

# Screen Currency 2026

Understanding the value of  
Australian screen and games

A study in 5 reports with  
supporting case studies

Report 4 of 5

# Economic Insights



Australian Government



UNIVERSITY OF  
**CANBERRA**

NEWS AND MEDIA  
RESEARCH CENTRE

# Screen Currency 2026

Understanding the value of  
Australian screen and games

# Economic Insights

This report is a trend analysis of the economic characteristics of Australia's screen and games industries.

It builds an evidence base of the size and impact of these industries and how they have been affected by industrial and technological changes. It includes analysis of screen and games' contribution to the nation's economy, the size and characteristics of the workforce, exports data, and analysis of screen production trends by content type and screen funding.

Aboriginal and Torres Strait Islander people are advised that this document may contain images and names of people who have passed.

This Screen Currency report was developed by Marion McCutcheon, Yogi Yidyattama and Stuart Cunningham from the University of Canberra. It was prepared for publication by Mandy Whitford, Impact Words Consulting, with Georgie McClean at The Gist and Screen Australia's Strategic Policy and Insights team.

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*Hollow Knight: Silksong*

# Acknowledgement of Country

Screen Australia acknowledges that we work on the lands of the Gadigal People of the Eora Nation in our Ultimo office and on the lands of the Wurundjeri People of the Kulin Nation in our South Melbourne office.

We pay respect to Traditional Custodians and Elders past and present, and recognise their continuous connection to culture, community and Country. We extend that respect to all Aboriginal and Torres Strait Islander peoples.

We acknowledge the strength and power of First Nations storytelling and are proud of the work of Screen Australia's First Nations Department, which has provided leadership and support to Aboriginal and Torres Strait Islander creators around the country for more than three decades.











*Pasa Faho*

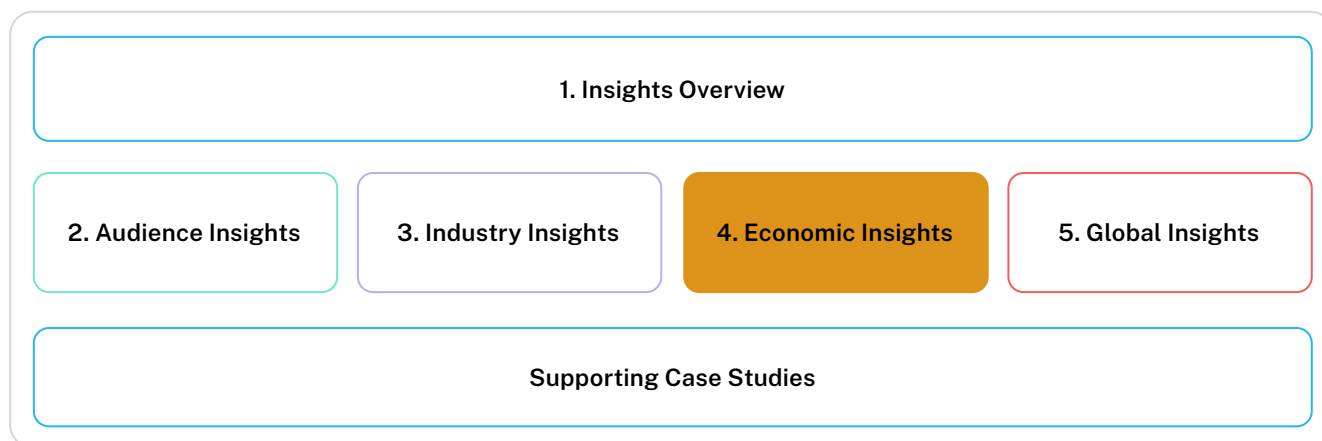


# About Screen Currency 2026 and this report

The *Economic Insights* report forms part of the Screen Currency 2026 suite of research, exploring the social, cultural and economic value of Australian screen and games.

Screen Currency's purpose is to provide a shared evidence base for government and industry, and to inform decision making and policy – including development of the next National Cultural Policy. The research updates and builds on the inaugural Screen Currency report published in 2016, acknowledging significant changes in the past decade. In doing so, it provides critical benchmarks for future tracking.

Screen Currency 2026 is a multifaceted research study that comprises 5 reports with supporting case studies.



This Screen Currency *Economic Insights* report is also referred to as “the economic study”. The findings focus on the **economic value and characteristics** of Australian screen and games industries.

The scope of the Screen Currency research spans the broad range of screen and games offerings in Australia, beyond that which Screen Australia supports directly, including:

- **Screen:** feature films, TV drama and comedy, documentary and factual, children’s programming, animation, light entertainment and online videos, viewed across all platforms. It does not include news, sport or user-generated content.
- **Games:** video games played on PC, console and mobile devices, ranging from simple puzzle and word games to immersive storyworlds and large-scale online environments that support social interaction and ongoing engagement.

Screen Currency provides evidence for the value of these critical creative industries to individuals, communities, the economy and the nation.

Click to read the other reports in the series

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Australia's Sleep Revolution with  
Dr Michael Mosley



# Executive summary

Australia's screen and digital games industries are a vital part of Australia's creative industries and national economy, generating economic activity, supporting highly skilled jobs and contributing to Australia's global competitiveness and cultural influence.

Beyond their direct economic footprint, these industries drive innovation, attract investment, and create flow-on benefits across broader industries.

**This economic study forms part of Screen Currency 2026**, a multidisciplinary program of research examining the social, cultural and economic value of Australian screen and games.

**The economic study presents a trend analysis of the economic characteristics of Australia's screen and games industries.** It aims to construct an evidence base of the size and economic impact of these industries, how they have been affected by the industrial and technology changes of the past 25 years, and the role of government policy in supporting these culturally significant industries operating in a highly competitive global market.

**The study also presents new analysis of screen production trends** for Australian features films, Australian TV drama, Australian children's TV drama and Australian documentary, over the period from 2000 to 2024.<sup>1</sup>

**The report comprises four chapters, covering:**

- 1. Estimation and analysis of the value of screen and games to the Australian economy** (2016/17–2023/24) based on the Australian Bureau of Statistics (ABS) national accounts data and applying the method developed by the Bureau of Communications, Arts and Regional Research (BCARR).
- 2. Estimation of the size of the screen and games workforce** (2008/09–2024/25), based primarily on ABS labour market and Census data and applying a method developed by BCARR, with additional analysis of **workforce characteristics such as multiple job holding and income**.
- 3. Analysis of available exports data**, including ABS business and balance-of-payments data, Screen Australia data on international expenditure and data from the IGEA Australian Game Development Survey.
- 4. Analysis of screen production trends** by content type, including the impact of industrial and regulatory change; and **analysis of funding for local screen content** from broadcasters and government support. This chapter is based on data collected by Screen Australia, the Australian Communications and Media Authority (ACMA) and the Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts (DITRDCA).

For further details of the data sources and methods see [Appendix 1: Detailed methodology notes](#). For information on terminology, see [Definitions, glossary and acronyms](#).

<sup>1</sup> This is a narrower range of screen content than considered in other studies within Screen Currency 2026, as it focuses on content types vulnerable to market dynamics and supported by Screen Australia. The audiences study for example, covers a broader range of content including light entertainment.



The scope of the screen and games industries discussed in this report includes the following sectors:

|                |                           |                                                                                                                                                                |
|----------------|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Screen sectors | Production                | Businesses mainly engaged in producing films, TV programs, commercials and other screen content.                                                               |
|                | Post-production           | Businesses mainly engaged in editing, sub-titling, credits, animation and PDV (post, digital and visual effects).                                              |
|                | Distribution              | Businesses mainly engaged in acquiring the rights to screen content and selling or licensing it to broadcasters and other distributors.                        |
|                | Exhibition                | Cinemas and film festivals.                                                                                                                                    |
|                | Free-to-air TV            | Businesses that provide TV broadcasting over the radiofrequency spectrum, available free to viewers (e.g. Seven Network, ABC).                                 |
|                | Subscription TV           | Businesses that deliver TV via cable or satellite networks, available to viewers through a paid subscription (i.e. pay TV providers such as Foxtel and Fetch). |
|                | Internet broadcasting     | Services that mainly broadcast screen content over the internet, including video on demand (VOD) services (e.g. Netflix, Prime Video and YouTube).             |
| Games sector   | Digital games development | Businesses mainly engaged in the creation and production of video games.                                                                                       |

## Relationship to the value chain in the Screen Currency industry study



While the industry study refers to **“Production”** as a stage in the value chain that includes post-production, this report considers “Production” and “Post-production” separately based on the Australian and New Zealand Standard Industrial Classification (ANZSIC) categories. To see how the industry sectors discussed in this report map to ANZSIC categories, go to [Table 11](#) in [Definitions, glossary and acronyms](#).

To find out more about the screen value chain go to:

Industry Insights



This report draws on publicly available national economic statistics and regulatory datasets, and bespoke data provided by Screen Australia. It is important to note that while these datasets provide valuable insights into the sectors we are attempting to understand, they do not always tell the full story.

The analysis that underpins this report adopts the methodology developed by the Bureau of Communications, Arts and Regional Research (BCARR) as part of the Australian Government’s 2024 refresh of the cultural and creative satellite accounts. The introduction of this framework represents a significant advancement in the measurement of Australia’s creative economy, providing a more comprehensive and consistent basis for understanding the sector’s contribution to economic activity.

This economic study should be considered alongside the other studies that comprise Screen Currency 2026, which include an audience study, industry study, global insights study, a summary report and supporting case studies. Screen Currency is a multifaceted project that presents a holistic view of value, including how that value is created and captured, and who benefits from it.

This executive summary brings together findings from across the components of this economic study, grouped as findings on the economic characteristics of Australia’s screen and games industries, followed by screen production and funding trends.



# Key findings

## Australia's screen and games industries – economic characteristics

The screen and digital games industries have **complex economies**. They are human capital intensive, exhibit hit-driven economics and long-tail market characteristics, and are shaped by economy-wide structural forces of globalisation and digitisation, and now the emerging impacts of artificial intelligence (AI).

While screen and games are united by the central role of screen technologies in the production and consumption of content, and are characterised by the use of moving images to communicate and entertain, **they encompass a wide range of activities**. These extend from production and post-production to distribution through national and international networks, streamers and online, and exhibition at cinemas and festivals.

### Finding 1



Australia's screen and games industries are a significant source of economic value and employment.

Together, screen and digital games activity contributed \$11.1 billion to the Australian economy in gross value added (GVA) in 2023/24, and the screen and games industries employed 68,844 people in 2024/25. For comparison, this GVA was 17.4% of the GVA of all cultural and creative activity in the same year, similar to GVA generated by each of the air and space transport and rental and hiring industries, and more than that generated by the sport and recreation, and the electricity generation industries. Of the total figures for screen and games, **\$10.8 billion in GVA and 66,080 jobs are associated with the screen industry, and \$317 million of GVA and 2,764 jobs are in digital games development.**

Overall, the growth trends of the sectors that make up the total screen and games industries reflect two different and opposite trends. **Value generated by Australia's production, post-production and digital games development sectors grew** over a period in which government support, through direct and indirect incentives, also expanded. On the other hand, **broadcasting GVA is in decline as free-to-air and subscription TV broadcasters (such as Foxtel and Fetch) lose revenue and audiences to online platforms and streamers.**

In terms of employment, since the COVID-19 pandemic **the production and post-production sectors have experienced challenging skills shortages**, which have limited workforce growth despite growth, in government production incentives that support production and jobs. On the other hand, **the number of people working in digital games development has continued to increase.**

### Finding 2



Digital games development is growing rapidly and is a remarkable export success story.

**Digital games development is the fastest growing industry, outpacing all of Australia's screen sectors in terms of GVA, employment and exports, albeit off a small base.** The value contributed by games to the Australian economy has more than doubled since 2016/17 – this growth is over a period which includes the introduction of both state and federal incentives and support. Employment in digital games increased by an average rate of 14.6% per annum between 2016/17 and 2024/25, compared to 2.3% growth in the rest of the workforce.

**Exports are a particular success story**, with industry estimates from the Interactive Games and Entertainment Association (IGEAs) suggesting that games exports are responsible for as much as 20% of Australia's total screen and games export earnings. Games exports saw an average annual growth rate of 15.4% between 2016/17 and 2023/24 in real terms (adjusted for inflation).



### Finding 3



The sectors that generate the most economic value are not those that create the IP.

**Content is key to business across the screen and games industries, but it's those businesses that supply content directly to audiences that generate the greatest share of GVA**, not the content creators. Together, free-to-air TV, subscription TV and internet broadcasting (including the streamers) generate the greatest share of GVA, 65% or nearly two-thirds. In contrast, the sectors that are upstream in the industry's creative engine room – production, post-production and digital games development – generate 22% of GVA.

**Production, post-production and games development are also highly labour-intensive compared to the broadcasting sectors.** More than 70% of the value generated by screen production, post-production, distribution and exhibition is returned to employees.<sup>2</sup> This exceeds the proportion of value returned to workers for the broadcasting sectors (including free-to air, subscription TV and internet broadcasting) – and the average for the entire Australian economy – by a high margin. Historically more than half of the value generated by broadcasters, both traditional and internet-based, has been returned to capital, but returns to labour are now increasing for these sectors.

**For all screen sectors, skills shortages since the COVID-19 pandemic have contributed to labour increasing as a share of GVA, with production and post-production companies most affected**, as they are typically very small and distribute most of their earnings to their employees. There may be potential for AI to increase efficiencies, however, delays in the availability of statistics mean the impact of AI on GVA is not yet visible. That said, while these sectors continue to be dominated by very small businesses, the share of returns to capital is likely to remain lower than in other sectors.

**Of the smaller contributors to screen GVA, distribution and exhibition have rebounded strongly since severe declines during the COVID-19 pandemic.** For these sectors, GVA has increased by an annual average of 31% and 18% respectively since 2020/21, with demand for distribution services picking up following increases in local production activity (although the sector has not returned to pre-COVID activity levels in employment) and cinema audiences returning to pre-pandemic habits.

### Finding 4



The sectors that generate the most economic value do not employ the most people, but they tend to offer higher incomes.

**The distribution and broadcasting sectors occupy structurally powerful positions downstream within the screen industry.** They are associated with higher shares of value and higher income levels. Those working in distribution and broadcasting earn higher median incomes than those working upstream in production and post-production. This is despite the production and post-production sectors transferring a very high proportion of their returns to employees, and despite skills shortages putting upward pressure on labour costs for skilled production professionals. It suggests that production and post-production companies have little or no capacity to offer their workers higher salaries and wages.

**In addition, those working in professional support roles, including management, accounting and legal services, earn more than those in creative roles.** This is a characteristic that screen sectors share with other cultural and creative industries.

<sup>2</sup> These sectors are grouped in the data on compensation of employees (COE). This data is not available for digital games development.





### Finding 5



The sectors that employ the most people do not necessarily offer stable careers.

**Together, the production and post-production sectors employ the largest segment of the screen workforce**, accounting for almost half of workers, with strong growth from the late 2010s driven by government support, particularly the tax offsets that have encouraged growth in expenditure on production in Australia.

**Despite the relative size of this workforce and its key role upstream in the value chain, it does not necessarily offer stable careers, with high levels of multiple job holding.** At any one time 34% of the production workforce hold multiple jobs – and over the course of a year a third of the people that work in production have held multiple jobs, suggesting that people churn within, and also in and out of, the sector. This group of precariously employed workers moves from project to project, and are the most exposed to any changes in Australia's competitiveness as a production location for international projects.

### Finding 6



Production and post-production output has grown faster than employment since the COVID-19 pandemic.

**Since the COVID-19 pandemic, GVA in the production and post-production sectors has continued to grow** while employment growth has been more modest. This pattern is consistent with firms generating more output per worker, although the available data does not identify the underlying drivers.

### Finding 7



Commercial TV is still an extremely important part of the screen ecosystem.

Despite the significant challenges that digitisation and globalisation have presented to traditional broadcasting business models, free-to-air broadcasters continue to play an important role in Australia's screen ecosystem. **While internet broadcasters (e.g. the streamers) have generated higher levels of GVA than Australia's free-to-air TV broadcasters since 2017/18, they do not employ as many people as free-to-air TV and do not spend as much on Australian programming.**

**Free-to-air TV broadcasters employ one of the largest workforces in the screen industry** – second only to production. They employ more than 14,000 people and offer the highest screen incomes, and neither have shown any sign of decline since the 2000s, despite commercial TV revenue losses over the same period.

**While commercial TV services have responded to their decreasing revenues by spending less on content (particularly on general drama and children's content) they continue to be Australia's largest source of demand for domestically produced programming**, with this position underwritten by the 55% Australian content quota for commercial TV licensees.



*The Rooster*

**Finding 8**

Screen and games exports have experienced substantial growth, driven by different demand factors.

**Australian screen and games industries are significant – and growing – export industries, aligned with the Australian Government’s agenda to diversify Australia’s exports.**<sup>3</sup> Screen and games exports totalled **\$1.6 billion** in 2023/24, including **\$1.3 billion in screen exports and \$323 million in games exports**. While this total was down from \$1.9 billion in the previous year, this does not represent a downward trend – screen exports can be volatile over time and an increase in foreign drama expenditure in the last financial year suggests that estimated total screen and games exports are likely to return to \$1.9 billion in 2024/25. In addition, the true value of screen exports is likely to be higher than indicated as locally made program sales to international streamers are not captured in the data.<sup>4</sup>

**The value of screen industry exports has experienced strong growth since the introduction of the producer, location and PDV offsets.** Between 2008/09 and 2023/24, the total value of screen exports more than doubled in real terms, increasing by an annual average of 4.7%.

**Games exports have experienced faster export growth** than the screen sectors, although this was off a smaller base and measured over a shorter period of time, at an average annual rate of 15.4% between 2016/17 and 2023/24.

The sectors generating the largest proportions of exports in 2023/24 were production and post-production (67% of total exports), games (20%) and internet broadcasting (8%). These are the only screen export revenue sources that have continued to grow in real terms since digitisation. For the sectors most negatively affected by digitisation and globalisation, export revenues have fallen. These sectors include distribution, free-to-air TV broadcasting and subscription TV.

**Foreign production<sup>5</sup> expenditure is the largest component of Australia’s screen exports.** Total foreign production expenditure continues to increase, reaching \$1.6 billion in 2024/25, more than six times the \$260 million recorded in 2010/11.

**The value of royalty exports is somewhat lower, at \$415 million in 2024/25.** Royalty exports have been growing since falling to lows in the early 2010s, with international competition for quality content from global media and tech companies driving up the value of content rights.

**Data limitation: Trends reported for each screen sector are sensitive to how businesses are recorded and classified in economic statistics.**

It is important to note that economic statistics up to 2023/24 do not record earnings by multinational companies that do not have a business presence in Australia. The ABS has extended National Accounts data from 2023/24 to include estimates for digital services, targeting the “most significant multinational enterprises providing digital services” – this can be expected to result in future changes in economic time series for the screen industries.

**A further challenge for this analysis is that foreign firms may not be assigned to an industry category that best fits their actual activity in Australia.** This means that subscription video on demand (SVOD) services such as Disney+ and Paramount+, whose first business presence in Australia was as subscription TV channels, may be recorded as subscription TV services rather than internet broadcasters.

3 Senator the Hon Don Farrell, “Trade Diversification Network activated” (Media Release, January 2026).

4 These sales are counted in ABS trade data as domestic rather than international sales. The deal terms these platforms use tend to capture rights for all territories, so these globe-reaching sales of Australian-made content on streamers do not show up in ABS export data (or in Screen Australia’s recoupment data).

5 Foreign production refers to film, television, or other screen content projects that are initiated, developed, and primarily controlled by non-Australian entities and undertake some or all production or post-production activity in Australia.



## Production and funding trends

Digitisation and globalisation have reshaped the composition of Australian screen production, driving growth in some types of content and sectors while others have contracted. These shifts have changed not only how much is produced, but what gets made and for whom. Within this changing mix, some culturally significant content types are more exposed to commercial pressures than others. Producers' choices about TV and film content production can be a complex balancing act, shaped by the needs of different types of broadcasters and commissioners. For example, commercial TV broadcasters need content to attract audiences and advertisers in a three-way market, while subscription TV broadcasters and SVOD services (or "streamers") use content to build a catalogue that will attract and retain subscribers. Differences in broadcasters' motivations and demand for content are a factor underpinning production trends of the past 25 years.

### Finding 9



Growth in Australian production revenue is a relatively recent phenomenon.

Until 2020, total sales generated by Australia's screen production, post-production and digital games industries were relatively stable in real terms, between \$3.5 billion and \$4.1 billion annually. This changed in the early 2020s, with sales peaking at \$6 billion in 2021/22 before decreasing to \$5.4 billion in 2023/24.

**This apparent boom in screen and games production was not uniformly shared** – it was focused in expenditure on Australian and foreign drama production and growth in games sales during the COVID-19 pandemic. Other measures of demand for Australian screen content were in decline, including the commercial broadcasters' expenditure on Australian programming.

### Finding 10



Sales revenue from digital games development is growing.

**Sales revenue in the digital games development industry is growing at a faster rate than for screen production or post-production, albeit off a smaller base as an emerging industry.** Games titles could not be tracked using data available to this economic study, so industry output is not assessed here beyond sales and exports.

**Based on ABS estimates, there were 188 digital games development businesses operating in Australia in 2021/22** – one-sixth of which received funding under Screen Australia's Games Production Fund, which commenced in March 2022.

### Finding 11



The number of Australian feature film titles is increasing, despite a shrinking market.

**While the numbers of drama feature films produced each year has increased steadily since the early 2000s, the funding available and returns from the release of feature film titles have both fallen.** This is evidenced by decreases in feature film budgets, and in Australian box office sales. Despite exhibition sector GVA returning to pre-COVID levels, these gains do not appear to be transferred to Australian features, with Australian box office sales continuing to track a downward trajectory.



## Finding 12



Expenditure on Australian TV drama is up, driven by premium budgets, but hours, titles and access are down.

**Drama budgets have increased sharply as streamers** invest heavily in premium scripted drama – characterised by cinematic production values, leading creative talent, and sophisticated storytelling – to compete in a burgeoning international marketplace. **However, SVOD commissions have not fully compensated for the commercial TV retreat from drama:** first-release hours in 2024 were half that of the early 2000s (excluding serials). Rights returns (pre-sales and sales revenue) are also down, as cost-plus contracts for global streamer commissions reduce opportunities for secondary sales and ongoing income.<sup>6</sup>

**Historically, Australia's TV drama production sector was sustainably funded by commercial broadcaster advertising revenues and supported by a sub-quota safety net.** This ensured a minimum amount of local drama for Australian audiences and a predictable pipeline of work for Australian drama producers. Over the past 25 years, digitisation and globalisation have reshaped this landscape, shifting demand from domestic broadcasters – whose advertising revenues have come under pressure – to global streaming services. Following the reduction in the drama sub-quota in 2021, commercial broadcasters are no longer the primary source of demand for Australian drama. (Noting that the Nine Network and Network Ten continue to commission Australian drama for the streaming services Stan and Paramount+ respectively.)

**Streaming platforms have overtaken other broadcasters as the largest commissioners of Australian TV drama.** Domestic and international streaming services are commissioning more titles and spending more on Australian drama than any other single broadcaster type. This shift predates the 2025 announcement of content obligations for qualifying streaming platforms.

**However, streamer expenditure on drama is driven by budgets rather than quantity,** so while their drama spend is very high, this is not translating to more titles or hours. **This has impacted work and revenue streams for producers.**

## Finding 13



The removal of the sub-quota for children's content on commercial FTA TV accelerated a contraction in commissioning activity for children's drama producers.

**Australian children's TV drama has contracted sharply, diminishing what had been a sustainable and highly regarded sector with a history of export success.** Children's content has long been vulnerable to market failure, and government historically placed an obligation on commercial broadcasters to offer age-appropriate new content to children.

**From the 1990s, technological and regulatory change allowed for the development of services tailored specifically for children,** including subscription television channels, the ABC's dedicated children's services and, subsequently, online and on-demand viewing platforms. The emergence of YouTube in 2005, as well as other digital video services, further fragmented young audiences and shifted viewing away from traditional linear (scheduled) broadcasting.

**In an environment where children's content was increasingly unprofitable for commercial broadcasters,** the removal of the children's drama sub-quota in 2021 accelerated an existing decline in commissioning activity, leaving Australian children's drama producers without a significant source of local commissions.

<sup>6</sup> Cost-plus is a production financing model where the commissioner covers the costs of the production plus a fixed fee. The model offers guaranteed upfront returns for producers regardless of the commercial outcome of a work, usually in return for relinquishment of backend rights and long-term profit participation.

## Finding 14



Demand for documentary programming has continued despite the removal of the documentary sub-quota for commercial broadcasters.

**According to production metrics, documentary production in Australia appears less volatile than drama, despite significant changes in broadcaster acquisition preferences and in distribution opportunities for Australian documentary creators.**

The replacement of the Australian documentary sub-quota for commercial TV licensees with a combined points system for both drama and documentary has not led to the same decline in the genre as seen in drama. Instead, **commercial broadcaster expenditure on the genre has increased**. At the same time, the volume of documentary programming commissioned by public service broadcasters and subscription TV services has contracted, with declines in both the number of titles and total hours since 2016.

## Finding 15



Commercial broadcasters remain the largest source of demand for Australian content, but this demand is concentrated in genres that do not attract government support.

**The program spend data reported by commercial broadcasters shows they continue to be a crucial source of demand for Australian programming.** With the 55% local content quota still in place, expenditure on programming by commercial TV broadcasters is around four times that of SVOD services.

**Commercial broadcasters have moved away from drama, but they have not moved away from other formats that align with their business model.** While they have reduced their total content expenditure, **they continue to spend on local sport, light entertainment, and news and current affairs**, which are time critical content forms that entertain and inform Australians and attract large audiences and advertising revenue. These forms of content do not attract government support as they are not at risk of market failure while the 55% Australian content quota is in place.

**Commercial broadcasters no longer play a significant role in commissioning the more vulnerable content types** that are the focus of this study<sup>7</sup> apart from their continued, but limited hours of documentaries.

<sup>7</sup> Australian features films, Australian TV drama, Australian children's drama and Australian documentary. This is a narrower range of screen content than considered in other studies within Screen Currency 2026, as it focuses on content types vulnerable to market dynamics and supported by Screen Australia. The audiences study for example, covers a broader range of content including light entertainment.





Plum

### Finding 16



Government support and regulation are integral to the Australian screen industry.

Government policy has long played a significant role in the screen industry, shaping both business activity and creative outputs across the value chain. Federal government direct and indirect (tax) support for screen was approximately \$1.2 billion in 2024/25, making **the Australian Government one of the largest single sources of finance for production activity** in Australia. Government's role is more pronounced still for content types that commercial broadcasters have largely stepped away from. For Australian narrative drama, documentary and children's programming, government (state and federal) has become the dominant source of funding, as overall commercial TV program expenditure continues to decline.

Government support of the Australian screen industry helps sustain production of content vulnerable to market failure and ensures a stable pipeline of work for local specialist practitioners.

This leads to an observation about the funding mix for Australian screen content (less so with games), where public sources account for a growing share of funding, while the commercial revenue that historically sat alongside them – particularly free-to-air advertising – has declined. Expenditure on Australian content – particularly expenditure on drama – is increasing, but with fewer titles being created and a production workforce that is stable rather than growing, a change felt most acutely by project-based workers reliant on the volume of production activity.

# Contribution of screen and digital games to the Australian economy

[Screen and games](#)
**Economic contribution**

[Employment](#)

[Exports](#)

[Production activity and funding](#)

This chapter provides estimates of economic gross value added (GVA) and gross domestic product (GDP)<sup>8</sup> generated by Australian screen content and digital games, including key sectors of Australia's screen and games industry value chain: production, post-production, distribution, exhibition, free-to-air broadcasting, subscription broadcasting, internet broadcasting and digital games development.

Overall, screen and games activity contributed \$11.1 billion in GVA to the Australian economy in 2023/24. This value, however, is not distributed evenly across the value chain. **The sectors with the largest shares of GVA are not those that create content, but the broadcasters** – together free-to-air, subscription and internet broadcasting generated almost two-thirds of screen GVA in 2023/24. Detailed estimates and analysis for each screen and games sector are included in [Appendix 2](#).

While digitisation has opened competition in broadcasting, and access to distribution easier than ever, significant capital investment remains a substantial barrier to entry. For traditional broadcasters, this is compounded by regulatory requirements, including licensing obligations that do not apply equally to streaming services. As a result, the broadcasting sector continues to exhibit concentrated market characteristics, with a limited number of dominant providers. This is reflected in **the relatively higher ratios of gross operating surplus (profit) to compensation of employees observed in the broadcasting sectors**.

Production was the fourth-largest screen sector in Australia in 2023/24 by economic value (GVA). Together, **production and post-production** (the boundary between these two sectors is porous) **have generated higher GVA than free-to-air TV broadcasting since 2022/23**. This highlights two important trends. First, **free-to-air TV GVA is in decline**, with its advertising revenues having halved since the early 2000s.<sup>9</sup> Second, **production has grown substantially**, with indirect government support including the Producer, PDV and Location Offset driving demand for the services of Australia's production and post-production sectors.

These trends are reflected in GVA growth rates. **Between 2016/17 and 2023/24, growth in GVA generated by production, post-production, internet broadcasting and digital games development all exceeded national GVA growth**. On the other hand, **GVA growth rates for free-to-air TV and subscription TV broadcasting were negative** – despite being two of the largest screen sectors by economic value and retaining the highest proportions of profits.

<sup>8</sup> GVA measures an industry's contribution to the economy, showing the value it adds after subtracting the cost of its inputs, and GDP measures the total economic activity of a country, representing the value of goods and services produced within a given period. See the glossary for further definitions of technical terms.

<sup>9</sup> See [Figure 35](#) in Appendix 2.





Also in decline over this period are distribution and exhibition, although their contribution to GVA has rebounded substantially since COVID-19. These contracting segments of the screen value chain are losing revenues to online – advertising expenditure has substantially transferred to online platforms, while digitisation has collapsed distribution windows, allowing production companies in some cases to side-step the distribution process all together.

**The exhibition sector (cinemas and festivals) appears to be recovering from the collapse of its business during the COVID-19 pandemic** and, as reported in the next chapter, remains one of the largest sources of employment in Australia's screen industry.

It is important to note that the Input-Output tables up to 2022/23 do not record earnings by multinational companies that do not have a business presence in Australia. From 2023/24 the ABS has extended the national accounts to include estimates for digital services, targeting the “most significant multinational enterprises providing digital services.”<sup>10</sup> Filling this important data gap is expected to result in changes in economic time series for the screen sectors, and may explain the increase seen in internet broadcasting GVA in 2023/24. A further complication is that these firms may not be assigned to the ANZSIC that best fits their actual activity in Australia, but retain a category that reflects their past business activities – meaning that SVOD services such as Disney+ may be recorded as subscription TV services rather than internet broadcasters, following their history in Australia as subscription TV channels.



10 ABS 2024, [Introduction of digital services in the Balance of Payments](#), accessed 15 April, 2026



# Method

This research follows the method developed by the federal government's Bureau of Communications, Arts and Regional Research (BCARR) in its 2024 refresh of the cultural and creative satellite accounts originally developed by the ABS.<sup>11</sup> This method uses the ABS National Accounts Input-Output tables as its data source for estimating GVA and GDP. **For further details on the approach, see [GVA estimation method in Appendix 1](#).** The method used is transparent and uses publicly available data and therefore is replicable over time.

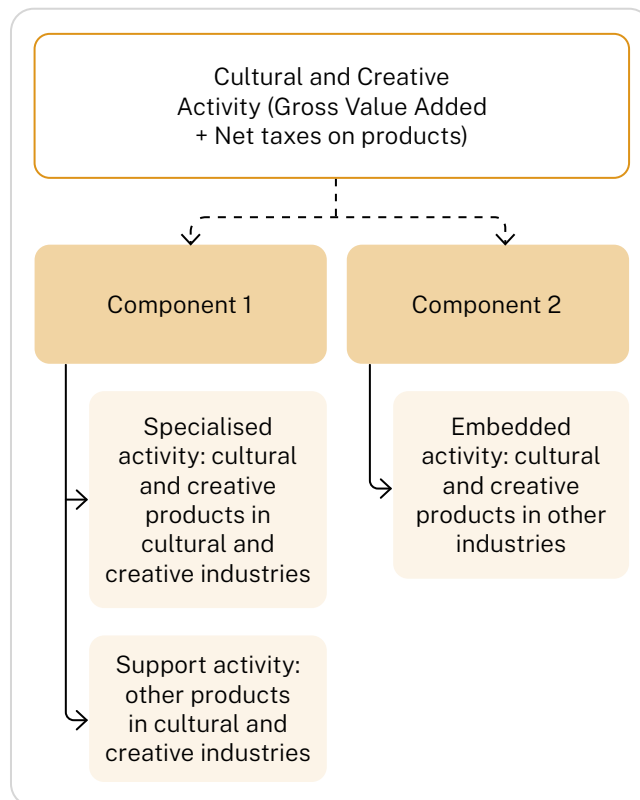
In presenting GVA estimates, value has been proportionally allocated to specialised, support and embedded activities as shown in the trident model in [Figure 1](#). For example, for the production sector, the value of:

- **specialised activity** – the value generated by specialist creative activity within the sector, such as making a TV series within the production sector
- **support activity** – the value generated by all other products recorded in the input-output tables for the production sector, for example a production company undertaking its own catering or legal services
- **embedded activity** – the value generated by production activity within all other industries, for example an advertising firm producing its own TV commercials or online video content.

**A note on terminology:** BCARR uses the term “domain” to refer to specialist, support and embedded activity as a whole for each area of cultural or creative focus. This report uses the term “sector” rather than domain. The estimates provided here are subsets of BCARR’s Film and TV and Internet Publishing and Broadcasting domains. For digital games development, BCARR’s GVA and GDP estimates have been replicated.

**Note on rounding:** Totals in tables in this report may not add due to rounding.

**Figure 1: BCARR cultural and creative satellite accounts framework and boundary**



Source: Bureau of Communications, Arts and Regional Research (BCARR) 2024, [Cultural and Creative Activity in Australia, 2008–09 to 2022–23 \(Methodology Refresh\) Statistical Working Paper](#).

<sup>11</sup> BCARR 2021, [Cultural and creative activity in Australia 2009–10 to 2018–19](#).



## Screen and games GVA and GDP

Screen and games together contributed \$11.1 billion in GVA to the Australian economy in 2023/24 (Figure 2, Table 1). For comparison, this was 17.4% of the value of all cultural and creative activity in the same year, similar to GVA generated by the air and space transport and the rental and hiring industries, and more than that generated by the sport and recreation and the electricity generation industries (Figure 4). Total screen industry GVA in 2023/24 was \$10.8 billion and games contributed \$317 million.

Overall, the GVA data reflects two different and opposite trends. **Australia's production and post-production sectors have grown rapidly alongside an expansion of government support through direct and indirect incentives. Broadcasting GVA, on the other hand, is in decline** as free-to-air and subscription broadcasters lose revenue and audiences to online.

Between the years of 2016/17 and 2023/24, total screen and games GVA grew very slightly by an average annual rate of 0.03%, compared with an increase of 2.3% for the economy as a whole.<sup>12</sup> **Since the COVID-19 pandemic year of 2020/21, screen and games GVA has increased, by an annual average rate of 5.9% (Figure 3).** While this suggests that the overall screen industry has recovered from the COVID-19 downturn, structural change in response to digitisation and globalisation is ongoing: **two of the largest contributors to GVA, free-to-air TV and subscription TV, are continuing to lose value** as they experience contractions in advertising revenue and as subscription TV has lost market share to SVOD services. **Production, post-production, distribution, exhibition and digital games development have been the key drivers of industry growth since 2020/21.**

**Digital games development has experienced extremely high GVA growth since 2016/17 with little or no impact during the COVID-19 pandemic.** This growth is from a low base: it is smaller than the screen sectors in Australia, generating \$317 million in 2023/24. The value it contributes to the Australian economy has more than doubled since 2016/17. This expansion has occurred over a period that includes the introduction of state and federal incentives and support, including the Digital Games Tax Offset from 2022, as well as targeted funding initiatives such as Screen Australia's support for games under *Revive*, the Australian Government's National Cultural Policy.

**It is the sectors that supply content directly to audiences – free-to-air TV, subscription TV and internet broadcasting – that generate the greatest share of GVA, 65%, nearly two-thirds, of all value generated by screen and games in 2023/24.** In contrast, the sectors that are the engine room of the industry – production, post-production and digital games development – generated 22% of GVA in the same year. This pattern is common across other cultural and creative industries. Companies that act as key intermediaries and decision makers tend to capture a larger share of value, reflecting their role in managing how content is supplied and distributed through the value chain from creators to audiences. That said, **Figure 2 shows that broadcasting is declining as a share of GVA** (notwithstanding a temporary increase in 2020/21 and 2021/22, as audience growth during the COVID-19 pandemic led to increased advertising revenues), while that of production is increasing. Whether this might become an ongoing transition in the screen market is, however, uncertain as the growth in production has largely been stimulated through government interventions.

**While screen and games GVA overall has rebounded more strongly than the rest of the economy since the COVID-19 pandemic, each sector has been affected by different drivers of growth.** For example, since the pandemic, the legacy free-to-air and subscription broadcasters have continued the decline that began well before COVID-19, with respective average annual falls of -4.0% and -3.1% since 2020/21.

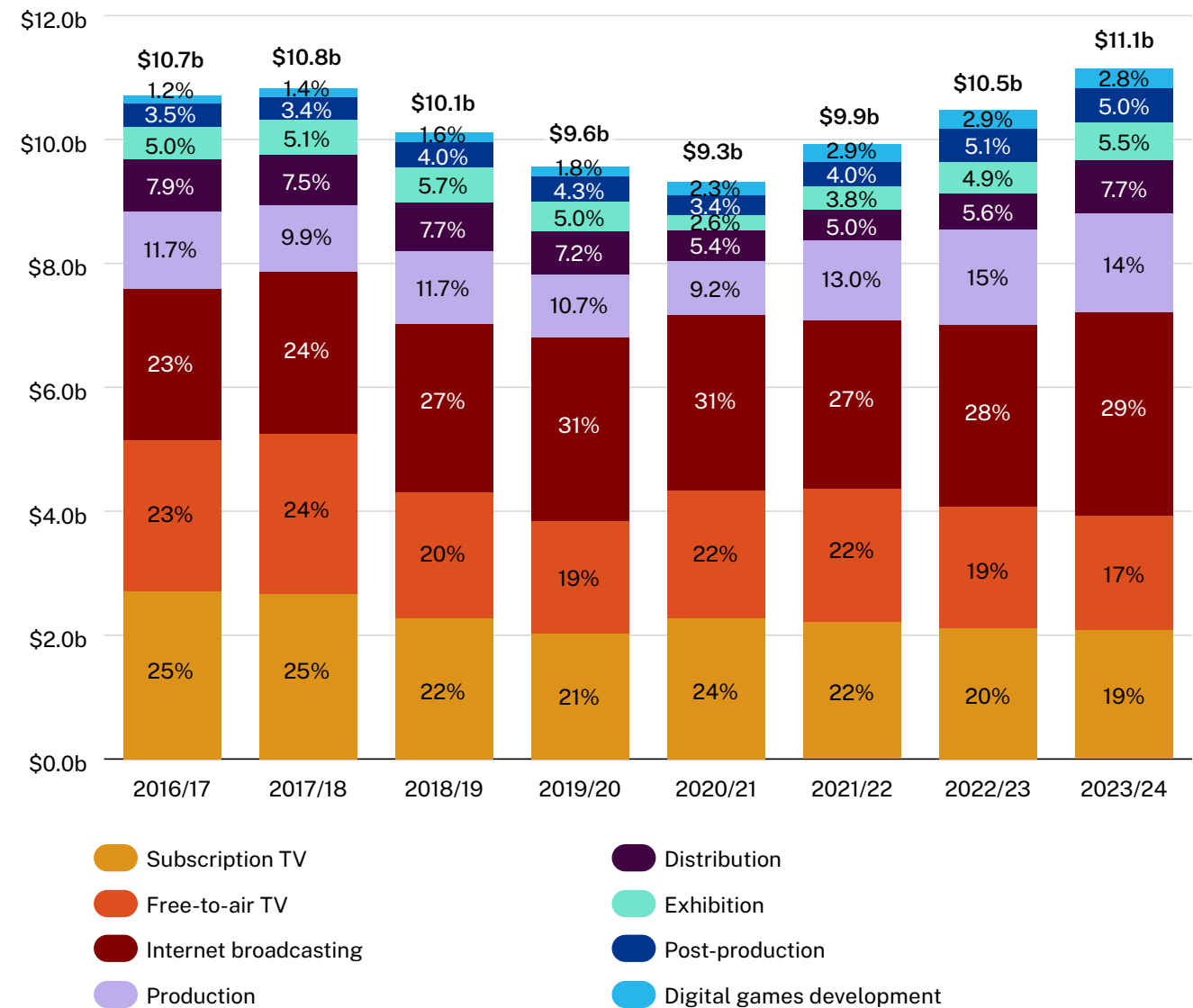
<sup>12</sup> Note that GVA growth rates in this chapter are not adjusted for inflation. This allows for direct comparison with the BCARR satellite accounts for cultural and creative industries.

**Exhibition and distribution have recorded strong growth since 2020/21** following the significant contraction associated with COVID-19, with GVA increasing by an average of 31% and 18% per year respectively. Digital games development has maintained its growth, with the pandemic not appearing to have any significant impact on the sector. Production and post-production have both experienced significant upticks in GVA growth since COVID-19, by annual averages of just over 20% and just under 20% respectively. While some of

this growth is a rebound following declines during COVID-19, about 50% of the growth represents new activity, likely generated by increases in government incentives and tax rebates attracting foreign productions to Australia.

