Generation Next: Post-cinema Australian moviemaking, innovation and implications for cultural policy

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Abstract

The Australian screen industries are a leading domestic creative industry sector at a crossroad. New production, distribution and exhibition technologies are challenging traditional models of "filmmaking". For the screen industries to remain competitive, they must renovate business models for an emerging marketplace. This paper is a preliminary examination of three key aspects of next generation filmmaking: post-cinema approaches to screen production, emerging production and business models, and issues for policy.

Introduction

The Australian screen industries are a leading domestic creative industry sector. The broad screen industries—across a spectrum of feature films, television, documentary, and light entertainment production, among others—are a AU$1.8 billion dollar industry (Screen Australia, 2010a). Screen industries achieve significant export earnings, accounting for AU$215 million in audiovisual royalties in 2005–06 (Screen Australia, 2010b), comprise seven per cent of national creative industries employment (Screen Australia, 2010c), and are a significant priority for government investment in the cultural sector.

Importantly, the screen industries are a key sector of the broader digital content industries. The digital content industries (computer games, digital video and film, post-production, web sites, animation) constitute a rapidly emerging industry sector that is economically significant to Australia's future (Cunningham, Cutler, Hearn, Ryan & Keane, 2004). They are worth $19 billion (3.3% of GDP), employ 289,000 people (Queensland University of Technology Creative Industries Research and Applications Centre & Cutler & Co, 2004), and yet experience an annual trade deficit of $2 billion (Centre for International Economics, 2005). In addition to scale, they are significant because they are drivers of the knowledge economy and enablers for other industry sectors. They translate “directly into the competitive advantage and innovation capability of other sectors of the economy” (Queensland University of Technology Creative Industries Research and Applications Centre & Cutler & Co, 2004). The digital content industries are knowledge-intensive and require highly skilled human capital (Florida, 2003; Cunningham et al, 2004; Queensland University of Technology Creative Industries Research and Applications Centre & Cutler & Co, 2004).

In recent years, “new technologies in production, distribution and exhibition have prompted a necessary re-imagining of the [Australian] film industry” (Connolly, 2008, p. 2). As traditional economic models for feature films become less viable “there is no doubt that those holding on to an antiquated notion of what cinema is and how it is exploited will struggle in this new landscape”. While cinema audiences and television ratings are in flux without altogether being in decline, online consumption is rising rapidly as more and more people migrate online for entertainment products (Verhoeven, 2010).

Digital technologies, disruptions in traditional modes of distribution, and strong growth in niche markets (Anderson, 2006), are fuelling new opportunities for filmmaking, embraced none more so than by emerging, tech-savvy filmmakers. Cultural representation itself is transforming within an interactive, social media driven environment. As the chief executive of Screen Australia (the peak government development body for Australian film), Ruth Harley (2009a) observes, a new culture of entrepreneurial filmmaking is emerging, driven by next generation filmmakers:

> I think that we are seeing a whole new talent base coming forward on the new platforms . . . short stories being told for mobile phones and particularly YouTube . . . I think the Italian Spiderman people on YouTube . . . are brilliant. The Beached As [Beached Whale] people coming through on YouTube … brilliant! So . . . there’s some very sharp group-based and emerging talent starting to find their stories through those channels. I think that’s very exciting, and we need to keep our eyes peeled. (Harley, 2009a)

While for some established Australian screen producers, the economics of online audiovisual production are “unclear” and “complex” (Wilson, 2009, p. 2), the next generation of filmmakers are forging new business models, and in some cases producing highly innovative “screen content”.

We argue that, for the screen industries to remain competitive—amidst strong criticism of the Australian film industry’s commercial performance in recent years (see Nowra, 2009)—they must renovate business models for an emerging marketplace. As Richard Harris (2007, p. 61) argued in his examination of emerging digital distribution and implications for the Australian film industry, “government and industry need to stand back, take a long hard look at where the industry is likely to go over the next ten to twenty years, and start asking questions about the future place of content within it”. A key question for Harris is: “how can Australian films take advantage of these opportunities and challenges?” Despite this imperative, there is very little research into next generation filmmaking at the cutting edge of screen production, both in terms of sustainable business models and enterprise dynamics in an online world, and the career trajectories of the filmmakers who will ultimately drive the next wave of innovation.

