

Western Australia Screen Capital & Industrial Pilot (WASCIP)

Mobilising Private Capital to Activate Western Australia's Screen Economy

1. Executive Summary

Over the past five years the Western Australian Government has made one of the largest public investments in screen industry infrastructure in Australia's history. Between **2021 and 2026**, the State will have committed approximately **\$391 million** to establishing the foundations of a globally competitive screen industry.

This investment includes:

Category	Program	Investment
Infrastructure	Perth Film Studios construction	\$233.5M
Infrastructure	Studio operations agreement	\$57M
Production Incentives	WA Production Attraction Incentive	\$20M
Production Incentives	WAPAI Top-Up	\$18.7M
Industry Development	Screenwest funding (5 years)	~\$55M
Industry Capacity	Workforce development	\$5M
Digital Sector	Games & interactive pilot	\$2M

Total Public Investment: ~ \$391M

This investment has established the **physical infrastructure, workforce capability and policy framework** necessary to support a competitive screen production sector.

However, infrastructure alone does not create a sustainable screen industry. The policy challenge facing Western Australia is now **industrial activation**.

Without mechanisms capable of mobilising private capital and anchoring intellectual property within the State, the industry risks functioning primarily as a **service economy**, generating short-term production expenditure but limited long-term economic value.

The **WA Screen Capital & Industrial Pilot (WASCIP)** is designed to address this structural gap. The program proposes a **three-year, \$40 million capped industrial rebate pilot** designed to:

- mobilise private investment into commercial screen projects
- activate the Perth Film Studios infrastructure
- increase production throughput in Western Australia
- anchor intellectual property ownership within the State
- generate long-term export revenue from globally successful productions.

The Pilot is an **industrial accelerant** designed to optimise WA's \$233.5 million Perth Film Studio investment by ensuring continuous, market-validated occupancy driven by privately capitalised, IP-generating productions.

Importantly, WASCIP operates as a **post-audit rebate system**, ensuring:

- no public funds are deployed upfront
- government exposure remains capped
- rebates are paid only against verified economic activity.

This structure allows Western Australia to test a new industrial financing mechanism while maintaining strong fiscal discipline.

2. The Structural Challenge in the Australian Screen Economy

Despite decades of public investment and strong creative output, Australia's screen sector has struggled to achieve financial self-sufficiency or generate enduring corporate wealth. While agencies frequently cite "**record production spend**" as evidence of sector health, this metric primarily captures money spent *making* content rather than value retained *owning* it.

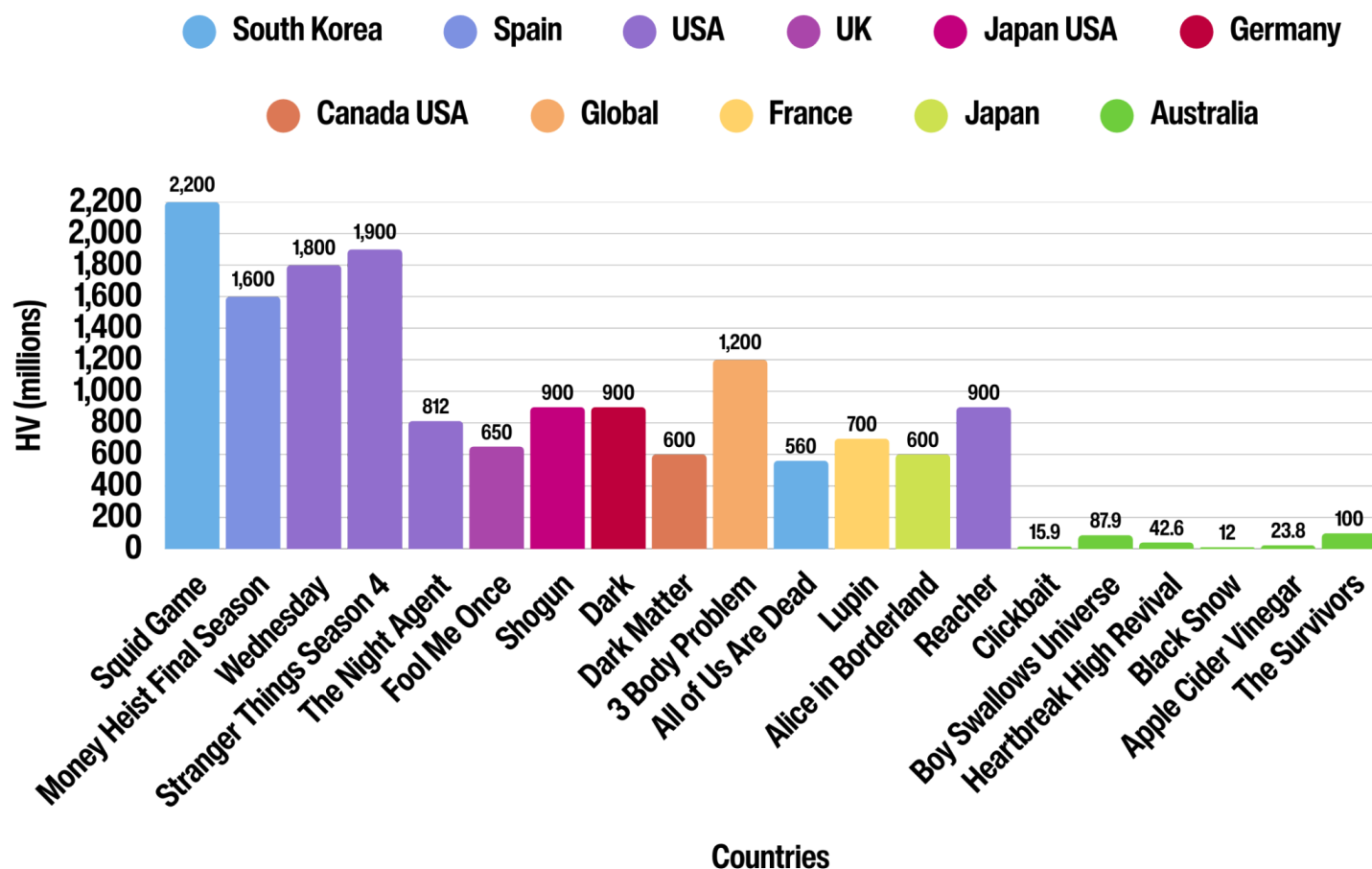
Across film, television and streaming platforms, the national screen sector now generates approximately **\$2.7 billion in annual production expenditure**.