**For a granular analysis of GVA for each sector, see [GVA and GDP by screen and games industry sector in Appendix 2](#)** where each sector is presented in order of its position in the screen value chain.

**Figure 2: GVA generated by screen and games activity, 2016/17 to 2023/24**



Source: University of Canberra estimates based on ABS National Accounts Input-Output tables; ABS 2023, *Film Television and Digital Games*, Australia; Digital games development estimates are from BCARR 2025, *Cultural and creative activity in Australia, 2014-15 to 2023-24*.



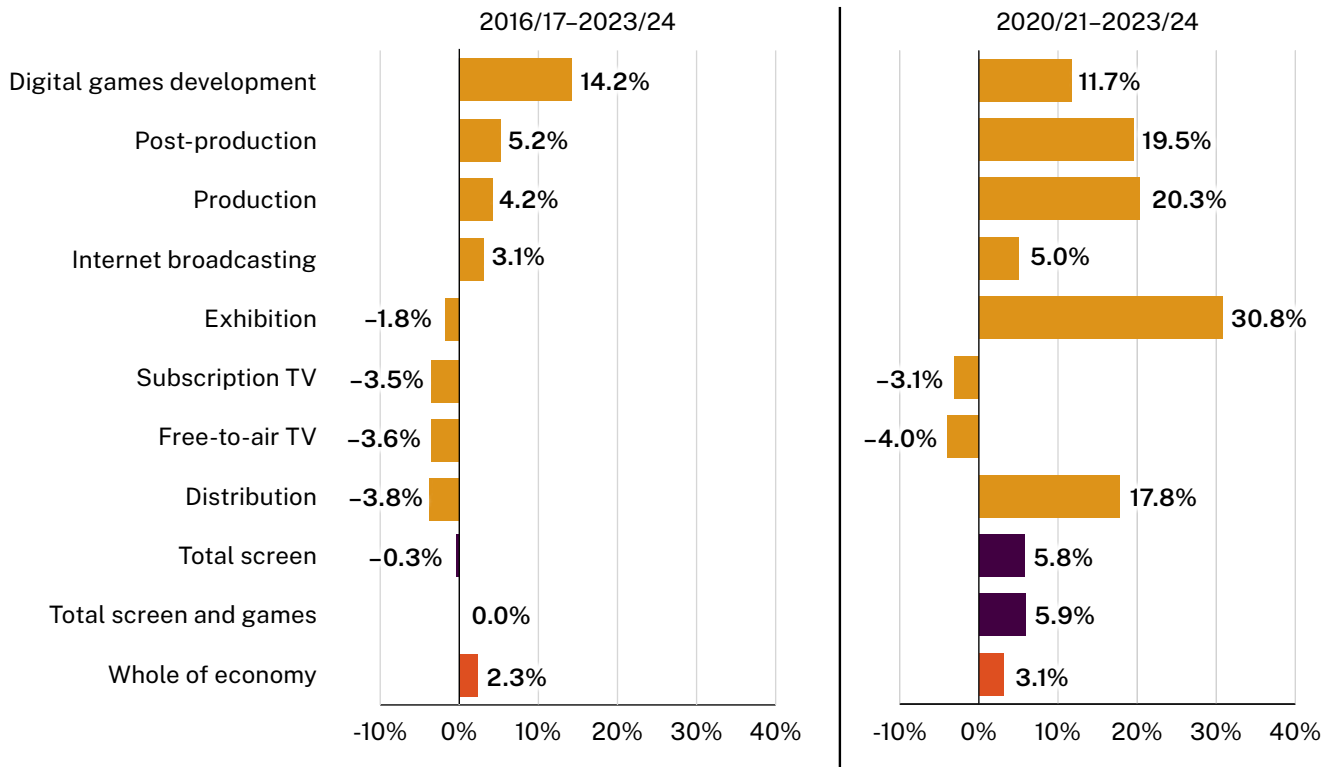
**Table 1: GVA and GDP generated by screen and games activity, 2016/17 to 2023/24 (\$ million)**

|                                     | 2016/17         | 2017/18         | 2018/19         | 2019/20        | 2020/21        | 2021/22        | 2022/23         | 2023/24         |
|-------------------------------------|-----------------|-----------------|-----------------|----------------|----------------|----------------|-----------------|-----------------|
| <b>Gross value added (GVA)</b>      |                 |                 |                 |                |                |                |                 |                 |
| Production                          | 1,249.6         | 1,073.9         | 1,187.2         | 1,028.1        | 858.9          | 1,290.8        | 1,536.3         | 1,592.8         |
| Post-production                     | 376.1           | 370.9           | 401.7           | 407.2          | 321.0          | 400.1          | 537.5           | 557.2           |
| Distribution                        | 843.6           | 814.6           | 777.0           | 689.8          | 502.6          | 493.9          | 583.5           | 861.7           |
| Exhibition                          | 536.2           | 557.0           | 576.8           | 476.6          | 242.6          | 373.1          | 508.4           | 610.6           |
| Free-to-air TV                      | 2,447.5         | 2,571.5         | 2,039.0         | 1,809.9        | 2,057.3        | 2,151.2        | 1,949.7         | 1,858.9         |
| Subscription TV                     | 2,702.6         | 2,666.9         | 2,266.4         | 2,025.6        | 2,270.5        | 2,206.4        | 2,113.9         | 2,075.3         |
| Internet broadcasting               | 2,429.5         | 2,624.4         | 2,706.7         | 2,963.0        | 2,841.8        | 2,720.5        | 2,943.3         | 3,273.1         |
| <b>Total screen GVA</b>             | <b>10,585.2</b> | <b>10,679.2</b> | <b>9,954.7</b>  | <b>9,400.3</b> | <b>9,094.6</b> | <b>9,635.9</b> | <b>10,172.6</b> | <b>10,829.6</b> |
| Digital games development           | 126.0           | 150.0           | 159.0           | 168.0          | 218.0          | 285.0          | 299.0           | 317.0           |
| <b>Total screen and games GVA</b>   | <b>10,711.2</b> | <b>10,829.2</b> | <b>10,113.7</b> | <b>9,568.3</b> | <b>9,312.6</b> | <b>9,920.9</b> | <b>10,471.6</b> | <b>11,146.6</b> |
| Net taxes                           | 34.3            | 27.6            | 36.1            | 29.1           | 27.8           | 26.9           | 32.5            | 13.5            |
| <b>Total screen &amp; games GDP</b> | <b>10,745.5</b> | <b>10,856.8</b> | <b>10,149.8</b> | <b>9,597.4</b> | <b>9,340.4</b> | <b>9,947.8</b> | <b>10,504.0</b> | <b>11,160.2</b> |

Source: University of Canberra estimates based on ABS National Accounts Input-Output tables; ABS 2023, *Film Television and Digital Games, Australia*.



**Figure 3: Comparison of screen and games and whole-of-economy average annual GVA growth rates, 2016/17 to 2023/24**

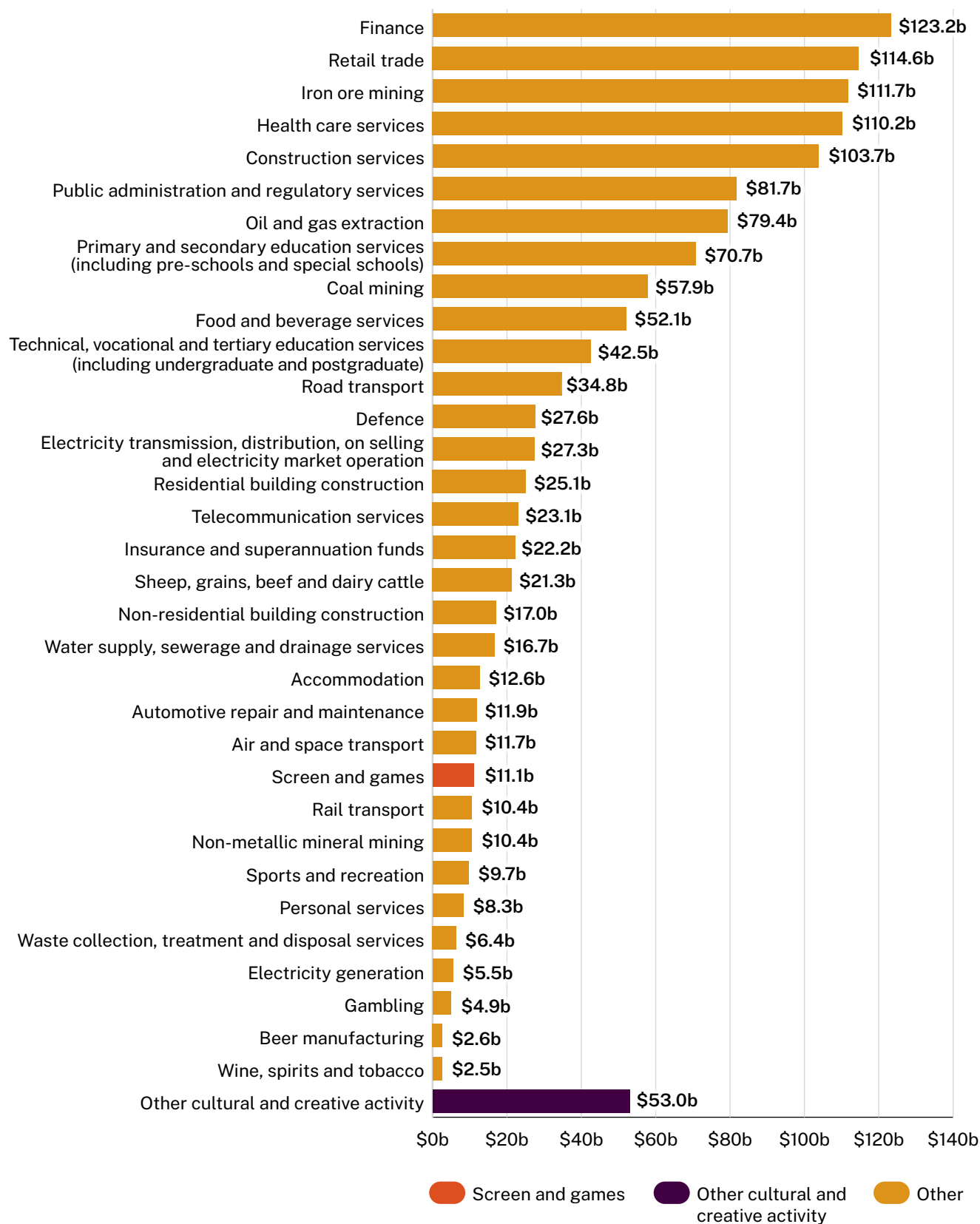


Source: University of Canberra estimates based on [ABS Australian National Accounts: National Income, Expenditure and Product, Table 37](#).





**Figure 4: Comparison of screen and games GVA with selected other industries, 2023/24**



Sources: University of Canberra estimates based on ABS *Australian National Accounts: National Income, Expenditure and Product*, Table 2. BCARR 2025, *Cultural and creative activity in Australia, 2024-15 to 2023-24*.



# Trident analysis

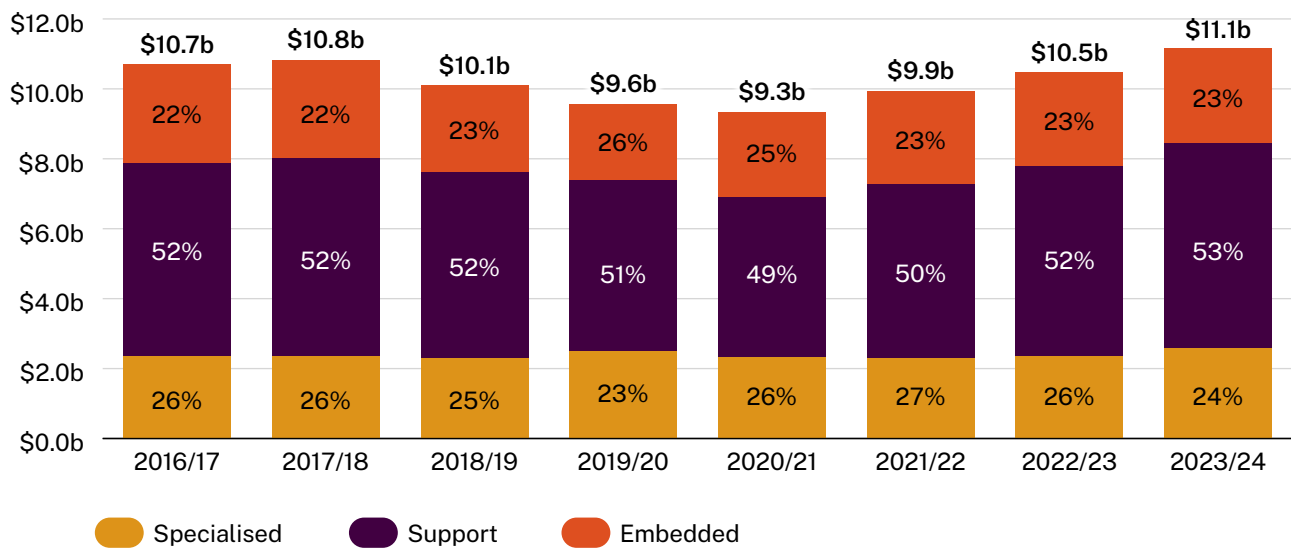
The outputs generated by each screen sector are highly diverse. Screen businesses are not only engaged in creating the products that define their industries but also provide other services that support their core activities: for example, production companies engage in post-production, legal services and catering, and TV broadcasters produce their own programs and offer data services. Overall, approximately one quarter of GVA is generated by specialised activities and approximately one half is from these diverse support activities, both occurring within screen and games industries (Figure 5).

Embedded activity, defined as screen-related activities in other industries, is also a significant source of value, accounting for just under a quarter of screen GVA. This highlights how the creation of screen products is not just limited to the screen industries: the increasing accessibility of digital video has led to screen products becoming important outputs of other industries including advertising services, performing arts operation, newspaper publishing and higher education.

To find out more about the screen value chain go to:

Industry Insights

Figure 5: Screen and games industry GVA generated by trident activity, 2016/17 to 2023/24



Source: University of Canberra estimates based on ABS National Accounts Input-Output tables; ABS 2023, *Film Television and Digital Games, Australia*.

Table 2: Screen and games industry GVA by trident activity, 2016/17 to 2023/24 (\$ million)

| Activity type | 2016/17  | 2017/18  | 2018/19  | 2019/20 | 2020/21 | 2021/22 | 2022/23  | 2023/34  |
|---------------|----------|----------|----------|---------|---------|---------|----------|----------|
| Embedded      | 2,346.7  | 2,348.7  | 2,301.6  | 2,491.9 | 2,328.7 | 2,298.5 | 2,370.1  | 2,592.7  |
| Support       | 5,527.2  | 5,658.6  | 5,296.1  | 4,887.6 | 4,576.2 | 4,981.0 | 5,427.0  | 5,857.5  |
| Specialised   | 2,837.4  | 2,822.0  | 2,516.0  | 2,188.8 | 2,407.6 | 2,641.5 | 2,674.5  | 2,696.4  |
| Total         | 10,711.2 | 10,829.2 | 10,113.7 | 9,568.3 | 9,312.6 | 9,920.9 | 10,471.6 | 11,146.6 |

Source: University of Canberra estimates based on ABS 2026, *National Accounts Input-Output tables*; ABS 2023, *Film Television and Digital Games, Australia*.



## Compensation of employees and gross operating surplus

GVA by industry can be measured as the sum of income flow to the people and organisations that contribute to production, providing insights into the relative contributions to GVA of human capital and organisational capital. The income components of GVA are:

- **compensation of employees (COE) or return to labour** – the total remuneration, in cash or in kind, payable by an enterprise to an employee in return for work
- **gross operating surplus (GOS) or return to capital** – the income from production of corporate enterprises
- **gross mixed income (GMI)** – income from the production of unincorporated enterprises, includes a mix of labour and capital returns
- **taxes less incentives on production and imports** – also included as a small but necessary balancing item.<sup>13</sup>

Over the past 50 years in Australia, COE's share of national income has gradually declined, from 62% in 1970 to 49% in 2024/25.<sup>14,15</sup> More recently, however, for the period under examination here, the share of each of the income components has been stable: between 2016/17 and 2023/24 COE remained at 47% of GVA, GOS increased from 34% to 36% and GMI decreased from 9% to 7%. In contrast, the proportional contributions of income for the screen sectors over this time period are volatile: the increases in the proportional share of COE and decreases for GOS seen here are evidence of increased labour costs stemming from skills shortages, possibly exacerbated by low mobility between the screen sectors and other industries.

The averaging methodology used here to estimate GVA does not provide a means for estimating COE and GOS at the ANZSIC industry class level. Instead, COE, GOS and GMI are presented by Input-Output industry class: 5501 Motion picture and sound recording, 5601 Broadcasting (except internet), and the Internet Broadcasting sub-set of 5700 Internet Publishing and Broadcasting Industry. These breakdowns are not available for digital games development.

**The production, post-production, distribution and exhibition sectors are brought together here in one**

**input-output category, Motion picture recording.**<sup>16</sup> Production dominates this category, contributing between 40% and 50% of GVA between 2016/17 and 2023/24.

**For this combined sector, the contribution of COE is extremely high compared with the rest of the economy.** From an already comparatively large 66% in 2016/17, the proportion of COE peaked at 107% in 2020/21 (when incentives to the sector exceeded taxes) and 92% in 2021/22. This peak reflects increases in incentives and growth in foreign production in Australia during COVID-19. Elevated labour costs stemmed from both heightened competition for production and post-production talent and the additional staffing, compliance and operational demands of producing screen content during the pandemic (Figure 6). Combined with an overall fall in GVA during the COVID-19 pandemic, the share of gross operating surplus and gross mixed income fell as activity contracted during the pandemic, reducing company profits. Since COVID-19, COE's share of GVA for this sector has fallen to 72%, closer to pre-COVID levels.

**These dynamics underscore the extent to which production is a highly labour-intensive sector.** Even before COVID-19, at 66% COE's share of GVA in the sector was well above the national average of 47%. One explanation of this is that **Australia's production sector is largely comprised of small and medium enterprises** and sole trader businesses, which means that less income is paid out as returns to capital.<sup>17</sup> Another characteristic at play is the **many special purpose vehicles (SPVs)** recorded in the sector (separate legal entities created to deliver individual projects), whose main purpose is to transfer payments rather than hold capital. A third factor is that **recent growth in production activity in Australia, especially strong since COVID-19, has boosted demand for skilled labour**, thereby creating a skills shortage in parts of the ecosystem. These all contribute to a sector transferring most of its GVA as labour compensation rather than returns on capital to domestic owners. In future, it is possible that further changes in the distribution of income may result from the impacts of AI as it becomes more ubiquitous in the sector, creating efficiencies.

13 ABS 2026, *Chapter 11 Gross Domestic Product – Income approach (GDP(I)). Australian System of National Accounts: Concepts, Sources and Methods*, accessed April 2026.

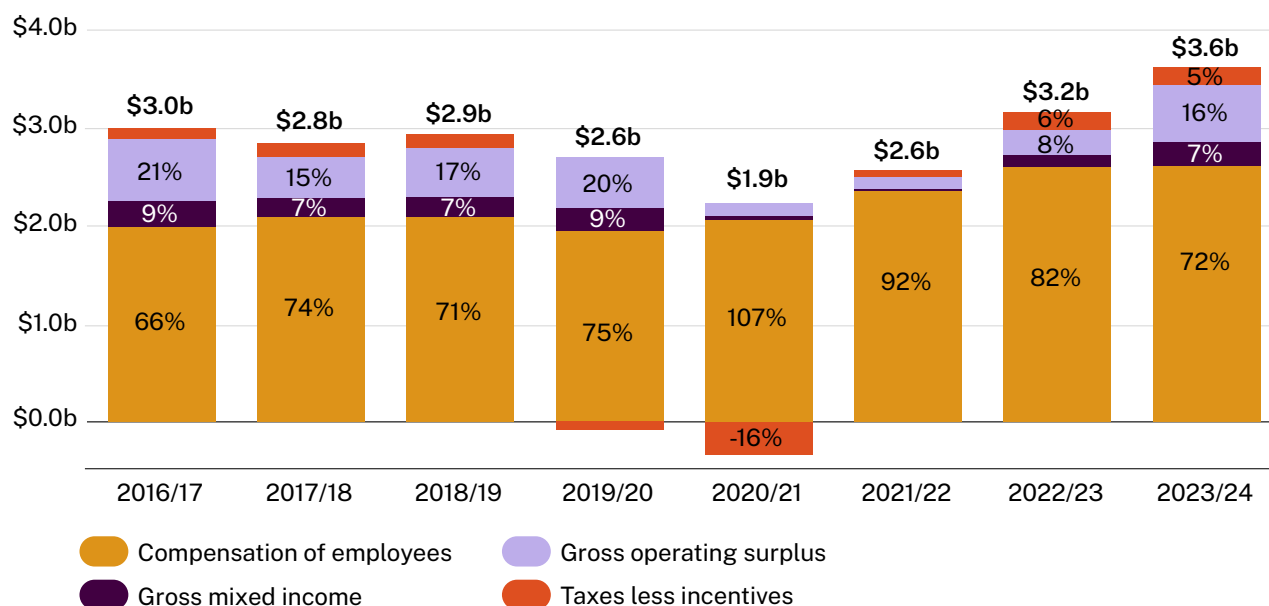
14 Reserve Bank of Australia 2019, "The Labour and Capital Shares of Income in Australia", *Bulletin*.

15 ABS 2025, *Australia System of National Accounts*, accessed 14 April 2026.

16 Excluding the sound recording component of Motion picture recording.

17 Department of Industry, Science and Resources and Industry Innovation and Science Australia 2026, *Mobilising Australia's Missing Middle*.

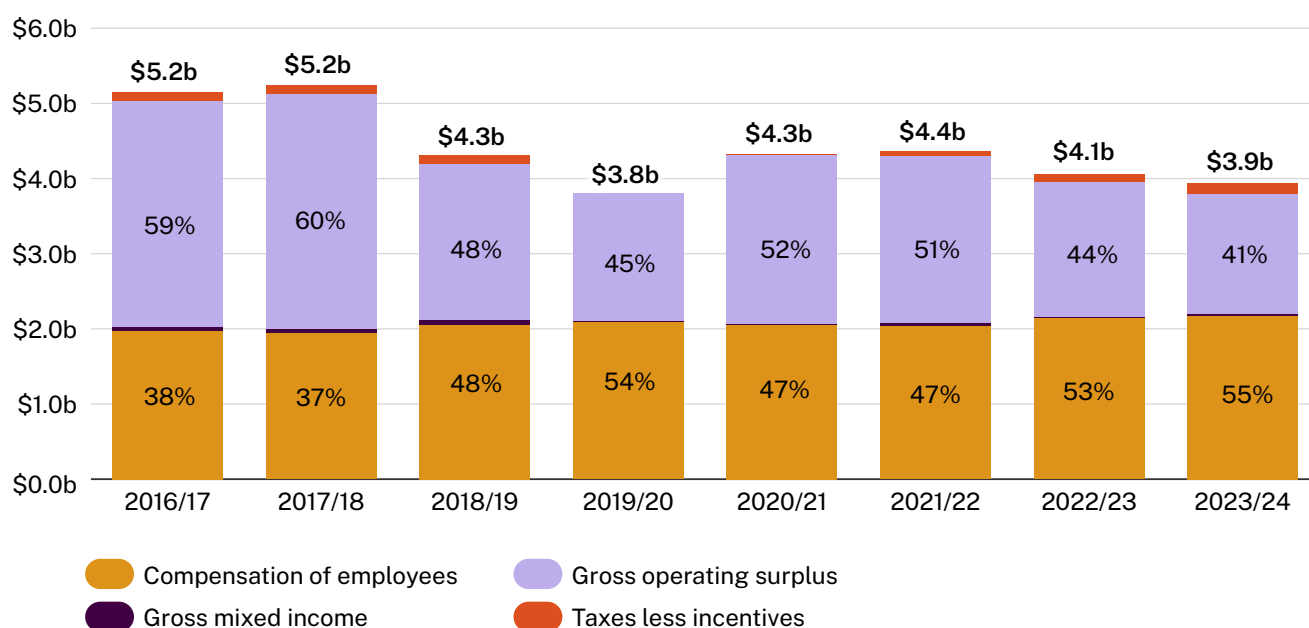
**Figure 6: Screen production, post-production, distribution and exhibition GVA breakdown, 2016/17 to 2023/24**



Source: University of Canberra estimates based on ABS 2026, [National Accounts Input-Output tables](#).

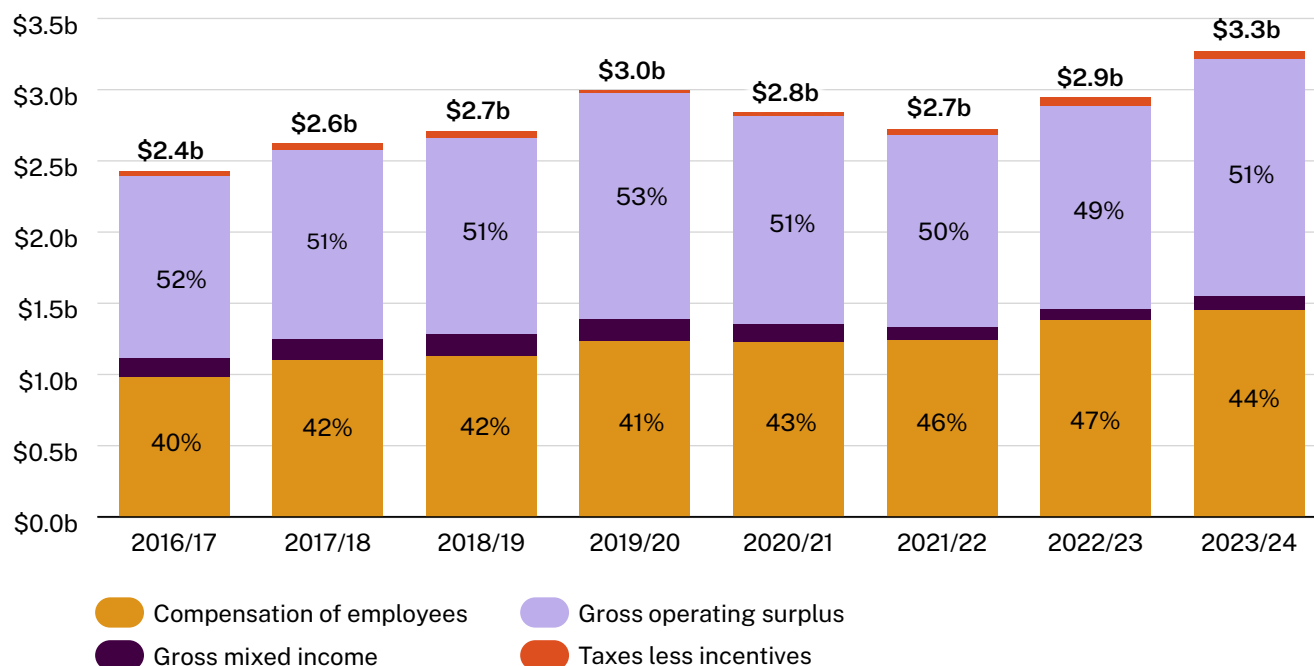
**Broadcasting (except internet) includes free-to-air TV and subscription TV broadcasting.** The businesses that operate in this sector are large publicly listed corporations and government business enterprises. **Figure 7 shows returns to labour have increased modestly in dollar terms, and risen sharply as a share of a declining GVA base.** This is despite the expectation that increased competition would lead to reduced labour costs as broadcasters seek to maintain profitability: as shown in the employment chapter, this sector pays the highest median incomes in the screen industries. Instead, the impacts of increased competition can be seen in the volatility in GOS, which as a share of GVA fell from 59% to 41% between 2016/17 and 2023/24. In total, the proportional contribution of GOS and GMI to GVA has been lower than that for the national economy since 2022/23.

**Figure 7: Broadcasting (except internet) GVA breakdown, 2016/17 to 2023/24**



Source: University of Canberra estimates based on ABS 2026, [National Accounts Input-Output tables](#).




**Figure 8: Internet broadcasting GVA breakdown, 2016/17 to 2023/24**


Source: University of Canberra estimates based on ABS 2026, [National Accounts Input-Output tables](#).

**For internet broadcasting, COE as a share of GVA has increased since 2016/17** and appears to have stabilised at levels similar to the national average, while the proportional contribution of GOS has been stable and GMI has fallen. The businesses captured by this sector are either large established broadcasting corporations or tech platforms with a business presence in Australia, both of which hold significant market power. GOS here is higher than in both motion picture recording and broadcasting (excluding internet), suggesting that this sector has greater ability to generate returns on capital for its shareholders ([Figure 8](#)). As with the production and post-production sectors, the increases here in COE, likely reflects increasing demand for skills in a globally-expanding sector – any possible impact of AI is yet to be seen in this data series.

# Employment in screen and games

Screen and games

Economic contribution


**Employment**


Exports



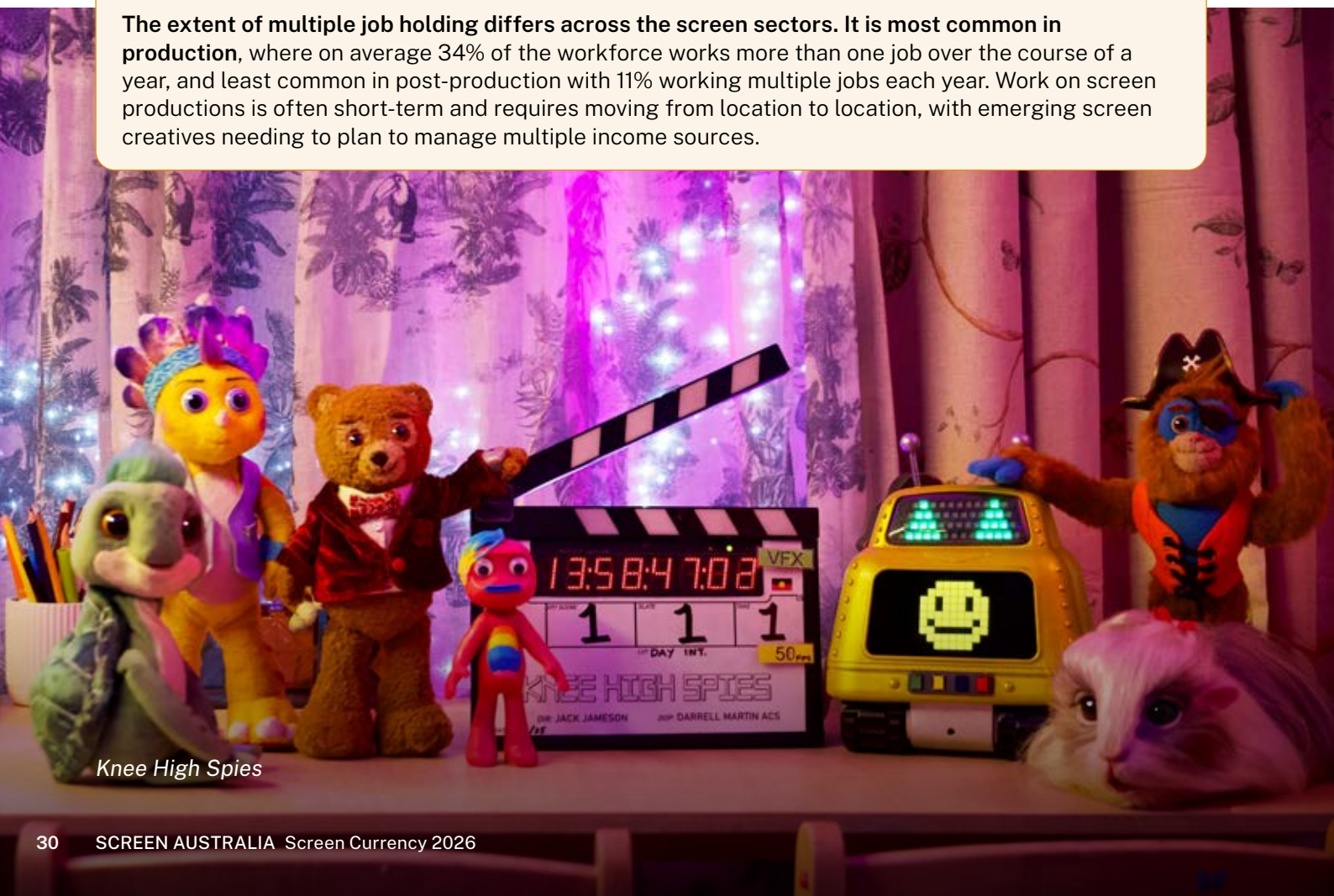
Production activity and funding

This chapter presents time series of data on employment in Australia's screen and games industries. It also explores incomes earned by those working in screen occupations and qualifications held by workers in the screen industry.

Overall, the sectors that have exhibited the strongest employment growth are those where **government incentives** have encouraged activity (production) or those that are still relatively new and in a **growth phase** (digital games development and internet broadcasting). The screen production workforce roughly doubled between 2016/17 and its peak in 2021/22, with growth accelerating as productions surged around COVID-19.

Although there is a growing demand for production skills, **it is the broadcasters (including free-to-air, subscription TV and internet broadcasting) that offer creatives the highest median incomes.** Employment in broadcasting sectors is relatively stable and median incomes are relatively high, although recent decreases in expenditure on salaries and falls in the ratio of salaries to sales for free-to-air TV broadcasters suggest that they are re-positioning their workforce.

**The extent of multiple job holding differs across the screen sectors. It is most common in production**, where on average 34% of the workforce works more than one job over the course of a year, and least common in post-production with 11% working multiple jobs each year. Work on screen productions is often short-term and requires moving from location to location, with emerging screen creatives needing to plan to manage multiple income sources.



Knee High Spies



## Method

The University of Canberra research team followed the method adopted by BCARR for establishing the size of Australia's cultural and creative workforce<sup>18</sup> but with the screen and games sectors framed differently to focus on industry employment rather than creative employment across the economy. This method uses the **ABS Labour Account** as the benchmark for estimating total employment in the screen and games industries, and the finer-grained data in other ABS datasets including the **Labour Force Survey, Jobs in Australia and the Census of Population and Housing** to estimate more detailed breakdowns. This approach allows us to gain sight of all job holders working in screen and games at any given point in time, including multiple job holders. **Details of the method are included in [Employed persons estimation method in Appendix 1](#)**. As with the approach to estimating GVA, the method is transparent and uses publicly available data and is therefore replicable over time.

## The screen and games industry workforce

In 2024/25 Australia's screen and games industries employed a total of **68,844 people**. This included **66,080 people working in screen industries and 2,764 working in digital games development** ([Figure 9](#), [Table 3](#)). 39% of the screen workforce (excluding games), were employed in production. The next largest employing sectors are further downstream in the value chain: free-to-air TV employs 21% of the screen workforce and exhibition employs 14%.

**While screen employment increased between 2008/09 and 2024/25**, by an average rate of 2.2% per annum ([Figure 10](#)), up to 2016/17 it was relatively steady at around 50,000. It then began to increase, **peaking at 69,317 in 2021/22, driven by a surge of international productions** coming to Australia seeking safe haven from COVID-19 impacts. Screen employment has since fallen slightly, to 66,080 in 2024/25.

**The largest increase in employed persons has been in the production sector.** Employment in production increased nearly two-fold from the mid-2010s, from 14,491 in 2016/17 to 26,667 in 2024/25 ([Figure 9](#)).

**The fastest-growing sector is digital games**, with employment increasing at a trend rate of 14.6% per annum between 2016/17 and 2024/25, from a low base, with the number of people working in the industry more than tripling, from 902 to 2,764. In comparison, the computer systems design industry, of which digital games development is a subset, grew by an annual average of 1.6% over the same period and the rest of the workforce grew by 2.3%.

**The sectors that have seen the greatest declines are distribution, exhibition, and cable and subscription broadcasting.** Employment trends here mirror GVA, with distribution and exhibition both impacted by the COVID pandemic, and subscription television disrupted by competition from internet broadcasting. While employment in the distribution sector has now surpassed COVID levels, exhibition and subscription television have continued their decline.

Differences in employment growth highlight that production and post-production have delivered growth in GVA since the COVID-19 pandemic while maintaining a stable employment base. Year-to-year variability in both employment and the value of government support reflects the ebb and flow of production activity rather than any clear trend. That output as measured by GVA continues to grow while employment remains stable suggests that these sectors have adapted to achieve productivity gains over this period.<sup>19</sup>

18 BCARR 2025, *Measuring Australia's Cultural and Creative Workforce, 2008–09 to 2023–24*.

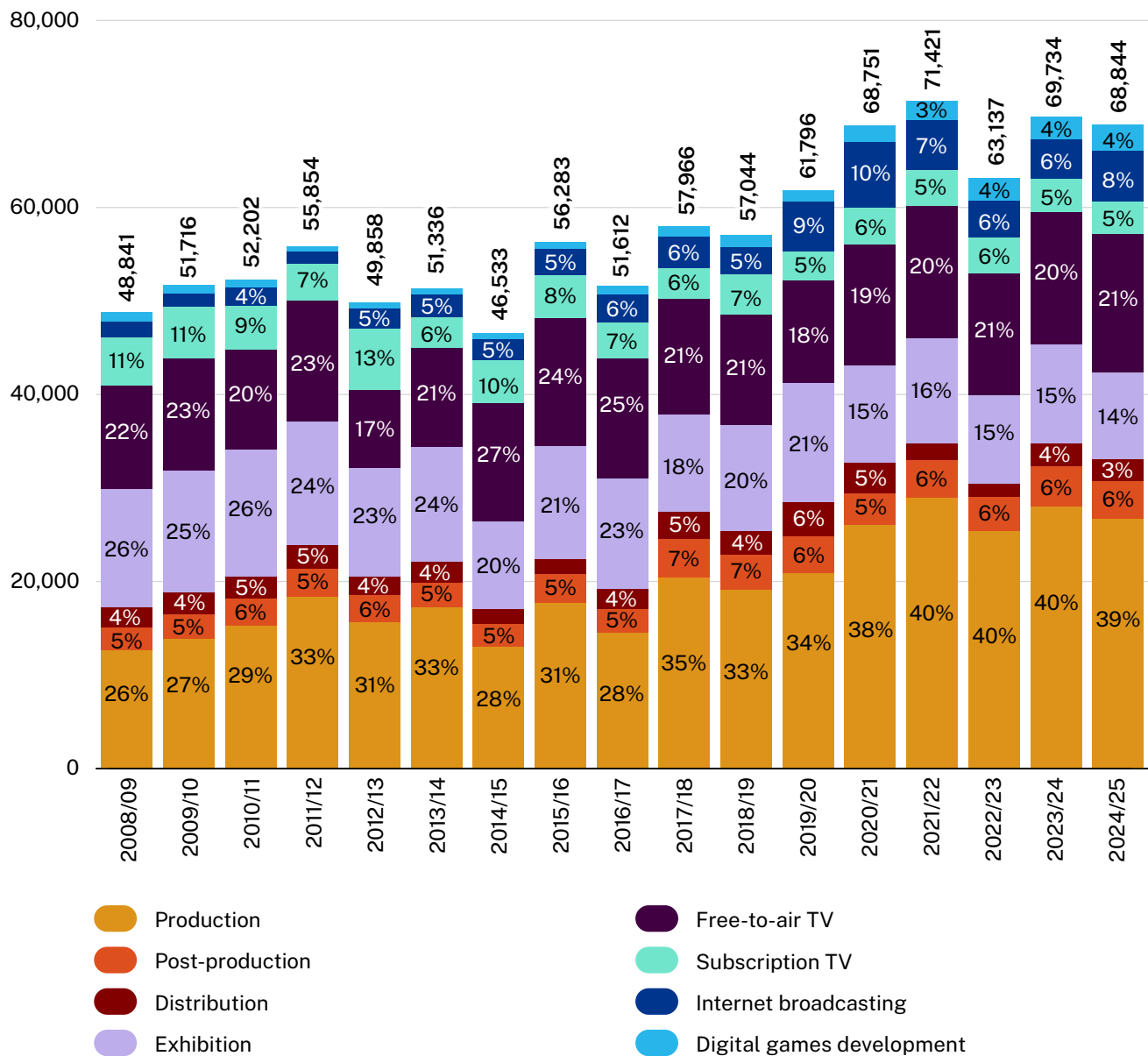
19 Creative Australia and SaCSA 2025, *Creative Workforce Scoping Study*.



Noteworthy here are the differences in the distribution of workers compared with the distribution of gross value added (GVA, [Figure 2](#)). While some sectors have similar shares of employees and GVA (in particular, post-production and free-to-air TV) others are very different. The most notable are production, with a higher share of workers than GVA, which is the engine room of creativity and not surprisingly employs more people per unit of output, and internet broadcasting, with higher GVA than share of employees, which primarily monetises content created by others.

For a detailed analysis of employment in each screen sector and digital games development, see [Employment in screen and games industry sectors by gender and geographical distribution](#) in Appendix 2, where each sector is presented in order of its position in the screen value chain.

Figure 9: Employed persons in the screen and games industry by sector, 2008/09 to 2024/25



Source: University of Canberra estimates based on the ABS Labour Account, ABS Labour Force Survey and ABS Jobs in Australia (TableBuilder), ABS Film, Television and Digital Games Survey, IGEA Australian Game Development Survey.