Debate around crisis in the film industry is an international conversation, but one which presently concentrates on macro issues of structural change and new platforms (e.g.

Macaulay, 2008; Mullen, 2008; Global Media Intelligence, 2007; Bennett & Brown, 2008; Zhu, 2001). Research tends to focus on disruptions in traditional distribution models (Zhu, 2001; Cunningham, Silver & McDonnell, 2009), and the long-tail, a term coined by Anderson (2006) to account for the growth of online niche markets at the low end of the marketplace. Research has also considered critical issues around pro-amateur content (content created by a producer(s) where a clear distinction between amateur and professional production is blurred), and the role of online consumption and fan culture in production processes (Hartley, 2009; Burgess & Green, 2009; Jenkins, 2006). In an Australian context, Luckman and de Roeper's (2008) analysis of opportunities arising from digital distribution for screen producers and the specificities of different national markets, is an early attempt to investigate this landscape.

Definitions and approach

Next generation filmmaking refers to both feature-length "movies" distributed outside theatrical release, and "screen content" produced for, distributed and consumed via the internet and virtual worlds. Mobile phones, other hand-held devices, and multi-platforms (which includes a combination of digital and traditional "analogue" platforms—i.e. television) also facilitate next generation filmmaking. To delimit this definition, screen content refers to entertainment-oriented content developed with business imperatives in mind or produced within the context of building a professional filmmaking career. For the purpose of clarity, "next generation filmmakers" may comprise several cohorts: some producers/creators may plan to remain in an online domain; some may aspire to eventually produce movies for cinema release, with next generation digital media a launching-platform; some may plan to enter television; and others may aspire for an eventual DVD release.

This paper presents preliminary analyses of key issues for the next generation of Australian filmmaking, and the new ways in which emerging filmmakers are producing screen content[1]. Within this agenda, the paper examines three core issues:

1. the "post-cinema" attitudes, processes, and strategies of "next generation" film makers;
2. economically viable and sustainable next generation business models and filmmaking practices; and
3. cultural policy frameworks and the film industry's innovation system.

"Post-cinema" mentality of filmmaking and career trajectories of young professionals

The investigation of issues around next generation filmmaking has the potential to generate important insight into the "post-cinema" mentality and career trajectories of

[1] The paper is based on research we are undertaking under the auspices of the Creative Workforce Program's research agenda at the ARC Centre of Excellence for Creative Industries and Innovation (CCI). Two of the core foundations guiding research in this area, from which this research emerges, are: the career trajectories of creatives and creative industries workforce development, including worker transition and renewal. Future studies into the three core objectives outlined above will include data collection from analysis of film student cohorts, interviews with filmmakers, policymakers and commentators/analysts, and a survey of current developments within the audiovisual sector.

emerging filmmakers who will drive next generation filmmaking. While a "movie" was traditionally shot on 35mm film, exhibited in cinemas before video/television release, marketed through traditional media channels to mass audiences whose consumption practices were constrained by release patterns and screening windows, "films" are increasingly shot on digital video, distributed online and consumed via numerous platforms from laptop computers to mobile phone, and become available for viewing on demand. Technological change is also creating "a new generation of digerati who have grown up with the internet and who relate to content in a completely new way" (Harris, 2007, p. 31). The next generation of filmmakers operate in a world where distinctions between producer and consumer are breaking down; the official media sphere is being transformed by the rise of the blogosphere; and social media and networking tools (including facebook.com and myspace.com) have become essential to viral marketing campaigns and fledgling online business ventures (see Hearn & Brow 2008).