At first glance this suggests a healthy industry. However, when production expenditure is compared with commercial outcomes, a structural imbalance becomes clear. Despite this significant level of production activity:

- Australian films typically capture **less than 4% of the domestic box office**
- Fewer than **10% of publicly funded films achieve commercial break-even**
- Many production companies operate on a **project-to-project basis** without accumulating long-term assets.
- On global streaming platforms — where success is increasingly measured by **total hours viewed rather than local box office performance** — **Australian titles rarely**

rank among the highest-consumed international content, limiting their ability to generate scale-driven licence value and long-tail revenue

Hours viewed (HV) by Title/Country (millions)



Netflix Top 10 Engagement Reports <https://top10.netflix.com>

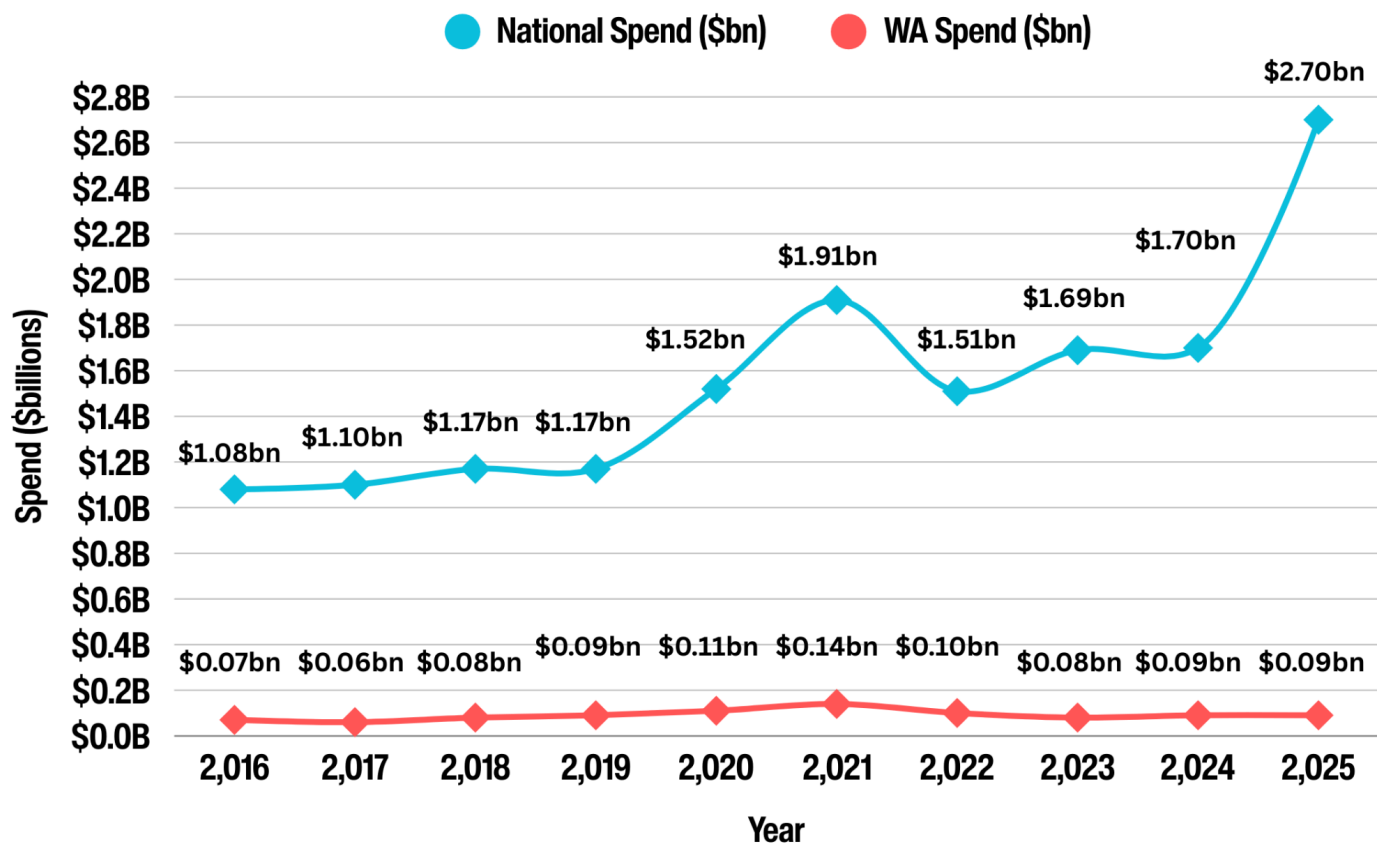
Hours Viewed (HV) measures the total global audience consumption of a title on streaming platforms and has become a key indicator of its commercial value, influencing licence fees, renewals and franchise potential. This suggests that the sector successfully produces content, but often struggles to generate **commercially successful intellectual property retained domestically**.

(Note: Certain streaming services do not release verified Hours Viewed (HV) metrics. Indicative HV figures have been calculated using audience reach modelling and revenue-equivalent economic assumptions.)

The issue is therefore not a lack of talent or production capability. Rather, it reflects a **structural financing challenge within the screen sector**.

Additionally, Western Australia has historically captured only a small share of Australia’s national drama production expenditure, with the majority of investment and screen activity concentrated on the east coast. This structural imbalance has limited the state’s ability to build sustained production capacity, retain creative IP and generate long-term economic returns — a trend this initiative seeks to meaningfully address.

