industries. Cathy Henkel was subsequently appointed the consultant on the NRRDB project and given the task of producing a report on the size and scope of the film, video and multi-media activities taking place in the region. The EXPO provided the ideal platform to launch and promote the survey, access people working in the industry from throughout the region and promote the aims of the Study.

In conjunction with the research project and to support the development of networking in the region, a Web-Site was created at www.nrfilmworks.com to provide a range of services. Presently these include:

- an internet based meeting point for the local industry
- an interactive database for professionals and semi-professionals working in the industry
- a data collection service and detailed questionnaire for research purposes
- a page hosted by North Coast CAMERA to advertise news, special events, workshops, screenings and other events.

In the future the web-site will also include:

- a page to promote facilities, equipment and skilled professionals in the region
- a forum for discussion and feedback on topics of interest to the industry
- a place to promote the region as a film-making centre and to showcase the locations available to film makers from around the world
- the development of a market place/distribution outlet for locally produced work.

The EXPO provided a high profile way of launching the Filmworks web-site and through utilising a donated computer, individuals were given the opportunity to access and be trained on how to enter their data and use the web-site to their advantage.

The survey was widely distributed to all media outlets wherever the EXPO toured and people attending the EXPO took advantage of the web-site to access the survey and database.

3. To provide a networking and co-ordinating focus for the industry:

The EXPO brought together many diverse sectors of the film, video and multimedia industries and initiated a dialogue between different sectors who had not talked to each other before. Members of the IT & T industries met with film and video producers, and multi-media or new media creators talked to people working in the traditional media sectors. The EXPO succeeded in gaining wide media attention, including television, radio, print media and community media coverage. Even if practitioners did not attend any or all of the FILMWORKS events, they were aware of them, and the EXPO and two Forums initiated a discussion within the industry regarding future directions. There were a number of individual practitioners who met during the EXPO and are now working on projects together.

The first Industry Forum was held as part of the Lismore stage of the EXPO and its purpose was to bring the diverse sectors of the industry together to explore new ways of working together to develop the industries in the region. The outcomes of this Forum are detailed later in this Report.

Who visited the EXPO?

It is estimated the over 800 people visited the EXPO during its 3 month tour. It attracted a wide section of the general public, and special events were organised to bring in specific groups, such as:

Students – Workshops were held involving training providers and students from TAFE, SCU, the Conservatorium and secondary schools.

Youth- School age students, specifically Years 10 – 12, as well as primary, were introduced to the SCU multi-media department. A children's day was held at the Lismore EXPO during the school holidays.

Individual film and video makers were encouraged to attend, in particular to see the screening program. Specialised workshops were held in writing, animation, short film production, documentaries, distribution, multi-media production and e-commerce.

Lismore

The Launch -The EXPO was launched on the 27 April. Miss Stella Kinsella was invited to interview the who's who of the film industry in front of an appreciative audience of over 60 people. Special guests included Di Morressy (Australian writer), Jeni Kendell and Paul Tait (award winning documentary makers), Don Blake (freelance professional voice), Cathy Henkel (award winning filmmaker), Christopher Dean (local businessman), Prof Sturt Cunningham (Head of School of Media and Journalism – QUT) and Jim Gallagher (NDTF). Mark Bromley from the Conservatorium volunteered his time and played his guitar beautifully during morning tea. After refreshments and champagne, the first film screened was the highly successful **Cry From The Heart** by Jeni Kendell. Representatives from the media attended, which resulted in two separate television interviews on NBN and Prime, as well as numerous stories in the print media and several radio interviews.

Workshops - One of the highlights of the Lismore EXPO was the vast array of workshops and presentations that were generously donated by individual film-makers. These included Animation - Tim Adlide, Cult ID (a youth based music show) - Janelle Buckley and Alan Vandermeide, a retrospect of Gaia Films - Jeni Kendell and Paul Tait, Befriend the Camera - Richard Lawton, Making Corporate and Community Videos - Cathy Henkel, Scriptwriting - Elaine Patton, Low to No Budget Shorts – Kim O'Connell, Music for Video – Rik Cole and Nicolette Boaz, demonstrations of SCU Multimedia by past students and a discussion on the Internet's Cultural

Future by Dr Gerard Goggin. These were all well attended and there were a great number of individuals who obtained new knowledge in these different facets of film-making.

The Forum – On the 6 May, 50 people attended the first industry forum. Discussions were held on a range of topics including why the Northern Rivers is attracting so many practitioners; what the factors are that limit growth and the drivers needed to assist it; and the future of the industry in the region. Cathy Henkel facilitated the Forum and the panel of speakers included David Bradbury, John Weiley, Prof Steve Garlick, Jane Oliver, Nicolette Boaz and Owen Johnson and Deb Cox (via video).

Individual presenters talked about the different aspects of the industry and gave personal accounts about what was needed to create more opportunities for their chosen fields. A lively debate was held and it was agreed that a concerted effort was needed if the film, video and multi-media industries were to develop in the Northern Rivers. It was concluded that a second forum was necessary to discuss further the different issues raised at this forum.

The Lismore program concluded with the extremely popular short film festival – Tropfest. Although this is a national festival, local shorts that had been entered, were also included in the evening's entertainment.