Trent from Punchy (YouTube short film) is a reportedly "real-life" interview with Trent from Punchbowl, New South Wales. Trent is a self-confessed bogan, thief and drug addict. He has become a cultural icon for younger generations, and loved for catch-lines such as "just relax, hey!" The short film, believed to be scripted although producers maintain it is an authentic interview, has generated almost 3 million views and a merchandising line from mugs and clothing to a soundtrack. As the short film is freely distributed, the original footage has been reproduced or "pirated" by countless fan videos on YouTube. Producers earn revenue streams predominantly through online clothing and merchandise sales.

Italian Spiderman, a cult 10-part YouTube series about an obese, macchiato-drinking super-hero, is another example. The filmmakers created a trailer for a fictional 1960s Italian action movie and posted it on YouYube. The trailer was marketed online as original footage from what was said to be a lost Italian exploitation classic. Rather than being auteur or producer driven, the franchise is created by a group of creative collaborators. After film school, rather than producing short films for festival circuits to build filmmaking reputations, the filmmakers built a fan base on YouTube and raised money for a 10-part series. In contrast to a division of labour between creative and technical talent, key creatives are responsible for most aspects of technical production. Rather than a classical narrative structure, *Italian Spiderman* is an exploitation spoof serial of ten four- to five-minute clips. The YouTube trailer has since received over 3 million views. The series has spawned an Italian music single, offers for an Italian television series, and an online merchandising store.

As this alludes to, career paths for next generation filmmakers may be evolving. In 1998, Annabelle Sheehan identified two distinct stages in the evolution of career pathways for Australian filmmakers. In the 1980s, filmmakers entered the industry through "on the job" training in government-funded organisations such as the Australian Broadcasting Corporation (ABC), Special Broadcast Service (SBS) and Film Australia, or large independent production houses including Crawfords Australia, before moving into other areas of production. However, by the late 1990s, tertiary-level screen production courses replaced real world learning as the gatekeeper for industry entry. The question is: how are *next generation* filmmakers developing their careers in an era of pro-am digital video production, multiple platforms and potentially global audiences? Is a third stage in professional career paths emerging? Is this pathway a combination of formal institutional training and real-world experience, or an independent pathway enabled by new technologies? As such, insight into a post-cinema mentality may inform new approaches to filmmaking, but will also provide important lessons for policy and screen education. *Italian Spiderman,* for example, began as a student filmmaking project at Flinders University.

An international example of next generation filmmaking is the ultra low-budget horror movie *ThanksKilling* (2009) about a homicidal Thanksgiving turkey back from the dead. In 2007, the feature film was produced by two college filmmakers for under US$3,500. Casting was conducted in a garage, and principal photography was completed within 11 days. While there is little unique about a low budget horror movie achieving popularity and commercial success—*The Blair witch project* (1999) and *Paranormal activity* (2009) are of course leading examples—what makes this film significant is that the filmmakers turned this schlock Z-grade film into a profitable franchise of which they control distribution. So while many filmmakers produce similar titles and sell their rights for an upfront fee, or a small percentage of royalties of net profits, this case study represents an independent multiplatform release strategy which has enabled the producers to control revenue streams. So far the film has secured pay-per-download release via 50 Pay-TV operators in the United States, and is available for mail-order from the movie's website (http://thankskillingmovie.com). A large proportion of revenue generated by the movie is returned to producers.

Economical viability for an evolving marketplace

Such cases suggest new opportunities for growth and revised business models for the Australian film industry to better position itself within the emerging marketplace. In recent years, there has been a great deal of uncertainty about the economic viability of online business models for audiovisual content. In particular, for some established film and television producers:

> the digital world right now seems a scary and difficult place. The business models are unclear, the audience is fragmented and the distribution models are too complex, too open or both. Then there are concerns over copyright and piracy, and difficulty in securing the additional rights to distribute content in the digital space. Additionally, the digital world has its own unique terms, unfamiliar or even puzzling to film and TV producers. For many, it can all seem too difficult—despite the fact that the Internet, mobile phones, games and interactive devices are not simply the future of media, but also the ubiquitous present (Wilson, 2009, p. 2).