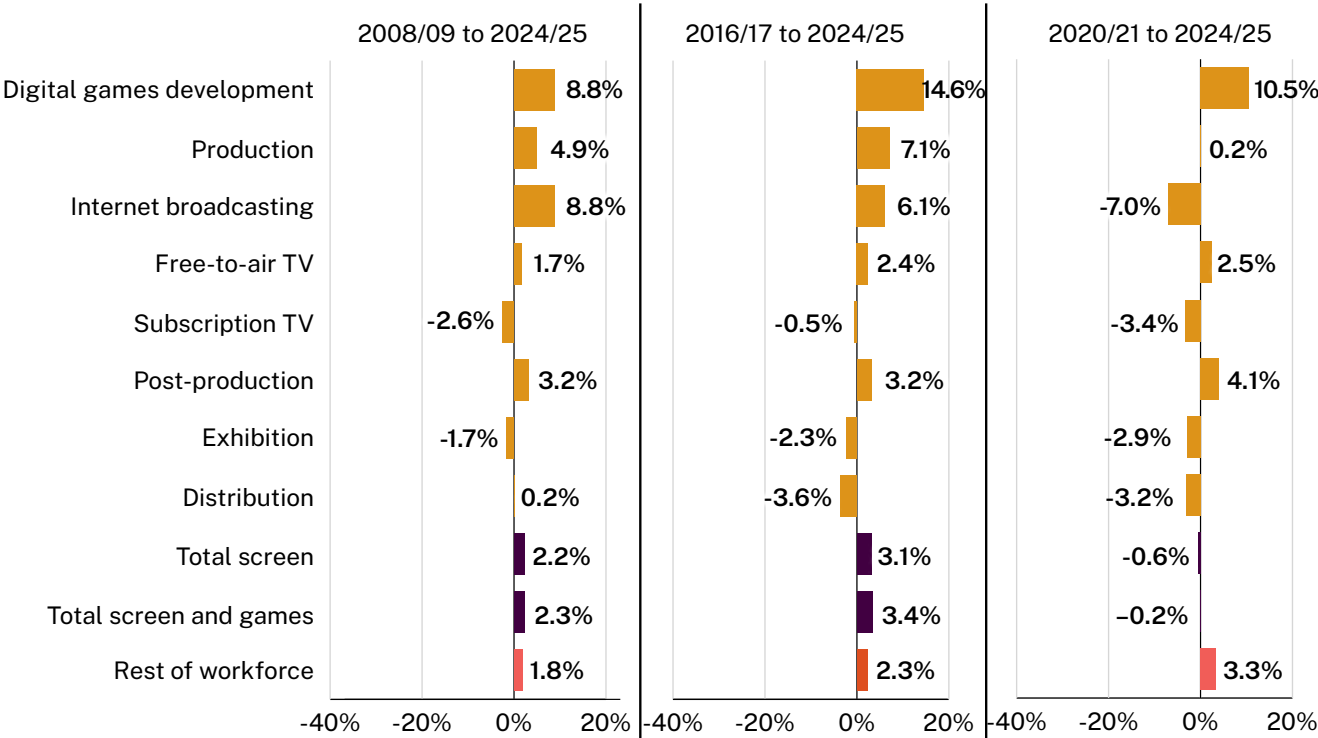

**Table 3: Employed persons in the screen and games industry by sector, 2008–09 to 2024/25**

|         | Production | Post-production | Distribution | Exhibition | Free-to-air TV | Subscription TV | Internet broadcasting | Total screen  | Digital games development | Total games and screen |
|---------|------------|-----------------|--------------|------------|----------------|-----------------|-----------------------|---------------|---------------------------|------------------------|
| 2008/09 | 12,578     | 2,514           | 2,144        | 12,647     | 10,987         | 5,246           | 1,630                 | <b>47,746</b> | 1,095                     | <b>48,841</b>          |
| 2009/10 | 13,822     | 2,704           | 2,250        | 13,074     | 11,989         | 5,509           | 1,476                 | <b>50,824</b> | 892                       | <b>51,716</b>          |
| 2010/11 | 15,221     | 2,917           | 2,368        | 13,543     | 10,701         | 4,731           | 1,964                 | <b>51,445</b> | 757                       | <b>52,202</b>          |
| 2011/12 | 18,277     | 3,044           | 2,536        | 13,223     | 12,906         | 3,964           | 1,323                 | <b>55,273</b> | 581                       | <b>55,854</b>          |
| 2012/13 | 15,585     | 2,924           | 1,995        | 11,629     | 8,264          | 6,578           | 2,246                 | <b>49,221</b> | 637                       | <b>49,858</b>          |
| 2013/14 | 17,176     | 2,678           | 2,177        | 12,307     | 10,628         | 3,249           | 2,492                 | <b>50,707</b> | 629                       | <b>51,336</b>          |
| 2014/15 | 13,024     | 2,415           | 1,596        | 9,386      | 12,650         | 4,572           | 2,239                 | <b>45,882</b> | 651                       | <b>46,533</b>          |
| 2015/16 | 17,699     | 3,071           | 1,613        | 12,084     | 13,672         | 4,594           | 2,816                 | <b>55,549</b> | 734                       | <b>56,283</b>          |
| 2016/17 | 14,491     | 2,571           | 2,128        | 11,787     | 12,834         | 3,868           | 3,031                 | <b>50,710</b> | 902                       | <b>51,612</b>          |
| 2017/18 | 20,357     | 4,168           | 2,919        | 10,415     | 12,309         | 3,345           | 3,353                 | <b>56,866</b> | 1,100                     | <b>57,966</b>          |
| 2018/19 | 19,030     | 3,835           | 2,473        | 11,357     | 11,866         | 4,237           | 2,971                 | <b>55,769</b> | 1,275                     | <b>57,044</b>          |
| 2019/20 | 20,856     | 3,954           | 3,653        | 12,722     | 10,972         | 3,129           | 5,265                 | <b>60,551</b> | 1,245                     | <b>61,796</b>          |
| 2020/21 | 26,015     | 3,424           | 3,200        | 10,432     | 12,986         | 3,919           | 7,008                 | <b>66,984</b> | 1,767                     | <b>68,751</b>          |
| 2021/22 | 28,894     | 4,094           | 1,764        | 11,192     | 14,208         | 3,862           | 5,303                 | <b>69,317</b> | 2,104                     | <b>71,421</b>          |
| 2022/23 | 25,311     | 3,741           | 1,316        | 9,511      | 13,052         | 3,831           | 3,917                 | <b>60,679</b> | 2,458                     | <b>63,137</b>          |
| 2023/24 | 27,951     | 4,332           | 2,503        | 10,533     | 14,194         | 3,521           | 4,235                 | <b>67,269</b> | 2,465                     | <b>69,734</b>          |
| 2024/25 | 26,667     | 4,080           | 2,292        | 9,302      | 14,747         | 3,470           | 5,522                 | <b>66,080</b> | 2,764                     | <b>68,844</b>          |

Source: University of Canberra estimates based on the ABS Labour Account, ABS Labour Force Survey and ABS Jobs in Australia (TableBuilder), ABS Film, Television and Digital Games Survey, IGEA Australian Game Development Survey.


*Leviticus*

**Figure 10: Comparison of screen and games industry employment growth rates by sector and rest of workforce, 2008/09 to 2024/25**



Note: Time periods are chosen here to allow comparison with GVA growth rates in the previous section.  
Source: University of Canberra estimates based on the ABS Labour Account, ABS Labour Force Survey and ABS Jobs in Australia (TableBuilder), ABS Film, Television and Digital Games Survey, IGEA Australian Game Development Survey.

## Main jobs vs multiple jobs

**Note:** the data used in this section does not provide visibility of digital games development or internet broadcasting.

**Multiple job holding plays an important role in cultural and creative industries.** In a field where work and careers are often precarious by nature, holding a second job (or more) can supplement income, and offer opportunities for skill development and networking opportunities.<sup>20</sup>

**Figure 11 shows the proportions of people working in the screen sectors who, over the course of each financial year, held more than one job with their main source of income in the relevant screen sector.<sup>21</sup>** Note that multiple job holders are recorded as working in the industry sector of their main source of income – their other jobs might be in the same sector or in different parts of the economy.

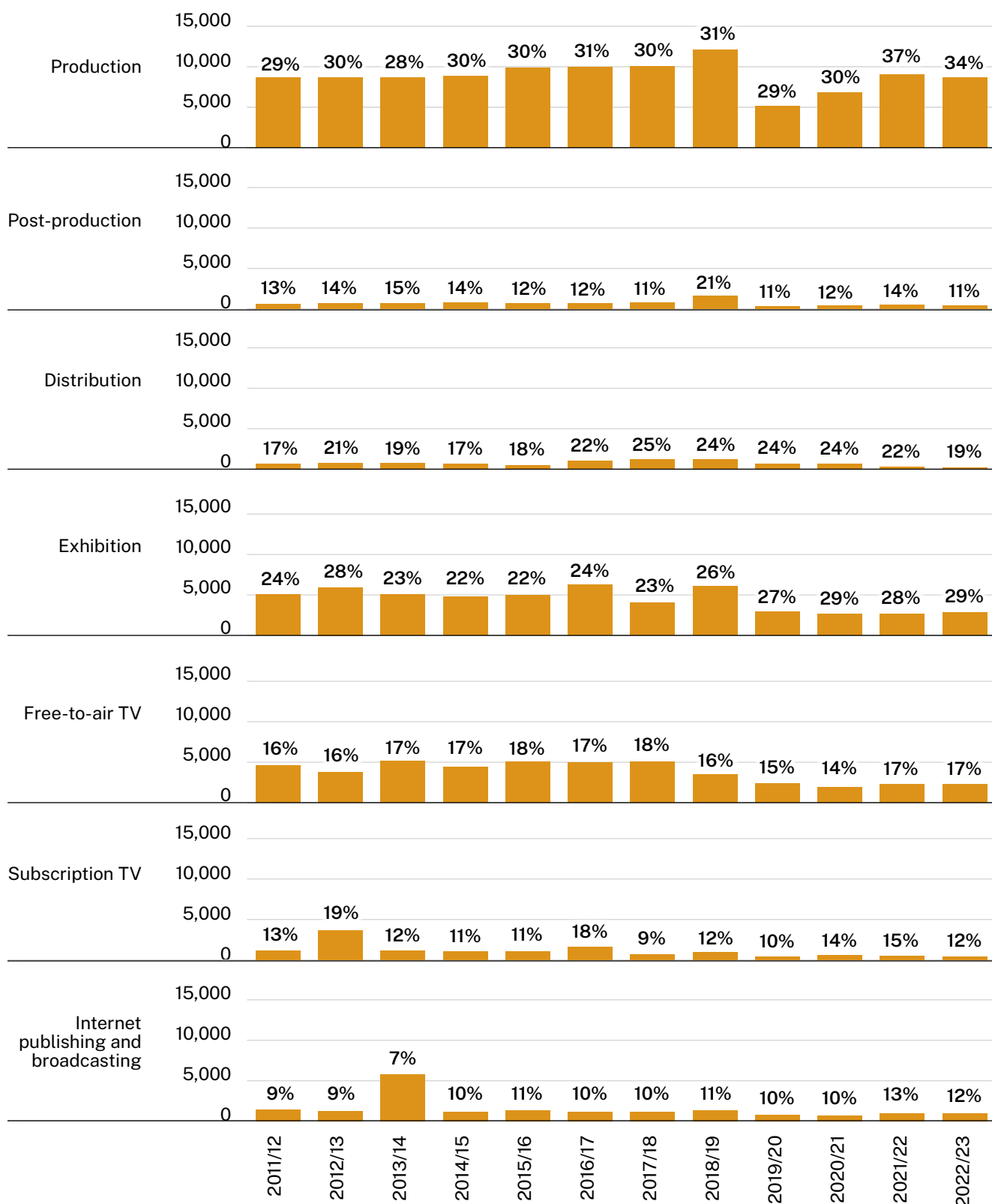
20 BCARR 2025, *Measuring Australia's Cultural and Creative Workforce, 2008–09 to 2023–24*.

21 Given the extent of the assumptions needed to estimate single vs multiple job holders for internet broadcasting and digital games development, they are not included in this section.





**Figure 11: Number and % of employed people working multiple jobs in screen sectors, 2011/12 to 2022/23**



Note: This data source does not allow visibility of digital games development or internet broadcasting. This data source is only available up to 2022/23.  
Source: ABS 2026, Jobs and Income of Employed Persons (Jobs in Australia), TableBuilder.



Kangaroo Beach

Overall, during the 2022/23 financial year, 26% of people working in the screen sector held more than one job (this excludes internet publishing and broadcasting). This is higher than the average of 20% for the total Australian workforce in the same year. It is also increasing, with the proportion of multiple job holders in the screen sectors growing from 20% in 2008/09.<sup>22</sup>

The sectors where the proportion of people holding multiple jobs is highest are production, where people move from job to job, and exhibition. **In production, an average of 34% of its workforce held multiple jobs in 2022/23**, with as many as 28,000 people working in production from 2021/22, this means 9,500 would hold multiple jobs over the course of a year. **In exhibition, the proportion of multiple job holders has increased from 24% to 29% while total employment has declined**, reflecting a general shift towards the casualisation of the Australian workforce. Note that current government policy is working to change this trend, encouraging permanent employment arrangements.

Multiple job holding is least common in post-production, where 11% of workers held multiple jobs in 2022/23. That multiple job holding is decreasing in post-production, even with levels lower than in other screen industries – post-production companies aim to hold on to their employees, who largely develop their skills in-house.

To find out more about working across multiple projects see:



Industry Insights



<sup>22</sup> BCARR 2025, *Measuring Australia's Cultural and Creative Workforce, 2008–09 to 2023–24*.



## Screen occupations in other industries

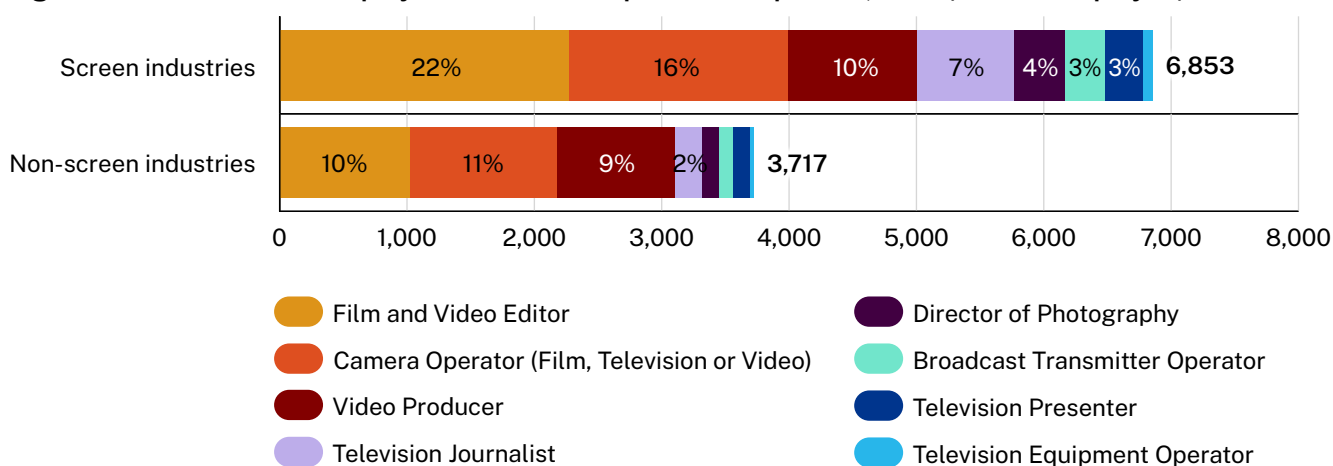
**Note:** the data used in this section does not provide visibility of digital games development or internet broadcasting.

**Australia's screen workforce extends beyond the screen industry, with people working in screen occupations across the economy:** the creative trident model of employment was developed to study this phenomenon. The University of Canberra's previous research of cultural and creative employment using the Australian Census has shown that there are more people in creative employment as their main source of income outside the cultural and creative industries than there are within them.<sup>23</sup> Estimating the numbers of people working in screen occupations in non-screen industries using benchmark data from the ABS

Labour Account is complex and beyond the scope of this project.<sup>24</sup> Instead, the University of Canberra research team has drawn on their earlier work to present Census employment data that provides insights on the extent to which screen workers are found across the workforce.

Figure 12 shows the distribution of people reporting that they worked in screen-specific occupations in the 2021 Census. It shows that **more than half as many as the total working in the screen industries were working in non-screen industries**. While the top two categories here were located in the screen industries (film and video editors and camera operators), equal third and fourth were in non-screen industries (also film and video editors and camera operators).

**Figure 12: Distribution of employment in screen-specific occupations, 2021 (% of all employed)**



Source: ABS 2026, Australian Census of Population and Housing 2021, TableBuilder.

This highlights that screen-related careers are not just to be found in the screen industries. **Screen workers** – particularly those working in production (see Figure 11) – **are significantly more likely than most others in the workforce to be working multiple jobs, and they are likely constructing portfolio careers across a range of industries**. Understanding the full extent of screen employment across the Australian economy is a data gap.

<sup>23</sup> McCutcheon M and Cunningham S 2022, *The Creative Economy in Australia: What Census 2021 Tells Us, briefing paper 1*.

<sup>24</sup> The detailed occupation categories contained in the Australia and New Zealand Statistical Classification of Occupations (ANZSCO) do not consistently differentiate screen work from other creative activities such as stage and radio. So, while it is possible to identify those occupations that are employed within the screen industry, estimating the number of people working in screen occupations in non-screen industries is more complex. Due to time constraints this calculation has not been conducted.

# Incomes in the screen sectors

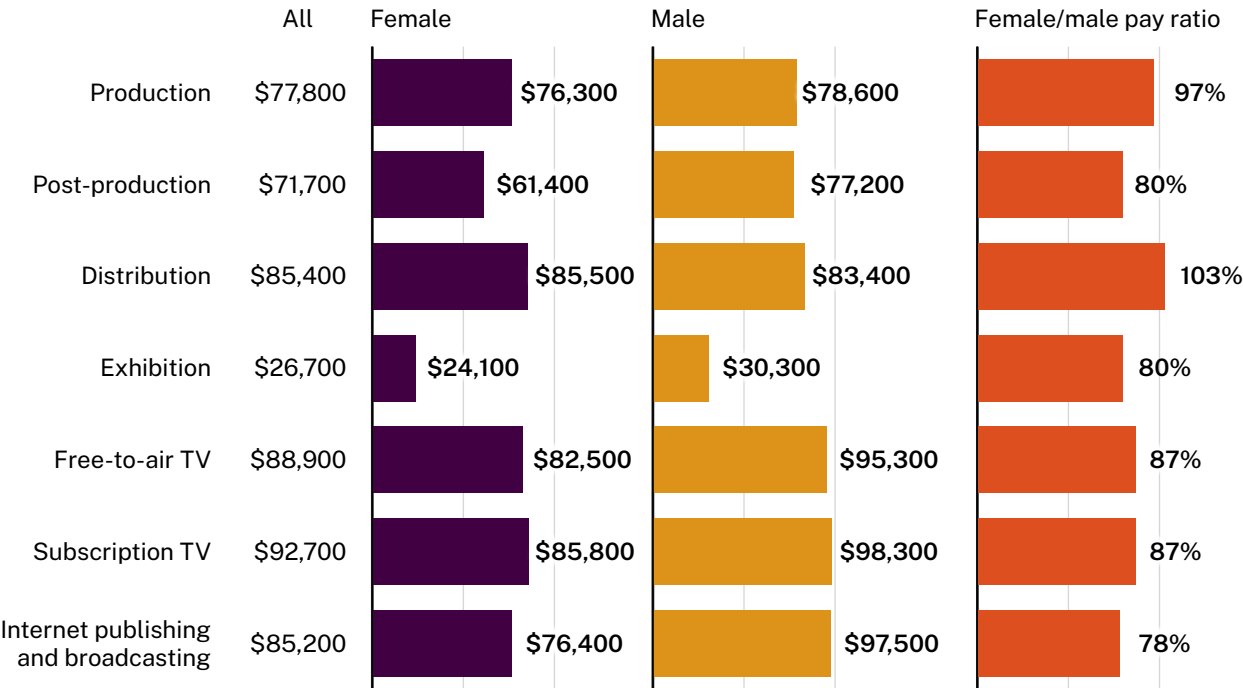
**Note:** the data used in this section does not provide visibility of digital games development.

The analysis here draws on granular data depicting median incomes for people working in different occupations within each screen sector. For details on the approach, see [Estimating median incomes of employed persons](#) in Appendix 1.

Overall, the income data presented here is consistent with income trends across the cultural and creative industries: **those workers who are responsible for the creation of ideas that lead to the production of the content that is then distributed, exhibited, broadcast and streamed are the least well paid.** Those in “support” roles (as defined in the Creative Trident, for example accountants, IT specialists and managers) are generally remunerated better overall and occupy more stable salaried jobs. Generally, females earn less than males in the same sector and occupation, although there are notable exceptions seen here – usually where the numbers of workers are very low.

A useful comparison is the median incomes reported in the Census for all cultural and creative workers. In 2021, this was \$84,600, with a median of \$76,300 for specialist creatives and \$90,500 for people working in support roles in cultural and creative industries. Creatives embedded in other industries reported a median income of \$87,500. **Across the screen industry value chain, people working in those sectors placed upstream in the value chain (production, post-production) report median salaries lower than these averages for the cultural and creative industries, while those downstream in distribution and broadcasting report incomes that are higher than the average for creative industries.** It is worth noting that the median incomes reported by people working in the screen sectors are higher than the average for the total Australian workforce, \$61,900. The exception is exhibition, which relies on lower-skilled casual and part-time employees to staff its cinemas – median incomes in this sector were \$24,100 in 2021 ([Figure 13](#)).

Figure 13: Screen industry median incomes by sector, 2021



Note: Data not available for digital games development or internet broadcasting. Internet publishing and broadcasting is included as a proxy for internet broadcasting.

Source: ABS Australian Census of Population and Housing, TableBuilder.





## Median income trends by screen sector

**The remainder of this section explores income trends for each screen sector.** Median incomes for occupation groups are included in [Median incomes by screen industry sector](#) in Appendix 2. **Census occupation data is not currently available for digital games.** However, following a recent review of the national occupation classification system, employment of digital games developers will be recorded in the future.

**It is important to note that Census data does not capture multiple job holders; it counts only those jobs that are a main source of income.** According to Census data (based on main job at Census time), **production** is the second largest employer in the screen industry. However, it is also important to note that this is an underestimate – as seen in [Figure 9](#) (based on the ABS Labour Account dataset which also captures secondary job holders), **production is by far the largest employer of screen workers in Australia.**

**The Census does nevertheless provide valuable insights into the demographic characteristics of the screen workforce.**

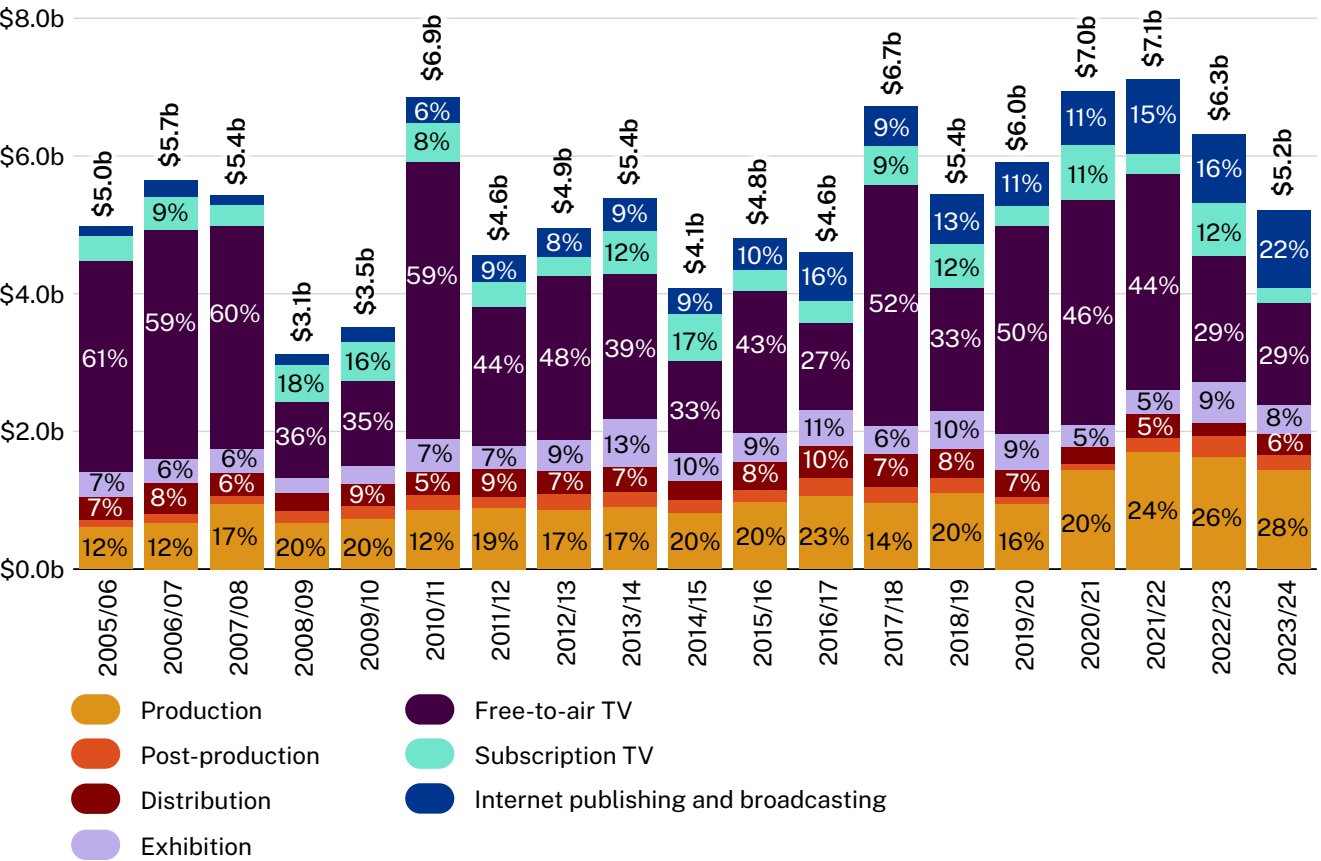
- In **production** (see [Figure 9](#) in Appendix 2), the highest-paid occupations are legal, social and welfare professionals (with males reporting a median annual income of \$182,000), office managers and program administrators (\$117,000 for males), health professionals (\$113,800 for males), engineering, ICT and science technicians (\$108,700), and those in management roles (ranging from medians of \$78,000 to \$123,900 for both genders). The largest occupation group in production is arts and media professionals, with females reporting slightly higher median incomes than males: \$82,300 compared with \$79,500.
- The **post-production** sector employs fewer people overall than production, and a narrower range of occupation groups ([Figure 49](#) in Appendix 2). The highest paid workers are in management roles (\$106,000 to \$130,000) and business, human resources and marketing professionals (\$112,700 for males). The largest occupation groups of the post-production workforce are design, engineering, science and transport professionals and arts and media professionals, respectively earning median incomes of \$77,800 for males/\$64,700 for females and \$70,600 for males/\$55,100 for females.
- **Distribution** also employs a narrow range of occupation groups ([Figure 50](#) in Appendix 2). The majority are specialist managers, business, human resources and marketing professional and arts and media professionals. The highest incomes are earned by managers (\$117,000 to \$172,400) and legal, social and welfare professionals (\$169,000), while arts and media professionals earn higher median incomes in distributions than in production or post-production (\$98,300 for females and \$88,400 for males).
- **Exhibition** (cinema and film festival workers) has the lowest median income among the screen sectors, while employing the third largest workforce. It has a strong retail presence, employing a wide range of occupations, with most people working in sales roles and as hospitality, retail and support managers ([Figure 51](#) in Appendix 2). The highest incomes are reported by legal, social and welfare professionals (\$159,300 for females) and non-hospitality management roles (\$78,900 to \$85,500 for females compared with \$115,900 to \$135,200 for males). The largest segment of the exhibition workforce are sales support workers, generally younger people working part-time, who report earning \$13,400 for females and \$14,600 for males.
- People working in **free-to-air TV broadcasting** report higher median incomes than those in production, post-production and exhibition. The largest group of occupations is arts and media workers, followed by other technicians and trade workers, and business, human resource and marketing professionals ([Figure 52](#)). The highest incomes are reported by managers (medians range from \$120,500 for females to \$171,400 for males), legal, social and welfare professionals (\$128,900 for females and \$156,000 for males), and automotive and engineering trades workers and sales support workers (both \$130,000 for males). Incomes reported by arts and media professionals working in free-to-air TV are higher than in production and post-production, at \$86,500 for females and \$98,500 for males. Higher management and legal incomes likely reflect the larger scale of broadcasting organisations – which sustain more senior and specialised management and legal functions – alongside the regulatory and compliance obligations of broadcasting relative to production.

- Median incomes reported in the **subscription TV broadcasting sector** tend to be higher than those in all other screen sectors (Figure 13). Like free-to-air TV, the largest group of occupations is arts and media workers, but in the case of subscription TV here they earn the highest incomes in the screen sectors, at \$90,000 for females and \$102,700 for males (Figure 53).
- Data presented in Figure 54 in Appendix 2 is for the entire **internet publishing and broadcasting industry** and is indicative of the distribution of incomes in internet broadcasting (which is a subset of that industry). It exhibits similar patterns to free-to-air and subscription TV: the largest occupation groups are arts and media professionals, business, human resources and marketing professionals, and its highest incomes are reported by managers and sales representatives and agents.

## Comparing staff costs and income

Comparing **total expenditure by sector on salaries and wages** (Figure 14) with the estimates of employment and median incomes in each screen sector presented in Appendix 2 provides additional context for understanding how each industry's contribution to the economy through expenditure on employees has changed over time. **The ratio of total salaries and wages to total sales reported in the ABS BLADE dataset<sup>25</sup>** (Figure 15) shows how much of each dollar earned is spent on paying staff: a higher ratio means the sector is more labour-intensive and profit margins may be tighter.

Figure 14: Total screen sector salaries, wages and other payments 2005/06 to 2023/24 (2024/25 dollars)



Note: Adjusted for inflation using the CPI (2024–25 = 100). Data not available for digital games and internet broadcasting. Internet publishing and broadcasting is included as a proxy for internet broadcasting.

Source: ABS 2026 BLADE TableBuilder.

25 Business Longitudinal Analysis Data Environment (BLADE) in ABS TableBuilder brings together data on all active businesses sourced from the ABS Business Register and Australian Taxation Office business activity statements and pay as you go data.

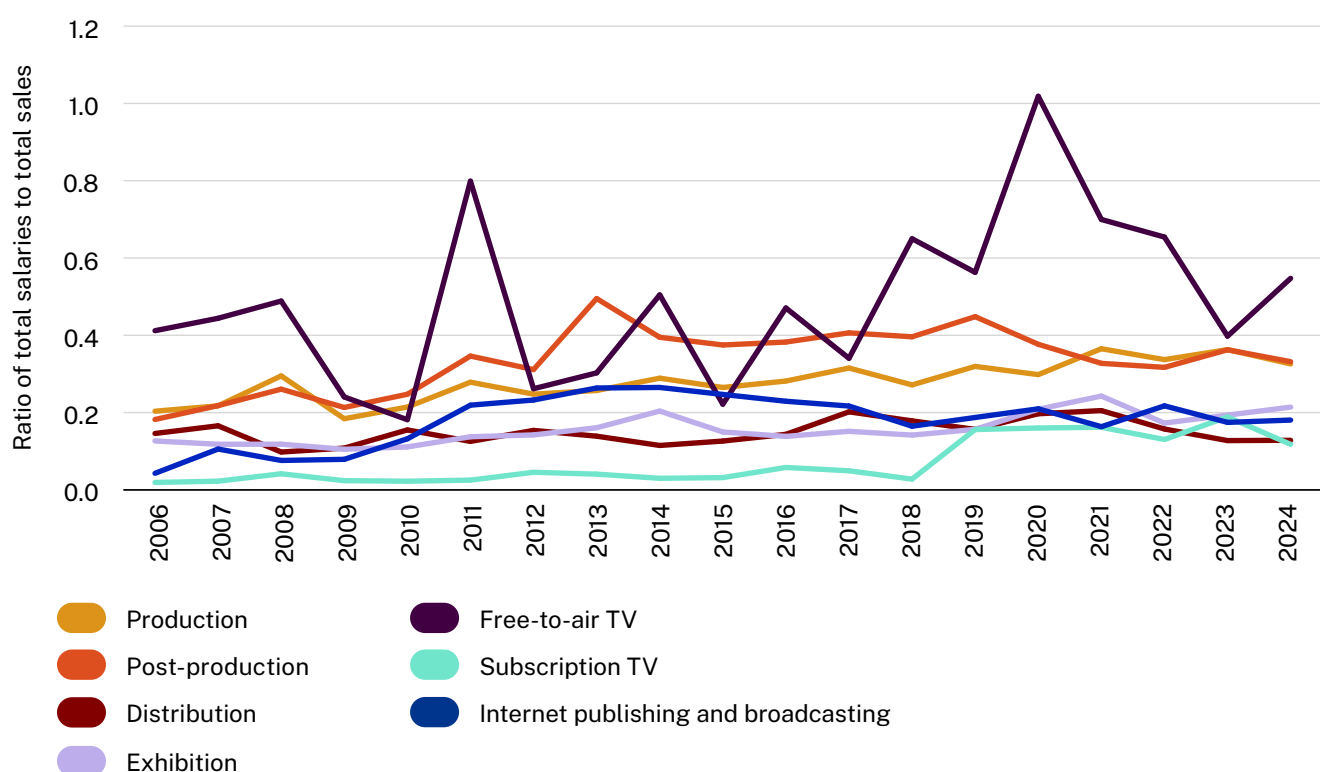


- Between 2008/09 and 2024/25, both the **production** sector's workforce and its **expenditure on salaries more than doubled**. Its largest increase in expenditure on salaries occurred during the **COVID-19 pandemic**, when the additional staffing, compliance and operational demands of producing screen content, along with increased demand for screen workers from foreign productions, drove up the value of payments. While expenditure on salaries has since declined slightly in this sector, it continues to be maintained at historically high levels, with multiple job holding typically at higher levels than in other screen sectors as production workers move from project to project. Figure 15 shows that **the ratio of salaries to sales for production has increased slowly but steadily since 2008/09**, to the point where it is the second highest across the screen sectors.

This is consistent with the very high ratio of compensation of employees (COE) to gross value added (GVA) seen in Figure 6. This further highlights an impact of the federal and state governments' screen incentive programs – in the context of an already limited supply of production skills, investment increased the demand for production skills, pushing up employment costs.

- While the **post-production sector** employs a smaller workforce than the production sector and similarly spends less overall on salaries, since 2020/21 the ratios of salaries to sales for the production and post-production have converged. This suggests that the two sectors increasingly share similarities in how much they pay their workers, their profitability and how they manage their businesses.

**Figure 15: Ratio of total salaries, wages and other payments to total revenue by screen sector, 2005/06 to 2023/24**



Note: Data not available for digital games and internet broadcasting. Internet publishing and broadcasting is included as a proxy for internet broadcasting.

Source: ABS 2026 BLADE TableBuilder.

- For both **distribution and exhibition**, while expenditure on salaries increased steadily up to the late 2010s, the ratio of salaries to sales increased at a slow rate. This reflects the impact of digitisation – both of these smaller sectors have lost business to online providers while they have continued to support an increasingly lean workforce.
- Perhaps the most curious example here is **free-to-air TV**. Between 2008/09 and 2024/25 it maintained its workforce at between 8,000 and 10,000 people, finishing this time series at 10,157. While its total workforce has been fairly constant, its share of screen employment gradually fell, from 22% in 2008/09 to 17%, and its share of salary payments halved, from 60% in the years 2005/06 to 2007/08 to 29% in 2023/24. Despite these decreases, the ratio of salary payments to total sales increased, from less than 0.2 in the years 2005/06 to 2007/08 to more than 0.5 from 2017/18 onwards. This tells us that while **free-to-air TV continues to spend more on its workforce than other screen sectors, it cannot continue to maintain its level of spend on salaries as the value of its sales is falling**.
- **Subscription TV broadcasting** had the lowest ratio of salaries to sales up to 2017/18, when it increased to levels similar to the internet publishing and broadcasting sector. Subscription TV broadcasting had the lowest ratio of salaries to sales up to 2017/18, when it rose to levels similar to the internet publishing and broadcasting sector. This increase coincided with Foxtel, the dominant provider, restructuring its business and shifting towards an IP-delivered streaming model - rationalising the subscription TV ecosystem and replacing its bundled offering with leaner, unbundled services designed to counter emerging streaming competitors with a more customer-centric proposition.
- **Internet publishing and broadcasting** is included here for completeness – in terms of salaries, total expenditure by its screen sector sub-set internet broadcasters is likely less than half of what is seen in [Figure 14](#). The ratio of salaries to sales is indicative, however, showing decreases since 2013/14 as internet-sourced revenues have more than covered the cost of salaries and wages.
- Data on **digital games development** is not available in the BLADE dataset that was used to

create [Figure 14](#) and [Figure 15](#). Employment in **the digital games development** industry is the fastest growing of all of the sectors studied here (see [The screen and games industry workforce](#)). Following declines in the 2000s, additional layers of support, particularly from the Victorian and Queensland state governments and then from the federal government, have supported development of the local games industry which has led to rapid upswing in employment.

## Skills in the screen sectors

**Note:** *the data used in this section does not provide visibility of digital games development.*

[Figure 16](#) shows the highest qualification held by people who reported working in screen sectors in the 2021 Census. It shows that **the most popular qualifications held by people who work in the screen sectors are creative arts qualifications, followed by management and commerce, and society and culture, qualifications**. That is, of the three most common qualifications employed in the screen sectors, two are creative arts and humanities qualifications. The only screen sector where management and commerce qualifications out-number creative arts is internet and publishing broadcasting – which is atypical of the rest of the screen industry.

**The screen industry's high prevalence of creative arts and humanities qualifications may put it at risk of increasing skills shortages.** Since 2018 there has been a reduction of available creative arts courses in Australian universities and in the TAFE sector and a decline in senior secondary school arts subjects. The previous federal government's Job Ready Graduates Package,<sup>26</sup> which came into effect in 2021, increased the cost of creative arts and other humanities courses and was associated with declines in enrolments and subsequent course closures.<sup>27</sup> The current government is considering reducing fees for creative arts and humanities courses.<sup>28</sup> In 2025, SaCSA reported a national shortage for skills that are important inputs to the screen industry: film and video editors, lighting technicians and audio engineers.<sup>29</sup>

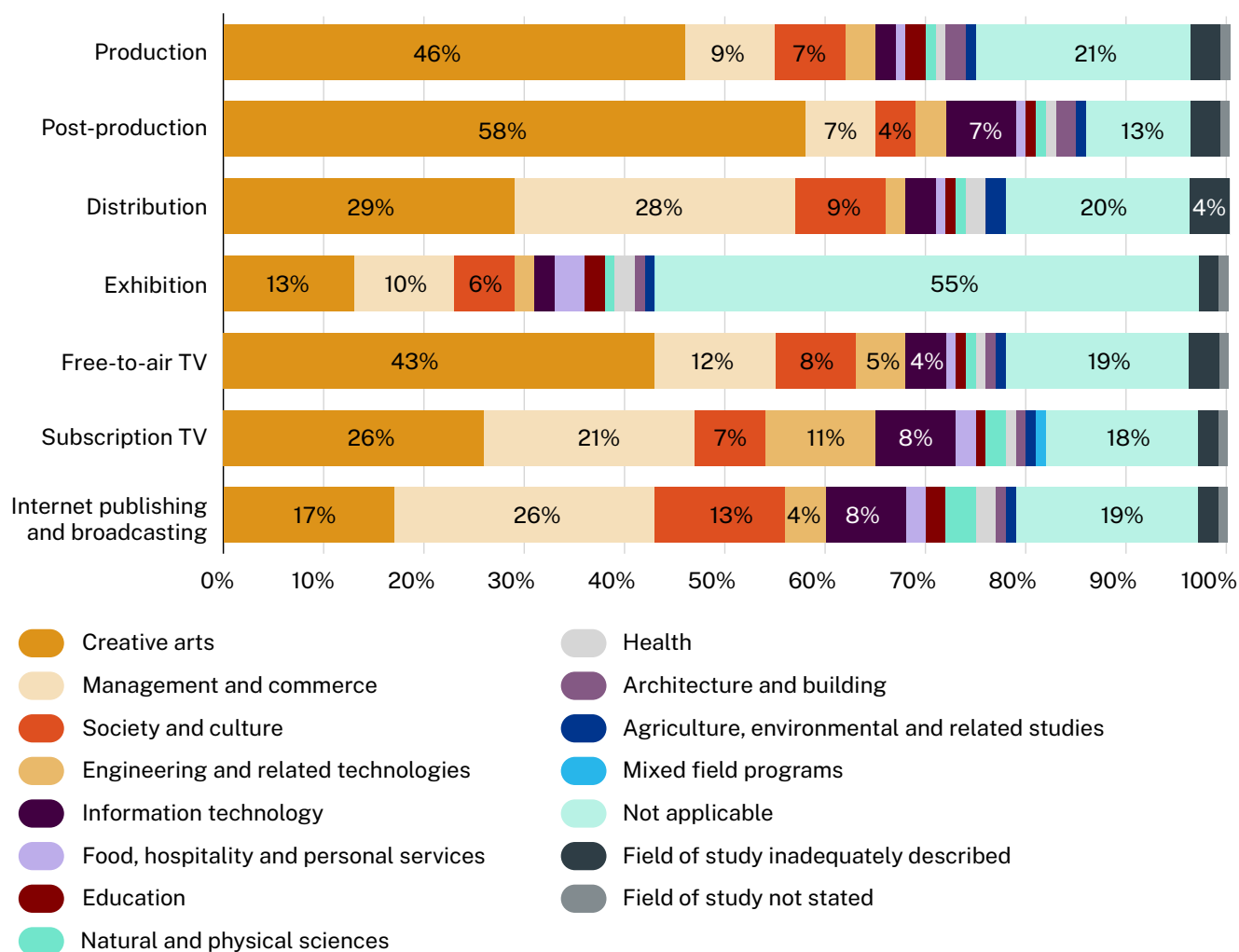
26 The Job Ready Graduate Package is a federal government higher-education reform package introduced in 2020 and 2021.