The Tour

It was viewed as extremely important that the EXPO should be given the opportunity to tour the whole of the region for a number of reasons:

- the Northern Rivers has a regional population of 250,000 and we wanted to reach as many people as possible
- to inform the general public of the push of development mainly coming out of the Byron / Lismore area
- to showcase the film-makers that live and work in the region, particularly the Byron, Lismore, Mullumbimby film-makers
- as a vehicle to distribute the survey to the outlying shires of the region
- as a tool to discuss the future of the industry in these shires.

Grafton

14 – 16 June

Shopping World

Touring to Grafton was made relatively easy through a number of strategic connections. John Pullinger of the Grafton Business Enterprise Centre informed Michael Keefe, Chairperson for the Chamber of Commerce and Manager of Shopping World in Grafton about the EXPO. Michael travelled to Lismore to view the EXPO for himself and then went out of his way to bring the EXPO to Grafton. Michael volunteered the services of his Marketing Manager, Lynda Davidson, who helped with all facets of the EXPO, from decorating the space and catering, to photocopying and paying for the telephone line installation. This amount of help and enthusiasm made the Grafton leg of the tour extremely gratifying.

Over the three days of the Grafton EXPO, a small but enthusiastic number of people attended the film screenings, workshops and displays. Students from Grafton TAFE took part in a short film workshop run by Kim O'Connell, and students from various schools explored the SCU multi-media display. Some visitors accessed the web-site. The drinks evening held on the first night gave representatives of the media an opportunity to meet Cathy Henkel and discuss further the research in the region and its implications for the future of the industry in Grafton.

Byron Bay 21 – 23 June The Great Northern

The Great Northern has been a sponsor and supporter of CAMERA over the last two years and happily agreed to support the EXPO. The venue has a video projector already set-up in the Backroom, though there was no telephone line, so unfortunately the web-site was not accessible. The Byron Tour (due to a high percentage of film-makers living in the Byron Bay area) was extremely popular with large numbers attending the various screenings and presentations. The special presentations by guest film-makers – David Warth, Michael Murray and Catherine Marciniak - were all well attended. The three guests screened their latest documentaries and talked about how their projects were financed and created.

Tweed Heads 26 – 27 June Tweed City

The two day Tweed Heads tour was handicapped by a disappointing choice of venue. The contacts provided in the region did not have a clear understanding of the demands of the tour and of the industry in general and were not as supportive. As a result, the numbers were very low, and some events had to be cancelled. However, the local media supported the event and gave it good coverage, and most were very supportive of the aims of the EXPO and the industry survey. Despite the small numbers, some useful connections were made. Three young film-makers from Griffith University attending the short film workshop were given information about the industry in the region and one of them later attended the second Forum in Clunes. The Community Cultural Development officer for the Tweed, has now been contacted by the Manager of the Tweed City Centre regarding the development of screen culture in Tweed Heads, including a local film festival.

Murwillumbah 28 – 30 June 76 Main Street

The enthusiasm of those who attended this leg of the tour was one of the highlights. Every day there was a small group of people waiting at the door to be let in. On the Thursday, 10 people attended a presentation that was given by Catherine Marciniak regarding her recent film, **Steel City**. The short film workshop run by Kim O'Connell was an extremely well presented workshop and was appreciated by the 20 enthusiastic film-makers who participated. All who later attended the drinks evening found themselves incorporated into an advertisement created by the workshop.

Nimbin 16 July Community Centre

Long-time Nimbin resident and active community member, Arthur Pike, attended all three days of the EXPO in Murwillumbah, and negotiated for the EXPO to be taken to Nimbin. It was held at the Community Centre in the centre of the town on Sunday 16 July. A program of films was screened commencing at 11am, which ran until 6pm in the evening. Throughout the day, a constant stream of people attended the screenings and looked at the displays and industry information provided. Discussions also took place between Cathy Henkel, Wolfgang Stemmer of the Nimbin Community School and Lizette Twistleton, the co-ordinator of Nimbin Community Centre, about the needs and aspirations of Nimbin and where they fit into the Filmworks Project. As a result of these discussions, several representatives from Nimbin attended the Forum in Clunes on the 29 July to explore Nimbin's role further in the local film-making industry.

Outcomes

Raising the profile: It is estimated that over 800 people attended the EXPO over the three months of its tour, and the media coverage of the event was extensive. NBN covered the EXPO in four separate news stories and Prime covered the launch. The local press coverage was extensive and

copies of this are available from the NDTF. Radio coverage comprised four ABC stories including interviews with EXPO organisers; Bay FM; 2NCR FM, Radio 97, 2GF Tweed Heads, Remah FM Grafton community radio, and NimFm Nimbin community radio.

Activities and events arising from the EXPO:

Legislative Council of NSW – The Hon Janelle Saffin – On Tuesday 30 May, our local member, Janelle Saffin, highlighted the EXPO in the ALP Legislative Council. Her talk included the key partners, NDTF and North Coast CAMERA, Cathy Henkel’s study and the first industry forum.

Grafton’s Film Festival – Due to the EXPO touring Grafton, Michael Keefe and the Chamber of Commerce organised Grafton’s first film festival – The Jacaranda Film Festival. Although entries were low, the organisers plan to continue next year and are confident that it will grow over the coming years.

Nimbin – Since the EXPO toured to Nimbin, the community centre has recently run a six week video production course with Jennifer Rush for disadvantaged youth. They have also initiated talks with CAMERA about workshops and are considering running regular screenings.