National Drama Spend vs. WA Spend (\$billions)



Screen Australia Drama Report (2024/25)

The Fee-for-Service Constraint

Australian producers often face structural financing gaps when assembling production budgets, requiring them to assign significant intellectual property rights to broadcasters, distributors or global streaming platforms in order to proceed.

While this model supports consistent production activity and employment, it can limit long-term revenue participation for local companies. As a result, many businesses operate on management fees and project margins rather than building enduring IP libraries or recurring income streams.

Over time this reinforces a cyclical, commission-dependent industry structure — one that is highly capable in delivering production services, but less able to accumulate balance-sheet strength and compounding creative assets.

The economic consequence is significant:

- Producers receive a management fee but retain little long-term participation.
- Companies struggle to build IP libraries.
- Without recurring revenue, businesses remain dependent on the next commission.
- Corporate balance sheets remain thin, limiting reinvestment and growth.

The result is an industry that resembles a sophisticated **service economy** rather than a compounding **asset economy**.

Key observations:

- **Production spending has increased**
- **Market share has declined**
- **Western Australia's share of Drama spend has remained modest**

Western Australia's share of national drama production expenditure has historically been modest, reflecting structural factors such as limited studio infrastructure and the scale of the local crew base compared with the eastern states. With significant new investment now underway in production facilities and industry capability, the state is entering a pivotal phase. The data highlights both the opportunity and the importance of ensuring that this infrastructure translates into sustained production attraction, skills development and locally driven content creation, enabling WA to participate more fully in Australia's growing screen economy.