27 Gattenhof S and Saunders J N 2026, "The Polycrisis for Arts and Creative Education in Australia", [Australian Journal of Education](#), Vol. 0(0) 1–20: 1–17.

28 Norton A 2025, "Labour has promised fast action to cut student debt, but arts students will have to wait for lower fees", [The Conversation](#).

29 SaCSA 2025, [Jobs and Skills Australia's 2025 Occupation Shortage List](#), accessed 14 April 2026.



**Figure 16: Employment in screen sectors by field of education, 2021**

Note: Not applicable means the question was not applicable to the respondent so they did not need to respond, field of study inadequately described means responses were not specific enough to be coded against a category, and field of study not stated means the question was not answered.

Source: ABS Australian Census of Population and Housing, TableBuilder.



MasterChef Australia (Behind the scenes)

### Creative Australia's 2025 Creative Workforce Scoping Study<sup>30</sup> reported the following:

- Many screen companies have concerns about tertiary and VET educational pathways. Graduates are not “job ready” and require significant onboarding due to a lack of technical and workplace skills: many VET and higher education graduates require very significant further training to be “set ready.”
- Recruiting and staff retention challenges include global competition, and mid to senior-level crew shortages. Promotion and professional development are often inconsistent. The workforce is ageing, particularly in key roles, with high burnout rates and managerial skills gaps.
- There are barriers surrounding training, skills and retention. There is a need for more affordable and accessible training, structured career progression and ongoing mentorship of workers in the sector's industry connections, hands on training opportunities, and to address freelance job market challenges.
- Significant workforce attrition issues stem from the lack of job stability, requirements for travel, long hours, lack of concentrated diversity, equity and inclusion practices, and lack of job flexibility and family-friendly working conditions.

### Screen Australia commissioned a Production Infrastructure Capacity Analysis (PICA)<sup>31</sup> to

understand the current capacity and provision of Australia's screen production infrastructure and workforce. Its findings include that 45% of screen production professionals and the majority of digital games makers are self-taught. Two-thirds of the screen production professionals who are self-taught have not taken a screen or film-related course at any type or tertiary institution, and 37% of digital games makers feel that their training has not sufficiently equipped them to work in the games sector. The report recommendations include:

- leveraging Australia's reputation for special effects and animation by interlinking the quality training offered by some companies
- ensuring there is adequate business development support and training for setting up and growing small businesses in the sector
- creating a training pipeline that links training to industry opportunities.

To find out more about education and training go to:



Industry Insights



<sup>30</sup> Creative Australia and SaCSA 2025, *Creative Workforce Scoping Study*.

<sup>31</sup> Olsberg SPI and Screen Australia 2026, *Production Infrastructure and Capacity Analysis (PICA)* pinpoints four key workforce challenges in the Australian screen industry.



# Screen and games exports

Screen and games

Economic  
contribution

Employment



Exports

Production activity  
and funding

This chapter presents estimates of screen and games exports, using a range of best available sources to build an evidence base.

**Australia's screen sectors generate export revenue through a variety of activities. The largest source of export revenue is expenditure by foreign productions filming in Australia.** Producers and distributors of films and TV programs license international rights through international sales agents or distributors, who in turn sell broadcast rights to overseas broadcasters and arrange theatrical release with cinema operators in each territory, often using international pre-sales as part of a deficit financing package. They can also earn export income through licensing for international versions of program formats, through merchandising and brand extensions.

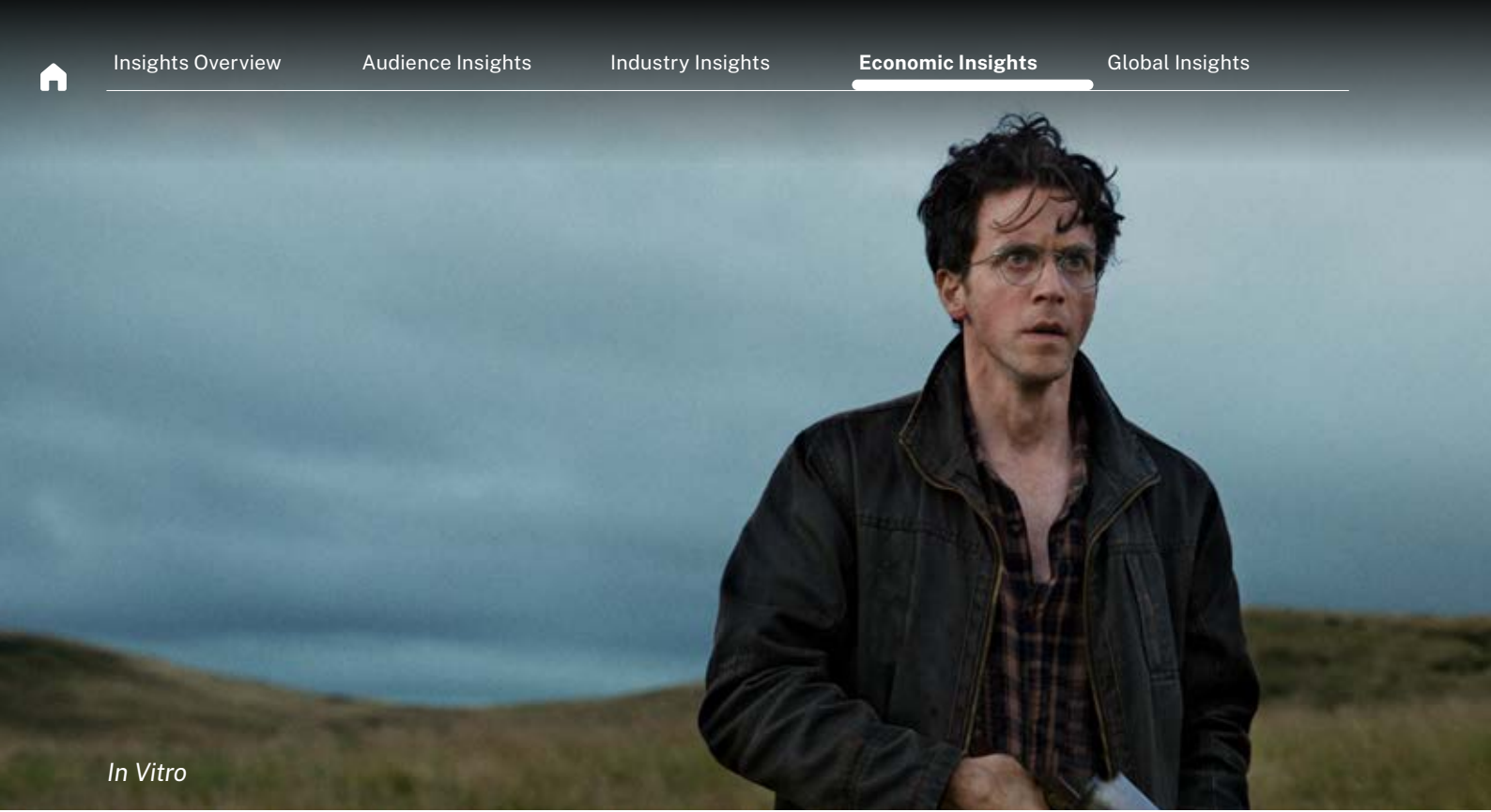
**Digital games developer export income takes different forms.** Developers make international sales via platforms such as Steam, PlayStation, Xbox and Switch, through in-game purchases, advertising, game expansions, merchandising and licensing and through selling their own development services.

While approaches to earning export income are well-established, over the past 25+ years the business practices employed by the screen and games industries have evolved at a faster rate than economic data collection systems. **Providing a comprehensive picture of the value of screen exports using existing economic statistics is therefore challenging.** Reasons are explained further below, including how the use of locally-registered special purpose vehicle (SPVs)<sup>32</sup> by the production sector means that a portion of international trade in screen content is recorded as domestic trade. To fill data gaps, the University of Canberra research team have added Screen Australia's estimates of foreign drama expenditure in Australia to ABS BLADE estimates of export revenue for screen sectors, and the Interactive Games and Entertainment Association (IGEA's) estimates of digital games exports.

**Together, these estimate the total value of screen and games exports at \$1.6 billion in 2023/24, comprising \$1.3 billion in screen exports and \$323 million in games exports which are seeing rapid average annual growth of 15.4%.** The screen figure remains an underestimate, as it does not include locally made program sales to global platforms like Netflix – a fast-growing part of the screen industry.<sup>33</sup>

32 Separate legal entities created to deliver individual projects, often used to manage financing, risk and contractual arrangements. In screen production, these entities are commonly wound up once a project is completed.

33 These sales are counted in ABS trade data as domestic rather than international sales. The deal terms these platforms use tend to capture rights for all territories so these globe-reaching sales of Australian-made content on streamers do not show up in ABS export data (or in Screen Australia's recoupment data).



*In Vitro*

## Method

Screen exports have increasingly been missed in Australian trade statistics. Possible reasons for this include:

- Content commissioned by local business establishments operated by international SVOD services are recorded as domestic sales rather than exports.
- SVOD services' preference for cost-plus financing contracts has led to lower rights returns over time, reducing secondary rights revenues (backend).
- Foreign productions filming in Australia usually operate out of a locally-registered SPV, a legal entity used to manage all local financing arrangements. Production services supplied to a local SPV are recorded as local sales rather than exports.<sup>34</sup>
- Broadcasters export both their own content and their broadcasting services. Available economic statistics do not differentiate between these.

The University of Canberra research team have therefore used four datasets to build an evidence base to help understand Australian screen and games exports:

- **ABS BLADE<sup>35</sup>** which includes the value of total exports by ANZSIC industry class. This provides an overview of direct exports by screen sectors, including rights and services sales, and any other goods and services.
- **The IGEA Australian Game Development Survey** reports the value of digital games exports which cannot be seen in ABS statistics as digital games development is not defined as a separate ANZSIC industry class. The survey is a self-report of revenue by local games studios who choose to participate.
- **The ABS Balance of Payments time series** includes the value of royalty exports for film, TV and home entertainment royalties. It does not show production services exports, which are included in its other business services category.
- **Screen Australia's Drama Report** includes estimates of international expenditure on drama production in Australia.

<sup>34</sup> An SPV is treated by the Australian Taxation Office as a standard Australian company, regardless of whether it is owned locally or by a foreign entity. This means that all sales to foreign-owned SPVs are recorded as occurring domestically and are not recorded as exports.

<sup>35</sup> BLADE in ABS TableBuilder brings together data on all active businesses sourced from the ABS Business Register and Australian Taxation Office business activity statements and pay as you go data.





**Over time the ABS BLADE time series has captured a decreasing proportion of screen exports, underestimating their value for at least 15 years.** The introduction of the Producer and Location Offsets in 2007 introduced new expectations around clear project-level accounting, triggering the increasing use of SPVs. SPVs, separate legal entities used to manage financing, risk and contractual arrangements for individual projects, are now the default for feature films and most drama series. An SPV is treated by the Australian Taxation Office as a standard Australian company, regardless of whether it is owned locally or by a foreign entity. This means that all sales to foreign-owned SPVs are recorded as occurring domestically and are not recorded as exports.

One outcome of this is declining headline export statistics for production and post-production sectors. **Here, we have added the Screen Australia international drama expenditure estimates to the BLADE and IGEA exports time series** to produce the combined time series shown in [Figure 17](#). This is justified using the assumptions:

- Following the introduction of the Producer Offset and Location Offset in 2007, 85% of international drama expenditure recorded in Screen Australia's Drama Report occurred through a SPV.<sup>36</sup>
- All international drama expenditure data reported by Screen Australia was associated with a SPV.
- All Australian expenditure by foreign-owned SPVs was recorded as domestic sales and not exports.

This approach may overestimate the total value of exports somewhat during the 2010s but can reasonably be expected to be more accurate into the 2020s as SPVs became uniformly adopted by foreign productions in Australia. As it still does not account for data gaps around streaming and broadcasting services noted above, total screen sector exports reported here should not be interpreted as representing the full extent of the value of Australian screen production exports.

36 Based on advice from Screen Australia.

# Screen and games export estimates

Overall, the total value of screen and games exports in 2023/24 was \$1.6 billion, including \$1.3 billion in screen exports and \$323 million in games exports (Figure 17, Table 4). While this total was down from \$1.9 billion in the previous year, there is volatility over time and it is likely to increase again in 2024/25, following an increase in international drama expenditure.

Between 2008/09 and 2023/24, the total value of screen exports doubled in real terms, increasing by an annual average of 4.7%. Games exports, which are visible over a much shorter period of time, grew by an average of 15.4% per annum between 2016/17 and 2023/24.

The sectors generating the largest proportions of exports in 2023/24 were production and post-production (67% of total exports including foreign production expenditure), games (20%) and internet broadcasting (8%). These are the only export revenue sources that have continued to grow in real terms since digitisation.

- **The largest export revenue source for production and post-production** (combined in this discussion because the boundaries between the two are porous) **is international drama expenditure**, which grew at an annual average rate of 15.0% between 2008/09 and 2023/24. Other production and post-production exports include rights sales – pre-sales and sales to international broadcasters and distribution revenues from overseas sources.
- **Internet broadcasting exports grew by an annual average rate of 7.0%** between 2008/09 and 2023/24. Exports here included a mixture of rights sales, subscriptions and online advertising.
- **Digital games experienced the strongest export growth**, at an average of 15.4% per annum from 2016/17, sourced through international games platforms, in-game sales and licenced merchandising.

Over the last 20 years, export revenues generated by distributors, free-to-air broadcasters and subscription broadcasters have fallen, impacted by digitisation and globalisation.

- **The distribution sector has declined significantly as a source of export revenue**, falling by an annual average of 2.7% between 2008/09 and 2023/24. This decline appears to reflect a combination of industry restructuring and changing business models. The growing prominence of global streaming platforms reduced the role of independent distributors, as streamers increasingly acquired broad rights to commissioned content and internalised distribution activities within their own global networks, limiting opportunities for distributors to earn revenue from territory-by-territory sales. At the same time, the growth in foreign drama expenditure suggests that screen-sector activity was shifting toward production services for global platforms, with export value being generated in different parts of the value chain rather than through traditional distribution channels.
- **Free-to-air and subscription TV broadcasters have also seen declining export revenues**, with earnings for both broadcaster types, each falling by an annual average of 1.8% and 3.1% between 2008/09 and 2023/24. One possible source is the decline in home entertainment royalties depicted in Figure 19. Another likely source is fall in ABC international content sales as it stepped back from taking an international rights position in the content it commissions.

Screen exports have two major components – royalty exports, and expenditure by foreign productions located in Australia. Each of these is explored in detail in the next two sections.

To find out more about production company exports and Australia's digital games development industry go to:

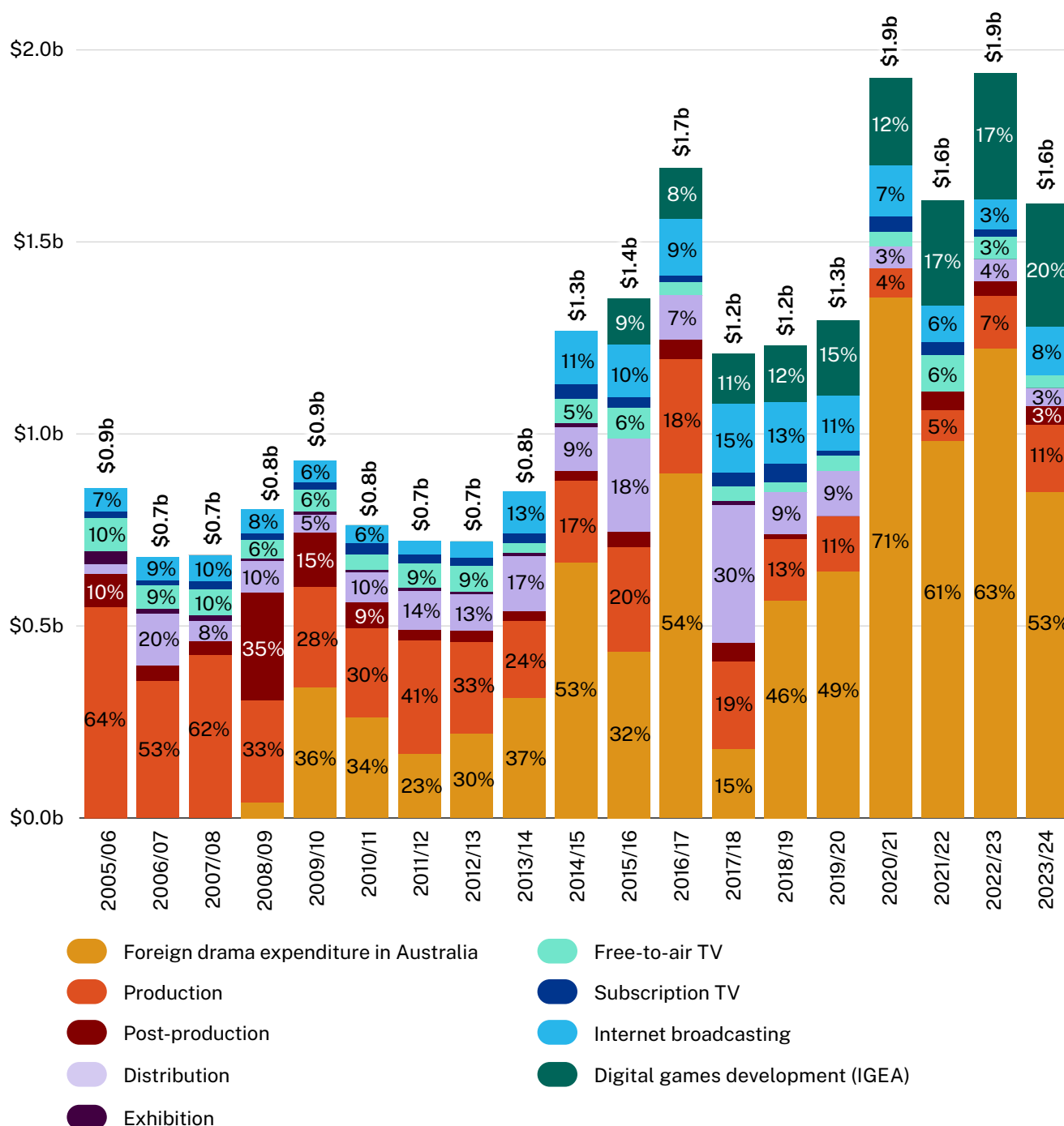


Industry Insights





Figure 17: Value of exports by sector, 2005/06 to 2023/24 (2024/25 dollars)



Notes: (1) The inclusion of international drama expenditure here is justified by assuming all international activity occurs through domestic SPVs and is therefore not reported in export statistics. (2) The internet broadcasting export figures here are estimates, calculated by multiplying internet publishing and broadcasting industry exports by screen's share of total screen and audio product exports reported in the ABS input-output tables. (3) IGEA did not publish revenue or export estimates before 2014/15 or for the year 2017/18 – the 2017/18 value here has been interpolated.

Sources: ABS BLADE TableBuilder, IGEA Australian Game Development Survey, UC estimates based on Screen Australia's international drama expenditure time series.

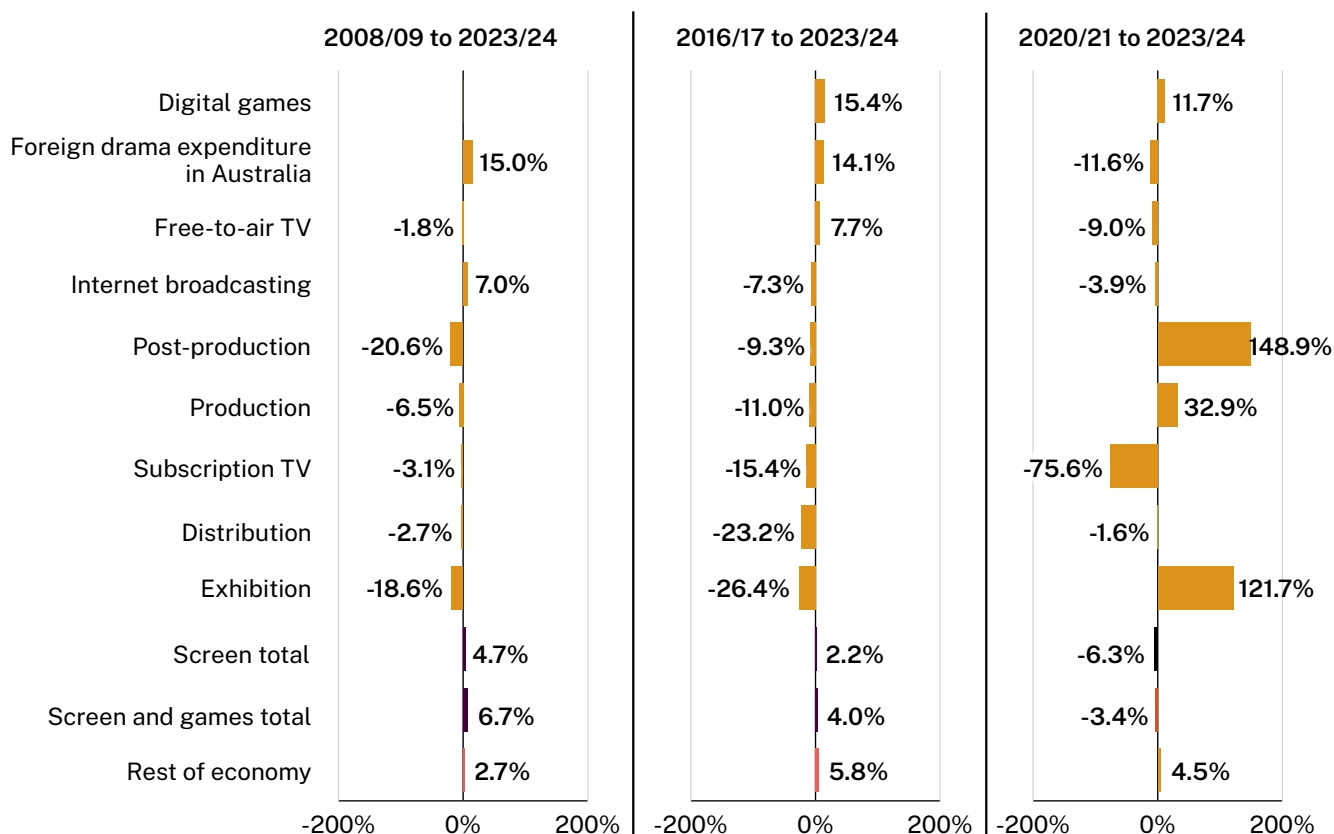


Table 4: Value of exports by sector, 2005/06 to 2023/24 (\$ million, 2024/25 dollars)

|         | International<br>drama<br>expenditure | Production | Post-<br>production and<br>other activities | Distribution | Exhibition | Free-to-air TV | Subscription<br>broadcasting | Internet<br>broadcasting | SCREEN<br>TOTAL | Digital games<br>development | GRAND TOTAL    |
|---------|---------------------------------------|------------|---------------------------------------------|--------------|------------|----------------|------------------------------|--------------------------|-----------------|------------------------------|----------------|
| 2005/06 |                                       | 546.4      | 83.1                                        | 27.1         | 33.1       | 89.6           | 17.7                         | 60.7                     | <b>857.5</b>    |                              | <b>857.5</b>   |
| 2006/07 |                                       | 353.2      | 37.5                                        | 131.9        | 16.4       | 58.0           | 16.6                         | 58.9                     | <b>672.5</b>    |                              | <b>672.5</b>   |
| 2007/08 | 672.98                                | 426.5      | 33.6                                        | 57.1         | 16.4       | 66.1           | 17.7                         | 67.0                     | <b>1,357.2</b>  |                              | <b>1,357.2</b> |
| 2008/09 | 42.84                                 | 263.0      | 278.0                                       | 83.3         | 5.1        | 51.6           | 19.9                         | 60.4                     | <b>804.1</b>    |                              | <b>804.1</b>   |
| 2009/10 | 334.81                                | 265.7      | 142.6                                       | 51.6         | 6.0        | 57.8           | 20.2                         | 60.5                     | <b>939.3</b>    |                              | <b>939.3</b>   |
| 2010/11 | 262.42                                | 233.1      | 70.2                                        | 73.5         | 11.3       | 41.7           | 32.4                         | 45.2                     | <b>769.9</b>    |                              | <b>769.9</b>   |
| 2011/12 | 167.16                                | 294.4      | 26.0                                        | 102.3        | 5.9        | 64.8           | 23.7                         | 37.0                     | <b>721.2</b>    |                              | <b>721.2</b>   |
| 2012/13 | 220.53                                | 239.1      | 29.3                                        | 96.8         | 5.7        | 65.9           | 23.7                         | 46.5                     | <b>727.5</b>    |                              | <b>727.5</b>   |
| 2013/14 | 310.52                                | 197.8      | 24.8                                        | 139.1        | 6.9        | 29.1           | 24.4                         | 108.7                    | <b>841.2</b>    |                              | <b>841.2</b>   |
| 2014/15 | 664.7                                 | 211.1      | 19.7                                        | 118.8        | 9.5        | 63.4           | 34.3                         | 133.2                    | <b>1,254.6</b>  |                              | <b>1,254.6</b> |
| 2015/16 | 427.35                                | 272.8      | 35.7                                        | 241.7        | 3.9        | 87.1           | 21.1                         | 139.8                    | <b>1,229.3</b>  | 123.4                        | <b>1,352.7</b> |
| 2016/17 | 888.19                                | 298.6      | 42.8                                        | 110.7        | 4.6        | 24.9           | 15.1                         | 150.2                    | <b>1,535.0</b>  | 125.2                        | <b>1,660.2</b> |
| 2017/18 | 173.63                                | 225.4      | 44.5                                        | 356.8        | 12.6       | 39.9           | 31.4                         | 176.9                    | <b>1,061.1</b>  | 135.8                        | <b>1,196.8</b> |
| 2018/19 | 564.42                                | 164.6      | 9.8                                         | 109.2        | 2.0        | 26.5           | 46.6                         | 160.5                    | <b>1,083.6</b>  | 146.3                        | <b>1,229.9</b> |
| 2019/20 | 643.33                                | 142.0      | 2.1                                         | 119.7        | 0.7        | 41.4           | 19.2                         | 145.8                    | <b>1,114.3</b>  | 194.7                        | <b>1,308.9</b> |
| 2020/21 | 1,347.53                              | 68.6       | 0.9                                         | 47.9         | 0.0        | 34.8           | 35.3                         | 141.7                    | <b>1,676.7</b>  | 231.0                        | <b>1,907.8</b> |
| 2021/22 | 985.77                                | 79.5       | 1.3                                         | 47.0         | 0.6        | 89.0           | 31.7                         | 100.3                    | <b>1,335.2</b>  | 272.9                        | <b>1,608.1</b> |
| 2022/23 | 1,222.62                              | 140.7      | 38.4                                        | 54.1         | 2.3        | 56.0           | 23.8                         | 81.2                     | <b>1,619.1</b>  | 320.8                        | <b>1,939.9</b> |
| 2023/24 | 852.25                                | 170.0      | 42.2                                        | 43.3         | 1.6        | 30.1           | 3.1                          | 133.3                    | <b>1,275.8</b>  | 323.0                        | <b>1,598.8</b> |

Sources: ABS BLADE TableBuilder, IGEA Australian Game Development Survey, UC estimates based on Screen Australia's international drama expenditure time series.



**Figure 18: Annual average growth in the value of exports by sector, 2008/09 to 2023/24**

Sources: ABS BLADE TableBuilder, IGEA Australian Game Development Survey, UC estimates based on Screen Australia's international drama expenditure time series.



# Screen rights exports

The ABS Balance of Payments provides details on royalty exports, a sub-set of total screen exports. It provides insights into the changing demand for content by different types of broadcasters.

In this dataset the classification of royalties in trade data is based on the type of market rather than the type of product. That is:

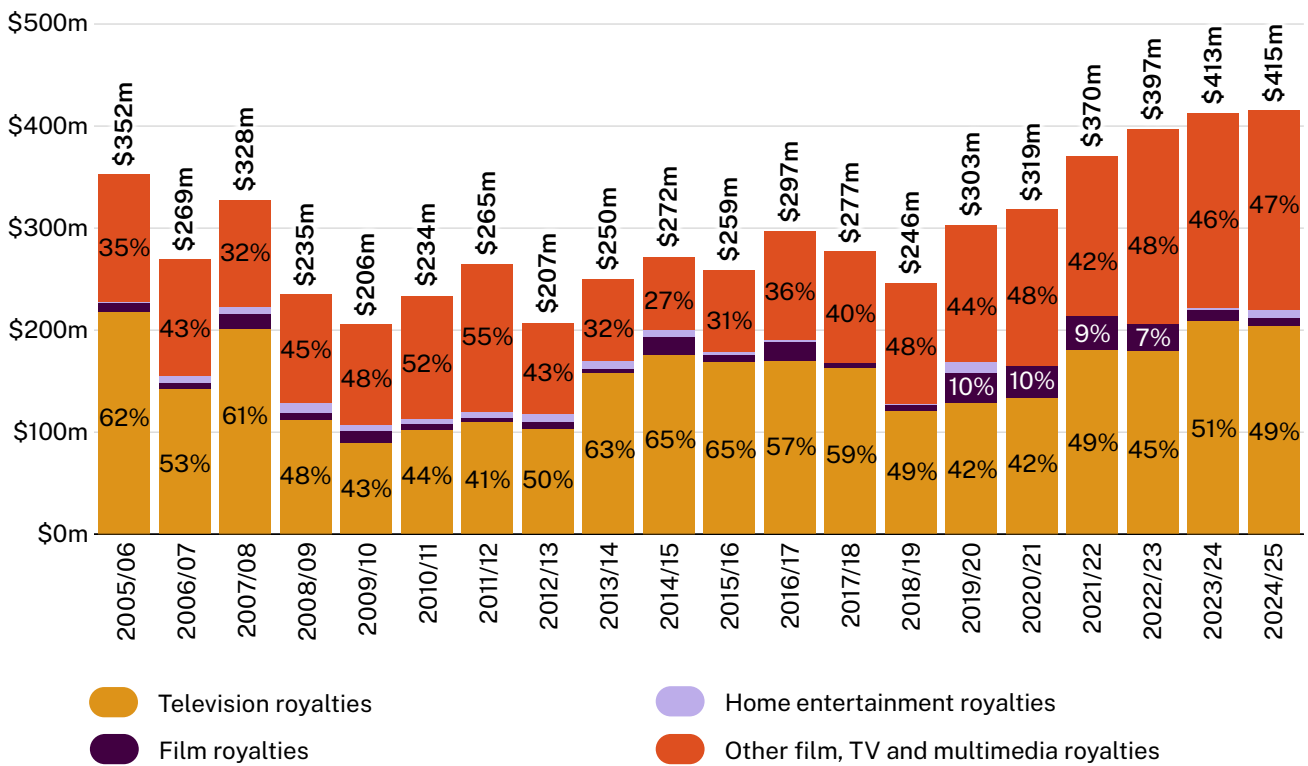
- TV royalty exports include sales of feature films for TV screening and sales of program formats
- film royalties include the right to theatrically distribute or exhibit feature films in cinemas
- home entertainment royalties includes the rights to distribute film and TV content via home-use formats including physical media and digital (download to own) retail, and
- other film, TV and multimedia royalties includes all other audiovisual exploitation rights including SVOD (and other VOD) licensing, non-theatrical rights (airlines, educational, interactive multimedia rights and bundled rights where the primary market cannot be allocated.

The ABS Balance of Payments trade data shows that in 2024/25, royalty exports totalled \$415 million (Figure 19). This continued a historic run of four years of highs that for the first time surpassed total royalty export highs of the early 2000s.

Most of the growth in royalty exports has been in TV royalties and in other film, TV and multimedia royalties. Since falling to a low of \$206 million in 2009/10, international competition for quality content from global media networks and multinational tech companies seeking to attract paying subscribers to their platforms has helped drive up the value of Australian royalty exports.

- TV royalties nearly doubled between 2009/10 and 2014/15 to \$176 million, growing by an average annual rate of 4% to \$204 million in 2024/25 in response to this new source of demand.
- Demand then shifted to other film, TV and multimedia royalties as networks increasingly sought content for their VOD services. By 2024/25 other film, TV and multimedia royalty exports were at an all-time high of \$196 million, having grown by an average of 5% per annum since 2009/10.

Figure 19: Royalty exports, 2005/06 to 2024/25 (2024/25 dollars)



Source: ABS Balance of Payments and International Investment Position, Australia.



## Foreign production in Australia

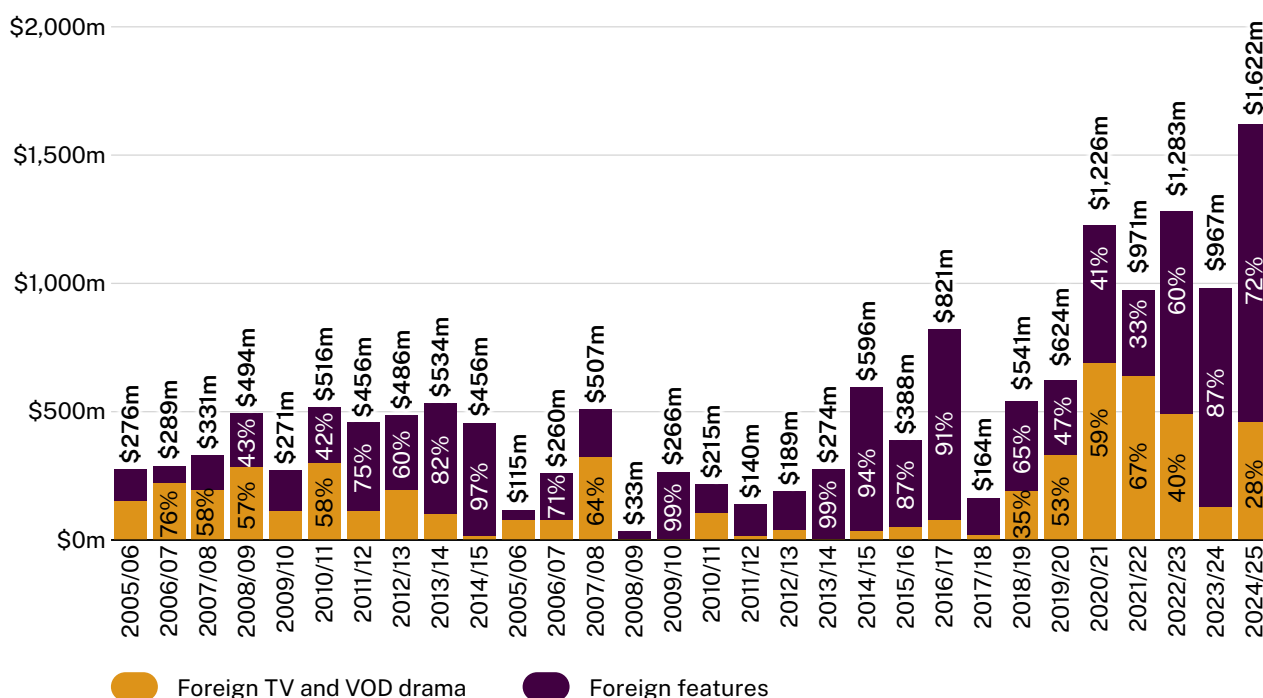
Foreign production activity in Australia<sup>37</sup> increased steadily following the introduction of the Location Offset in 2007 and the addition of the Location Incentive in 2019. **Between 2010/11 and 2024/25 international expenditure on drama production and post-production in Australia increased more than sixfold, from \$260 million to \$1.6 billion.**

This growth in foreign production expenditure has occurred in both feature film and TV drama production (Figure 20). The temporary decline in TV drama expenditure between 2021/22 and 2023/24 likely reflect several factors, including the 2023 US writers' and actors' strikes, which disrupted global production and inbound production activity. An anticipated increase to the Location Offset to match the production offset for TV drama was passed in 2024. Over this period more Australian dramas that qualified for the Producer Offset were produced, so total production expenditure was not adversely affected (see Figure 23 for details on Australian TV drama production).

**Whether a foreign production comes to Australia depends on the financial viability of producing here compared with other locations.** This is shaped by a range of factors, including the investment incentive packages offered by federal, state and local governments, the value of the Australian dollar, and the availability and depth of skilled crews and production infrastructure.

**Total international expenditure in Australia is also influenced by production budgets** – in any given year a single high-budget production can have an enormous impact on foreign-sourced income. For example, the growth in international drama expenditure in 2020/21 reflected the coincidence of two independent factors: COVID-19 driving productions to seek safe haven in Australia, and a surge in premium TV drama budgets as platforms competed to establish their vertically integrated streaming services.

Figure 20: Expenditure on foreign drama production in Australia, 1995/96 to 2024/25 (2024/25 dollars)



# Production activity and funding in Australia

[Screen and games](#)
[Economic contribution](#)

[Employment](#)

[Exports](#)

[Production activity and funding](#)

The chapter begins by examining production sales revenues for Australian screen and games, to set context for understanding the drivers of demand for Australian screen content and sources of change.

For the remainder of the chapter, the University of Canberra research team conducted a deep dive into the data collections managed by Screen Australia, and the ACMA, and their predecessors.

There are rich data records of the screen content types that receive direct and indirect support by government, and are supported through content obligations on broadcasting services: feature films, adult and children's TV drama and documentary.

**Screen production trends from 2000 to 2024** are presented for each of these screen content types, followed by examination of the **main sources of funding for Australian screen content**: Australia's commercial, public service and subscription TV broadcasters and streamers, and government support.

**The analysis** shows how digitisation and globalisation, and the regulatory changes put in place in response, have affected Australia's screen production and post-production sectors, and how they have evolved over the last quarter century.

**A significant change is that streaming platforms now spend more (in real terms) on scripted drama than the commercial broadcasters did before digitisation.** And while commercial broadcasters are still the largest source of demand for Australian screen content overall, their spending is concentrated in genres such as sport, light entertainment and news.

**Feature film production:** The numbers of Australian feature films produced each year nearly doubled between 2008 and 2024, with no increase in total production expenditure, as production budgets declined. Financial returns also appear to be declining, with uncertain domestic box office returns and reduced up-front international pre-sales likely to continue putting downward pressure on budgets.

**TV drama production:** Audience fragmentation and the shift away from linear viewing have eroded advertising revenue for commercial FTA TV operators, and because drama is expensive to produce relative to the audience it now attracts, their investment in it has fallen significantly. While public service broadcasters continue to commission drama, streaming platforms are now the most important commissioners of Australian drama. This has significant implications for Australian producers and Australian audiences, with fewer titles and hours commissioned.

**Documentary production:** Demand for Australian documentaries appears not to have been greatly impacted by the structural changes to the Australian TV industry. Commercial TV broadcasters' documentary offerings have continued despite the removal of the documentary quota, indicating documentary programming has a role in commercial TV business models.





## Method

To provide context on the value of production, the section on screen production trends starts with an analysis of screen production sales using the ABS BLADE total sales dataset. Games sales were analysed using estimates from the ABS Film, Television and Games Survey and the IGEA Australian Games Development Survey for the years they were available, as there is no consistent source of digital games development industry sales revenue.

The Australian screen production trends analysis then presents insights from tailored datasets prepared by Screen Australia for each of the TV and film content types that it supports (Australian features films, Australian TV drama, Australian children's drama and Australian documentary) over the period from 2000 to 2024, and production expenditure data available on Screen Australia's website.

It uses Screen Australia's records of first releases (theatre and broadcast) to track the supply of productions and expenditure survey records to track the value of production activity. The analysis considers the value of these Australian content formats to different classes of broadcaster<sup>38</sup> and how their incentives to commission and exhibit these types of content have evolved over the past 25 years, through a period of unprecedented technological change.

The section on funding for Australian screen content draws on data sourced from Screen Australia, the Australian Communications and Media Authority (ACMA) and the Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts (DITRDCA).



38 The term "broadcaster" is used broadly here and includes free-to-air terrestrial broadcasters, cable and satellite subscription broadcasters and streamers.