Murwillumbah – Lesley Buckley (Community Cultural Development Officer – Tweed City Council) is now applying for funding to run a video workshop. A peak arts organisation in Tweed Heads has been talking with CAMERA regarding regular screenings at the newly opened cinema in Murwillumbah.

The Filmworks Forum No 2 – On the 27 July, over 160 people attended the second forum, which was held in Clunes at the Old School Common. Many individuals and organisations from the region were present because of their participation in the EXPO.

Web-site – Over the duration of the EXPO, 57 people submitted their details onto the database. There were over 800 hits and a number of people accessed the program and learnt about the two forums.

Conclusion

The EXPO was an exciting success. It was the vehicle that launched a year of co-ordinated activity for the film, video and multi-media industries, raising the profile of the industry through the large amount of publicity and has paved the way for a uniform approach to the growth of the industry in the region.

We feel that a biennial event in the region, such as the EXPO, would be appreciated by the filmmakers and areas that hosted it. We believe audience participation would grow in the future as the general public became more aware of this industry.

Financing, though, needs to be carefully considered and some government funding could be sourced in the future. The budget was not enough to cover the true amount of work needed by the co-ordinator to complete the task. The EXPO’s budget would decrease if the Lismore section was reduced to one weekend.

Further, including Grafton and Murwillumbah within the tour will stimulate growth of the industry over time in these areas. A Grafton Festival has already commenced and Murwillumbah is in the process of negotiating a deal with the new owners of the Regent Cinema to host regular CAMERA screenings. Tweed Heads is a difficult place to access and it appears that the arts, film and multimedia sectors are not well represented in this area, or they are not very visible. Further

research may prove this wrong, but, until then, it was recommended that Tweed Heads be excluded from the tour until such time as a better venue and better contacts could be found.

Overall the EXPO not only stimulated industry development, but also community cultural development through the workshops that were conducted by professionals working in their fields. Many people attending the workshops were individuals just starting out in the industry. The EXPO also introduced the outlying areas of the region to the benefits of these developments and galvanised them into more involvement in the future.

Aliison Kelly, EXPO Co-ordinator, Nov 2000.

The Sponsors

It was considered necessary for the EXPO to be funded privately due to time constraints. Organisations within and outside the region were approached and many people gave the necessary money or supported the EXPO through in-kind donations. Without these valuable contributions the EXPO would not have existed.

The EXPO would like to acknowledge and thank the following major supporters:

Northern Development Task Force	Southern Cross Regional Research Institute
Thursday Plantation	Southern Cross University
Australian Key Centre for Cultural and Media Studies	
Consolidated Properties, in particular Casuarina Beach and Goonellabah Shopping Complex also	
Aspect North	NR Regional Development Board
Norlink	North Coast CAMERA
Hatchling Productions	

and those organisations who generously supported the EXPO:

Trevor Oram's Leading Edge	The Northern Rivers ECHO
The Ad Agency	Ballina Net
LINC TV	The Northern Rivers Conservatorium
Kelly Creations	NOROC
Jim Poulos	Lismore Subway
Grafton Chandlers	Grafton Shopping World
The Great Northern, Byron Bay	Tweed City
Murwillumbah Elders	Nimbin Community Centre

as well as the individuals who gave up their valuable time:

Leila Turner	Debra Taylor
Taran Tula	Wanda Coates
Alan Vandermeide	Glenn Nowotny
Christina Spurgeon	Stuart Cunningham
Tom O'Regan	Lizette Twistleton
Wolfgang Stemmer	Arthur Pike
Steve Garlick	Lesley Buckley

And all the film-makers and presenters who helped make the EXPO possible, including:

Cathy Henkel	Michael Murray
Catherine Marciniak	Wayne Young
Stella Kinsella	Tim Adlide
Jeni Kendell	Paul Tait

Appendix 6: JULY FORUM: CLUNES

Summary of Discussion:

TOPIC A: What are some of the factors that are limiting growth of the local industry and what are the drivers that enhance growth?

John Weiley led the discussion. The reasons that he and other people want to live here is that it is more productive to live out of the city. However, what takes us away from here in our work is needing city-based facilities and funding, lack of communications, and culture. He suggested that a broadband of communication in and out of here is necessary for people to work in the region more effectively. He cited the example of an IMAX movie he produced some time ago by downloading images from a studio site in Los Angeles. - this sort of thing is an example of the way we will be going in the future. Also, there is a very strong argument for sharing facilities as film-makers do not want the expense and the work involved in maintaining individual resources. Further, accessing investment is an important requirement and this could be better managed through a film-makers' centre. It is important that we take control of the digital age as it comes upon us. Finally, the film and video culture needs assistance to develop. This need is exemplified when we compare its underdevelopment with the Pub and music culture in the region.

Q. What about an academic approach to film and video making such as the Film and TV school in Sydney?

A. In order to succeed, it has to go out of the school room and become something real. It has to relate to processes in the real world.

Q. By culture do you mean people being encouraged to think critically about film making and film products?

A. Yes, and developing projects that give people the confidence and means to explore these things.

Q. Accessing stuff that comes from outside of this area is expensive and involves travel, particularly for people on low incomes.

A. The villages are a long way apart and travel is an issue. Cultural events do need to travel through these spaces. However, a central organisation is necessary in order to facilitate this.

Q. Is strengthening courage and confidence a necessary step before people can step out into the national and international arenas.

A. Even established film makers need the support in maintaining courage and confidence and this is one of the things that we will work on.