As Wilson points out, the future for film production is online and, as commentators have argued, with DVD sales declining and online audiences growing, "independent content producers need to explore alternative, web-based distribution methods" (Coleman & Karena, 2009). Dispelling what Cunningham, Silver and McDonnell (2009, p. 1) describe as "overly enthusiastic optimism versus determined pessimism" about the impacts of new technologies, Elberse and Oberholzer-Gee (2008) found in recent empirical investigation that a long-tail market is emerging and small niche markets are developing for some, but not all, titles.

Nevertheless, emerging online or multiplatform production requires new investment models, and marketing and distribution strategies (Harris, 2007). Consequently, major questions remain around the economic viability and sustainability in this environment. Traditional film producers typically receive a fee-for-service, and rarely receive revenue from market segments along the value chain —theatrical release, non-theatrical (airlines, ships, hotels and motels), video/DVD, Video on Demand (VOD), Pay television/cable TV, free-to-air television, online/new media, education, soundtracks, to merchandise. However, as this paper's case studies indicate, the next generation are increasingly developing models targeting value creation in segments of the recoupment chain typically controlled and exploited exclusively by distributors, particularly new media/online markets, sound tracks and merchandising. There are also different types of online content—from "native digital content" or content created specifically for an online environment (e.g. flash videos, online video), marketing add-on content, and repurposed traditional analogue content (particularly heritage collections) among others—which may require different approaches and economic models.

One segment of the Australian film industry, in some cases achieving economic viability and thriving in the marketplace's long-tail, is horror movie production. Recent empirical analysis shows that Australian horror movie production has trebled from less than 20 films in the 1990s to over 70 horror titles produced between 2000 and 2009 (Ryan, 2010 in press). While high-profile titles such as *Wolf Creek* (2005) and *Daybreakers* (2010) receive theatrical release, there is a sub-culture of ultra low-budget horror titles harnessing innovative filmmaking practices, and, in some cases, alternative distribution models, which are consumed by horror audiences worldwide. *I know how many runs you scored last summer* (2008), *Demons among us* (2006) and *When evil reigns* (2006), among others, have been filmed quickly and cheaply on digital video, they utilise skeleton crews and unknown actors, and they are promoted online via low-cost viral marketing and social networking tools (e.g. Facebook). These titles are released via specialty online cult/trash movie catalogues like Sinister Cinema and Something Weird Video, as well as video-on-demand websites like Indiemoviesonline.com and Movieflix.com (Ryan, 2008; Ryan, 2010 in press).

Challenges for cultural policy

These approaches to filmmaking open up interesting questions for cultural and creative industries policy. Recent reforms to government-administered finance structures is developing what Harley (2009a) describes as a two-tier industry: "a cultural tier" comprised predominantly of movies financed under a cultural remit; and a "commercial tier" comprising offshore production filmed in Australia and large "international-scale" domestic projects such as *Australia* (2008), *Guardians of Ga'Hoole* (2001) and *Mad Max 4* (2011). What is the position of next generation filmmaking within the Australia film industry's milieu, and how does it contribute to innovation? The YouTube animation *Beached Whale*, receiving over five million views and spawning a successful online merchandising franchise, has recently spawned an 11-part ABC Television series. Therefore, what is the relationship between entrepreneurial online content production, and traditional filmmaking practices? Does next generation filmmaking act as a research and development laboratory for traditional media? Is YouTube content a launching pad for traditional film and television careers, or a "first-step" in an emerging industry activity in its own right? Are there market cycles for YouTube/cross platform content, and are successful projects examples of rapid prototyping for media content? Is there a two-way flow for technology transfer?

Since the 1970s, Australian cinema has been developed and sustained by cultural policies and public subsidy to foster "Australian stories", or as Maher (1999, p. 13) puts it, the "representation and preservation of Australian culture, character and identity".