# Australian screen production trends

## Production sales revenues

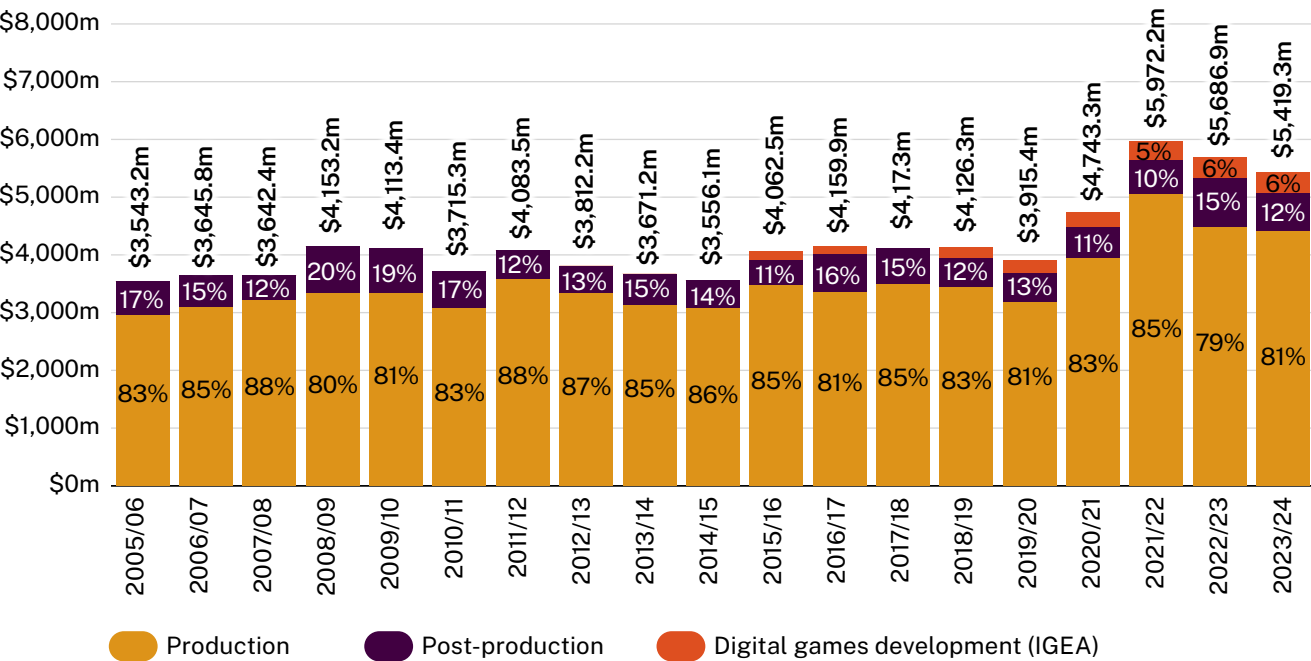
Growth in Australian screen production sales is a relatively recent phenomenon (Figure 21). For the fifteen years to 2019/20, the value of screen production sales was stable in real terms, with a small average increase of 0.6% per annum, and post-production sales saw a small average decline of 0.9% per annum (Table 5).

In contrast, digital games development sales have grown extremely rapidly off a small base at an average rate of 13.1% per annum between 2015/16 and 2023/24, although growth can be expected to slow as the industry matures.

There was an up-tick in sales revenue in 2020/21 and 2021/22 for the screen and games industries related to the COVID-19 pandemic. This boosted both the number of foreign productions locating in Australia and consumer purchases of games, and impacted streamer purchasing preferences.

The apparent boom in production was not uniformly shared across the screen industry. Rather, there are different stories for different types of content, influenced by the changing dynamics of the industry on the broadcasters and other distributors that drive demand for Australian content. These are explored in detail in the following sections.

Figure 21: Digital games and screen production and post-production sales revenues, 2005/06 to 2023/24 (2024/25 dollars)



Note: Adjusted for inflation using the CPI (2024/25 = 100). There is no consistent source of digital games development industry sales revenue. This chart includes ABS and IGEA estimates for the years they are available.  
Source: ABS 2026 BLADE TableBuilder, ABS 2023, Film, Television and Digital Games Survey, IGEA Australian Games Development Survey.



## Production trends

This remainder of this section presents screen production trends from 2000 to 2024 by content type for Australian feature films, TV drama, children’s drama and documentary. Data sources include title records managed by Screen Australia, Screen Australia’s Drama Report Survey, program expenditure records provided to the ACMA by commercial and subscription TV broadcasting licensees, and SVOD services and available data on the Australian Screen Production Incentive (ASPI)

published by Screen Australia and the Australian Taxation Office. Comparable data for digital games is not readily available.

For information on games production trends go to:



Industry Insights



Table 5: Digital games and screen production and post-production sales revenues and growth rates, 2005/06 to 2023/24 (2024/25 dollars)

| Sector                         | Total sales<br>2023/24 | Average annual growth rates |       |
|--------------------------------|------------------------|-----------------------------|-------|
| Production                     | \$4,407.8m             | 2005/06 to 2023/24          | 1.9%  |
|                                |                        | 2005/06 to 2019/20          | 0.6%  |
|                                |                        | 2020/21 to 2023/24          | 2.2%  |
| Post-production                | \$664.2m               | 2005/06 to 2023/24          | 0.4%  |
|                                |                        | 2005/06 to 2019/20          | -0.9% |
|                                |                        | 2020/21 to 2023/24          | 9.9%  |
| Production and post-production | \$5,072.0m             | 2005/06 to 2023/24          | 1.7%  |
|                                |                        | 2005/06 to 2019/20          | 0.3%  |
|                                |                        | 2020/21 to 2023/24          | 3.2%  |
| Digital games                  | \$347.3m               | 2015/16 to 2023/24          | 13.1% |
|                                |                        | 2019/20 to 2023/24          | 11.9% |

Note: Adjusted for inflation using the CPI (2024/25 = 100).  
Source: ABS 2026 BLADE TableBuilder, ABS 2023, Film, Television and Digital Games Survey, IGEA Australian Games Development Survey.



The Royal Hotel



# Australian drama feature film productions

Production activity associated with feature films has increased steadily since the early 2000s, with some fluctuations in the time series from year to year (Figure 22a). For drama features, the number of Australian titles produced each year has nearly doubled, from a mean of 23 per year between 2000 and 2008 to 40 between 2020 and 2024, with an average growth rate of 3.1% per year between 2000 and 2024.

Despite this growth in titles, total production expenditure on Australian feature films has not changed (Figure 22b). Since the establishment of Screen Australia in 2008, and excluding the COVID years of 2020/21 and 2021/22, the average real (adjusted for inflation) rate of change in total expenditure has been a very slight decline of 0.05% per annum. This small decrease is an outcome of falling production budgets, countered by the growth in titles seen in Figure 22a: since 2008, the average drama feature budget reported in Screen Australia’s Drama Report has fallen by an annual average of 2.6% in real terms (Figure 22c).

Overall, expenditure on features in Australia each year is strongly influenced by the budgets of the features in production, with the number of titles having a lesser impact on spend. Total expenditure and mean budgets reported in Screen Australia’s Drama Report are highly correlated at 0.84. While the correlation between the number of titles in production and total spend is still positive, the association is not as strong with a correlation of 0.36.

Australian box office revenue provides a clear pattern of decline over the past ten years (Figure 22d). Since 2008, box office earnings from Australian titles have fallen by an average of 4.0% per year, adjusted for inflation. The rate of decrease has accelerated since the COVID-19 pandemic, at 8.4% per year between 2020 and 2024.

To learn more about rights, go to:



Industry Insights



**Declines in box office earnings for Australian features reflect general trends in cinema attendance.** However, domestic box office revenue from Australian features can be heavily influenced by a single breakout title: the Australian share of total box office has swung between 1.3% and 11.8% since 2000, spiking in years such as 2015 and 2021 before falling back. The broader box office, by contrast, reflects longer-term macro trends in cinema attendance.

To learn more about Australian audiences viewing choices, go to:



Audience Insights

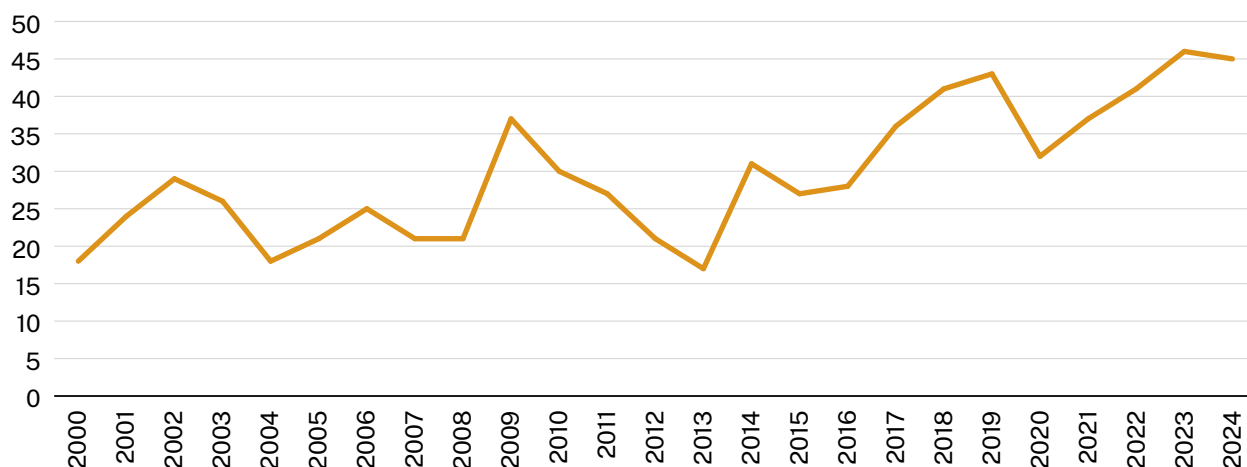


The majority of production companies producing feature films were located either in NSW or in Victoria up to 2016 (Figure 22e). Later records of producer headquarters are incomplete, however, it appears that most producers continue to be located on Australia’s east coast. Prior to the establishment of Screen Australia as many as 80% of drama features and 100% of documentary features were produced by NSW and Victoria-based companies. Since 2008, this proportion has fallen to between 30% to 50% of titles – although this cannot be assumed as definitive due to the rapid growth in the number of production companies that do not provide information about where they are headquartered.

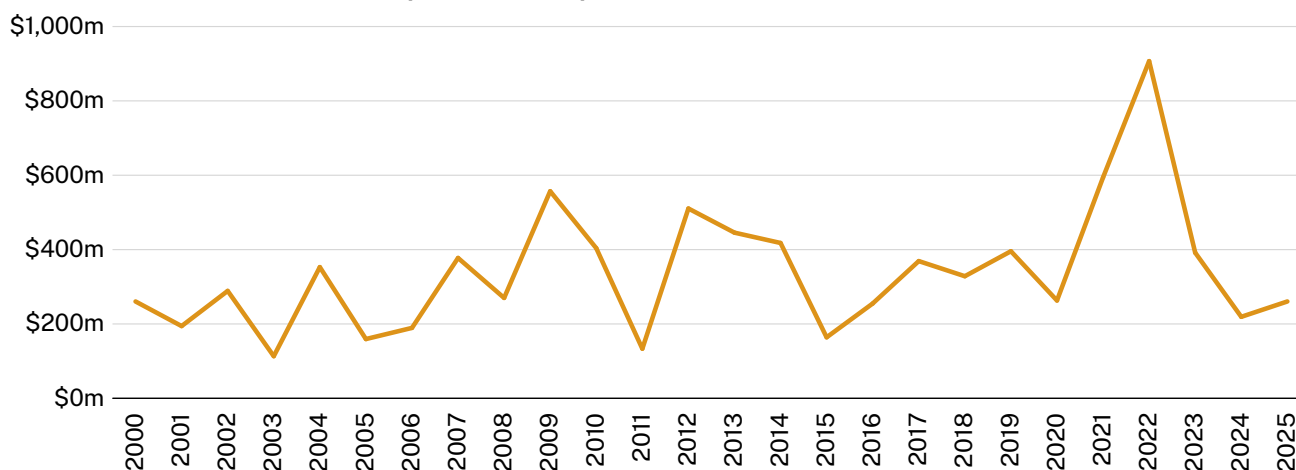
Table 6: Australian drama feature titles and box office (2024/25 dollars)

| Time periods | Titles |       | Box office |            |
|--------------|--------|-------|------------|------------|
|              | Mean   | CAGR  | Mean       | % of total |
| 2000–2008    | 23     | -0.5% | 65.1       | 4.5%       |
| 2009–2019    | 31     | 3.5%  | 62.6       | 4.1%       |
| 2020–2024    | 40     | 9.0%  | 43.8       | 5.3%       |

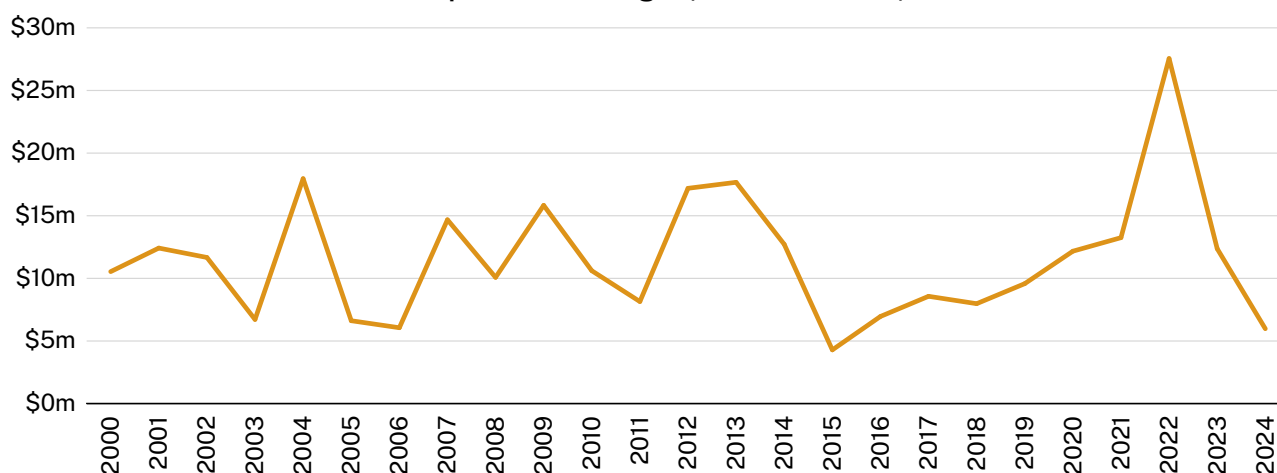


**Figure 22: Australian drama feature films, 2000 to 2024****a. Number of first release drama feature titles**

Source: Screen Australia custom dataset.

**b. Australian drama feature film production expenditure (2024/25 dollars)**

Source: Screen Australia Drama Report.

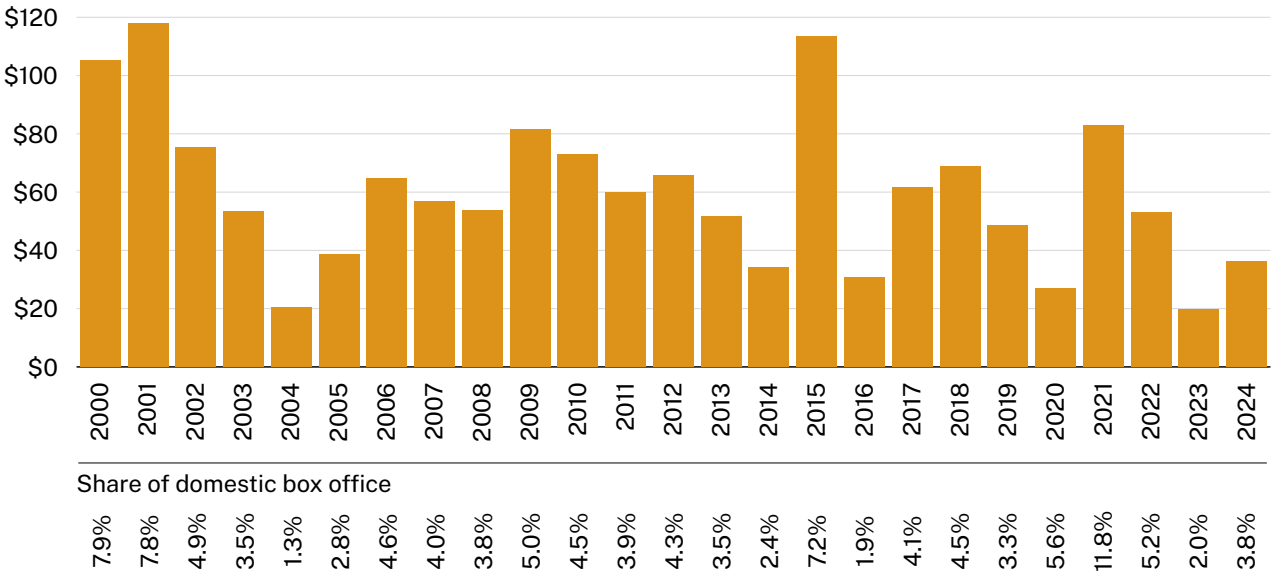
**c. Mean Australian drama feature film production budget (2024/25 dollars)**

Source: Screen Australia Drama Report.

Note: All spend and revenue time series are adjusted for inflation using the CPI (2024/25 = 100 unless otherwise indicated).

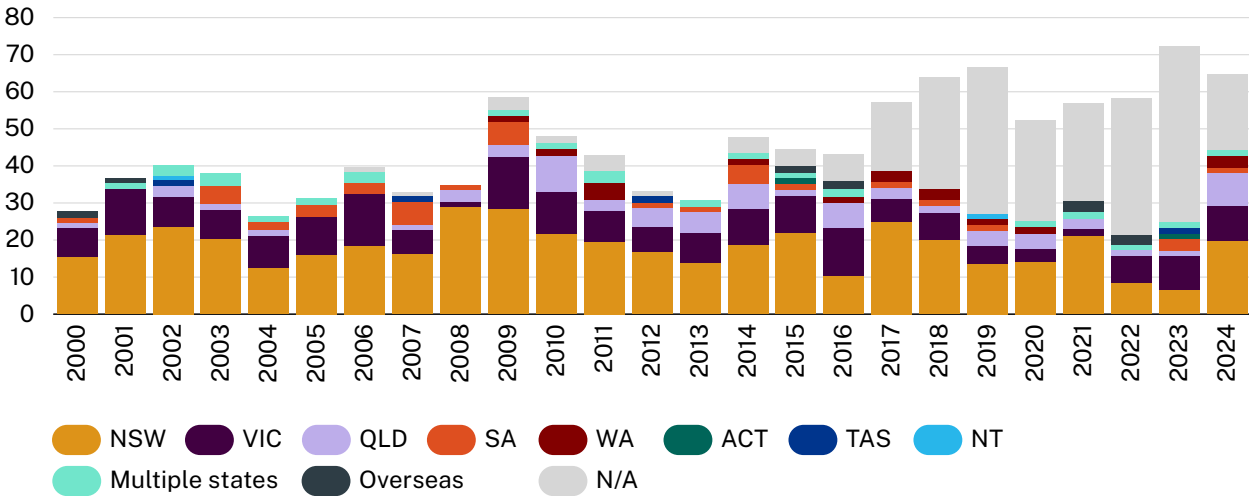
Figure 22: Australian drama feature films, 2000 to 2024

d. Australian box office (2024/25 dollars)



Source: MPDAA and Numero, published by Screen Australia.

e. Feature titles by location of production company



Source: Screen Australia custom dataset.

Note: All spend and revenue time series are adjusted for inflation using the CPI (2024/25 = 100 unless otherwise indicated).



# Australian TV drama production

This section examines Australian TV drama titles over three time periods to show how broadcaster business models responded to the impacts of digitisation and globalisation, and the resulting impact on broadcaster demand for Australian TV drama. These are:

- from 2000 to 2013 as Australian free-to-air broadcasters adjusted to digitisation
- from 2014 to 2019 as the TV industry was forced to face competition from international streamers and online services
- 2020 to the present, as the new paradigm became the norm.

Between 2000 and 2013, the industry was adjusting to the **increased number of broadcast channels** made possible with the digitisation of the broadcasting services spectrum. During this period, **the number of Australia drama titles produced each year was relatively steady, while broadcast hours were in decline**: first release titles averaged approximately 31 each year while broadcast hours fell by an average of 3.0% per year (Figure 23a and Figure 23b, Table 7).

**Commercial broadcasters were also reducing their investments in Australian drama.** In the early 2000s commercial broadcasters were unable to leverage their new multichannels to grow their advertising revenue as digital platforms captured a growing share of Australian advertising spend. As commercial broadcasters began to lose the advertising income they had enjoyed for decades and that had funded a predictable pipeline of Australian drama commissions, they lost their incentive to invest in drama.

Before digitisation, commercial broadcasters regularly commissioned more drama than required under the drama sub-quota because drama had reliably attracted large audiences whose attention could be profitably sold to advertisers. As audiences fragmented, with the rapid popularity of streamer content overwhelmingly based around drama, **commercial broadcasters shifted their preferences towards programming that could attract a mass audience**: time-critical live events, sports, news and current affairs and reality TV.<sup>39</sup>

Following the review of the Australia Content Standard for Commercial TV<sup>40</sup> conducted between 2000 and 2003, the media regulators the ABA and ACMA adjusted the points system for first-release Australian TV drama to reflect changes in licence fees for drama programming. In 2003, for example, the ABA wrote that it proposed to “increase incentives for commercial TV licensees to broadcast more expensive series, miniseries and telemovies. These programs are popular with audiences but involve considerable expense and risk for broadcasters”.<sup>41</sup> Since then, both titles and hours of drama broadcast by commercial services have fallen as drama investment became commercially unsustainable and the federal government reduced the drama sub-quota and adjusted the points system.<sup>42</sup>

The ABC was better placed than the commercial broadcasters to adapt to multichannelling as it had been an early adopter of digital broadcasting technology with its investments shaped by public service rather than commercial imperatives. It had also benefited from budget increases in 2009/10 and 2011/12 that allowed it to increase its expenditure on drama and pursue a strategy of commissioning First Nations stories.<sup>43</sup> Australia's only subscription platform during this period, Foxtel, commissioned minimal drama, preferring to direct its New Eligible Drama Expenditure obligation to feature film and investments in drama series commissioned by commercial TV broadcasters.<sup>44</sup>

39 Potter A and McCutcheon M 2025, *Australian Cultural Policy Unravelling: The Digital Demise of National Television Drama*, Routledge, Oxon and New York, p. 44–49.

40 The Australian Content Standard for Commercial Television Licensees was in force between 2000 and 2020, replaced by the Australian (Content and Children's Television) Standards 2020, which commenced from 1 January 2021.

41 ABA 2002, “Final draft of Australian content standard for television: Proposed changes to the Australian content standard”, [ABA Update](#).

42 Note that the majority of commercial drama broadcast hours are for the serials *Home and Away* and *Neighbours*, together accounting for more than 200 first release broadcast hours each year until *Neighbours* finished its run on regulated commercial FTA Australian TV on July 28, 2022.

43 Potter A and McCutcheon M 2025, *Australian Cultural Policy Unravelling: The Digital Demise of National Television Drama*, Routledge, Oxon and New York, p. 45.

44 McCutcheon M 2006, *Is Pay TV Meeting its Promise?*

**Table 7: First release Australian adult TV drama titles, broadcast hours and average rates of change**

| Broadcaster type            | Time periods | Titles           |                               | Broadcast hours |                               |
|-----------------------------|--------------|------------------|-------------------------------|-----------------|-------------------------------|
|                             |              | Mean title count | Average annual rate of growth | Mean hours      | Average annual rate of growth |
| Commercial broadcasters     | 2000–2013    | 17               | -3.8%                         | 412             | -3.6%                         |
|                             | 2014–2019    | 16               | 3.6%                          | 291             | -0.9%                         |
|                             | 2020–2024    | 10               | -16.9%                        | 229             | -7.7%                         |
| Public service broadcasters | 2000–2013    | 11               | 6.2%                          | 60              | -0.3%                         |
|                             | 2014–2019    | 21               | 0.6%                          | 84              | -1.2%                         |
|                             | 2020–2024    | 13               | 0.1%                          | 57              | 1.4%                          |
| Subscription TV             | 2000–2013    | 3                | 1.1%                          | 22              | 4.2%                          |
|                             | 2014–2019    | 5                | 12.3%                         | 35              | 7.1%                          |
|                             | 2020–2024    | 2                | -5.1%                         | 8               | -19.3%                        |
| SVOD                        | 2015–2020    | 3                | 22.3%                         | 17              | 1.6%                          |
|                             | 2020–2024    | 14               | 38.8%                         | 81              | 53.8%                         |
| Online                      | 2015–2020    | 11               | 22.0%                         | 9               | 22.0%                         |
|                             | 2020–2024    | 18               | -6.2%                         | 29              | 22.8%                         |
| All                         | 2000–2013    | 31               | 0.8%                          | 489             | -3.0%                         |
|                             | 2014–2019    | 53               | 9.7%                          | 431             | 0.3%                          |
|                             | 2020–2024    | 57               | 2.3%                          | 403             | 4.4%                          |

Source: Screen Australia custom dataset.

Between 2014 and 2019, new streaming services entered the Australian market and YouTube developed as a platform for distributing drama, forcing a globalisation of the Australian drama sector and increased competition. **Local drama became a means for broadcasters to compete with each other**, to attract audiences to sell to advertisers and to appeal to subscribers. This resulted in a sharp increase in the number of drama titles commissioned each year, which grew at an average annual rate of 9.7%, but not in broadcast hours as limited series became the dominant model.

All broadcaster types grew their drama commissions over this period, but with different business motivations driving demand. **Commercial broadcasters** commissioned a similar number of drama titles, but reduced their average yearly commissioned hours by nearly one third, favouring shorter drama series<sup>45</sup> that had the dual benefit of earning more drama sub-quota points under the Australian Content Standard and freeing up time slots for new and extremely popular reality TV programming. Despite not receiving continued funding to support drama, **public service broadcasters** commissioned more drama titles than other broadcaster types and more non-serial broadcast hours. **Foxtel**, arguably the broadcaster most directly threatened by the arrival of Netflix and Stan in 2015, doubled its drama production levels under a five-year plan for creative high-end quality drama that would simultaneously drive subscriptions and sit comfortably alongside the HBO dramas in its catalogue offerings.<sup>46</sup>

45 Lotz A D, Potter A, McCutcheon M, Sanson K & Eklund O 2021, *Australian Television Drama Index, 1999–2019*, Queensland University of Technology.

46 Windsor H 2016, 'The Gatekeeper', *Inside Film*, August–September pp. 37–38; Turnbull S and McCutcheon M 2024, *Transnational TV Crime: From Scandinavia to the Outback*, Edinburgh University Press, Edinburgh, p. 75.





**This period also saw the rapid emergence of drama on streaming services and other online platforms.**

The value of drama for these broadcaster types is distinctively different. Customers will only purchase streamer subscriptions if they perceive them to be value for money, so they are therefore more likely than advertiser-funded commercial services to offer content that is highly valued by potential subscribers.<sup>47</sup> **During these early years of streamer services in Australia, they competed vigorously to attract new customers,** acquiring existing local drama, co-commissioning new drama and investing in their own commissions. **This led to rapid growth, with their Australian titles growing at an average of 22% per year (Figure 23).**

**Online drama, on the other hand, typically has starkly different characteristics to other TV drama.** Generally, it is a short-form format, often web series or sketches running for 10 minutes or less. The content reported here by Screen Australia in its titles database does not capture the full breadth of short-form online drama made in this period, and mostly includes titles funded under development programs including Screen Australia's Multiplatform Drama Program, and its Fresh Blood and Skip Ahead funding programs, which are initiatives with the ABC and YouTube respectively.<sup>48</sup> As a comparison, between the years of 2012 and 2019, each year an average of 47 unique web series were submitted to international and local web series festivals by Australian creators.<sup>49</sup>

**While the total value of Australian TV drama for different classes of broadcaster may not have altered over the period since 2020, market conditions and regulatory changes have impacted broadcaster demand.** While total TV drama titles and hours have continued to increase (at average annual rates of 2.3% and 4.4% respectively), the commercial broadcasters and Foxtel have reduced their commissioning of local TV drama on their broadcast channels. In 2020 the federal government modified the sub-quota point system in response to COVID-19 production restrictions, giving commercial broadcasters greater flexibility in how they met their already-reduced Australian drama obligations – for some, this meant acquitting their obligations through a single series of a long-running serial. Where they have the option, the commercial broadcasters

and Foxtel have increasingly shifted their drama investment towards co-commissions with their own streaming platforms. This led to an immediate reduction in drama on commercial TV: titles fell by an annual average of 17% and hours by 7.7%, with the number of titles offered each year more than halving between 2020 and 2024. By 2024, 98% of Network Ten and the Seven Network's total drama hours were made up of *Home and Away* and *Neighbours*.<sup>50</sup>

**Foxtel's drama commissions also fell over this period,** by an average annual rate of 5.1% for titles and 19% for broadcast hours. This reduction is also seen in ACMA's New Eligible Drama Expenditure obligation reports, which show Foxtel's spend on new Australian drama falling from between \$65 and \$70 million in 2016 and 2017 to \$32.4 million in 2023/24 (see Figure 27), and reflects how industrial responses to digitisation and globalisation have affected the subscription TV sector. Foxtel's previous channel providers such as Disney have established their own SVOD services, thereby reducing Foxtel's overall drama expenditure along with its Australian drama obligation. Instead, Foxtel is commissioning drama for its own SVOD service, BINGE, contributing to the continued growth of drama launched on SVOD services.

**TV drama expenditure growth has been driven by rapid growth in premium SVOD drama commissions and their budgets. Average per-hour budgets for free-to-air drama series have been stable in Australia since the early 2000s in real terms.** Screen Australia's annual Drama Report shows a rapid jump in expenditure on local TV drama production in 2021/22 (Figure 23c). This is due to two factors: a rapid increase in the number of SVOD titles in production from nine in the previous year to 30, combined with the continuation of the high budgets for these series (Figure 23d). With subsequent falls in expenditure due to the commercial broadcasters' retreat from drama and budgets for SVOD series as much as five times higher than for local free-to-air networks, by 2024 75% of all Australian TV drama expenditure was on SVOD series.

47 McCutcheon M and Lotz AD 2024, Video distribution. In MD Noel (ed.) *Elgar Encyclopedia on the Economics of Competition, Regulation and Antitrust*, Edward Elgar Publishing.

48 Ryan MD 2025, 'From digital originals to skip ahead: online content and web series policy rationales in Australia', *Media International Australia*, 0(0).

49 Ellingson S, Ryan M.D and Turnbull S 2026, *The Web Series Experiment*, Taylor & Francis.

50 *Neighbours* was cancelled for the second time in 2025, after being picked up by Prime Video following its first cancellation in 2023.

*The Newsreader*

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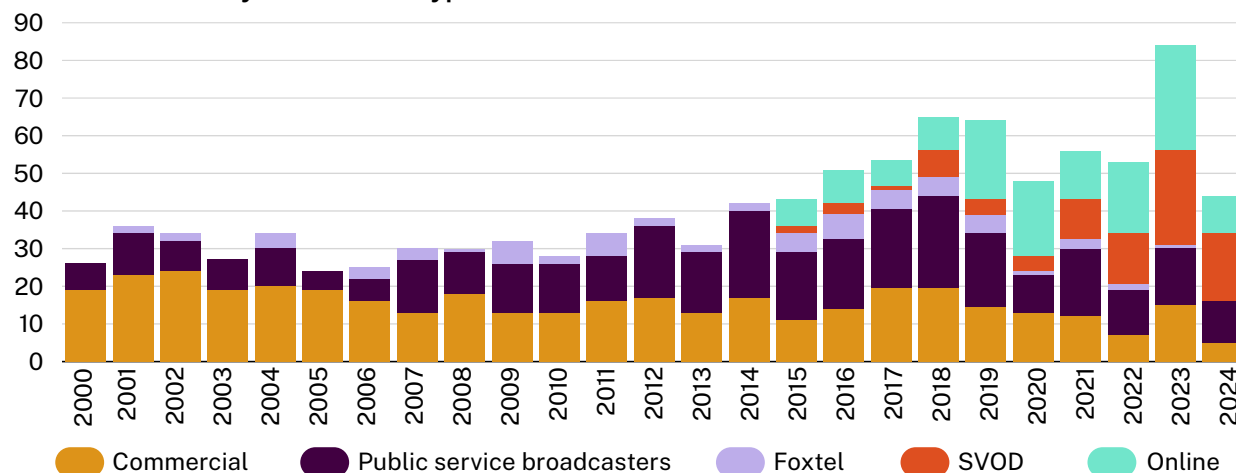


**Despite the globalisation of the TV distribution market, Australia's production sector appears to have remained primarily headquartered in NSW.**

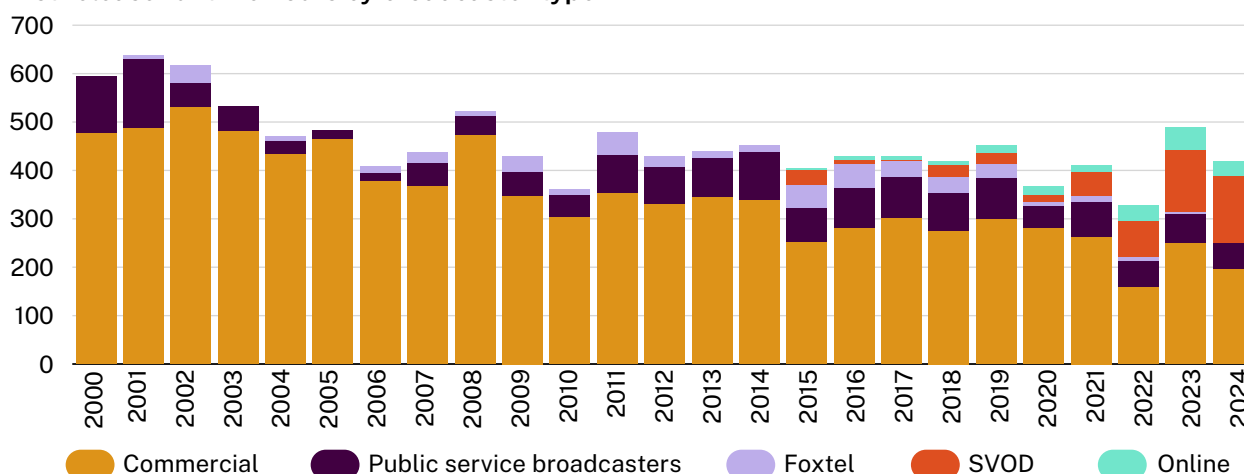
Since 2000, the proportion of broadcast hours created by NSW production companies has been consistently around 60% and hours by Victorian companies has been around 30%, suggesting that most ongoing work – and therefore most permanent jobs – associated with Australian TV drama production are located in these two states ([Figure 23e](#)). This suggests that state government production incentives may be bringing short-term work to new locations without persuading businesses to establish themselves away from the hubs of Sydney and Melbourne.

**An additional trend affecting drama production is that more production companies are making less Australian drama<sup>51</sup>.** Commercial broadcasters are contracting with fewer production companies, while the ABC is doing the opposite, spreading its commissions over as many producers as possible. This raises questions about sustainability – producers who no longer receive drama commissions from commercial broadcasters have turned to light entertainment, while the producers who work for the ABC cannot rely on it for ongoing work.

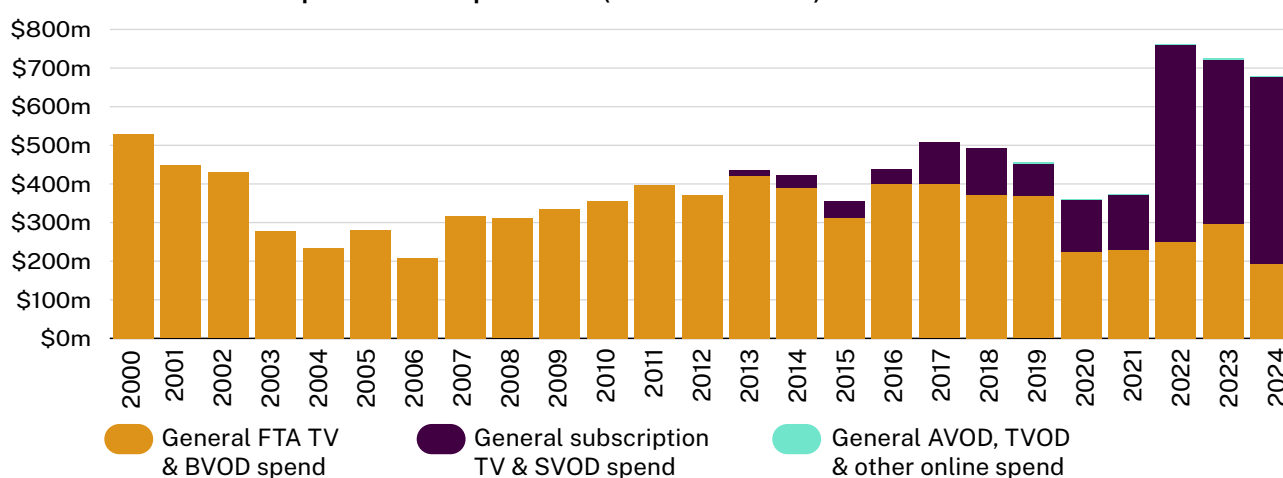
51 Lotz A D, Potter A, McCutcheon M, Sanson K & Eklund O 2021, *Australian Television Drama Index, 1999–2019*, Queensland University of Technology.


**Figure 23: Australian adult TV drama, 2000 to 2024**
**a. First release titles by broadcaster type**


Source: Screen Australia custom dataset.

**b. First release runtime hours by broadcaster type**


Source: Screen Australia custom dataset.

**c. Australian TV drama production expenditure (2024/25 dollars)**


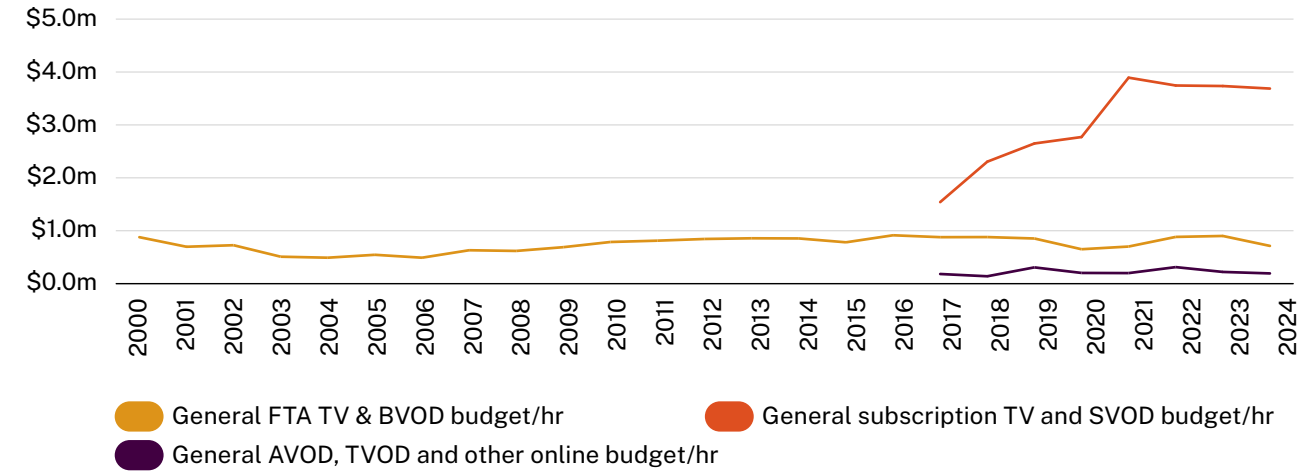
Source: Screen Australia Drama Report.

Note: All spend and revenue time series are adjusted for inflation using the CPI (2024-25 = 100).



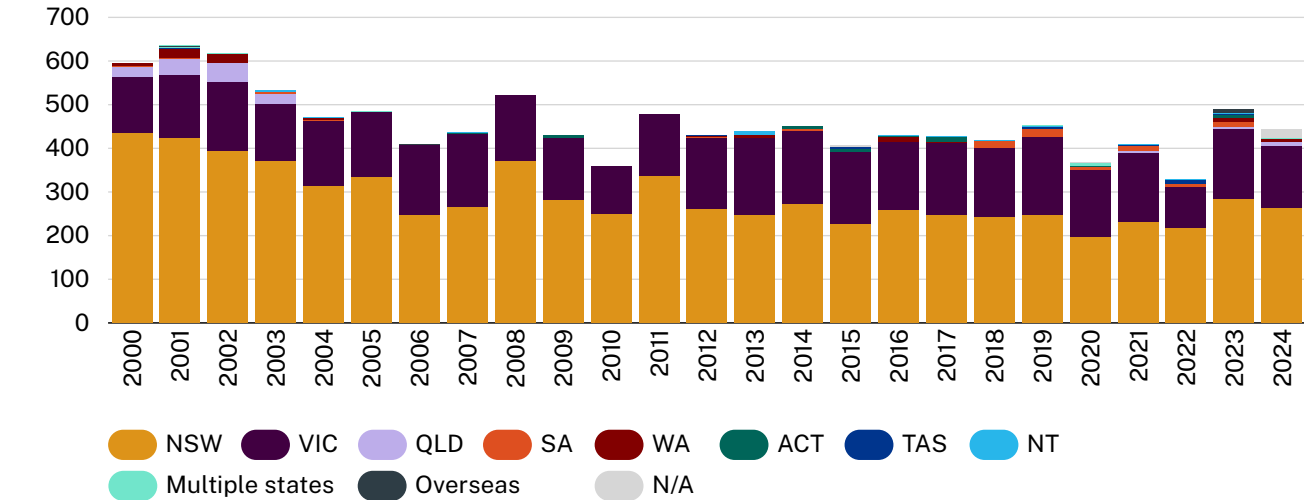
Figure 23: Australian adult TV drama, 2000 to 2024

d. Mean production budget per hour (2024/25 dollars)



Source: Screen Australia Drama Report.

e. First release runtime hours by location of production company



Source: Screen Australia custom dataset.