Someone suggested that if you want an industry in the region, we need to make money. Being cerebral is not enough. For example, documentaries are not selling.

A. There are tremendous opportunities for people to make high budget movies in the area. This already does happen, my work is an example. Cultural and commercial development can work side-by-side.

Summary: Out of this discussion there seems to be an acknowledgement that both cultural, regional and commercial concerns exist and need to be developed simultaneously.

Topic B/C: Developing a model for a film, video and multimedia centre for the region, and future directions for North Coast CAMERA

Cathy Henkel led this discussion. She suggested that in considering the development of a film centre it is valuable to consider also the existing role of the local film culture, community based organisation, North Coast CAMERA, as a functioning, incorporated body already working to some of these ends. Cathy talked about the Regional Solutions Programme, a federal government initiative to assist regional and rural communities build their capacity to identify and implement development opportunities. She said there were grants available up to \$500,000, and that we have to think about how we could apply for and utilise this money, remembering that in order to get such grants, a non-profit community-based organisation such as CAMERA with its incorporated community/regional focus is necessary.

In opening the discussion, Cathy talked about the experience that she and her partner, Jeff Canin, were having as individual film-makers, their continuing need to acquire and upgrade their equipment, a costly venture. She also talked about the demands of the industry on their own time and lifestyles, for example, they live in a converted bus and frequently work weekends and nights. Despite these sorts of drawbacks, people continue to move to this area for lifestyle reasons. She asks then, what are the needs of local film-makers and how they can be met by the Centre.

Cathy introduced her model for a proposed centre for film, video and multimedia industries in the Northern Rivers Region. She talked about the geographical positions, strengths and needs of the various locations: Byron, Lismore, Ballina and Clunes.

Existing and developing facilities:

Peter Baverstock from SCU spoke about the Cellulose Valley project and its intention of attracting industries to the area that have some relationship with the University. Some sort of relationship with the film, video and multimedia industry would be encouraged.

Warren Elliot of Channel Ten said that one of his great hopes was to see some sort of regional cohesiveness develop in all industries. He spoke about the now unused studio facilities at Channel Ten in Goonellabah which could be utilised by the local industry represented here today. He also said that the network would be interested in looking at sourcing material out of the region, as a form of alternative programming, and gave as an example a short films slot once a month.

Cohesion between local film makers, businesses and newcomers:

There is a tendency for film-makers to work in isolation and in association with people and organisations out of the area. There is a need to bridge the gap between these local film producers and local businesses in order to develop funding strategies, and between the established film-makers and newcomers through mentor type relationships.

Relationships with the big studios:

It was mentioned that while we don't want a Fox studio here, there is a need to establish relationships with these commercial enterprises because of the resources that they have available.

Centre Structure, locale and size:

Questions were raised about the structure of the centre. This is something that needs to be investigated and Cathy suggested that looking at the structures of existing resource centres would be useful. Also, Cathy suggested that it would be expedient to start small, probably with the Byron office because it is the most obvious and easiest to develop.

Defining the Region:

A 'Nimbinite' asked the forum to remember to include Nimbin in discussions! Nimbin has a unique contribution to make, ie very talented people with time (with perhaps a resistance to structure). Similarly, some one mentioned that there have been three major productions produced in the Tweed Heads region in the last couple of years and they wanted to be included as well. Cathy mentioned that there had not been much response to the Expo visit in that part of the region. However, it is part of the Northern Rivers region and should not be overlooked.

Centre projects:

There was a query about how the centre's projects would be organised. Cathy suggested that individual producers would bring their own projects to the centre. At the same time producers who had projects that they did not have time to work on, would be able to pass them on to other people in the region or use the FILMWORKS database.

Topic D: Developing a Locations Centre for the region

Kingston Anderson, the Manager of the Production Liaison Unit of the NSW Film and TV Office told the forum that increasing levels of production in regional areas such as we are experiencing is a phenomenon being replicated all over the world. American productions are moving to other locations in Canada and Australia because of the cost savings derived from favourable exchange rates. He suggested that we are well placed in this region to service these sorts of activities because of the regional critical mass in film-making expertise and services. However, in order to take advantage of these opportunities, these things need to be marketed correctly. Also a local infrastructure will assist this process. He also mentioned that there will be a grant available from the 1st January 2001 from the state government specifically for films shot in regional areas.

Strategies for marketing local locations:

Tom Hiscocks, speaking for the Filmworks initiative, spoke about plans to begin marketing regional locations through a web site.

A comment was made that it would be necessary to consult with local councils first, some of whom have already gone ahead and are setting up their own costing structures for these sorts of activities.

Kingston spoke about the new state legislation recently introduced to standardise the way councils deal with film-makers. The act, called the Local Government Amendment (Filming) Bill 2000, recognises and establishes filming as a legitimate activity within the local government act. It contains a set of protocols and guidelines for filming within local government areas. This includes how to apply for filming permits, a pricing structure, and timeframes etc.

All will be standardised across the state. Kingston said he would like to encourage a no-fee structure for location activities, letting the benefits to a region flow directly on from the activity.

Some one mentioned that there were disadvantages, for example, twenty big trucks arriving onto a site could have impacts not desired, particularly environmental. This is a concern. Other factors that need considering are whether the crew can get to the location and whether they can be accommodated etc.