3. Service Economy vs Content Economy

The Australian screen sector currently operates across two distinct economic models.

Sector	Characteristics
Foreign Service Production	Large budgets, strong short-term economic activity
Domestic Content Production	Smaller budgets, limited commercial outcomes

Major international productions — such as *Thor: Love and Thunder*, *Godzilla x Kong* and *Mission: Impossible* — generate significant local economic activity while filming in Australia.

These projects support employment for local crews and drive substantial spending across accommodation, logistics, construction and professional services, delivering valuable short-term economic benefits to host regions.

However, the underlying intellectual property typically remains owned by offshore studios. As a result, once production concludes, the long-term revenue streams associated with distribution, merchandising, licensing and franchise development largely accrue outside Australia. The enduring enterprise value created by these productions therefore sits predominantly beyond the domestic economy.

By contrast, locally owned screen content can generate sustained economic returns over extended periods. Successful Australian intellectual property has the potential to deliver ongoing value through international sales, streaming licensing, format adaptations, tourism impacts and franchise expansion.

Understanding the distinction between a **production services economy** and a **content ownership economy** is central to the current policy challenge. While Australia has become highly competitive in attracting global production activity, strengthening the capacity to originate and retain scalable intellectual property will be critical to building long-term industry wealth and commercial resilience.

4. The Challenges of Domestic Market Share

The commercial challenges facing Australian productions are not new. During the **10BA private investment era (1981–1988)** Australian films achieved historically high levels of commercial success. In **1986 Australian films captured 23.5% of the domestic box office**, the highest level recorded in the modern era. This period produced several globally recognised Australian films including: Crocodile Dundee, The Man from Snowy River and Mad Max.

These films were largely financed through **private investment structures enabled by the 10BA incentive framework**.

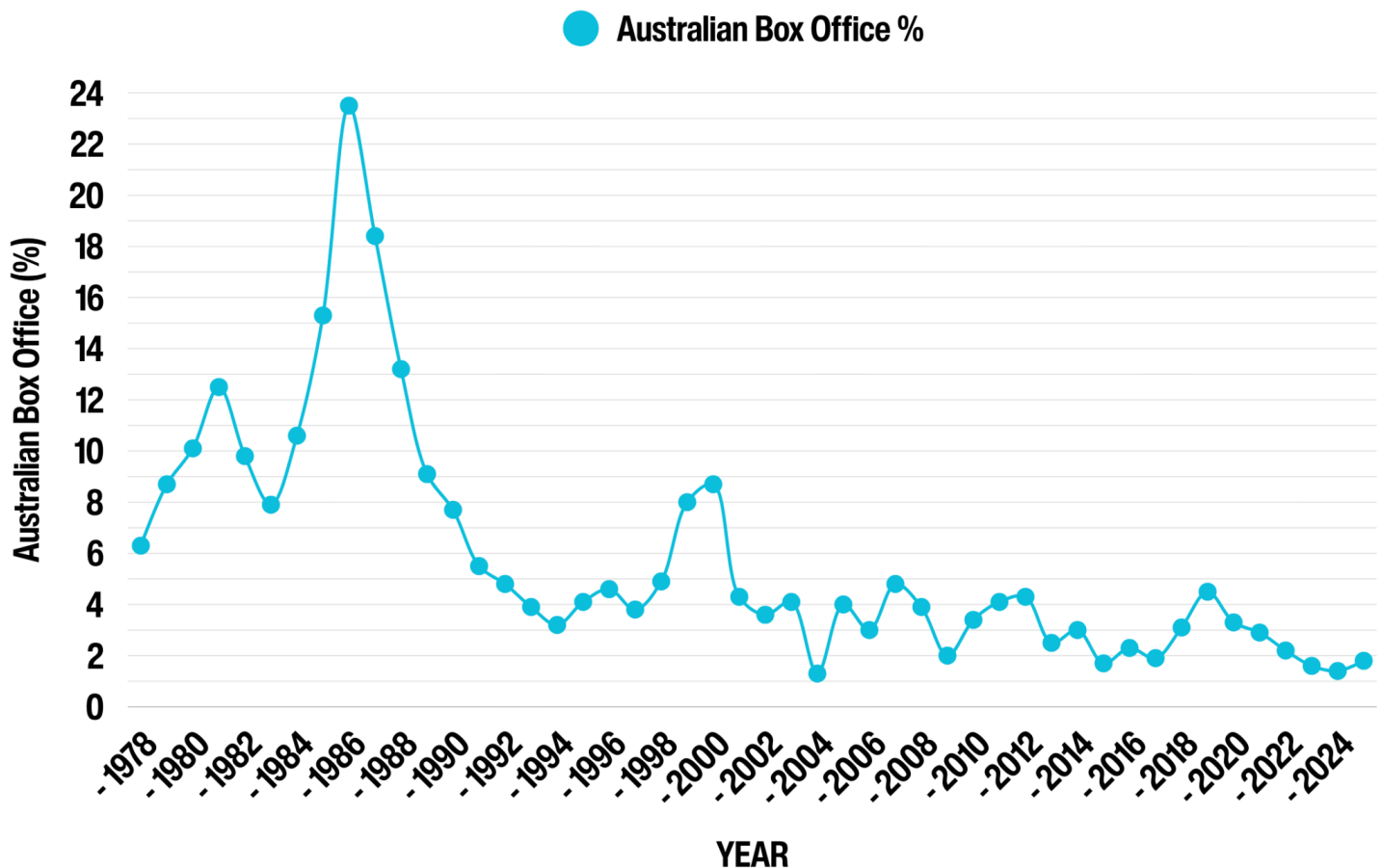
Following the removal of this framework in the late 1980s, Australian box office share declined sharply. Over the following decades, market share stabilised between **2% and 4%**, where it remains today.