Policymakers have generally "defined the Australian cinema . . . as a moment of cultural resistance against a dominant Hollywood other" (Verhoeven, 2010, p. 154), subvention has tended to adopt a narrow high-brow perspective of cultural production, largely shutting out genre and commercial production (Ryan, 2009), and policy has emphasised a "national cinema" with little regard to international engagements and exchanges (Verhoeven, 2010). While policy rationales and funding structures are in transition—placing a new emphasis on greater commercial viability and audience appeal in contrast to films financed purely on cultural grounds (Garrett, 2008; Harley, 2009b)—government support for the Australian film industry faces major challenges.

Many challenges revolve around globalisation and the erosion of national boundaries, technological change and the rise of new platforms, which raises questions for what constitutes cultural content, issues of "taste", and the reality that youth audiences increasingly consume entertainment products outside traditional media channels (Cunningham, 2006; Ryan, 2009).

Importantly, next generation filmmaking raises critical issues for the future of filmmaking, which currently fall outside the purview of cultural policy. Such issues include innovative filmmaking practices, the film industry's innovation system (a holistic term accounting for interrelations between enterprises and institutions, technology, educational systems, policy regimes and so on (see Cunningham et al., 2005), "new economy" business models (e.g. Hearn & Pace, 2006), and the role of social networks in distribution (Hearn, Roodhouse & Blakey, 2007). As Tom O'Regan (1996) demonstrates, Australian cinema is an assemblage of multiple elements from individual filmmakers and production strategies, cultural institutions, critics, to policymakers and policy frameworks, all of which influence the nature, representation and consumption of diverse Australian films at any one time.

Although state and federal governments are recognising the role creativity plays as a driver of innovation across the broader economy (Cunningham, 2006), there is a major disconnect between cultural and innovation policy (Hearn, Roodhouse & Blakey, 2007), and a limited understanding of "cultural innovation" (Eltham, 2009). Creative industries discourse frames creative sectors in terms of enterprise dynamics, innovation systems, and the dynamics of online and mobile production and consumption in a knowledge economy (Cunningham et al., 2004; Hearn & Rooney, 2008). However, the film industry rarely figures in creative industries policy or discourse (O'Regan & Goldsmith, 2006), and is generally regarded as an "old" or "analogue" media sector with little relevance to digital content production. Research into next generation screen practices potentially delineates new opportunities for policy highlighting the relations between next generation filmmaking and the Australian film industry's innovation system by forging a new rapprochement between creative industries and cultural policy discourse.

Conclusion

While the Australian film industry is in the early stages of transition and government funding agencies are increasingly emphasising the production of "commercially successful" films and reaching "audiences" (see Harley, 2009c), Australian cinema remains a major object of government support for its ability to produce unique cultural expression contributing to a sense of national identity both at home and abroad. In the words of the Honourable Minister for the Environment, Heritage and the Arts, Peter

Garrett, MP, (2009, p. 2), "government has an important role to play in this sector [arts and cultural production of which film is a cornerstone] . . . the arts and creativity deserve recognition and support". On 27 October 2009, Peter Garrett, MP, in a speech to the National Press Club titled *A national cultural policy to 2020* (p. 8), outlined future directions for the national cultural policy agenda. In particular, he flagged three key themes underpinning future government policy: "keeping culture strong"; "engaging the community"; and "powering the young". According to Garrett (2009, p. 8), "'powering the young' demands attention, given the immense reservoir of creative vitality and enthusiasm that resides in young people. It's here that much that is dynamic and new is conceived". However, as the Hon. Peter Garrett has argued, to "unleash and promote this creativity for wider consumption we need to examine new opportunities for experimentation and exhibition" and, of particular importance to this research project:

> We [Australia] should explore direct funding for individuals whose creative activity pushes the boundaries to new knowledge and ways of doing things—analogous to the public funding provided to scientists and academics for their research. And we need to build stronger connections between individual artists and the well-supported, large arts organisations and companies. (Garrett, 2009)

The proposed agenda discussed here could identify new growth opportunities for the Australian film industry and new business and economic models but, importantly, it will lay conceptual foundations for new ways in which Australian cultural production can flourish and continue to contribute to a sense of national identity within an online and mobile world of media consumption.

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