Topic E: Fostering cultural development and screen culture in the region - assistance for short films animations, features, documentaries, new media, community video and aspiring film/video makers

Aliison Kelly and Gerard Goggin led this discussion. The first step is identifying local organisations that already support film culture in our region: film festivals, screenings, community media organisations, regional broadcasters, educational institutions, community welfare organisations with an interest in screen culture, video stores, the arts community etc.

Advantages:

There are a number of existing organisations and educational institutions in the region committed to the development of screen culture. Representatives of the Buzz Film Festival and LINC TV spoke about their activities.

Challenges:

Limited funds, size and distribution of the population, retaining and attracting talent to the region and collaboration between local organisations.

Discussion:

A suggestion was made that film festivals outside the area be encouraged to tour regional areas such as our own. Already there are a number of festivals being brought into the area.

The Buzz organisers said they could easily get funding to stage their festival in capital cities, but they were committed to remaining in Byron Bay. A representative from Nimbin Community radio station (NIMFM) reminded us to use them for advertising.

Questions about the location of a centre and its regional significance:

The emphasis on Byron at this forum was noted. A warning was given that if we are to have a regional emphasis, then this must be constantly remembered; that Byron is not the region. This was compared with the experience of the Writers' Centre and its shift from Lismore to Byron. The idea of regional emphasis and the location of the centre sparked quite a discussion.

Topic F: The Australian International Documentary Conference in Byron Bay

Lois Randall and Michael Murry described the process they went through in tendering for the International Documentary Conference. It has been successful and will be held in Byron in 2003, and this will be the first time it has been held out of a capital city. They mentioned that when it was held in Brisbane, it resulted in the formation of QDocs, which has stimulated a lot of activity in that area. It is hoped that there might be a similar outcome for this region.

SUMMARY OF SMALL GROUP DISCUSSIONS:

There were three small groups and the following is a summary of their discussion.

1. DEVELOPMENT OF A FILMWORKS CENTRE

There were approximately 45 people participating in this workshop. Others took part as observers. The following ideas and strategies emerged from the discussion:

1. We need a serious business plan: a group of producers will meet in Byron following the Forum to discuss format options and funding.
2. The website and database are essential to the development of the Centre.
3. What we want out of a Byron Bay Centre is:
 - A Locations Centre
 - A cast and crew database/agency
 - Information about equipment hire and services
 - A cultural activities centre (eg. Film festivals, screenings, workshops)
 - An educational centre for training and mentor schemes.
4. Possible locations for centre include:
 - The Byron Triplex (on the Woolworths Site in Byron Bay)
 - Back of the NORCO building in Byron Bay
 - The building above NBN in Carrington Street, Lismore
 - The North Power site in Mullumbimby
 - Stuart Street building in Mullumbimby
 - Acreage outside Byron
5. The wish-list for the Byron Centre included:
 - A centrally located building with office space for independent producers
 - screening rooms and café
 - off-line edit suite(s)
 - a facilities manager/"tech head" to do maintenance/repairs/trouble-shooting
 - a centre co-ordinator/gatekeeper to answer phones/supervise equipment/promote the Centre/seek new projects
 - a workshop space/meeting rooms
 - proximity to a cinema and café
 - office facilities such as colour photocopier/ Internet access/scanner
 - a Production Support officer to advise aspiring film-makers and manage the youth mentor or training scheme
 - a LINC TV translator for Byron area.

STRATEGIES:

1. We need to find a Patron for the Centre
2. We should research further the location options
3. A working group was established to examine these options and decide on a preferred site(s) and a working model. This group should also examine the information from the five existing screen resource centres already operating around Australia. The working group consists of: - Lucy Cameron - Nikki Fuda - John Weiley - David Neilsen - Michael Murray - Lee Johnson - Cathy Henkel
4. A Grants committee was also established to examine further the Regional Solutions funding guidelines and work together on a number of regional applications. This group consists of: - Lucy Cameron - Don Frater - Cathy Henkel - Lizette Twisleton - Jim Gallagher.

2. DEVELOPMENT OF A LOCATIONS CENTRE

Approximately 30 people attended this workshop.

Discussion from the forum centred around three main topical points:

- The defined area to be serviced by the Northern Rivers Locations Centre
- The strategic advantages of this area as a film, television & multimedia location
- The need to define the area's capacity for filming in the region.

Further research into these main issues for the location centre will be undertaken by a collective over the next few months.

FURTHER input or comments were invited.

3. SCREEN CULTURE DEVELOPMENT

The Screen Culture Workshop was attended by approximately 35 participants.

Plenary Discussion

First, there was a wide ranging discussion of different ideas around screen culture. Ideas and suggestions included the following:

Issues in Screen Culture

Regional activity: There is a need for more regional screenings. This could involve touring festivals or organising more regional showcasing of local work. It could also involve on-line discussions/real-time chat/real-time web activity/on-line screenings.

Regional development bodies/councils could be encouraged to

- Cooperate more on cultural issues
- Provide additional funding & focus

Issues arising:

Questions were asked regarding who provides funding if you have a project — what is the scope of such funding? Are there alternative funding/distribution sources?

Is it possible to set up a Short film fund? — \$1,000 grants

Getting films to people — hiring equipment?

The role of film societies (e.g. in Nimbin)

Music — where do you get it?

The role of cable TV

The Internet: connection & bandwidth

Education — the role of CAMERA

Preference for/against computers

Festival atmosphere — creates excitement

Distribute a sample CD of films

Writing — the need for education on scriptwriting for film and funding for this

Market — the need to find new ways of distributing programs.