Market Orientation and Incentive Alignment

Over time, the current financing framework has shaped both the economics and the commercial focus of the screen sector. With public funding and agency approval often central to project viability, creative and production decisions can naturally gravitate toward meeting cultural and eligibility criteria that improve the likelihood of support. While this has sustained industry capability and distinctive Australian storytelling, it can also reduce the emphasis on audience scale, market positioning and commercially driven intellectual property.

This dynamic has contributed to perceptions of limited upside among private investors, reinforcing reliance on public funding pathways and constraining the sector's capacity to build enduring, revenue-generating screen businesses.

Australian Box Office Share (%) vs Year



Source: Australian Film Commission historical box office share data

By introducing capital-facing incentives and encouraging greater participation in intellectual property ownership, **WASCIP is designed to rebalance these settings — complementing existing cultural objectives while strengthening commercial orientation, attracting private investment and supporting the development of scalable Australian content enterprises.**

Key takeaway:

Australia's **highest levels of domestic box office success** occurred during a period when **private capital played a central role** in financing film production. The subsequent decline in market share following the removal of capital-driven incentives suggests that sustainable audience scale and commercial impact are closely linked to financing structures that encourage market participation, risk-sharing and intellectual property ownership.

5. Case Studies: The Economic Power of Intellectual Property

While many productions struggle commercially, several Australian films demonstrate the extraordinary economic potential of successful intellectual property.

Crocodile Dundee (1986)

Budget: **A\$12.3M**

Global Box Office: **A\$459.2M**

Crocodile Dundee remains the most commercially successful Australian film ever produced. The film was financed largely through private investors during the 10BA era and generated returns many times its original production budget. The economic impact extended beyond the film itself, contributing to:

- global awareness of Australian culture
- tourism promotion
- international distribution revenue.

Babe (1995)

Budget: **A\$42M**

Global Box Office: **A\$355.6M**

Babe became one of the most internationally successful Australian family films ever produced. The film received multiple Academy Award nominations and continues to generate revenue through international licensing and streaming distribution.

Happy Feet (2006)

Budget: **A\$140M**

Global Box Office: **US\$537.6M**

Directed by George Miller, Happy Feet won the Academy Award for Best Animated Feature and became one of Australia's most successful animated productions.

Talk to Me (2023)

Budget: **A\$6.3M**

Global Box Office: **~A\$128.8M**

Talk to Me achieved an estimated **20x return on production budget**, making it one of the most profitable Australian films of the past decade.

The Mad Max Franchise

The Mad Max franchise demonstrates the long-term value of successful intellectual property. The original **Mad Max (1979)** was produced on a budget of approximately **A\$490,000** and generated roughly **A\$140M in global box office revenue**, becoming one of the most profitable films ever produced.

Mad Max 2 (1981) was produced on a budget of approximately **A\$5.6M** and generated approximately **A\$50.4M globally**.

Mad Max: Fury Road (2015) was produced on a budget of approximately **A\$210M** and generated approximately **A\$532M in global box office revenue**.

More than **45 years after its creation**, the franchise continues to generate global revenue. The global commercial success of George Miller's filmography — including the *Mad Max* and *Happy Feet* franchises — has generated approximately **AUD \$2 billion in worldwide theatrical box office revenue**, demonstrating the substantial long-term economic potential of Australian-originated screen intellectual property when supported by scalable financing structures and access to international markets.