Note: All spend and revenue time series are adjusted for inflation using the CPI (2024-25 = 100).





## Australian children's TV drama production

Children's TV drama is significantly more at risk of replacement than other types of domestic programming and therefore is particularly vulnerable to market failure. The value of children's drama to commissioning broadcasters varies according to their different business models.

**For advertiser-funded commercial services, programming children's content severely restricts the ability to generate a revenue from the timeslot.** Audiences are small and increasingly fragmented across digital platforms, and the advertising permitted during children's and preschool periods is capped or prohibited, so there is little incentive for commercial broadcasters to invest in age-appropriate content. The incentive for **subscription and SVOD services** to invest in children's content takes a different form: offering children's content has a role in encouraging parents to subscribe to a curated service that provides a safe viewing environment for children. For **public service broadcasters**, offering children's content fits with their charter obligations to inform and entertain all Australians and to reflect cultural diversity.

These preferences are a complete switch of the market structure that developed pre-digitisation. **Over more than 30 years, from the introduction of the Children's TV Standard in 1979 to the 2010s, the commercial broadcasters were the most significant sources of demand for Australian children's TV drama** (Table 8, Figure 24a). Put in place to assuage concerns about the quality of programming offered to Australian children and lift the "educational" value of TV generally, the Standard ensured access to quality children's content on commercial TV (including a minimum of 25 hours of new drama per year) and regular pipeline of work that allowed for the development of a specialised Australian children's drama production sector that exported Australian stories to the world. Because of its high cost and low profitability, local broadcasters were unwilling to fully fund children's drama. Instead, producers became reliant on international pre-sales for financing, making children's drama a reliably successful screen export.<sup>52</sup>

While the Australian children's drama sub-quota was in place, between 2000 and 2020, the number of titles and hours of Australian children's TV drama on commercial services was relatively stable, averaging nine titles and 84 hours each year (Figure 24a and Figure 24b). Between 2000 and 2020, commercial broadcasters were the primary source of demand for Australian children's TV drama, commissioning 62% of titles and 72% of broadcast hours.

In 2020, following years of lobbying by commercial broadcasters and using changing viewing habits as a rationale, **the federal government removed the longstanding Australian children's content quotas** as part of broader screen content reforms. While children's drama can still be used to acquit commercial TV broadcaster's overall local content obligation, removing the sub-quota caused a sharp decline in the production and broadcast of Australian children's content on commercial FTA television.<sup>53</sup> By 2024, children's drama on commercial TV amounted to a total of one title and seven broadcast hours.



52 Potter A 2024, 'Supporting children's drama in the on demand age: Assessing the efficacy of forty years of Australian policy frameworks and funding schemes', *Critical Studies in Television*, 19(2), 201-218.

53 Australian Children's Television Cultures 2025, *Australian Children's Television Cultures Summary Report 2021-2024*, Swinburne University of Technology and RMIT University.



In contrast, the public service broadcasters – and the ABC in particular – have positioned themselves as Australia’s most important providers of culturally-relevant children’s content. The ABC’s 2009–12 triennial budget provided it with \$67 million in tied funding to establish a children’s channel, ABC ME, which launched in December 2009 and quickly became the most popular TV service for children aged five to 12. ABC ME’s need for new children’s live action drama, commissioned from a wider range of production companies, to some extent masked the decline in live action children’s drama commissioned by commercial broadcasters.<sup>54</sup> Public service broadcasters have increased their children’s TV drama commissions from four titles and 24 hours a year between 2000 and 2009, before the launch of ABC ME, to six titles and 32 hours a year up to the removal of the Standard in 2020, to nine titles and 36 hours a year between 2021 and 2024. However, while public service broadcaster commissions have increased overall, since the Standard was removed, live action dramas have continued to be displaced by animation: public service broadcaster new releases of live action children’s drama fell from six in 2020 to one in 2024, while animations increased from three to six.

The flow-on effects of the removal of the Australian children’s quota and increasing animation commissions have had a substantial impact on the production industry, with established producers leaving the sector. The number of production companies releasing children’s TV drama fell by more than 50% from a maximum of 16 in 2019 to seven in 2024,<sup>55</sup> evidence that producers of Australian children’s drama have either left the industry or adapted their businesses.

Table 8: First release Australian children’s TV drama feature titles and broadcast hours, 2000 to 2024

| Broadcaster type            | Time periods | Titles                        |                               | Broadcast hours |                               |
|-----------------------------|--------------|-------------------------------|-------------------------------|-----------------|-------------------------------|
|                             |              | Mean title count <sup>a</sup> | Average annual rate of growth | Mean hours      | Average annual rate of growth |
| Commercial broadcasters     | 2000–2020    | 9                             | -1.7%                         | 81              | -0.2%                         |
|                             | 2021–2024    | 2                             | -29.8%                        | 13              | -32.8%                        |
| Public service broadcasters | 2000–2020    | 5                             | 3.8%                          | 27              | 4.9%                          |
|                             | 2021–2024    | 8                             | 3.3%                          | 35              | -2.1%                         |
| Subscription TV             | 2000–2020    | <1                            | n.a.                          | 2               | -2.2%                         |
|                             | 2021–2024    | 0                             | n.a.                          | 0               | n.a.                          |
| SVOD                        | 2017–2024    | 1                             | n.a.                          | 6               | -18.6%                        |
| Online                      | 2017–2024    | 1                             | n.a.                          | 2               | -30.8%                        |
| All                         | 2000–2020    | 14                            | 0.4%                          | 112             | 1.0%                          |
|                             | 2021–2024    | 12                            | -5.4%                         | 65              | -16.3%                        |

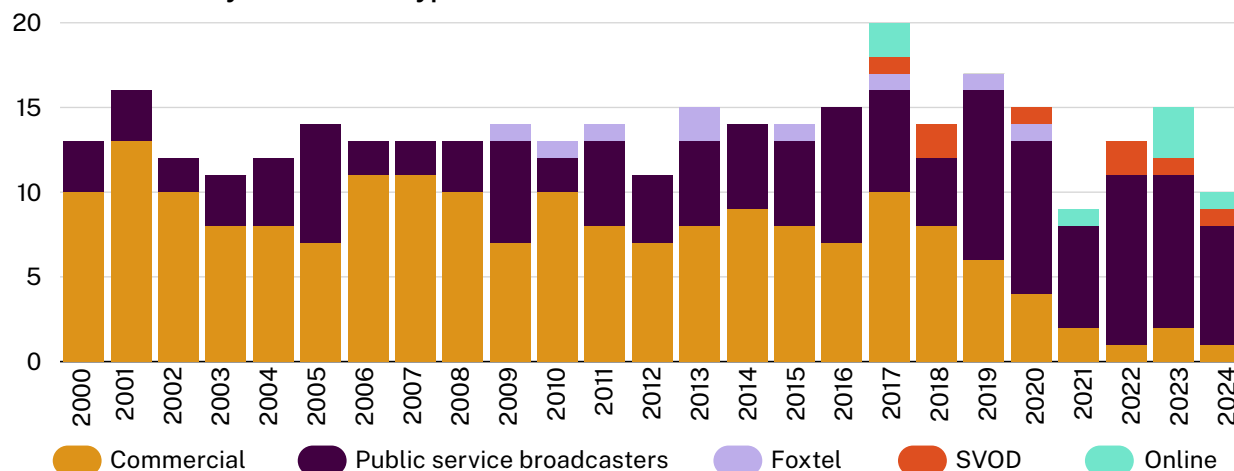
Note: a. Mean titles are rounded to the nearest whole number and do not sum to the total.  
Source: Screen Australia custom dataset.

54 Lotz A D, Potter A, McCutcheon M, Sanson K & Eklund O 2021, *Australian Television Drama Index, 1999–2019*, Queensland University of Technology.  
55 Based on author’s update of data presented in Lotz A D, Potter A, McCutcheon M, Sanson K & Eklund O 2021, *Australian Television Drama Index, 1999–2019*, Queensland University of Technology.



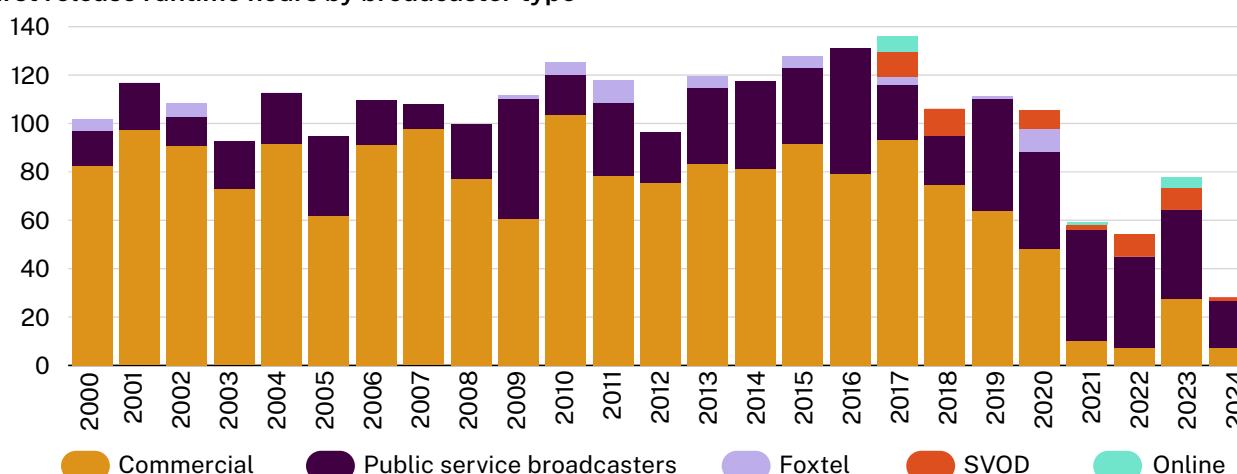
Figure 24: Australian children's drama, 2000 to 2024

a. First release titles by broadcaster type



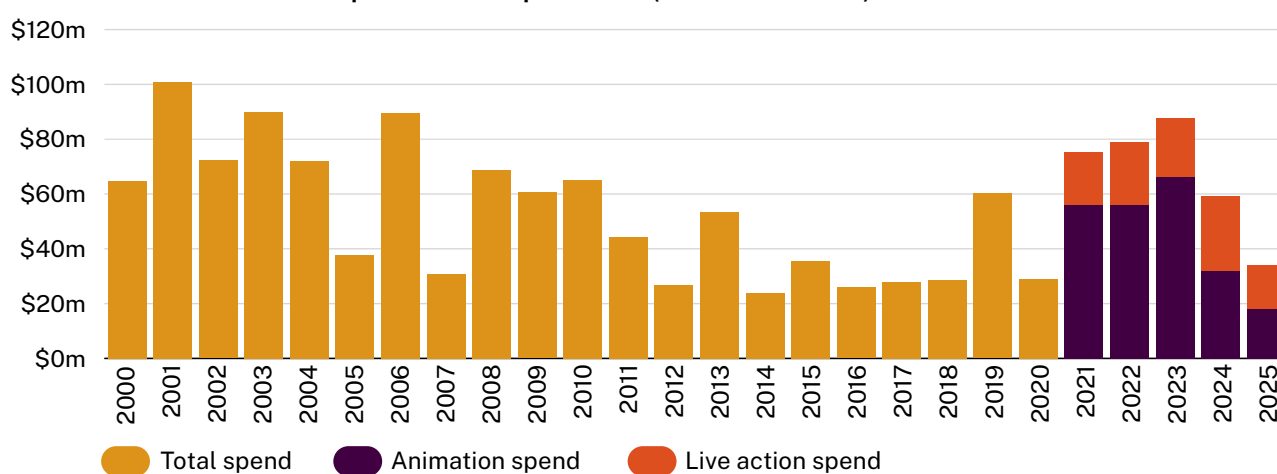
Source: Screen Australia custom dataset.

b. First release runtime hours by broadcaster type



Source: Screen Australia custom dataset.

c. Australian children's drama production expenditure (2024/25 dollars)



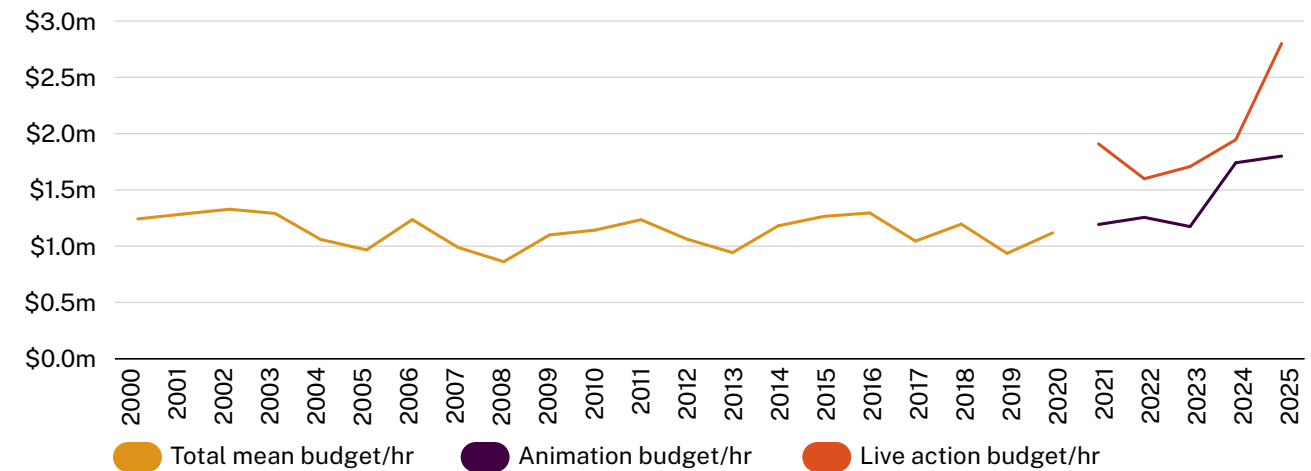
Source: Screen Australia Drama Report.

Note: All spend and revenue time series are adjusted for inflation using the CPI (2024-25 = 100 unless otherwise indicated).



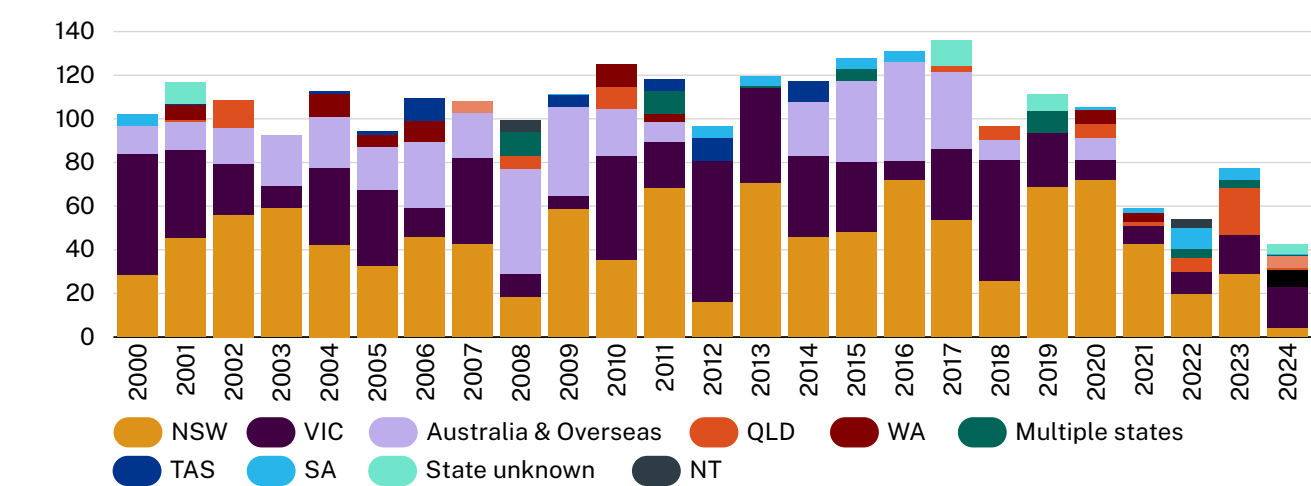
Figure 24: Australian children’s drama, 2000 to 2024

d. Mean production budget per hour (2024/25 dollars)



Source: Screen Australia Drama Report.

e. First release runtime hours by location of production company



Source: Screen Australia custom dataset.

Note: All spend and revenue time series are adjusted for inflation using the CPI (2024–25 = 100 unless otherwise indicated).





# Australian TV documentary production

**The definition of what constitutes a documentary is extremely broad.** Commercial TV broadcasters and public service broadcasters tend to sit at either end of a spectrum. Commercial broadcasters commission documentaries that are close to light entertainment in style, while public service broadcaster documentaries place heavier emphasis on documentaries that inform as well as entertain.

**Over the past 25 years, the total number of documentary titles released in Australia each year has decreased**, with increases in theatrical titles not compensating for falls in TV releases. **Documentary series dominate** documentary production in Australia, with the number of titles broadcast each year stable between 2000 and 2024 ([Table 9](#)). Since 2016, the numbers of documentary one-offs on Australian broadcasting services has more than halved, while increases in TV features have not compensated for their decline.

**Commercial TV broadcasters are offering fewer documentaries, but decreases in broadcast hours are not as significant as for drama.** Historically, commercial TV licensees were required to meet a sub-quota of 20 hours of first-release Australian documentaries each year. The sub-quota operated very much as a safety net, with licensees often meeting but not exceeding the requirement in any given year. From the 1990s until 2020, when 2020 screen content reforms removed the documentary sub-quota, commercial TV broadcasters commissioned more documentary series and fewer shorts and documentary features, with the result that up to 2020, commercial documentary titles had fallen by an annual average of 3.6%, while hours had increased by an average 1.3% per year ([Table 9](#)). In response to the removal of the documentary sub-quota and the introduction of the new points system, both title counts and hours fell, by a respective 36% and 16% between 2020 and 2021. But these falls have not continued since 2021, suggesting that there is a business case for commercial TV broadcasters to continue to offer documentaries to their audiences: despite increases in documentary budgets, they remain less costly than TV drama and are therefore likely to be more profitable in any given time slot.

**The various iterations of the Australian content standard have never specified the type of documentary content that commercial TV licensees are required to broadcast.** This means that the documentaries commissioned by

commercial broadcasters reflect the demands of their market – they are popular, allowing them to maximise advertising returns, and cost broadcasters as little as possible, allowing them to maximise profits. These are documentaries designed to primarily entertain, rather than inform.

**Public service broadcasters offer more documentary content than any other domestic distribution pathway** and are responsible for more than half of first-release documentary titles and hours offered to Australian audiences. While public service broadcasters are not required to meet any kind of quota for documentary programming, it aligns with the charter requirements of both the ABC and SBS, which provide a mandate for the broadcasters to educate, inform and entertain. Documentaries are also relatively low cost (particularly when compared with drama, see [Figure 25d](#) and [Figure 23d](#)) and allow public service broadcasters to commission content from a wide range of creators, thereby ensuring that they can offer a diverse range of content from a diverse range of production companies.

**Around 2016, coinciding with the entry of streamers in Australia's broadcasting ecosystem, public service broadcasters appear to have shifted their documentary acquisition preferences.** Before 2016, the number of titles they were offering was decreasing at an annual average rate of 3.5%, while hours were increasing at an average rate of 4.9% as they programmed fewer shorts and more series. From 2016 onwards this changed, with both the numbers of titles and hours decreasing, while public service broadcasters continued to favour series.

**Overall, the total number of first-release documentaries offered by subscription TV services, streamers and online platforms did not change between 2000 and 2024, with falling numbers of documentaries on subscription TV being almost perfectly replaced by new media services.** This is a different scenario to drama, where streamers have more than exceeded recent commercial drama commissions. Here it appears that subscriber demand for documentary content may be somewhat inelastic – to attract subscribers, subscription and online services need only offer minimum amounts of documentary programming.

**Table 9: First release Australian documentary titles and broadcast hours**

| Broadcaster type            | Time periods | Titles                        |                               | Broadcast hours |                               |
|-----------------------------|--------------|-------------------------------|-------------------------------|-----------------|-------------------------------|
|                             |              | Mean title count <sup>a</sup> | Average annual rate of growth | Mean hours      | Average annual rate of growth |
| Commercial broadcasters     | 2009–2020    | 38                            | -3.6%                         | 119             | 1.3%                          |
|                             | 2020–2021    | 34.5 <sup>b</sup> –24         | -36.3%                        | 131–112         | 15.9%                         |
|                             | 2021–2024    | 27                            | 1.4%                          | 121             | -2.1%                         |
| Public service broadcasters | 2009–2015    | 132                           | -3.5%                         | 217             | 4.9%                          |
|                             | 2016–2024    | 93                            | -4.6%                         | 188             | -1.4%                         |
| Subscription TV             | 2009–2015    | 29                            | 22.1%                         | 85              | 32.8%                         |
|                             | 2016–2024    | 12                            | -7.5%                         | 56              | -2.4%                         |
| SVOD                        | 2017–2024    | 6                             | 36.2%                         | 19              | 43.5%                         |
| Online                      | 2016–2024    | 7                             | 22.1%                         | 7               | 53.6%                         |
| Theatrical feature          | 2009–2015    | 7                             | 3.6%                          | 9               | 4.8%                          |
|                             | 2016–2024    | 24                            | 15.2%                         | 34              | 14.2%                         |
| TV feature                  | 2009–2015    | 30                            | -1.4%                         | 35              | -0.2%                         |
|                             | 2016–2024    | 20                            | 4.9%                          | 26              | 7.4%                          |
| TV series                   | 2009–2015    | 73                            | 5.8%                          | 316             | 7.7%                          |
|                             | 2016–2024    | 72                            | -0.5%                         | 326             | 0.6%                          |
| TV shorts                   | 2009–2015    | 100                           | -7.5%                         | 66              | -6.1%                         |
|                             | 2016–2024    | 51                            | -8.4%                         | 32              | -9.1%                         |
| All TV documentaries        | 2009–2015    | 202                           | -2.1%                         | 417             | 4.6%                          |
|                             | 2016–2020    | 149                           | -5.0%                         | 384             | -0.3%                         |
|                             | 2021–2024    | 136                           | -2.6%                         | 386             | 0.9%                          |
|                             | 2009–2024    | 169                           | -3.8%                         | 399             | -0.3%                         |

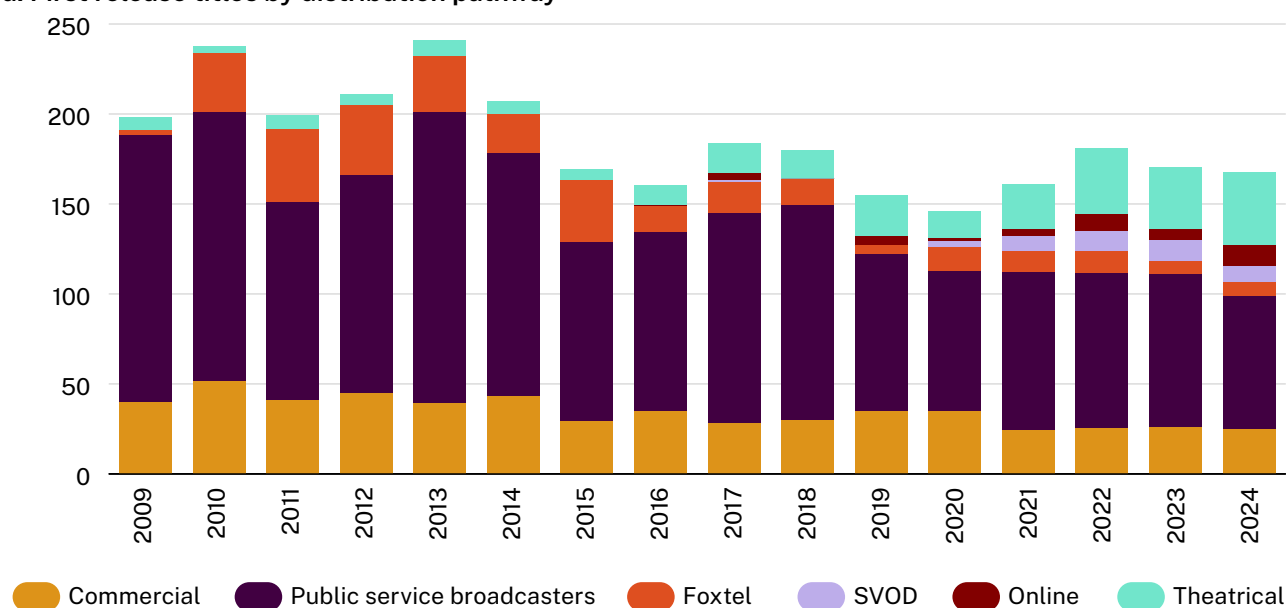
Note a. Mean titles are rounded to the nearest whole number and do not sum to the total.

b. Half a title is recorded where the titles is a co-production with another broadcaster.

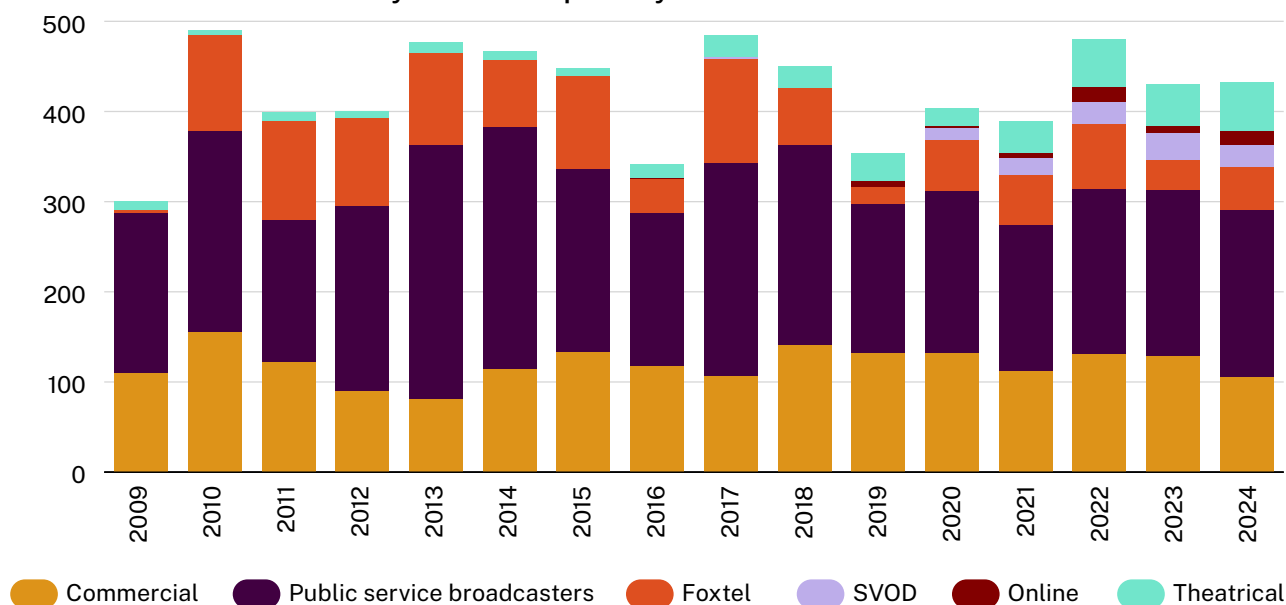
Source: Screen Australia custom dataset.

**Since 2016, the number of theatrical<sup>56</sup> documentary titles and hours released each year has more than tripled.** While growth has been steadily increasing over this period, the most pronounced acceleration has occurred from 2022 onwards. This shift coincides with the removal of documentary subquotas for broadcasters (effective 1 January 2021) and a corresponding decline in documentary TV feature volume, which has fallen at an average annual rate of 33% across the 2009/15 and 2016/24 periods ([Table 9](#)). In this context, alternative financing pathways, such as the 40% Producer Offset for theatrical documentaries, may represent a more accessible route to market than traditional broadcaster commissions.

<sup>56</sup> Theatrical features are defined here as feature documentaries that were produced independently, or were not released on a broadcasting service within a short time of theatrical release.

**Figure 25: Australian TV documentary, 2009 to 2024****a. First release titles by distribution pathway**

Source: Screen Australia custom dataset.

**b. First release runtime hours by distribution pathway**

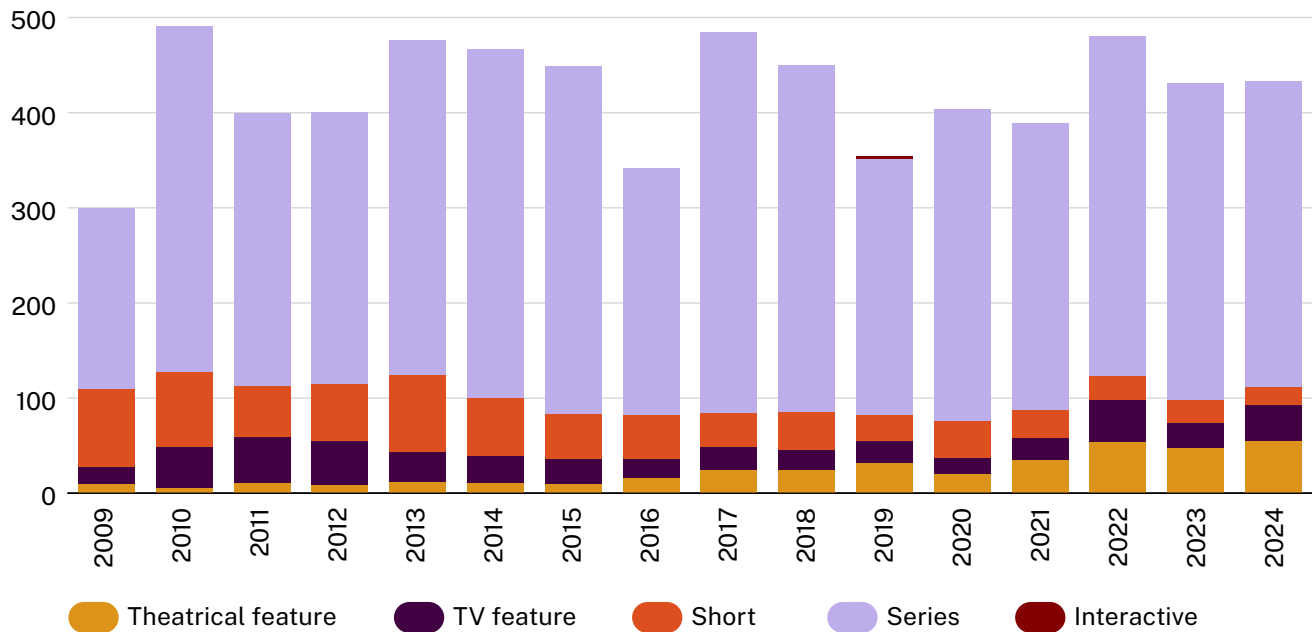
Source: Screen Australia custom dataset.

Note: All spend and revenue time series are adjusted for inflation using the CPI (2024-25 = 100 unless otherwise indicated).



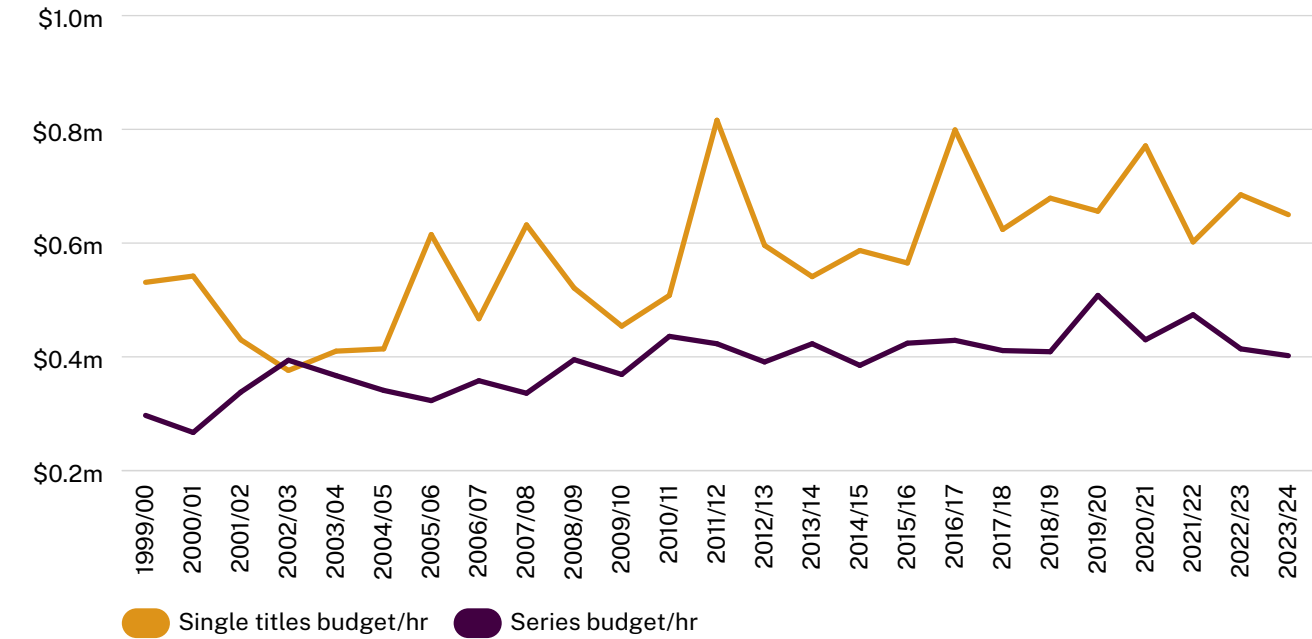
Figure 25: Australian TV documentary, 2009 to 2024

c. Runtime hours by documentary type



Source: Screen Australia custom dataset.

d. Mean production budget per hour (2024/25 dollars)



Source: Screen Australia custom dataset.

Note: All spend and revenue time series are adjusted for inflation using the CPI (2024/25 = 100 unless otherwise indicated).





## Funding Australian screen content

Historically, the most important sources of funding for Australian screen content were free-to-air broadcasters and government incentives. International sales were also an important part of the funding mix for Australian content that had potential to travel – particularly Australian drama, both adult and children’s. As technological change provided capacity for new broadcasting and new media services, so the range of funding sources also increased.

The difference between investment in and expenditure on content can be ambiguous, with a variety of negotiated positions possible with who might own equity and future rights entitlements. This is beyond the scope of this report – what is important to recognise is that equity investments, sales to distributors and sales and pre-sales to broadcasters all form part of the funding web for Australian content, along with government direct and indirect incentives for productions regarded as being of national and regional importance.

This section provides an industry-wide analysis of the sources of funding for Australian content, drawing on data sourced from Screen Australia, the Australian Communications and Media Authority (ACMA) and the Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts (DITRDCSA). It first examines available data on broadcaster acquisitions and investments in local content, then turns to government incentives, focusing on federal government programs.

Note that private investment and local government support are not included in this analysis. Private investment plays a relatively small role in financing Australian screen production compared with other markets where there is a stronger culture of private investment.<sup>57</sup> Local government support for the screen industry is a data gap.

## Broadcaster expenditure on local content

Expenditure by broadcasters on local content can be seen as one indicator of its value to their businesses. Their programming choices and the share of budgets allocated to different types of local content may also suggest how such content is perceived by audiences and the Australian community more broadly, given that commissioning decisions are generally influenced by expectations of audience interest and willingness to watch or pay for access.

### Commercial TV broadcasters

Commercial TV broadcasters are spending less on both Australian content and imported content, even though the ratio of their programming expenditure to total revenue has increased. In 2017, the Australian Communications and Media Authority (ACMA) recommenced publication of the program expenditure data it collects from commercial broadcasting licensees (Figure 26). The time series provides insight into the changing programming strategies of commercial broadcasters: they are spending markedly less on drama (both Australian and overseas) and children’s programming, while continuing to spend on time-critical (“live” or constantly updated) news and current affairs, sport and light entertainment (reality) genres that allow them to maximise audiences in each time slot, and thus profits. Between 2016/17 and 2023/24, total expenditure on Australian content fell from \$2,046.5 million to \$1,627.9 million in 2024/25 dollars, a decrease of 21%. Over this time period, the ratio of commercial TV expenditure on Australian content to total revenue increased from 0.34 to 0.73, as commercial TV earnings fell at a faster rate than their expenditure on local content.<sup>58</sup>

<sup>57</sup> Screen Australia 2025, *Drama Report 2024/25*.

<sup>58</sup> IBISWorld 2024, *Free-to-air Television Industry Report 2023-24* Commercial television network revenue estimates were sourced from IBISWorld 2024.

**Commercial broadcasters are spending less on all Australian content types – except light entertainment and documentary** (Table 10). The ACMA commercial TV broadcaster programming expenditure dataset clearly shows commercial TV broadcasters' retreat from children's content and adult drama. Between 2016/17 and 2023/24 commercial TV licensee expenditure on both content types fell in real terms, by 86% and 69% respectively. Commercial expenditure on Australian documentaries, on the other hand, increased, by a total of 19% over the same time period, but it still represents a relatively small proportion of overall content expenditure, at 1.2% in 2023/24.

**Commercial TV broadcasters are also spending less on overseas drama**, which has fallen from a high of 32% of total program expenditure in 2006/07 to 11% in 2023/24. The content types on which commercial TV broadcasters continue to spend (although at decreasing rates) are local sport, light entertainment and news and current affairs – all of which are time critical and are the types of content most likely to attract the kind of mass audience that allows commercial broadcasters to maximise profits through generating advertising revenues.

**Commercial broadcasters have reduced expenditure on Australian sport content as streamers bid up the cost of rights:** SVODs are directing as much as 30% of their total local content expenditure towards sport (Figure 28). While there are no datasets of sports broadcast hours available to this study, rights migration provides evidence that commercial broadcasters are reducing their sports content as streamers bid up the cost of rights – over the past decade many sports that were once partly or fully broadcast on free-to-air TV are now on subscription TV or SVOD services.<sup>59</sup>

**Despite significant declines in program expenditure, commercial broadcasters continue to maintain their crucial role as the largest source of demand for Australian content.** Despite reducing their expenditure on programming, the 55% Australian content requirement continues to ensure that commercial TV broadcasters maintain an Australian look and feel. As a point of comparison, in 2022/23 expenditure on Australian programming reported by commercial TV licensees was the equivalent of 86% of total screen production and post-production sector GVA.

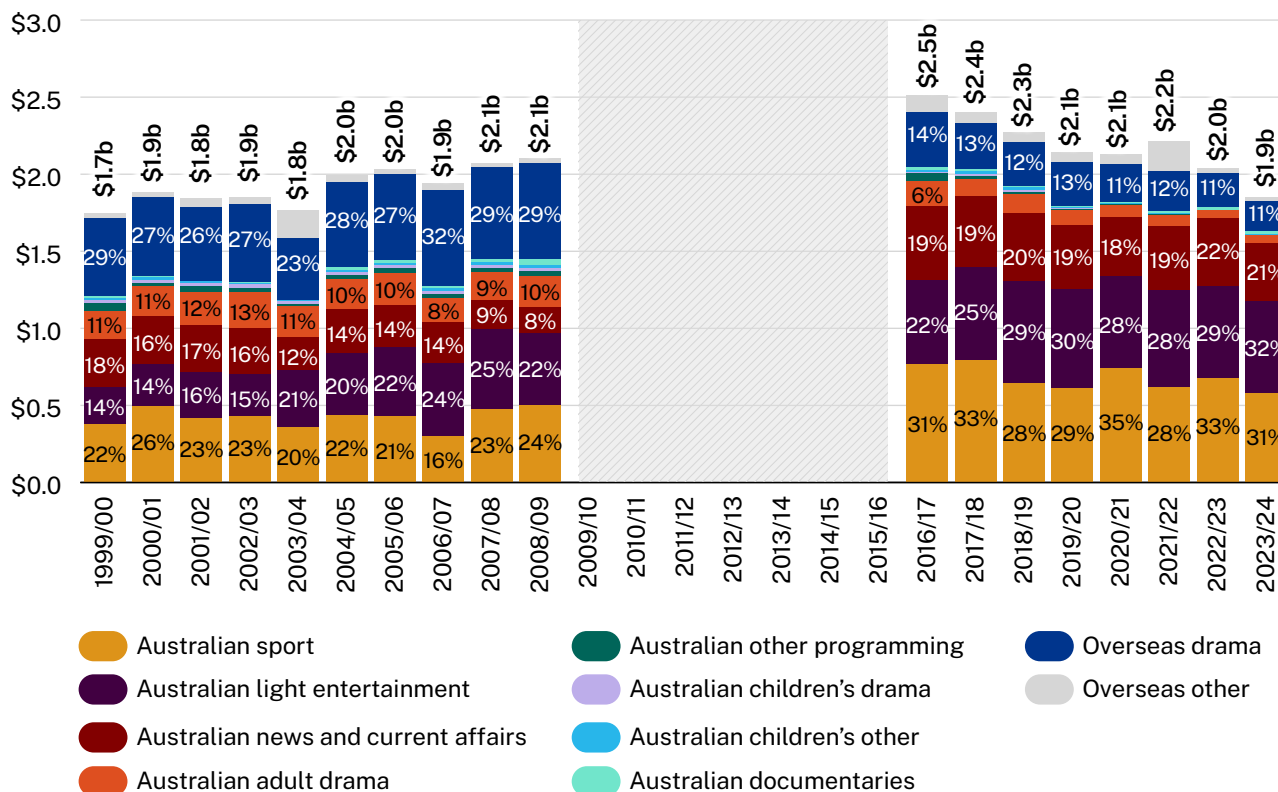


Five Bedrooms

59 For examples see: WWOS staff 2020 November 12, "Nine and Stan Sport announce deals with Wimbledon and Roland Garros", *Nine*, Middleton D 2023 January 03, "New \$1.5 billion broadcast deal confirmed for CA", *Cricknet.com.au*, Laidlaw K 2025 October 05, "A-LEAGUE MEN'S returns for 2025/26 season on 10 and PARAMOUNT+", *TV Blackbox*.