Strategies

Film festivals — more of them with feedback to organisers

On-line exhibition space, hosting local work/ incorporating local database

Popcorn Taxi model — face-to-face monthly forum; Cotton Club weekly event

Young people — need for training/mentorship

New media- opportunities, eg sponsorship from Internet companies, including those not locally based

New media for emerging film-makers (e.g. accessible hire of digital equipment)

Different distribution model for new media, (e.g. Internet - the personal computer is home-based and networked)

K-grind - high bandwidth sites

Information on equipment/opportunities

Database on web designers

Avenues to sell work, inviting people to region to show work.

Small Group Discussion

Participants divided into groups to develop concrete proposals in a number of areas.
These proposals were:

Education

Nurturing original ideas - advice on how to utilise these

Central resource giving guidance on what is available for students and teachers

Space for requests

Filmworks website should have individual chatroom

Volunteers program to gain experience - database for work experience

Linc TV— web presence on what is on offer

CAMERA could have an:

- On-line web tutorial
- a weekly message bank giving a 'what's on'

Canvassing TAFE and ACE to increase their hours allocation for regional areas

Work experience with industry professionals

Follow-through of workshops.

Transport to facilities

Townhalls — available locations

Use of computers in idle hours

Need to canvass skilled people to offer courses and/or be available for consultation

Assistance with development of ideas/script development.

Exhibitions & Screenings

The region needs

-a Short film festival incorporating documentaries

- Co-operation between Buzz, North Coast CAMERA and Open Slather?

- the entire region to be incorporated in our film festivals and film industry as a whole

- more regular outlet for local film-makers- perhaps once a month at four different venues, e.g.

Cotton Club (Byron Bay), Ballina Fair Cinema, North Coast CAMERA in Lismore

More days like today!

Information

Create a CD Rom from the Northern Rivers, highlighting the local film industry, including many (or even all) aspects of the industry, e.g. music, film, editing, Internet, writing, acting, database, etc.

Appendix 7: Fostering Cultural Development and Screen Culture in Northern Rivers: Some preliminary thoughts

A Paper by Dr. Gerard Goggin and Allison Kelly

Screen Culture

An essential part of developing film and multimedia industries in Northern Rivers is fostering cultural development and what is often called 'screen culture.' Film and multimedia industries play a central role in representing images and meanings of our culture. By culture, we mean something much broader than elite or high culture; here we are thinking of culture in the sense of 'way of life' — the whole range of things we now watch, browse, surf, see, hear, in our daily lives through TV, cinema, internet and CD-ROMs.

Discussing screen culture is an important part of the Filmworks project because it poses questions about:

- Who watches or consumes film and multimedia in our region?
- How do we encourage and foster our filmmakers and multimedia practitioners, especially those just starting out?
- How do we encourage film and multimedia as part of a vibrant local mix of cultures and cultural expressions, thus developing audiences for local work?

Commentator Liz Jacka has suggested that:

We can speak of a film culture rather than a film industry, to mean something which embraces the latter but which is wider and more diffuse...It thus includes not only the familiar trio of production, distribution and exhibition structures, but also the critical, educational, promotional, lobbying and other discourses that create contexts for the reception of film and are almost the conditions for its existence as a cultural form.ⁱ

At a national level, the Australian Film Commission (AFC) provides support for screen culture:

Funding for industry and cultural development, referred to as screen culture builds upon and complements film development activity by supporting emerging talent; industry and professional development; and the development of audiences for Australian and international programs. A vigorous and diverse screen culture in Australia is supported through recurrent funding to major screen organisations and through project funding for specific events and development activities.ⁱⁱ

With the rapid changes to film and multimedia at the present time, many of the traditional approaches to cultural development are being contested and reconsidered (especially in the wake of inquiries such as the Productivity Commission Final Report on Broadcasting).ⁱⁱⁱ

In a region such as Northern Rivers, we may draw on screen cultural development initiatives at a national or state level, but we also need to consider what forms this development might take to support the consolidation and ongoing development of the industry in our area. There are some models available, which we need to consider. For instance, Film Illawarra,^{iv} who hold seminars and invite personnel from NSW Film and Television Office, AFC and the like to discuss funding options and ways of applying for them. They provide a focus for promoting locations in the area to filmmakers and promoting local industry their web-site, though also have some infrastructure (such as a Avid editing suite) through links with Wollongong University.

What form does Screen Culture take in our region?

An important first step is understanding the existing forms of screen culture and development in our region. There are a number of important organisations and institutions in our region which are fostering screen culture. These include, but are not limited to:

- Local fim-makers and multimedia practioners (training, supporting and employing emerging talent, organising screenings, publicising and distributing work);
- Local cinemas, video stores and other distribution outlets (such as the emerging online and CD-ROM mechanisms);
- Film festivals (such as Buzz short film festival and Open Slather);
- Filmmaker organisations (such as North Coast CAMERA);
- Commercial and public broadcasters;
- Community broadcasters (such as LINC-TV);
- Educational institutions (such as Southern Cross University, TAFE, schools, adult and community education providers);
- Community and welfare organisations with an interest in cultural development and screen culture (Ballina Youth Service, Byron Shire Youth Activities Centre and TAFE Outreach);
- The arts community (NORPA, Northern Rivers Writers Centre, Byron Bay Writers Festival)

Given the achievements of these bodies so far, and their ongoing roles, an essential part of a screen culture strategy will be discussing and identifying their specific roles and contributions, as well as potential for new, collaborative work.