Bluey (2018–present)

Season 1 Budget: ~**A\$6M**

Episodes: 52 (7 minutes each)

Global Franchise Value: ~**AU\$3B**

Produced by Brisbane-based Ludo Studio, Bluey has become one of the most commercially successful Australian television properties. The franchise has generated substantial economic value beyond the television series through merchandise licensing, publishing and live stage productions.

Key commercial indicators include:

- **AUD\$3B** estimated global franchise value
- **AUD\$2B** in annual global retail and licensing sales
- **5M+** Bluey books sold worldwide

Bluey demonstrates the scale of long-term economic value that can be generated when Australian intellectual property becomes a globally successful franchise.

James Wan (Franchise Creator / Director)

Films: *Saw*, *Insidious*, *The Conjuring Universe*, *Aquaman*

Estimated Global Box Office: **AU\$5.6B+**

Western Australian–raised filmmaker James Wan has created or directed several of the most commercially successful horror franchises in modern cinema.

The **Saw franchise** has generated approximately **A\$1.5B in global box office revenue**.

The **Insidious franchise** has generated approximately **A\$1.1B globally**.

The **Conjuring Universe** has generated approximately **A\$3.3B globally**, making it one of the most successful horror franchises in film history.

Collectively, Wan's films have generated **over A\$5.6 billion in global box office revenue**, in addition to substantial long-term franchise value through sequels, spin-offs, licensing and streaming distribution.

Strategic Insight

These examples demonstrate that Australian filmmakers are fully capable of creating globally successful intellectual property. However, these successes occur **sporadically rather than systematically**.

The policy challenge is therefore not whether Australian creatives can produce globally competitive work. The challenge is creating **financing structures that allow those successes to occur more frequently**.

6. The Streaming Era and Global Demand

The global screen industry has undergone profound structural transformation over the past decade. The rapid expansion of subscription streaming platforms has fundamentally reshaped how screen content is financed, distributed and consumed. Unlike traditional broadcast or theatrical models, streaming platforms operate across integrated global subscriber bases, dramatically expanding the potential audience reach for successful productions.

Recent performance data illustrates the scale at which global streaming hits can operate.

Series	Country	Platform	Hours Viewed
Squid Game (3 Seasons)	South Korea	Netflix	~4.5B
Money Heist	Spain	Netflix	~1.7B
Stranger Things (5 Seasons)	USA	Netflix	~10.0B
Dark	Germany	Netflix	~500M
Boy Swallows Universe	Australia	Netflix	~88M

Two key insights emerge from this data:

First, non-English language productions are now capable of achieving extraordinary global reach. Series originating in markets such as South Korea, Spain and Germany have demonstrated that distinctive storytelling combined with scalable production values can translate into worldwide audience engagement.

Second, global audiences have become increasingly comfortable consuming international content. The traditional constraints of language, geography and domestic market size have been materially reduced by platform distribution models that promote algorithmic discovery and simultaneous multi-territory release strategies. This development significantly expands the potential export market for Australian screen content.

At the same time, major streaming platforms are entering a new commissioning phase characterised by a stronger emphasis on **fewer, higher-impact productions**.

Senior industry leadership has increasingly signalled a shift away from volume-driven content strategies toward prioritising quality, franchise potential and global audience scale. For example, Disney CEO Bob Iger has publicly noted the need to focus on producing “**fewer but better**” titles as part of broader industry recalibration, while Paramount Global leadership has similarly emphasised disciplined investment in premium, commercially resonant projects.

This evolving commissioning environment reinforces the importance of financing structures capable of supporting internationally competitive production budgets and market-oriented intellectual property development. For Australian producers, the opportunity is no longer constrained by distribution access, but by the ability to originate scalable content capable of performing at a global consumption threshold.

As global streaming platforms shift toward commissioning fewer, higher-impact titles, jurisdictions capable of supporting commercially scalable productions are increasingly better positioned to capture export revenue, attract investment and participate meaningfully in global screen market growth.

7. The Global Incentive Environment

Screen production has become a highly mobile and internationally competitive industry. Governments across major screen markets have progressively introduced incentive frameworks designed not only to attract production expenditure, but to support the development of commercially scalable domestic screen sectors.

As global competition has intensified, several leading jurisdictions have converged around incentive settings in the approximately 40% effective support range.