**Figure 26: Programming expenditure by commercial TV broadcaster licensees, 1999/00 to 2023/24 (2024/25 dollars)**



Note: The ACMA did not publish commercial TV programming expenditure data between 2009/10 to 2015/16. Time series is converted to 2024/25 dollars using the CPI.

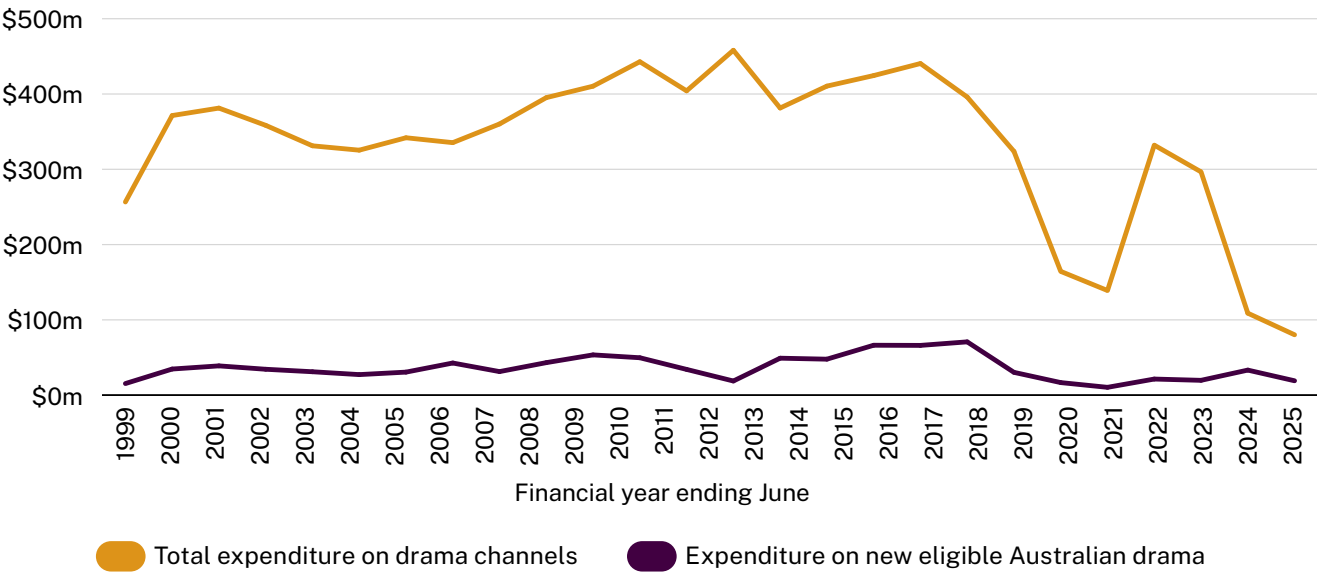
Source: ACMA 2025, Commercial TV program expenditure, Broadcasting Financial Results.

**Table 10: Change in expenditure on local content by commercial TV broadcasters between 2016/17 and 2023/24**

| Content type                        | Proportion of total, 2023/24 | Total change % | Average annual change % |
|-------------------------------------|------------------------------|----------------|-------------------------|
| Australian documentary              | 1.2%                         | 18.9%          | 4.1%                    |
| Australian light entertainment      | 31.9%                        | 8.5%           | 0.3%                    |
| Australian news and current affairs | 20.6%                        | -20.6%         | -2.5%                   |
| Australian sport                    | 31.4%                        | -24.3%         | -3.2%                   |
| Overseas content                    | 12.0%                        | -52.4%         | -7.7%                   |
| Australian adult drama              | 2.7%                         | -69.1%         | -16.2%                  |
| Australian children's content       | 0.2%                         | -86.0%         | -47.5%                  |

Source: ACMA 2025, Commercial TV program expenditure, Broadcasting Financial Results.

**Figure 27: Australian drama expenditure by subscription TV licensees, 1999 to 2025 (2024/25 dollars)**



Source: ACMA data, in Potter A and McCutcheon M 2025, *Australian Cultural Policy Unravelled: The Digital Demise of National TV Drama*, Routledge.

## Subscription TV broadcasters

**Expenditure on Australian drama by subscription TV broadcasters has fallen substantially, in line with decreasing expenditure on drama channels, and will decline further as Foxtel continues to reduce its drama channel expenditure.** The value of drama to subscription TV operators such as Foxtel has collapsed since the period where it had a near-monopoly over paid TV services in Australia. Since the launch of Netflix in 2015 and the simultaneous arrival of Stan, subscription TV services have faced severe competition from dedicated drama services available to Australian consumers at much lower price points and quickly lost market share. Since 1998/99, subscription TV licensees have had to comply with the New Eligible Drama Expenditure (NEDE) rule, which requires that they direct 10% of all expenditure on drama channels to new eligible Australian drama. Until the late 2010s, the NEDE rule saw subscription TV services directing between \$30 million and \$50 million towards Australian drama production each year, including investments and pre-sales in feature films and Australian drama series that had been commissioned by free-to-air broadcasters (Figure 27).<sup>60</sup>

By 2016, Foxtel was commissioning its own drama series, with the aim of enhancing its catalogue by offering exclusive dramas that could sit alongside its HBO listings, increasing its annual NEDE spend to \$71 million in 2017/18. Since then, subscription TV spend on Australian drama has fallen to as little as a quarter of previous levels: between 2017/18 and 2022/23 the number of subscription drama channels operating in Australia fell from seven to three.<sup>61</sup> With licensees spending less on drama channels, the NEDE obligation has fallen, and Foxtel has focussed on building its streamer business, BINGE, which includes investing in local drama.

60 McCutcheon M 2006, *Is Pay TV Meeting its Promise?*

61 ACMA 2025, *Spending on subscription TV drama*.





## Subscription video on demand (SVOD) services

**Streaming platforms make significant investments in drama production.** Not only is drama core to their business model, which relies on an attractive catalogue of content that customers can view in their own time, but also because exclusive drama is a way to differentiate themselves from competitors, and they can distribute the high cost over a global customer base. Since 2019/20, streamers in Australia have consistently directed half or more of their expenditure to drama, with it increasing to 75% in 2024/25.

**Drama's role in attracting customers has seen production budgets increase sharply** (Figure 23d), as global tech companies with large budgets have built streaming businesses worldwide. The ACMA data, for example, shows that as much as three-quarters of streamers' content spend in Australia is directed towards their own commissions.

SVOD services are now spending more on scripted drama than the commercial broadcasters before digitisation. The datasets presented here evidence the changing Australian TV ecosystem: while commercial TV licensees continue to spend more overall on Australian content than other broadcasting service types, SVOD services have been the largest source of demand for Australian drama programming since 2020/21, the second year that the ACMA collected streamer expenditure data. Since then, SVOD drama expenditure has more than doubled, while commercial drama expenditure fell – these platforms now spend more than six times the amount that commercial broadcasters do on adult and children's drama combined, \$313.0 million compared with \$51.5 million (Figure 28).

The prominence of streaming platforms in the production of Australian drama is accompanied by distinctly different contracting arrangements: international SVOD services typically acquire IP rights in perpetuity in exchange for significant cost-plus financing. This front-ends the returns to producers, but does not provide residuals, which over the longer term can be an important source of income for production companies.

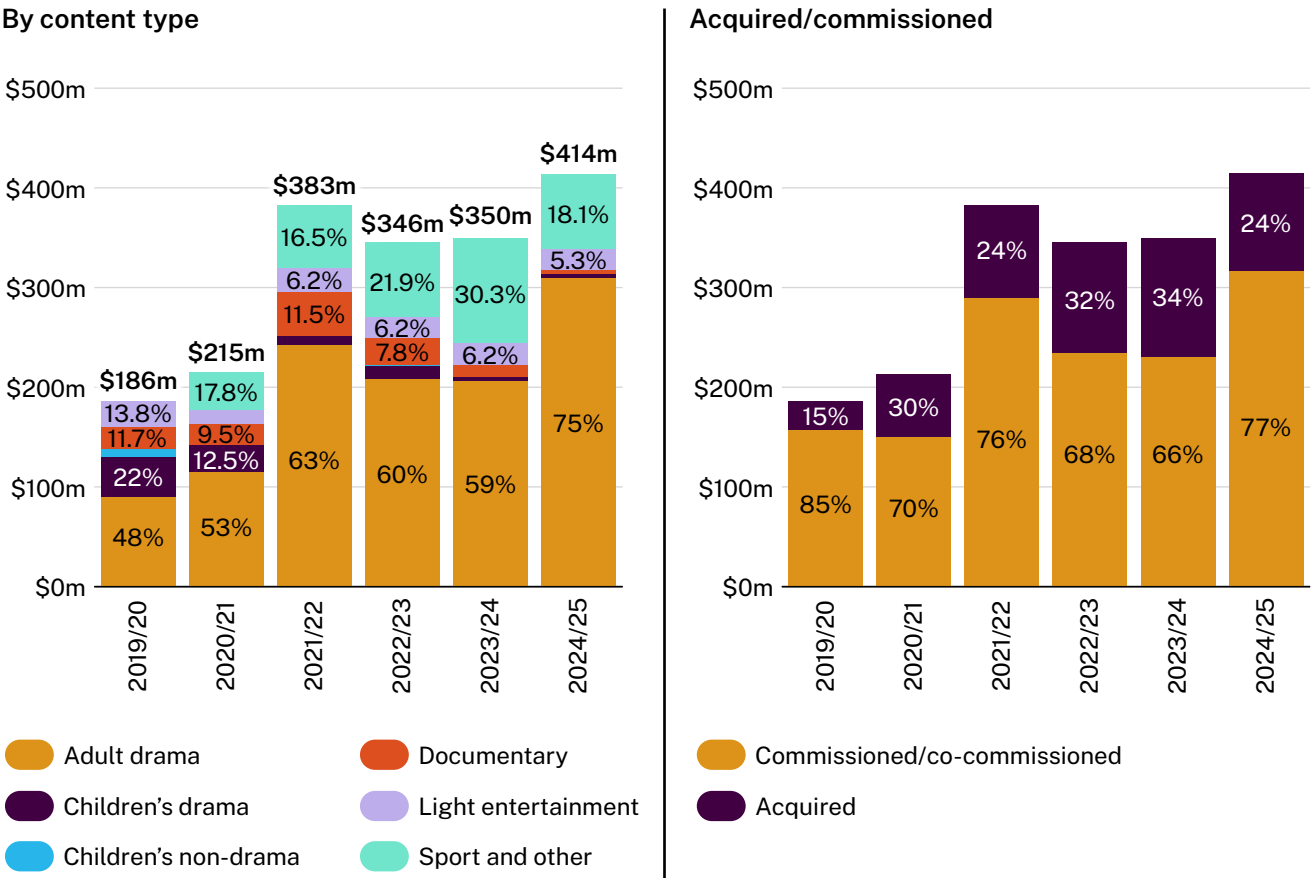
**Sport is also an important part of the local content offer for SVOD services in Australia.** Local SVODs have acquired the rights to a variety of foreign competitions that are less suitable for free-to-air broadcasting due to time-zone differences but are popular with Australia's multicultural population. The proportion of their local spend directed at sport, between 16% and 30% since 2021/22, is considerably higher than in other English-speaking countries (in 2023, comparable figures were 2.6% in the UK, 1.5% in Canada and 4.3% in the US).<sup>62</sup> Changes to the anti-siphoning rules in 2024 to protect free-to-air TV broadcaster access to broadcast rights for the most popular sports place constraints on further increases in SVOD expenditure on sports.

**In November 2025 the Australian Government introduced a new Australian content obligation for major SVOD services,** which commenced on 1 January 2026. The new Australian Content Requirement requires major streaming services with at least one million Australian subscribers to invest at least 10% of their total program expenditure for Australia, or 7.5% of their Australian revenue, on new local drama, children's, documentary, arts and educational programs.<sup>63</sup> Some major streamers may already meet the new requirement's expenditure thresholds – in these cases the quota may function as a floor to secure existing investment in Australian content.

62 Brzoznowski K 2024, September 30, "Report: Australian SVODs spend big on live sport", [World Screen](#).

63 Department of Infrastructure, Transport, Regional Development, Communication, Sport and The Arts Office for the Arts 2025, [Australian screen content requirement for streaming services](#), accessed 15 April 2026.

Figure 28: Australian content expenditure by SVOD services, 2019/20 to 2024/25 (2024/25 dollars)



Source: ACMA 2025, *Spending by subscription video on demand providers*.

# Government support of local screen production

For their projects to be viable, the Australian production and post-production sectors are often reliant on direct and indirect support from multiple government agencies. This section examines available data that provides an overview of total direct support by federal and state governments and indirect support by the federal government. It does not attempt to estimate support offered by local governments, which is an information gap.

Direct total support of the screen production and distribution sectors by the federal and state governments has increased significantly over the last 10 years (Figure 29a). Between 2015/16 and 2023/24, total federal and state government direct support of Australia's production and distribution

sectors increased overall by 82% from \$213.5 million to \$387.6 million in real terms, restoring cuts in funding from 2007/08.<sup>64</sup> Much of this increase was in state government support, with state government expenditure supporting screen production increasing by a total of 136% over this period while federal expenditure increased by 34%. The fall in total direct support in 2023/24 was due primarily to a substantial decrease in federal government funding.

Indirect support provided by the federal government to the screen and games industry through the ASPI and games production offsets has also increased (Figure 29b), although it has followed a different trajectory to direct funding. From its initial launch in 2007, the total annual value of the ASPI and games

64 Note that these totals do not include local government expenditure supporting production and distribution, which is not included in the DITRDCA Cultural and Creative Statistics Working Group, Cultural Funding by Government, Australia, 2023-24 report. A New Approach (ANA) includes estimates of expenditure on culture (including film and television production) in its Insight Report 2024 report *The Big Picture 4: Expenditure on Artistic, Cultural and Creative activity by governments in Australia in 2007-08 to 2021-22*. ANA's estimates were provided by the ABS as a consultancy data extract from ABS Government Finance Statistics, Annual, 2021-22. ANA does not report local government expenditure on film and television production. According to ANA, in 2021/22, local government contributed 24% of total government spend on culture – we do not expect that their proportional share of total government expenditure on screen incentives will be this high.

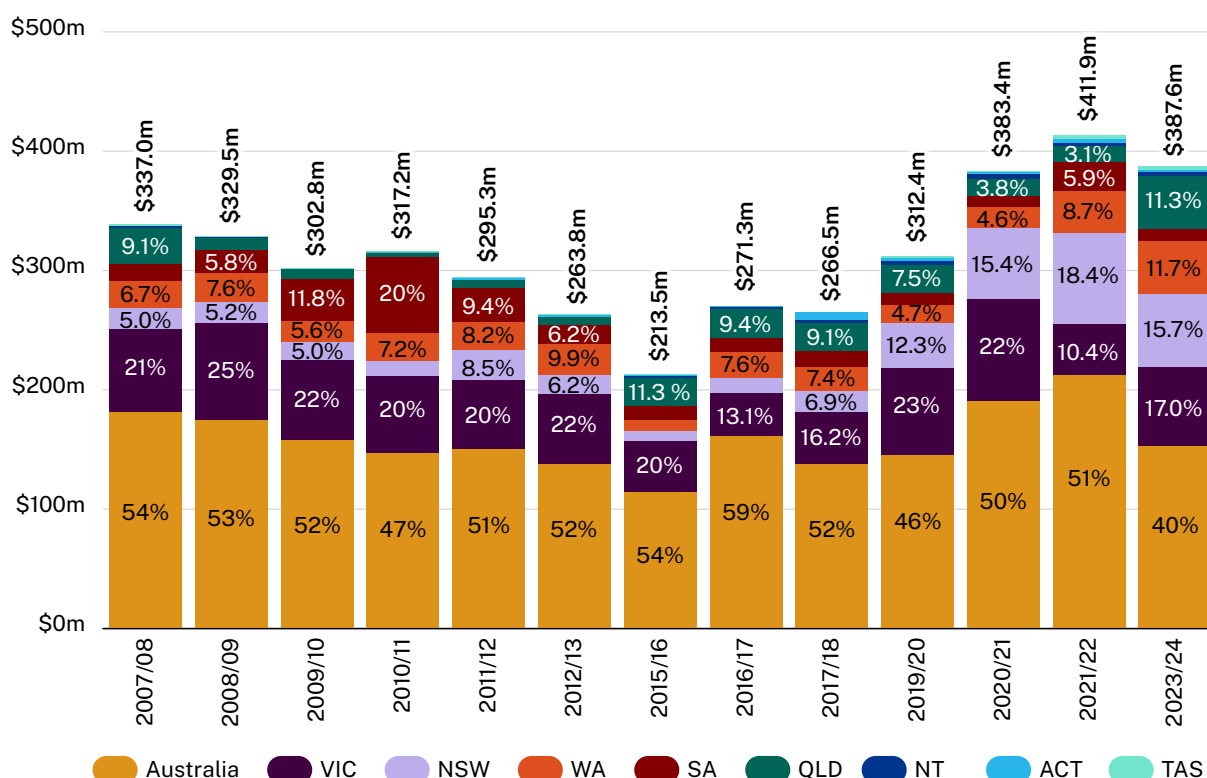


offsets averaged around \$200 million, increasing through the 2010s to more than \$550 million in 2017/18 before falling during the COVID-19 pandemic. The value of the offsets has since grown strongly, to more than \$1 billion in 2024/25, reflecting an increase in the number and scale of the individual projects that have accessed the scheme under

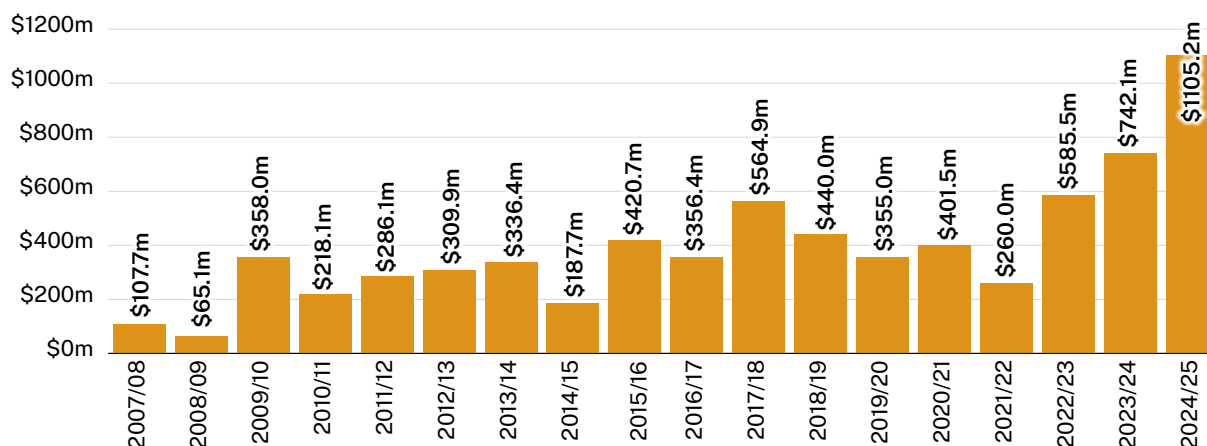
expanded eligibility requirements. The impact of these changes can be seen in corresponding fluctuations in GVA (Figure 2), employment (Figure 9) and exports (Figure 17), highlighting the importance of the ASPI and the games tax offsets to the growth of the screen and games production sectors.

**Figure 29: Federal and state government support for the Australian screen and games industry, 2007/08 to 2024/25 (2024/25 dollars)**

**a. Total direct funding by federal and state governments to support screen production and distribution, 2007/08 to 2023/24**



**b. Indirect federal funding through the ASPI, 2007/08 to 2024/25**



Note: DITRDCA does not commission the Cultural Funding by Government dataset every year.

Sources: DITRDCA Cultural and Creative Statistics Working Group, Cultural Funding by Government, Australia, 2023/24, ABS 2014, Cultural funding by government 2012–13; ATO Annual Reports: 2008/09 to 2014/15 Part 2 Performance Reporting, 2015/16 to 2024/25 Part 5 Performance and Accountability.

The federal government does not report the value of the different categories of tax rebates under the ASPI (the Producer Offset, the PDV and Location offsets) due to tax secrecy requirements designed to avoid identifying individual taxpayers. However, Screen Australia reports the aggregate value of its approvals for the Producer Offset (available only to Australian productions) in its Annual Reports, and this means it is possible to estimate the value of the Producer Offset supporting Australian feature films, TV drama and documentaries and compare it with Screen Australia's direct production investment programs ([Figure 30](#)).

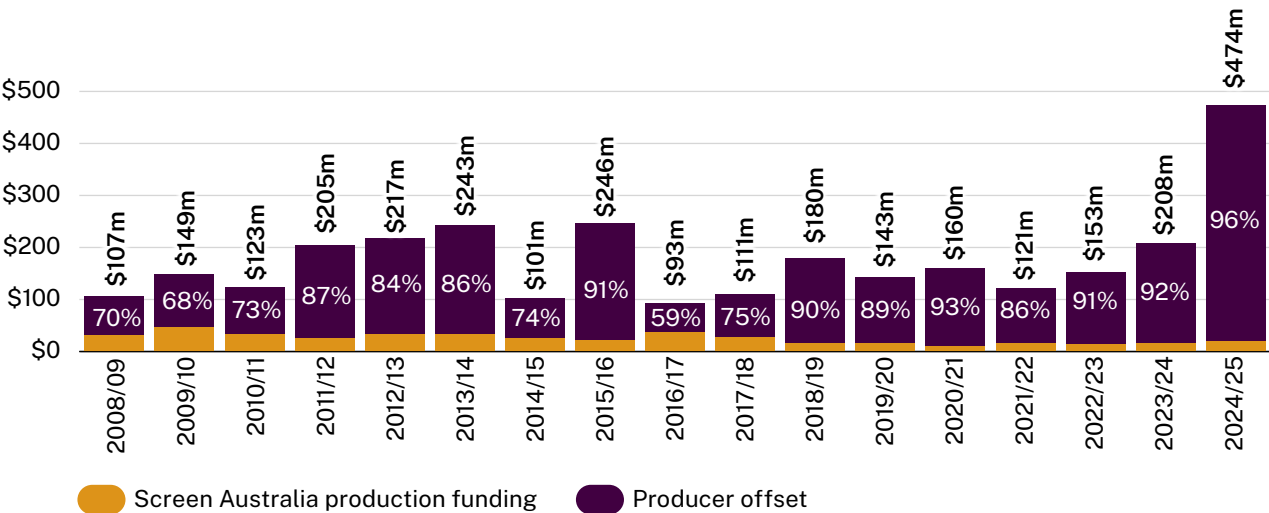
Screen Australia's direct production investments have fallen since the late 2000s, both in real dollar terms as growth in its budget has fallen behind inflation, and as a proportion of total federal support as the value of the Producer Offset has grown. For feature film production, Screen Australia's total production investments halved, from around \$30 million between 2008/09 and 2017/18 to \$15 million from 2019/20. Similar trends have played out with TV drama and documentaries.

Use of the Producer Offset scheme has increased over the last three years, from an average of 142 certificates each year between 2009/10 and 2016/17 to more than 200 between 2022/23 and 2024/25. The value of the Producer Offset has more than doubled in real terms over the same period, from an annual average of approximately \$230 million to \$484 million respectively.

Comparing the value of Producer Offset approvals with the total support offered under the ASPI shows that the majority of federal direct and indirect support funding incentivises Australian storytelling. While the Producer Offset is a volatile year-to-year measure (the timing of a small number of high-budget productions can shift the annual total significantly), average Producer Offset approvals represented almost 60% of total support over the last ten years. In 2024/25, it represented 65% of the total ASPI. In total, direct federal government support via Screen Australia, combined with indirect support such as the Producer Offset and the share of the PDV Offset directed to local production, have accounted for between 60% and 70% of federal government funding allocated to local productions over the past five years.

**Figure 30: Federal direct funding and Producer Offset support for Australian screen production, 2008/09 to 2024/25 (2024/25 dollars)**

**a. Feature film production**

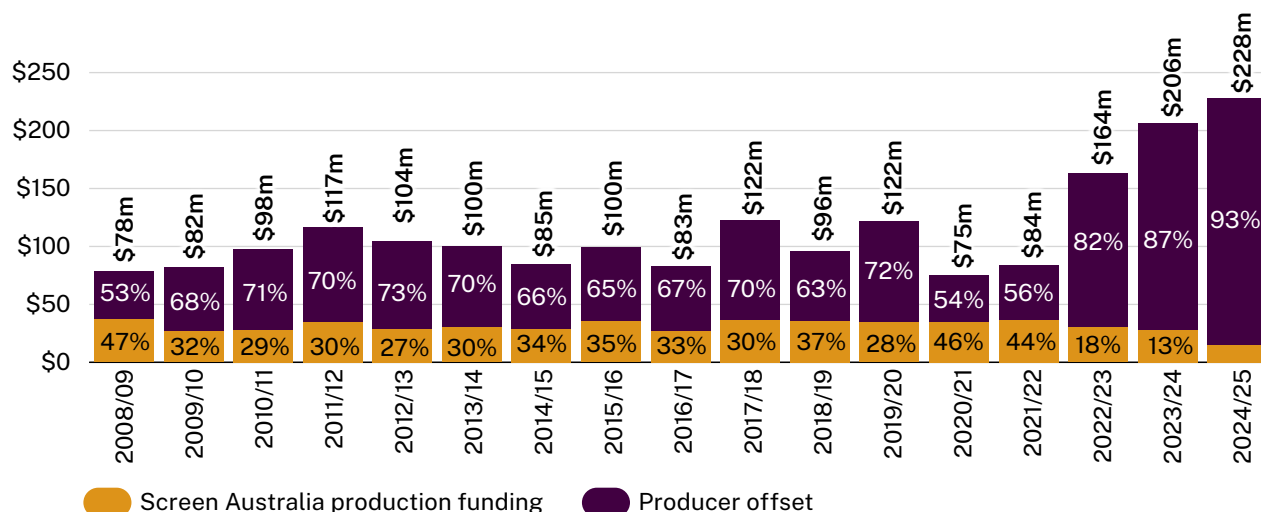




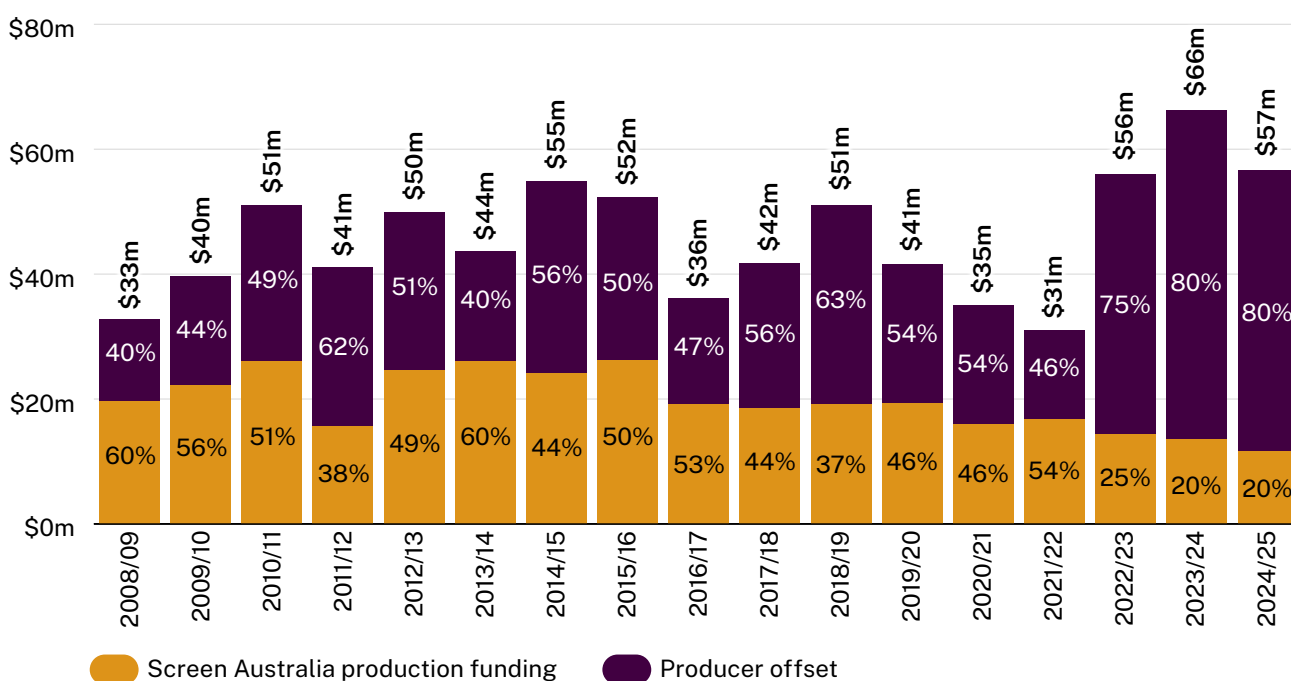


**Figure 30: Federal direct funding and Producer Offset support for Australian screen production, 2008/09 to 2024/25 (2024/25 dollars)**

**b. Adult and children's TV drama production**



**c. Documentary production (Australian only)**



Note: Screen Australia did not publish shoot and PDV expenditure separately for features in 2023/24 and 2024/25 or for TV drama in 2024/25. Here PDV is combined with the Producer Offset for Australian productions and with the Location Offset for foreign productions. The TV data chart does not include dramas intended for online release.

For information on games funding trends go to:

Industry Insights



# Definitions, glossary and acronyms

The primary data sources used in this report are economic and industry datasets published by the Australian Bureau of Statistics (ABS) and datasets compiled by federal agencies including the Australian Communications and Media Authority (ACMA) and Screen Australia in acquitting their roles as regulators and administrators of government policy. The report has therefore adopted the industry definitions contained in the Australian and New Zealand Standard Industrial Classification (ANZSIC) and in the *Broadcasting Services Act 1992* (BSA).

Screen and games industries covered by this report include the following ANZSIC industry classes and two subsets of ANZSIC industry classes.

Table 11: Industry sectors covered by this study

| Industry group         | ANZSIC industry code | ANZSIC industry title                                                                    | Short title used in this report |
|------------------------|----------------------|------------------------------------------------------------------------------------------|---------------------------------|
| Screen industries      | 5511                 | Motion picture and video production                                                      | Production                      |
|                        | 5512                 | Motion picture and video distribution                                                    | Distribution                    |
|                        | 5513                 | Motion picture exhibition                                                                | Exhibition                      |
|                        | 5514                 | Post-production services and other motion picture and video activities                   | Post-production                 |
|                        | 5621                 | Free-to-air TV broadcasting                                                              | Free-to-air TV                  |
|                        | 5622                 | Cable and other subscription broadcasting                                                | Subscription TV                 |
|                        | n.a.                 | Internet broadcasting (a subset of 5700 Internet publishing and broadcasting)            | Internet broadcasting           |
| Digital games industry | n.a.                 | Digital games development (a subset of 7000 Computer system design and related services) | Digital games development       |

Broadcaster types are based on the categories of broadcasting service defined in the BSA that encompass both radio and TV.

Table 12: Broadcaster types

| Broadcasting services in the BSA   | Definition                                                                                                                                                                                                           | Term used in this report                          |
|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|
| National broadcasting services     | Services provided by the Australian Broadcasting Corporation and Special Broadcasting Service                                                                                                                        | Public service broadcasters (ABC, SBS)            |
| Commercial broadcasting services   | A service that provides programs intended to appeal to the general public, are usually funded by advertising revenue, are operated for profit and use the broadcasting services bands of the radiofrequency spectrum | Commercial TV services or commercial TV licensees |
| Subscription broadcasting services | A service that provides programs intended to appeal to the general public via cable, satellite or terrestrial broadcasting to paying subscribers                                                                     | Subscription TV services                          |
| SVOD service                       | A service that provides audiovisual content on demand to paying subscribers                                                                                                                                          | SVOD service or streamer                          |
| Community broadcasting services    | A service provided for community purposes and not operated for profit                                                                                                                                                | Community TV services                             |



# Glossary

## Above-the-line roles

Creative leadership roles that shape the content and direction of a screen project, such as writers, directors, producers and principal cast. These roles are typically engaged early and influence creative and commercial outcomes.

## ACMA

Australian Communications and Media Authority. Australia's national regulator for broadcasting, telecommunications, radiocommunications, unsolicited communications and certain types of online content.

## ACCTS

*Broadcasting Services (Australian Content and Children's Television) Standards 2020.*

## ACTF

Australian Children's Television Foundation. Australia's national body dedicated to developing, funding, distributing and advocating for Australian children's TV content.

## AGDS

Australian Game Developer Survey. Annual survey of Australian game developers run by the Interactive Games and Entertainment Association (IGEA).

## ANZSIC

Australian and New Zealand Standard Industrial Classification. A standard system for grouping businesses and industries based on their main economic activity. The screen and games sectors discussed in this report are based on ANZSIC groupings (see [Table 11](#)).

## Audience access

The ability for content to reach and be discovered by audiences, shaped by platforms, distributors, marketing activity, algorithms and availability across services or screens.

## Australian children's TV drama

Australian children's TV drama refers to live-action and animated drama produced for child audiences, including titles created for broadcast television and online release.

## Australian documentary

As defined by *Broadcasting Services (Australian Content and Children's Television) Standards 2020*: A program that is a creative treatment of actuality other than a news, current affairs, sports coverage, magazine, infotainment or light entertainment program.

## Australian feature film

A film made in Australian for first release in cinemas that is at least 60 minutes in length.

## Australian TV drama

A drama program as defined by the *Broadcasting Services (Australian Content and Children's Television) Standards 2020* made for adult and/or family audiences first released on free-to-air, broadcaster video on demand (BVOD), subscription video on demand (SVOD), advertising-based video on demand (AVOD), transactional video on demand (TVOD) platforms. It does not include children's drama, which is made specifically for child audiences.

## ABC

Australian Broadcasting Corporation. Australia's largest public service broadcaster.

## ABS

Australian Bureau of Statistics.

## ASPI

Australian Screen Production Incentive. A system of indirect screen production support launched in 2007. The system is a set of tax rebates including the Producer Offset, the Location Offset, the PDV Offset and the Digital Games Offset.

## Australian National Accounts: Input-Output Tables

A set of national accounts tables produced by the ABS that describe inter-industry relationships within the economy. They are commonly used to estimate indirect and flow-on economic effects.

## Backend

Revenue participation earned after a production has recouped its initial costs and contractual distribution fees. Backend typically refers to a share of profits or net receipts paid to rights holders, producers, talent or investors based on the commercial performance of a project.

## BCARR

Bureau of Communications, Arts and Regional Research.

## Below-the-line roles

Technical, craft and production roles involved in delivering a screen project, such as crew, editors, designers, camera, sound and production staff. These roles are typically engaged during production and post-production.

## BLADE

Business Longitudinal Analysis Data Environment. BLADE is an economic data tool combining tax, trade and intellectual property data with information from ABS surveys to provide a better understanding of the Australian economy and businesses' performance over time.

## CAGR (Compound average growth rate)

Compound average growth rate. Used in this study to calculate average annual growth. CAGR is the annualised rate that a data series would need to grow by from its starting value to its ending value. It includes compounding values and therefore reflects how values accumulate over time. CAGR is a smoothed and representative growth rate that removes volatility and shows the effective long-term trend.

## Catalogue

The body of completed screen or games works a company owns or controls. A catalogue can generate ongoing revenue, audience engagement and strategic value over time. *See also: Slate.*

## COE

Compensation of employees. The total amount an employer pays a worker for doing their job. It includes wages and salaries, non-cash benefits, and superannuation and other employer contributions.

## Commissioning

The process by which a broadcaster, platform, or publisher agrees to finance, acquire, or pre-purchase a project, usually in exchange for specific rights, exclusivity, or control over distribution.

## Cost-plus/service-based model

A business model where a company is paid a fee or margin to deliver work for a client, rather than sharing in long-term ownership or profits from the content.

## Creative trident

The creative trident is a useful way of presenting creative industry and creative occupation data that highlights different categories of creative workers:

- **Specialist** creatives work in creative occupations within the creative industries
- **Support** professionals work in support roles (not defined as creative occupations) within the creative industries
- **Embedded** creatives work in creative occupations in industries other than creative industries.

## Cultural and Creative Satellite Accounts

A satellite account produced by the ABS (and updated by BCARR) that measures the economic contribution of cultural and creative activity, including output, employment and gross value added, using a framework aligned with the National Accounts.

## Deficit financing

An approach to financing a film or TV program where the broadcaster pays less than the cost of production and the producer covers the "deficit" through expected international sales, format sales, remakes and long-tail syndication. This model allows producers to retain IP and earn significant backend if the show travels well.

## Digital games development

Businesses mainly engaged in the creation and production of video games.

## Distribution

Businesses mainly engaged in acquiring the rights to screen content and selling or licensing it to broadcasters and other distributors. ANZSIC class: "Motion picture and video distribution."

## DMRC

Digital Media Research Centre, Queensland University of Technology.

## Embedded activity or employment

A category of the creative trident. Refers to creative activity or workers "embedded" in non-creative industries.

## Exhibition

Businesses that mainly present screen content to audiences, i.e. cinemas and film festivals. ANZSIC class: "Motion picture exhibition."





## Foreign production

Foreign production refers to film, TV, or other screen content projects that are initiated, developed, and primarily controlled by non-Australian entities and undertake some or all production or post-production activity in Australia.

## Free-to-air TV

Businesses that provide TV broadcasting over the radiofrequency spectrum, available free to viewers (e.g. Seven Network, ABC). ANZSIC class: “Free-to-air TV broadcasting.

## GDP

Gross domestic product. A measure of the total economic activity of a country, representing the value of goods and services produced within a given period.

## GVA

Gross value added. A measure of an industry’s contribution to the economy, showing the value it adds after subtracting the cost of inputs.

## GOS

Gross operating surplus or Profit. What is left over from production once a business has paid for its inputs and its employees.

## Internet broadcasting

Services that mainly broadcast screen content over the internet, including video on demand (VOD) services (e.g. Netflix, Prime Video and YouTube).

## IP

Intellectual property. Legal rights over creative works such as films, TV programs, screenplays, music, games and characters, including the ability to license, sell, or commercially exploit them.

## Jobs in Australia (dataset)

A longitudinal administrative dataset produced by the ABS using linked employer-employee tax data. It provides detailed information on jobs and earnings by industry, occupation, geography and demographic characteristics, and enables analysis of job creation, destruction and worker mobility over time.

## Labour Account (dataset)

An integrated dataset produced by the Australian Bureau of Statistics (ABS) that reconciles data from multiple sources to provide a coherent picture of the Australian labour market. It aligns measures of jobs, employed persons, hours worked and labour income, and resolves differences between business-based and household-based data sources to produce internally consistent labour statistics.

## Live services/live operations (games)

Ongoing updates, content releases and community engagement activities that continue after a game’s initial launch, sometimes for many years.

## Market failure

Market failure occurs when the normal forces of supply and demand do not produce the optimal amount of a good or service for society. The market either overproduces, underproduces, or fails to produce. This leads to a loss of overall welfare — meaning society could be better off with a different allocation of resources.

## Monetisation

The methods used to generate revenue from content, such as sales, subscriptions, advertising, in-game purchases or licensing.

## NEDE

New Eligible Data Expenditure. The name of the minimum Australian drama expenditure requirement for subscription TV licensees, which is set at 10% of total drama expenditure.

## NITV

National Indigenous Television.

## PDV

Post, digital and visual effects. The creative and technical work often completed after filming, including editing, visual effects, animation, sound, music and colour grading.

## PICA

Production Infrastructure Capacity Analysis (2025). A national sector analysis commissioned by Screen Australia to understand the current capacity and provision of Australia's screen production infrastructure and workforce. The study maps the Australian screen production sector (including film, TV, documentary, animation, digital games and online), assesses current and future workforce capacity needs and trends, evaluates education and training provision, incorporates state-by-state breakdowns, and provides evidence-based recommendations to inform policy, strategic planning and initiatives to support sustained sector growth.

## Platform

A digital service or marketplace that distributes content to audiences, such as streaming services or games storefronts, often controlling access, data and commercial terms.

## Post-production

Businesses mainly engaged in editing, sub-titling, credits, animation and PDV (post, digital and visual effects). ANZSIC class: "Post-production services and other motion picture and video activities."

## Pre-sales/advances

Up-front finance provided by distributors, broadcasters, or publishers in exchange for future rights to a project.

## Production

Businesses mainly engaged in producing films, TV programs, commercials and other screen content. ANZSIC class: "Motion picture and video production." Note that the Screen Currency industry study refers to "production" as a stage in the value chain that includes post-production. This report considers "production" and "post-production" separately based on the ANZSIC categories (although in reality, the boundary between these sectors is porous).

## Production sales revenue

Sourced from ABS BLADE and the IGEA Australian Games Development Survey, the production sales revenue metric combines total sales reported to the Australian Taxation Office by companies registered as operating in the production and post-production sectors and digital games development revenue estimated by IGEA through its annual industry survey.