What are some of the challenges and opportunities in cultural development and screen culture?

There are a number of challenges in cultural development at a regional level, including:

- Limited funds;
- Size and distribution of population;
- Keeping film-makers and multimedia practitioners in region;
- Retaining and attracting emerging talent in the region;
- Difficulty in sustaining and creating screen cultural organisations at a regional level;
- Maintaining and creating collaboration among different organisations.

However, there are also many opportunities:

- Advantages our region has to offer as a location for film and multimedia in terms of lifestyle, if other issues are addressed;
- Distinctiveness and vibrancy of local cultures;
- High level of talent among emerging filmmakers;
- Goodwill among local film and multimedia industry and screen culture organisations to work cooperatively;
- Presence of significant local educational institutions.

How do we go about fostering screen culture in our region?

In the plenary session and workshop, the convenors of this session are hoping that participants will suggest a wide variety of ideas about how we can foster screen culture in our region.

We do not come with any preconceived ideas, but suggest the following as possibilities:

- Establishing a local short film fund (with aims of supporting and encouraging emerging and young filmmakers; and educating filmmakers in the processes involved in receiving funding; to ensure a certain professional standard is reached in the production process)
- Annual short film and/or documentary festival (two successful models already exist, Buzz and Open Slather; Will these festivals continue? What are their future plans? Do we need both of them? Should they pool their resources and provide one larger festival? What do they need to keep going? What role should film-maker organisations play in these?)
- Discussing with video stores the possibility of a dedicated section for local, independent videos;
- Library of film, videos, and multimedia work, and resources
- What role could a local film and multimedia peak body play in fostering screen cultural development (for instance, what might Filmworks do, along the lines of or departing from a Film Illawarra?)
- What initiatives can local educational institutions take to contribute to screen culture?
- What specific initiatives are needed in the new media area? Is there scope for specific initiatives to foster circulation of and training for new media (e.g. interactive CD-ROMs, multimedia distributed on internet)?
- What initiatives or strategies are needed to support community media?

ⁱ 'Film', in *The Media in Australia*, ed. Stuart Cunningham and Graeme Turner (Sydney: Allen & Unwin, 1997) 228.

ⁱⁱ <http://www.afc.gov.au/services/funding/lists/cultur.html>

ⁱⁱⁱ www.pc.gov.au/inquiry/broadcst/finalreport/index.html

^{iv} <http://www.filmillawarra.org.au>

Appendix 8: Brief biographies of speakers at the first Industry Forum in May

Deb Cox

An honours graduate in English literature and linguistics, Deb is one of the most sought after television script editors in the country. She has worked on *The Sullivans*, *Carson's Law*, *Flying Doctors*, *Fire*, *Janus*, and numerous other successful prime-time Australian series.

Working with Artists' Services, Deb was writer and co-producer of the successful and award-winning mini-series *Simone De Beauvoir's Babies* and feature film *Dead Letter Office*. She also co-wrote the successful mini-series *Kangaroo Palace* and has been integrally involved in a number of other Artists' Services projects, including the feature film *The Sound of One Hand Clapping*. She was a writer of the mini series *Shadows of the Heart* and co-wrote the feature *Stan and George's New Life*. Deb Cox created *Sea Change* (Series Three is now in production) and together with Andrew Knight has been the principal writer for the series.

David Bradbury

Twice nominated for an Academy Award, David has earned a reputation over the last 20 years as a journalist and film-maker prepared to go to extreme lengths to bring the truth to Australian and overseas audiences. His films include *Frontline* about Veteran Vietnam war cameraman Neil Davis; *Chile: Hasta Cuando?*, shot clandestinely during Pinochet's dictatorship; *Nicaragua: No Pasaran*; *Public Enemy Number One* about Wilfred Burchett; and *South of the Border*. His locally produced work includes *Jabiluka*, *Loggerheads*, *Battle for Byron 1 and 2*, his recently completed documentary *Wamsley's War* about John Wamsley. He is working on a new film about Cuba and a feature set in East Timor.

John Weiley

John is Australia's leading producer and director of high definition motion pictures. He has produced, written and directed films in all giant screen formats, including IMAX, IMAX3D and Showscan, and has been making films for more than 20 years.

In 1986 Weiley founded his production company, Heliograph, to produce and distribute giant screen films world wide. He also researched and developed the specifications for the giant screen cinema for the Australian Bicentennial Exhibition and Expo 88, the Blue Mountains Maxvision theatre, and he founded Cinema Plus Pty Ltd, to build the Sydney Imax Theatre, which houses the largest projection screen in the world.

John's first IMAX film *Antarctica* won the prestigious Prix du Jury in the Third International Imax Film Festival, Paris, in 1991, and in 1995 it won the Golden Eagle award at the New York Cine Film Festival. He also wrote and directed the IMAX 3D film "Imagine" - by far the most complex 3D film yet devised -which premiered at Expo 93 in Seoul. In 1996 he won the film-makers Award for innovation and excellence in large format film-making, at the international conference of giant screen theatre operators in Barcelona.

In 1997 John moved his production company to Byron Bay. He has recently completed an Imax science feature about the sun, titled *Solarmax*, which was launched at the London Science Museum in late June 2000. Filming for *Solarmax* took place all around the world, but thanks to the internet and email it was researched and managed entirely from his Byron Bay office.