Jurisdiction	Incentive
United Kingdom	39.75%
British Columbia	40%
Saudi Arabia	40–50%
Ireland	40%
Canary Islands	45–54%

In this context, incentive policy functions as part of a broader industrial toolkit influencing where screen investment is structured, how projects are financed and which regions are able to originate commercially competitive productions.

For jurisdictions seeking to build long-term screen capability and retain intellectual property ownership, competitive financing settings can play an important role in supporting production scale, attracting private capital participation and improving the economic resilience of domestic screen businesses.

8. The WASCIP Pilot

Against this global and structural backdrop, the **WA Screen Capital & Industrial Pilot** introduces a targeted industrial financing mechanism designed to mobilise private capital and increase commercially oriented production activity within Western Australia. The pilot is intended to complement existing cultural funding settings by supporting projects capable of operating at a scale consistent with contemporary global commissioning and distribution dynamics.

By providing a capped, performance-linked rebate framework, **WASCIP seeks to improve the feasibility of privately financed productions** while encouraging the retention of intellectual property participation through Western Australian-domiciled production entities. In doing so, the program aims to increase production throughput, activate recently developed studio infrastructure and strengthen the State's capacity to originate commercially competitive screen content.

Feature	Design
Rebate Rate	40%
Pilot Duration	3 years

Government Cap	\$40M
Payment	Post-audit rebate
Eligibility	WA-domiciled production entity

Rebates are issued only following production completion and independent verification of eligible expenditure. This structure ensures that public funds are directly tied to realised economic activity while enabling the State to test a new capital-facing industrial model within a clearly defined fiscal envelope.

9. Treasury Safeguards

The preceding analysis outlines both the structural challenges facing the screen sector and the economic rationale for introducing a targeted industrial activation mechanism. While WASCIP is designed to improve the commercial orientation of production financing and unlock private investment, it is equally important that any new policy instrument maintains a disciplined approach to public risk exposure.

Screen production is inherently variable and hit-driven. Individual project outcomes can differ significantly, and production cycles are influenced by global market conditions, platform commissioning trends and investor sentiment. For this reason, the proposed pilot has been structured with explicit fiscal safeguards intended to ensure that public participation remains proportionate, capped and directly linked to verified economic activity within Western Australia.

Accordingly, WASCIP incorporates several mechanisms designed to protect public finances while still enabling the State to test a new industrial financing model.

Post-Audit Payment

Rebates are issued only after production completion and independent verification of expenditure. If a project fails to complete, no rebate is issued.

Private Capital First-Loss Position

All production financing must be secured prior to rebate eligibility. Private investors therefore absorb production execution risk.

Legislated Funding Cap

Government exposure is limited to **\$40 million over three years**.

WA Economic Command Test

Productions must operate through **Western Australia-domiciled production entities** that retain meaningful participation in intellectual property ownership.

10. Economic Activation Potential

Within a fiscally controlled policy framework, WASCIP is designed to operate as a targeted economic catalyst capable of leveraging relatively modest public participation into materially larger levels of privately financed screen production activity. Rather than functioning as a traditional subsidy mechanism, the pilot is structured to improve capital feasibility for commercially oriented projects and increase overall production throughput within Western Australia.

At full utilisation of the capped pilot envelope, the program has the potential to mobilise a blended financing pool broadly structured as follows:

Public Investment	Private Capital	Total Production Spend
\$40M	~\$60M	~\$100M

This catalytic structure enables government participation to act as a risk-balancing mechanism that encourages private investors to commit capital to projects capable of generating scalable intellectual property and export-oriented revenue streams.

Transition to Economic Activation Potential

Taken together, these safeguards are intended to ensure that public participation under WASCIP remains fiscally contained while aligning government support with demonstrable economic activity and private capital commitment. By structuring the pilot as a capped, post-audit rebate mechanism, the State is able to test an industrial financing approach that balances prudence with opportunity.

Within this controlled risk framework, the potential economic upside becomes more material. If successfully implemented, the pilot has the capacity to catalyse a step-change in production throughput, attract additional external investment and increase the likelihood that Western Australian-originated intellectual property participates more meaningfully in global screen markets. It is this combination of disciplined fiscal design and scalable activation potential that underpins the economic rationale for the WASCIP model.

WASCIP Multiplier Effect

The proposed WASCIP framework is designed to operate as a catalytic investment mechanism rather than a traditional grant programme. By providing targeted public stimulus at the front end of project financing, the initiative aims to unlock significantly larger pools of private capital, enabling Western Australia to support multiple commercially scaled productions and increase the probability of globally competitive intellectual property emerging from the state.