Nicolette Boaz

Nicolette and her partner Rik Cole have a music creation business, called PSM Productions. Both have degrees in Contemporary Music (1992-1995) and compose for films, documentaries, TV and jingles. PSM operates a digital recording studio for voice-over work and for the general public.

On-the-job sound recording and sound design for film is also part of their service. Nicolette has been teaching at Lismore Conservatorium for six years. Rik teaches Music Business at the same establishment. Nicolette is currently completing a Masters degree in Orchestration. Their credits include: *Eye on the Reef*; a one hour documentary about the Barrier Reef for Nova Films; *Jabiluka* for David Bradbury and Frontline Films; *Safe Celebrations* ; *Walking Through a Minefield* and *Not the End of the World* for Hatchling Productions; *Walking with my Sisters*; a one hour documentary for SBS directed by Bronwyn Kidd; *Yoga for Kids*; for Lightsource Films, and *Dancing on Glass*; Ken Ross' feature film

Prof. Steve Garlick

He is an adjunct professor at Southern Cross University and Director of Research at Southern Cross Regional Research Institute. Steve is probably one of Australia's foremost authorities on regional economic development policy. He has some twenty years experience as a researcher, policy developer and program manager in regional development, local government and labour market areas. He was a key architect of the former Keating Government's Working Nation regional development strategy and the subsequent regional development program. He spent 12 years as a senior executive and ministerial adviser with the Federal Government in a number of portfolios dealing with regional development, local government and industry.

Steve has more than seventy research publications to his name and has managed a number of major regional development consultancies. He has experience in overseas regional development policy and practice, having been a visiting fellow of the Centre for Urban and Regional Development Studies in the UK in the early 1990's, and has provided regional development and local governmental advice to governments in China, Poland and Canada.

His current research involves the role of universities as knowledge stimulators for regional development. He is currently undertaking studies in this field in eight countries (UK, Ireland, Spain, Germany, Netherlands, Finland, Greece and Australia), including sixteen Australian regions.

Dr Gerard Goggin

He is convenor of the Media Studies Program at the School of Humanities, Media and Cultural Studies, Southern Cross University, Lismore, where he teaches media theory and digital media production. Gerard has worked extensively on telecommunications and new media policy for organisations such as Consumers Telecommunications Network, Communications Law Centre, and Australian Consumers Association. He is a member of the Internet Society of Australia.

Gerard's current research projects include a book on new media and disability, work on cultural representations of and on the Internet, and a special issue of Media International Australia on telecommunications in Australia.

Keith Davidson and Jane Oliver - Norlink

Keith Davidson is the Executive Officer of the Northern Rivers Regional Chamber of Commerce & Industry Incorporated, Chair of Norlink and a small business owner. Keith represents the business through his role as executive officer of the regional chamber on the Northern Development Task Force, Southern Cross regional Research Institute and Norlink Ltd.

One of the main priorities of the Regional Chamber of Commerce is to have businesses in the region in a position where they can take advantage of new technologies. The Regional Chamber has just completed a series of workshops "Investigating E-Commerce" successfully run by **Jane Oliver**. This series of workshops has been rated as the best of its kind in Australia.

Owen Johnston - AFC

He graduated from the Swinburne Film School in 1982. After stints as a freelance sound recordist and camera assistant in Brisbane and Melbourne for *ABC News*, *Channel 7 News*, *Channel 9 News*, and *Willessee*, Owen secured a Film Victoria attachment to Crawford Productions in 1984. He worked as a sound editor on the series *Carson's Law*, *Henderson Kids*, and *Zoo Family*, and as picture editor on *The Flying Doctors*. As a freelance editor in Melbourne, Owen worked on the drama series *Neighbours* and *Dusty* and edited numerous documentaries and corporate videotapes for Kestrel Films before returning to Brisbane in 1990. He has subsequently directed television commercials, taught at Griffith University, produced and co-written the documentaries *Red Ted and the Great Depression* (1994) and *The Legend of Fred Paterson* for the ABC (1996) and produced the AFC Indigenous drama *Grace* (1998). Owen was the founding president of the Queensland Documentary Association, a board member of QPIX, and the Chair of the 5th Australian International Documentary Conference.

Kerry O'Rourke - QPIX

Kerry is the Director of QPIX LTD, Queensland's Screen Resource Centre, dedicated to fostering independent screen production and screen culture in Queensland.

Kerry describes himself as a "farm boy from Atherton Tablelands in North Queensland" which he didn't leave till he was 21. He has an extraordinarily diverse background, which includes science, theatre, music, cinema management, journalism, education and film-making. He has made documentaries and short films including a one hour documentary on prisons called "The Road" in 1988 which was screened internationally at Leningrad International and Bombay International Film Festivals.

He managed the Centre Cinema in Brisbane - Queensland's first cinemateque, which he modelled deliberately as a mix of the French originals from the 50's, and the old style of country picture theatre presentations from his childhood which incorporated regular live stage performance. He also managed the Mt. Isa Civic Centre for eight years from 1990 to 1997 and was General Manager/Project Manager for the Empire Theatres in Toowoomba for two years. During this ten year period he managed and produced over 1000 shows and events

He was Assistant Manager of the Melbourne Elizabethan Orchestra, worked for 4ZZZ FM Brisbane and ABC Radio. He started life initially as a painter and managed Reading's Records & Books in Melbourne (Australia's first alternative book store) for two years.