Flow structure:

\$40M Public Catalyst → \$100M Production Investment → 3 - 4 Major Productions → Potential Breakout Global Hit → \$500M - \$1B Long-Tail IP Value

This multiplier dynamic reflects the hit-driven economics of the global screen industry, where a relatively small number of successful titles can generate disproportionate long-term economic returns. A widely referenced example is New Zealand's experience following *The Lord of the Rings* trilogy.

- Combined production budgets were approximately **AUD \$430–450 million**
- Global box office exceeded **AUD \$4.5 billion**
- The films catalysed the long-term growth of the New Zealand screen sector, including the global expansion of Weta Digital, which was ultimately acquired in a transaction valuing the business at approximately **AUD \$2.3 billion**
- Tourism New Zealand has identified a sustained increase in international visitation following the global release of *The Lord of the Rings* films, with screen exposure recognised as a contributing influence on travel demand. In the decade after release, **international arrivals rose by approximately 40%**, and tourism research suggested that around **10–15% of long-haul visitors associated the films with their decision to visit**. Over time, screen-related tourism linked to the franchise is estimated to have generated **several billion Australian dollars** in cumulative visitor expenditure.

While Western Australia's strategy is not predicated on replicating any single international precedent, the example illustrates how catalytic public investment aligned with scalable intellectual property can generate enduring industry capability, export revenue and enterprise value well beyond the initial production spend.

In this context, even a single breakout success enabled through WASCIP has the potential to create economic value that substantially exceeds the original public contribution, while strengthening Western Australia's position as both a competitive production destination and an originator of globally recognised screen content.

Targeted catalytic investment in scalable screen intellectual property can therefore play a material role in generating long-term economic returns, attracting private capital and anchoring enduring industry capability within the state.

11. Complementarity with Screenwest

Western Australia already maintains a well-established cultural screen funding framework through Screenwest. Screenwest plays an important role in supporting the foundational health of the sector by investing in:

- emerging creatives and early-career talent
- culturally significant and locally distinctive storytelling
- regional production activity and community engagement
- industry capability and professional development.

These functions are essential to maintaining a vibrant creative ecosystem and ensuring Western Australian voices continue to be represented on screen.

However, cultural development settings are not always designed to address the capital intensity and market dynamics associated with large-scale commercial screen production. As global production economics have evolved, the capacity to attract private investment, scale budgets and retain IP ownership has become central to long-term industry sustainability.

WASCIP is intended to introduce a complementary **industrial policy track** focused on strengthening these commercial dimensions of the sector.

Track	Focus	Delivery
Cultural Track	Cultural storytelling	Screenwest
Industrial Track	Commercial productions	WASCIP

This dual-track structure enables each mechanism to operate where it is most effective. Cultural investment can continue to nurture creative capacity and distinctive storytelling, while industrial incentives can support larger-scale productions capable of generating export revenue, attracting global partners and building enduring screen businesses within Western Australia.

Together, these complementary approaches have the potential to create a more balanced screen ecosystem — one that supports both cultural expression and sustainable commercial growth.

12. Conclusion

Western Australia has already undertaken a substantial and forward-looking investment in the physical and institutional foundations of a competitive screen industry. The construction of Perth Film Studios, the expansion of workforce capability and sustained support for cultural production have positioned the State to participate more actively in a rapidly evolving global screen economy.

The next policy challenge is not one of infrastructure creation, but of industrial activation. Without mechanisms capable of mobilising private capital and supporting the retention of scalable intellectual property, the economic benefits of production activity are likely to remain largely short-term in nature. Ensuring that public investment translates into sustained industry

depth, export capability and enterprise growth will be critical to realising the full value of the State's existing commitments.

The **WA Screen Capital & Industrial Pilot** offers a fiscally disciplined opportunity to test a complementary industrial financing model. By operating as a capped, post-audit rebate designed to leverage private investment, the pilot seeks to increase production throughput, strengthen commercial orientation and encourage the development of globally competitive screen content originating from Western Australia.

If successful, the program has the potential to support the transition of the State's screen sector from a primarily service-driven production environment toward a more balanced model that combines **cultural vitality with enduring commercial value**. In doing so, Western Australia would be better positioned to capture a greater share of the long-term economic returns associated with global screen content — including export revenue, skills retention, enterprise formation and the creation of sustainable creative industries. A **time-limited pilot structure** allows government to evaluate outcomes, refine settings and determine whether a capital-facing industrial incentive should form part of the State's long-term screen policy framework.

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