## Real terms

Adjusted for inflation.

## Rights

The legal permissions that determine who can use, distribute, adapt, or monetise content and in which territories or formats.

## SAC Test

Significant Australian Content Test. The statutory test that Screen Australia applies when deciding whether a screen product qualifies as significant Australian content for the purposes of the Producer Offset (see ASPI).

## SBS

Special Broadcasting Service. Australia's second largest public service broadcaster.

## Screen sectors

This report uses this term to refer to all industry sectors involved with the production and dissemination of screen content. Screen industry sectors are defined according to the ANZSIC (see [Table 11](#)) and include production, post-production, distribution, exhibition, free-to-air TV, subscription TV and internet broadcasting.

## Self-publishing (games)

A model where a developer releases and markets a game directly, without a third-party publisher, taking on greater risk but retaining more control.

## Service businesses

Ongoing businesses that provide specialist services across multiple projects, such as post-production studios, visual effects houses, animation studios, production services, or technical support providers.

## Slate

The collection of projects a company is developing or producing at a given time, including works in development and in production. Managing a slate can help spread risk across multiple projects. See *also: Catalogue*.

## Specialised activity or employment

A category of the creative trident. Refers to creative activity or workers located within their industry of specialisation.



## SPVs

Special purpose vehicles. Separate legal entities created to deliver individual projects, often used to manage financing, risk and contractual arrangements. In screen production, these entities are commonly wound up once a project is completed.

## Subscription TV

Businesses that deliver TV via cable or satellite networks, available to viewers through a paid subscription (i.e. pay TV providers such as Foxtel and Fetch). Services are licensed as subscription TV services under the *Broadcasting Services Act 1992*. The category excludes SVOD services/streamers. ANZSIC class: "Cable and other subscription broadcasting."

## Support activity or employment

A category of the creative trident. Refers to activity or workers involved in supporting the output of a creative industry.

## SVOD

Subscription video on demand. Streaming services funded through paid subscriptions, where audiences pay to access content.

## Value chain

The stages through which creative work moves, from idea and development through production, distribution and audience engagement. In practice, activity is often overlapping and cyclical rather than strictly linear.

## Vertical integration

A structural feature of commercial activity whereby a number of parts of the value chain of a product or service is owned or controlled by the same enterprise.

## Vertical screen formats

Video content designed to be viewed vertically on smartphones and mobile devices, commonly distributed through platforms such as YouTube, TikTok and Instagram. These formats lower barriers to entry but often offer less predictable long-term income.

## VOD

Video on demand. Screen content that audiences can access at a time of their choosing, rather than through scheduled broadcast. Related definitions include:

- **Advertising-based video on demand (AVOD).** A form of VOD in which content is made available free to viewers and supported by advertising inserted before, during or after the streamed video, similar to traditional commercial TV.
- **Free ad-supported streaming TV (FAST).** A form of ad-supported streaming that delivers curated, linear-style channels over the internet (e.g. Pluto TV, Tubi, Samsung TV Plus). It is often grouped with AVOD but distinct in offering scheduled channels rather than purely on-demand libraries.
- **Transactional video on demand (TVOD).** A form of VOD where users pay on a per-title basis, typically to rent (for a limited viewing window) or purchase digital access to a film or program.
- **Subscription video on demand (SVOD).** A form of VOD where users pay a recurring subscription fee for access to a library of content. SVOD providers in Australia include Netflix, BINGE, Apple TV+, Disney+, Prime Video, Paramount+ and Stan. Some SVOD providers offer AVOD tiers for lower recurring fees.
- **Broadcast video on demand (BVOD)** are digital distribution platforms operated by free-to-air broadcasters that provide access to broadcast content either live or on demand. BVOD providers in Australia include 9Now, 10 Play, 7plus, ABC iView and SBS On Demand.

## Windows

The structured sequence of release periods during which a film is made available across different platforms and markets (e.g. cinema, TVOD, SVOD, FTA TV). The *theatrical window* refers specifically to the period of exclusive cinema exhibition before a film becomes available on other platforms.

# Appendix 1:

## Detailed methodology notes

### GVA estimation method

It is important to note that all estimates of GVA and GDP are exactly that, estimates, and there are a number of possible approaches to their calculation. In Australia, the ABS first developed satellite accounts to the national accounts for the cultural and creative industries in 2013, one component of which was ‘broadcasting, electronic or digital media, and film’.<sup>65</sup> To establish its satellite accounts, the ABS drew on QUT’s (now UC’s) creative trident model and its creative and cultural industries definitions. It estimated value added over the entirety of the creative and cultural industries plus value generated through creative occupations in other industries and non-market/volunteer value. The ABS satellite accounts were based on non-public data and have only been published for Australia as a whole. They were later updated by BCARR using an indexing methodology to create a time series that extended from 2012/13 to 2017/18.<sup>66</sup>

Between 2022 and 2024 BCARR reviewed the satellite accounts to update the methodology and publish revised creative and cultural GVA and GDP estimates for 2008/09 to 2022/23.<sup>67</sup> As its data source, BCARR used the input-output tables from the national accounts. These detail the value of products supplied by groups of similar industries, where products are defined using the Input-Output Product Classification and industries are defined using the Australian and New Zealand Standard Industrial Classification systems.<sup>68</sup> BCARR used the input-output tables to estimate the value of:

1. creative and cultural products and other products produced by the creative and cultural industries, and
2. creative and cultural products produced by other industries (Figure 1).

In its new method, **BCARR defines the creative and cultural industries as consisting of 15 different domains**, including three that are relevant to Australia’s screen sector: film and TV activities, internet publishing and broadcasting, and digital games development.<sup>69</sup> Each of these domains is defined in terms of the industries and products from the input-output tables, including:

- The **film and TV activities** domain brings together six industries and seven input-output product categories (Table 13).
- **Internet publishing and broadcasting** consists of one ANZSIC industry class, 5700 Internet Publishing and Broadcasting Industry. This industry captures a broad range of activity including ‘textual, audio and/or video content of general or specific interest on the internet’.<sup>70</sup> Here the value generated in this industry class is isolated to that generated by video activity alone.

65 ABS 2014, *Australian National Accounts: Cultural and Creative Activity Satellite Accounts, Experimental, 2008-09*, accessed 15 April 2026.

66 BCARR 2021, *Cultural and creative activity in Australia 2009-10 to 2018-19*.

67 BCARR 2024, *Cultural and Creative Activity in Australia, 2008-09 to 2022-23* (Methodology Refresh).

68 Input-output tables are only published by the ABS for Australia as a whole, so state/territory estimates are not readily available using this approach. They map the flow of goods and services between industries within an economy, showing who buys what from whom. They present a comprehensive view of the supply and use of all products in the economy and provide a more detailed breakdown of GVA and GDP than top-line national accounts.

69 Note that BCARR defines advertising and promotion as a separate creative domain to film and television activities. While advertising does draw on screen skills, it is not a focus of study here. To the extent that the advertising sector generates work for the screen sector, this activity is captured in this analysis – other advertising activity is not.

70 ABS 2013, *5700 Internet Publishing and Broadcasting Australian and New Zealand Standard Industrial Classification (ANZSIC)*, accessed 15 April 2026.





- For **digital games development**, there is no ANZSIC industry or product category specifically coded for digital games development. BCARR has already done substantial work estimating GVA and GDP for digital games development for its satellite accounts.<sup>71</sup> Work here is limited to re-presenting BCARR's estimates.

**Table 13: BCARR film and TV activities – industry and product inclusions**

| Industries by ANZSIC industry class                                         | Products by input-output product code                                           |
|-----------------------------------------------------------------------------|---------------------------------------------------------------------------------|
| 5511 Motion picture and video production                                    | 55110010 Motion picture and video production                                    |
| 5512 Motion picture and video distribution                                  | 55120010 Motion picture and video distribution services                         |
|                                                                             | 55120020 Copyright leasing - motion pictures and videos                         |
| 5513 Motion picture exhibition                                              | 55130010 Motion picture theatre services                                        |
| 5514 Post-production services and other motion picture and video activities | 55140010 Post-production services and other motion picture and video activities |
| 5621 Free-to-air TV broadcasting                                            | 56210010 Free-to-air TV broadcasting services                                   |
| 5621 Cable and other subscription broadcasting                              | 56220010 Cable (Pay TV) and other subscription broadcasting services            |

## GVA calculation steps

This section describes the process used to calculate a time series of GVA estimates for the years 2016/17 to 2023/24.<sup>72</sup>

The ABS's input-output tables report industry groups at a higher level of compilation than the most detailed ANZSIC industry class. That is, the six ANZSIC industry classes listed in Table 13 are included in the input-output tables as three input-output industry groups:

- 5501 Motion picture and sound recording
- 5601 Broadcasting (except internet), and
- 5700 Internet Publishing and Broadcasting Industry

This means that **products supplied by each input-output industry need to be allocated to appropriate industry classes to estimate value added for each industry**. This is achieved via the following steps:

1. Select the relevant industry groups from the ABS Input-Output Tables (Product Details), Supply (Basic Price) Table 2: 5501 Motion picture and sound recording, 5601 Broadcasting (except internet) and 5701 Internet service providers, internet publishing and broadcasting, web search portals and data processing
2. For each of these industry groups, identify the value supplied by relevant screen products (listed in [Table 13](#)).
3. Estimate the proportions of value supplied by specialised screen products for each industry class (listed in [Table 13](#)).

<sup>71</sup> To estimate the value of digital games development, BCARR partially included the product 70000010 Computer systems, hardware and software design and development services, the only product relevant to digital games. According to BCARR, 'in-scope units have been found to be predominantly coded to ANZSIC class 7000 Computer system design and related services based on the latest ABS's publication of Film Television and Digital Games. This publication has also been used as an additional data source to estimate this activity by separating digital games development out of the product IOPC Computer systems, hardware and software design and development services'. Since BCARR's estimates are already tightly focussed on digital games development, we propose to rely here on its substantial work establishing a time series of GVA and GDP estimates.

<sup>72</sup> ABS 2026, *Australian National Accounts: Input-Output Tables*, accessed 15 April 2026.

4. The proportion for each industry class is then multiplied by total GVA (P1 Compensation of employees + P2 Gross operating surplus and gross mixed income + P4 Other taxes less incentives on production) for the input-output industries 5501, 5601 and 5701 to estimate GVA for each.
5. The value of specialised screen activity is estimated by multiplying the total of these components by the proportional value of specialised screen products for each ANZSIC industry class.
6. The value of support activity is estimated as the non-specialised value associated with each ANZSIC industry class. This is estimated as the difference between the total output value of each industry class and the value of its specialised activity.
7. For value generated by embedded activity in other industries, steps 1 and 2 are repeated for the value generated by screen products in industries other than 5501 Motion picture and sound recording, 5601 Broadcasting (except internet) and 5701 Internet service providers, internet publishing and broadcasting, web search portals and data processing. Excluding these three industries for calculating embedded value ensures that the value of screen products estimated as support activities in the target screen industries will not be double counted.

Note that the ABS did not publish input-output table breakdowns for Internet Publishing and Broadcasting in 2020/21, so it is not possible to use the input-output tables to calculate GVA estimates for Internet Broadcasting for that year. Instead, **Internet Broadcasting GVA is estimated for 2020/21 by interpolating the estimates for 2019/20 and 2021/22.**

**Digital games development is not defined either as a separate product or industry by the ABS.** BCARR has already done considerable work estimating GVA for digital games development. There is no need to further disaggregate their estimates for this domain, so their results are simply reproduced.

## Employed persons estimation method

In December 2025, while this report was being prepared, **BCARR released its interim report *Measuring Australia's Cultural and Creative Workforce, 2008–09 to 2023–24***, which was designed to establish a best-practice method<sup>73</sup> for identifying the size and scope of cultural and creative employment in Australia.<sup>74</sup> The University of Canberra research team and Screen Australia agreed that **the analysis should follow BCARR's approach for estimating employment to ensure comparability. The estimates presented here, however, differ from BCARR's in one important way.**

**BCARR allocates employment to “cultural and creative domains”** by first identifying cultural and creative occupations and allocating them to their respective domain, and then allocating “non-cultural or creative” roles employed in each industry to its relevant domain. For the screen industries, which employ a highly diversified range of creative skills including advertising professionals, designers and performing artists, this approach means that a significant portion of screen workers are not allocated to the BCARR Film and TV activities domain but are instead allocated to the domain of their occupation, including advertising and promotion, design and fashion, and literature, creative and performing arts.

Following discussions between Screen Australia and the University of Canberra, it was agreed that while BCARR's approach is well suited to considering cultural and creative employment across the economy, it is not appropriate for Screen Currency. Screen Australia is concerned with Australia's screen and games industries and those other sectors with which it interacts – the aim here is to understand how the screen sector in its entirety has been impacted by technological, industrial and policy change in the 21st Century. **Therefore this analysis takes a slightly different approach, using the same datasets and method as BCARR, but framing the screen and games sectors differently to focus on industry employment.**

<sup>73</sup> The methodology for BCARR's interim report was reviewed by the Australian Bureau of Statistics.

<sup>74</sup> BCARR 2025, *Measuring Australia's Cultural and Creative Workforce, 2008–09 to 2023–24 Interim report*.



## Employed persons calculation steps

The following processes were used to calculate employment estimates based on BCARR's methodological guidelines. The approach described here uses the ABS Labour Account as the benchmark for total employment in the screen industries, and the finer-grained data in other ABS collections including the Labour Force Survey, Jobs in Australia and the Census of Population and Housing to weight the Labour Account totals. The Labour Account provides a quarterly estimate of the number of people holding a job in Australia at that specific time. Here the quarterly estimates have been averaged to calculate an annual estimate for each financial year.

**ANZSIC industry classes: Motion picture and video production, Post-production services & other activities, Motion picture exhibition, Motion picture and video distribution, Free-to-air TV broadcasting, Cable and other subscription broadcasting.**

1. Start with the ABS Labour Account (LA) benchmark totals for ANZSIC2 industries 55 Motion Picture and Sound Recording Activities and 56 Broadcasting (except internet).
2. Using the ABS Labour Force Survey (LFS), calculate the proportion of employed persons that work in 551 Motion Picture and Video Activities.
3. Multiply the LA total and the LFS proportion to estimate total employed persons in 551.
4. Using ABS Jobs in Australia (JA), calculate the proportion of employed persons that work in each of the ANZSIC4 motion picture industries.
5. Multiply the 551 total and the JA proportions to estimate total employed persons in each ANZSIC4 industry.
6. Gender proportions are estimated using ABS Jobs in Australia (TableBuilder). This dataset runs from 2011/12 to 2022/23. Proportions for years either side of these are assumed to be constant, equal to the most contemporaneous year.
7. State proportions are estimated using ABS Census. Census data is available for the years 2006, 2011, 2016 and 2021. Proportions for non-Census years are estimated using linear regression.

### ANZSIC industry sub-set Internet broadcasting

1. Start with the LA benchmark totals for 57 Internet publishing and broadcasting (IPB).
2. Assume people working in IPB are all either involved in screen, audio or publishing work.
3. Assume the distribution of people in IPB is identical to their distribution over the screen, audio and publishing industries
4. Use the JA employed persons counts to estimate the proportion of people working in screen by ANZSIC4 (using screen + audio + publishing as a base).
5. Multiply this proportion by the total for IPB to estimate persons employed in Internet broadcasting.
6. For missing years, extrapolate the proportion time series by using the linear relationship between time and the known proportions.
7. Multiply the IPB totals by the proportions to estimate persons employed in internet broadcasting.
8. Gender and state proportions are estimated using the approach described above.

### ANZSIC industry sub-set Digital games development

1. Start with the LA benchmark totals for 70 Computer systems design (CSD).
2. Using estimates of employed persons from the ABS Film, Television and Digital Games survey and the annual IGEA Australian Game Development surveys, calculate the ratio of digital games jobs. This provides estimates for the years 2015/16 (ABS) and 2019/20, 2019/22, 2021/22, 2022/23 and 2023/24 (IGEA). Missing proportions are estimated using linear regression. The proportion for 2024/25 is held constant to avoid overestimation of employment.
3. Gender and state proportions are calculated using estimates published by IGEA.

**Note on gender reporting:** The ABS Jobs in Australia dataset introduced a “missing” category for gender from 2019/20. This means there is the possibility of including an “other” category from this year, however, the numbers would be extremely small. For example, the largest cluster of “other” is 0.07% of the production industry in 2022/23, a total of 21 people in total. This figure is highly unlikely to be an accurate estimate of the number of gender diverse people who work in production, so here the “missing” category is grouped with “female”.



## Estimating median incomes of employed persons

The data was sourced from the 2021 Australian Census, which records those jobs that were a main source of income during the two weeks before Census.

**Detailed charts for each screen and games sector are included in Appendix 2.** Use these charts to compare proportions and for a source of information on median incomes. For employment counts, use the estimates based on the benchmark source, the ABS Labour Account in the previous section.

**Counts can be used to identify the most common occupations within each sector** – be aware that they do undercount employment by as much as

one third as they do not include the full extent of multiple job holding.

**All median income estimates are as reported in the Census and are not adjusted for inflation.**

## AI disclosure

This report was developed with some assistance from Artificial Intelligence (AI) tools. AI tools were used to support tasks such as data analysis, summarising information and editing. All AI-generated outputs were subject to human review and verification to ensure accuracy and alignment with the research objectives. Screen Australia uses AI in accordance with its [AI Guiding Principles](#).



Delphinium





# Appendix 2: Detailed estimates for screen sectors and games

This appendix provides further detail on economic value, employment and income estimates for each screen industry sector (production, post-production, distribution, exhibition, free-to-air broadcasting, subscription broadcasting and internet broadcasting) and digital games development.

## GVA and GDP by screen and games industry sector

### Production

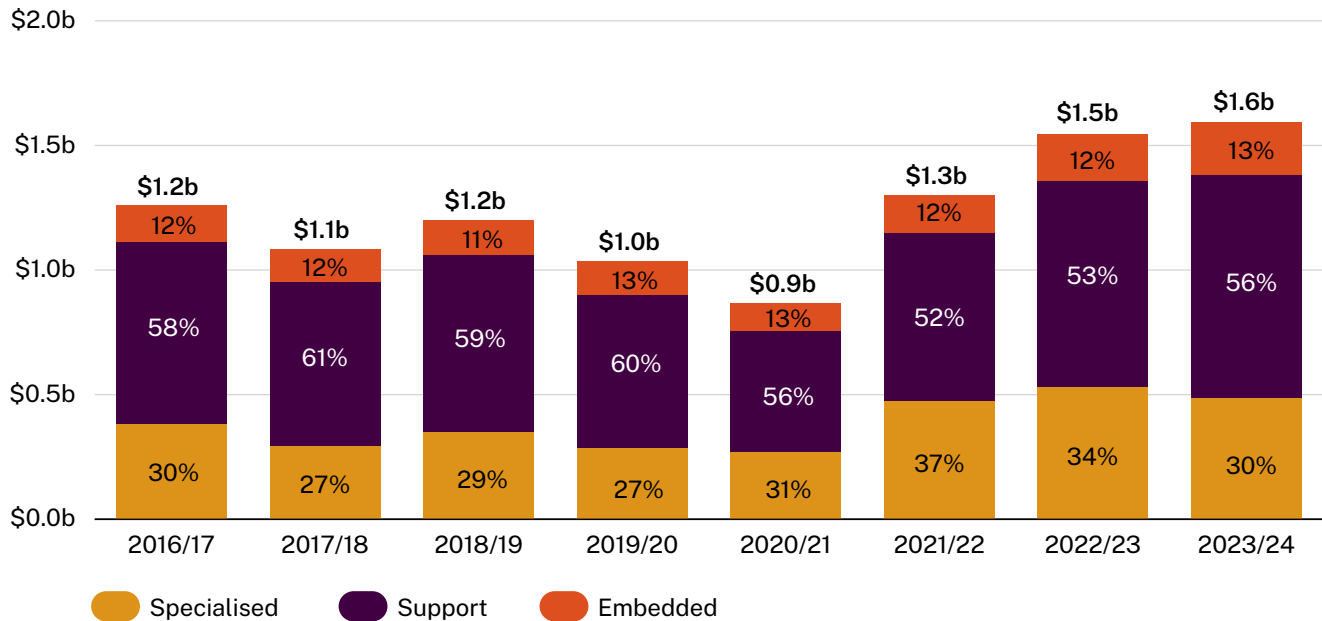
The production sector includes businesses (production companies) mainly involved with creating films, TV programs, videos and commercials.<sup>75</sup> Production companies earn revenue through licencing the content they make, directly to broadcasters and to distributors who negotiate with broadcasters and other distributors worldwide. Historically production companies could be earning rights revenues from successful productions decades after initial release. An increasing trend is cost-plus financing, where broadcasters pay up-front for the content they commission in return for all intellectual property. Production companies also offer services to foreign productions that have located in Australia.

In the financial year 2023/24, production was the fourth-largest screen sector in Australia, contributing **\$1.593 billion in GVA, 14.3% of the total value of screen industry GVA** (Figure 31, Table 14).

**Production GVA grew overall by a total of \$343.2 million** between 2016/17 and 2023/24, at an annual average rate of **4.2% per annum**. This period included a fall between 2016/17 and 2019/20 of \$221.5 million that predated the COVID-19 pandemic, reflecting local broadcasters retreat from investing in expensive local content formats (see Figure 26 in [Australian screen production trends](#)). Over the three years from **2020/21 to 2023/24, production GVA grew by an annual average of 20% as the sector benefited from increases in federal government and state government incentives** directed at encouraging investment in Australian screen production and post-production.

**In 2023/24, 30% of GVA generated by production was generated by specialised activities within the production sector itself**, that is, making screen content. More than one half of GVA was generated through support activities within the production sector, which included advertising and marketing, accounting and financial management and catering services. **GVA generated by screen production embedded in other industries averaged 12% of the sector total over the study period**. The proportional distribution of value generated by specialised, support and embedded activity was fairly steady over the COVID-19 years, suggesting that losses were evenly distributed across the economy.

<sup>75</sup> The ABS ANZSIC classification system defines the motion picture and video production industry as consisting of businesses “mainly engaged in producing motion pictures, videos and television programs or commercials. These productions are recorded and stored on a variety of analogue or digital visual media such as film, video tape or DVD”. Product code: 55110010.  
ABS 2013, [5511 Motion Picture and Video Production Australian and New Zealand Standard Industrial Classification \(ANZSIC\)](#), accessed 15 April 2026.

**Figure 31: Production GVA by trident category, 2016/17 to 2023/24**


Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.

**Table 14: Production GVA and GDP, 2016/17 to 2023/24**

| Year                         | Gross value add<br>\$m | Net taxes<br>\$m | Gross domestic<br>product | Share of total screen<br>and games GVA<br>% |
|------------------------------|------------------------|------------------|---------------------------|---------------------------------------------|
| 2016/17                      | 1,249.6                | 7.7              | 1,257.4                   | 11.7%                                       |
| 2017/18                      | 1,073.9                | 7.4              | 1,081.3                   | 9.9%                                        |
| 2018/19                      | 1,187.2                | 10.0             | 1,197.2                   | 11.7%                                       |
| 2019/20                      | 1,028.1                | 7.3              | 1,035.4                   | 10.7%                                       |
| 2020/21                      | 858.9                  | 8.2              | 867.1                     | 9.2%                                        |
| 2021/22                      | 1,290.8                | 7.4              | 1,298.2                   | 13.0%                                       |
| 2022/23                      | 1,536.3                | 9.0              | 1,545.3                   | 14.7%                                       |
| 2023/24                      | 1,592.8                | 1.4              | 1,594.2                   | 14.3%                                       |
| <b>Average annual growth</b> |                        |                  |                           |                                             |
| 2016/17 – 2023/24            | 4.2%                   | -14.0%           | 4.2%                      |                                             |
| 2020/21 – 2023/24            | 20.3%                  | -51.1%           | 20.0%                     |                                             |

Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.



## Post-production

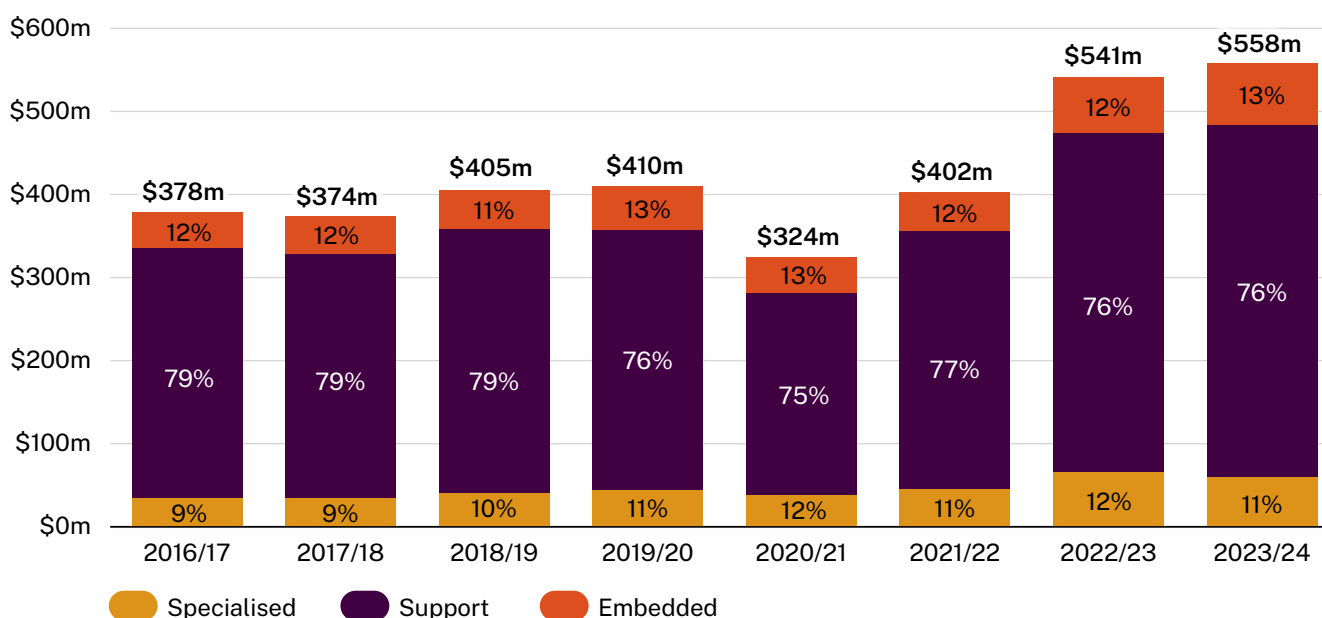
The post-production sector is mainly engaged in providing post-production services such as editing, and animation and visual effects.<sup>76</sup> Post-production companies earn revenues in a similarly diverse way as production companies, through rights revenues generated by existing intellectual property, through commissions from broadcasters and through fee-for-service work.

In 2023/24, post-production was the third-smallest screen sector in Australia, contributing **\$557.2 million in GVA, or 5.0% of the total value of screen industry GVA**. While it was one of the smallest screen sectors, it was also one of the fastest growing over the study period, at an annual average rate of **5.2%**.

As with production, **post-production GVA fell during the COVID pandemic by \$86.2 million**. This occurred after a period of gradual growth from 2016/17 to 2019/20, at an average rate of 3.2% per annum. Post COVID-19, the sector has grown rapidly, at a rate of 19.5% per annum.

**Specialist post-production activity** – which includes editing, animation and special effects activity within the post-production sector – generates a relatively small proportion of GVA, which increased from 9% in 2016/17 to 11% in 2022/23. The largest proportion, approximately three-quarters, is generated by **support activity** (computer systems, software design and development services as well as catering, and accounting services). That the value of support activities here is so much greater than specialised likely reflects the allocation of much activity in this sector to production – **the boundaries between production and post-production are permeable**, especially for activities such as animation. For embedded post-production activity, GVA averaged 12.0% of the total over the study period, similar to the production sector.

Figure 32: Post-production GVA by trident category, 2016/17 to 2023/24



Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.

<sup>76</sup> The ABS describes this sector as being “mainly engaged in providing post-production services and other motion picture and video activities, including specialised motion picture or video post-production services such as editing, film/tape transfers, titling, subtitling, credits, closed captioning and computer-produced graphics, animation and special effects, as well as developing and processing motion picture film.” Product code: 55140010. ABS 2013, 5514 Post-production Services and Other Motion Picture and Video Activities Australian and New Zealand Standard Industrial Classification (ANZSIC), accessed 15 April 2026.

Table 15: Post-production GVA and GDP, 2016/17 to 2023/24

| Year                         | Gross value add<br>\$m | Net taxes<br>\$m | Gross domestic<br>product | Share of total screen<br>and games GVA<br>% |
|------------------------------|------------------------|------------------|---------------------------|---------------------------------------------|
| 2016/17                      | 376.1                  | 2.3              | 378.4                     | 3.5%                                        |
| 2017/18                      | 370.9                  | 2.6              | 373.5                     | 3.4%                                        |
| 2018/19                      | 401.7                  | 3.4              | 405.1                     | 4.0%                                        |
| 2019/20                      | 407.2                  | 2.9              | 410.1                     | 4.3%                                        |
| 2020/21                      | 321.0                  | 3.1              | 324.0                     | 3.4%                                        |
| 2021/22                      | 400.1                  | 2.3              | 402.3                     | 4.0%                                        |
| 2022/23                      | 537.5                  | 3.1              | 540.6                     | 5.1%                                        |
| 2023/24                      | 557.2                  | 0.5              | 557.7                     | 5.0%                                        |
| <b>Average annual growth</b> |                        |                  |                           |                                             |
| 2016/17 – 2023/24            | 5.2%                   | -13.0%           | 5.1%                      |                                             |
| 2020/21 – 2023/24            | 19.5%                  | -51.8%           | 19.2%                     |                                             |

Source: University of Canberra estimates based on ABS National Accounts Input-Output tables

## Distribution

The distribution sector is mainly involved in the buying and selling of program rights to broadcasters and cinema operators and in supporting production financing arrangements through pre-sales.<sup>77</sup> Income sources include fees for content sales and rights revenues earned through investments in the productions that they help finance.

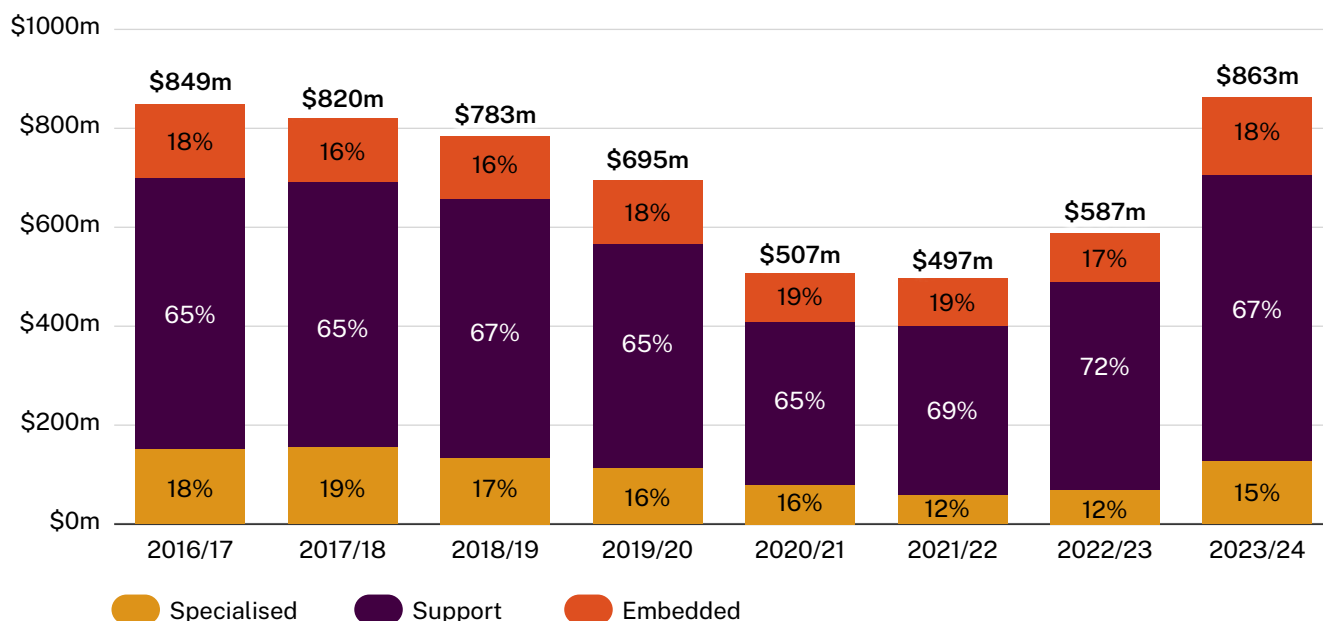
In 2023/24, distribution was the fifth-largest screen sector in Australia, contributing **\$861.7 million in GVA, or 7.7% of the total value of screen industry GVA. The sector was mostly in decline during the study period:** between 2016/17 to 2021/22, GVA generated by distribution nearly halved, from \$843.6 million to \$493.9 million. This likely reflects a combination of factors including the declining use of distribution services as production of Australian TV drama fell during COVID-19 (see [Figure 22](#) and [Figure 23](#)), content creators releasing their productions themselves online and streamers' practice of directly acquiring all IP rights in the content they commission. Since 2021/22, the sector has regained considerable value, increasing by an annual average rate of 17.8% to \$863 million in 2023/24, with demand for distribution services picking up following increases in production

sector sales ([Figure 21](#)) and TV drama production expenditure ([Figure 23c](#)).

**Most of the value generated by the distribution sector is associated with support activities.** The proportion of GVA generated through distribution activities and rights sales has been fairly stable, falling slightly from 18% to 15% of sector GVA between 2016/17 and 2023/24 while the proportion generated through **support activities** such as legal, accounting and management services increased from 65% to 67%. The proportion of sector GVA generated by embedded activity in other industries has been higher than specialised activity since 2019/20. This suggests that the production companies and broadcasting companies that distribute their own programs are continuing to do so, while it is the distribution industry itself that is most affected by changes such as SVOD acquisition practices.

<sup>77</sup> The ABS defines the motion picture and video distribution industry as "mainly engaged in acquiring distribution rights and distributing motion pictures and videos. These products are distributed (through leasing and wholesale channels) to a range of exhibitors such as motion picture theatres and television stations using a variety of visual media". Product code: 55120010. ABS 2013, [5512 Motion Picture and Video Distribution Australian and New Zealand Standard Industrial Classification \(ANZSIC\)](#), accessed 15 April 2026.




**Figure 33: Distribution GVA by trident category, 2016/17 to 2023/24**


Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.

**Table 16: Distribution GVA and GDP, 2016/17 to 2023/24**

| Year                         | Gross value add<br>\$m | Net taxes<br>\$m | Gross domestic<br>product | Share of total screen<br>and games GVA<br>% |
|------------------------------|------------------------|------------------|---------------------------|---------------------------------------------|
| 2016/17                      | 843.6                  | 4.9              | 848.5                     | 7.9%                                        |
| 2017/18                      | 814.6                  | 5.4              | 820.0                     | 7.5%                                        |
| 2018/19                      | 777.0                  | 6.3              | 783.3                     | 7.7%                                        |
| 2019/20                      | 689.8                  | 4.7              | 694.5                     | 7.2%                                        |
| 2020/21                      | 502.6                  | 4.5              | 507.1                     | 5.4%                                        |
| 2021/22                      | 493.9                  | 2.7              | 496.6                     | 5.0%                                        |
| 2022/23                      | 583.5                  | 3.4              | 586.9                     | 5.6%                                        |
| 2023/24                      | 861.7                  | 1.0              | 862.7                     | 7.7%                                        |
| <b>Average annual growth</b> |                        |                  |                           |                                             |
| 2016/17 – 2023/24            | 3.8%                   | 19.1%            | -3.9%                     |                                             |
| 2020/21 – 2023/24            | 17.8%                  | -42.8%           | 17.6%                     |                                             |

Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.

# Exhibition

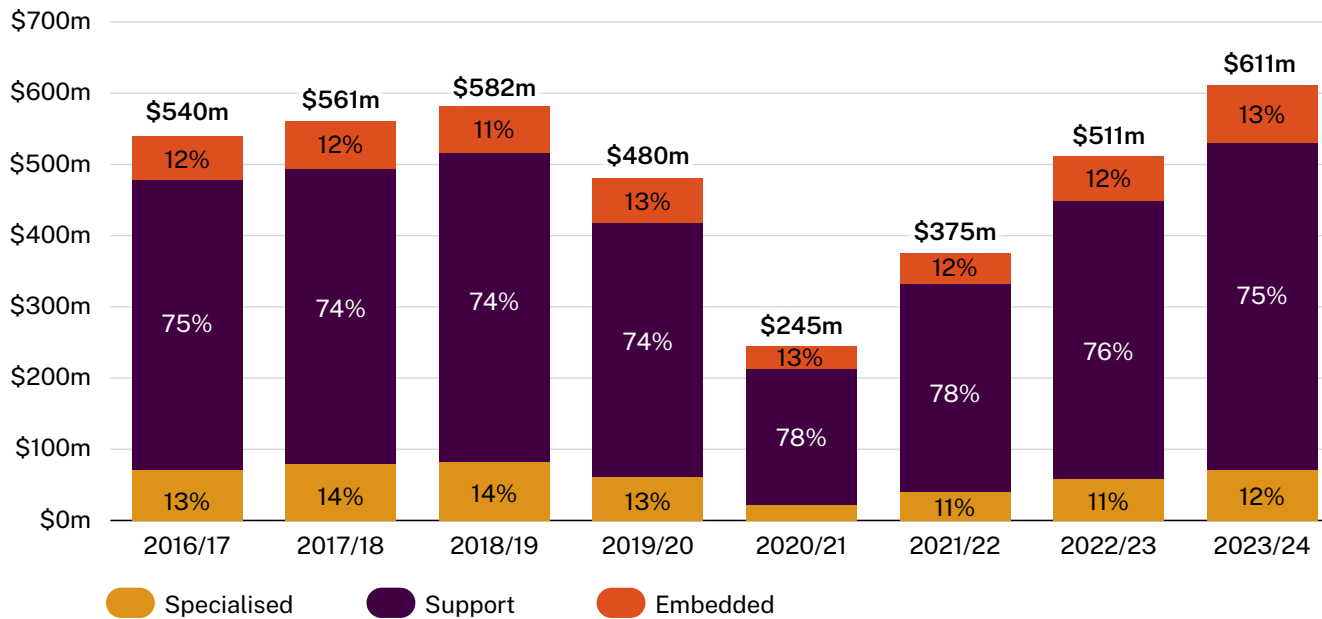
The exhibition sector is primarily involved with operating movie theatres and running film festivals.<sup>78</sup> While it generates revenues through ticket sales, concession sales (snacks, drinks, movie paraphernalia) are an important source of income for theatre operators.

In 2023/24, exhibition was the second-smallest screen sector in Australia, contributing **\$611 million in GVA, or 5.5% of the total value of screen industry GVA**. Motion picture exhibition was severely affected by the COVID pandemic, falling by more than one half between 2018/19 and 2020/21. Subsequent increases have since seen motion picture exhibition GVA revert to previous levels

(not adjusted for inflation), as cinema audiences returned to pre-COVID habits<sup>79</sup> (see the discussion on falling box office revenues in the production trends chapter).

**Three-quarters of the value generated by the exhibition sector is associated with support services** rather than specialised theatre services, reflecting the importance of concession revenues (popcorn and drinks) to movie theatre operators. The approximately 12% of value generated by exhibition in other industries is associated with movie theatre services provided by organisations such as galleries, education institutions and parks and gardens.

Figure 34: Exhibition GVA, 2016/17 to 2023/24



Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.

78 The ABS defines the Motion picture exhibition industry as “mainly engaged in screening motion pictures using a variety of visual media. Included in this class are units screening productions at festivals and other similar events.” Product code: 55130010. ABS 2013, [5513 Motion Picture Exhibition Australian and New Zealand Standard Industrial Classification \(ANZSIC\)](#), accessed 15 April 2026.

79 Screen Australia 2025, [Cinema Audience Attendance Patterns](#), accessed 15 April 2026.



Table 17: Exhibition GVA and GDP, 2016/17 to 2023/24

| Year                         | Gross value add<br>\$m | Net taxes<br>\$m | Gross domestic<br>product | Share of total screen<br>and games GVA<br>% |
|------------------------------|------------------------|------------------|---------------------------|---------------------------------------------|
| 2016/17                      | 536.2                  | 3.3              | 539.5                     | 5.0%                                        |
| 2017/18                      | 557.0                  | 3.8              | 560.9                     | 5.1%                                        |
| 2018/19                      | 576.8                  | 4.9              | 581.6                     | 5.7%                                        |
| 2019/20                      | 476.6                  | 3.4              | 480.0                     | 5.0%                                        |
| 2020/21                      | 242.6                  | 2.3              | 244.9                     | 2.6%                                        |
| 2021/22                      | 373.1                  | 2.1              | 375.2                     | 3.8%                                        |
| 2022/23                      | 508.4                  | 3.0              | 511.4                     | 4.9%                                        |
| 2023/24                      | 610.6                  | 0.5              | 611.1                     | 5.5%                                        |
| <b>Average annual growth</b> |                        |                  |                           |                                             |
| 2016/17 – 2023/24            | -1.8%                  | 20.6%            | -1.9%                     |                                             |
| 2020/21 – 2023/24            | 30.8%                  | -42.2%           | 30.5%                     |                                             |

Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.

## Free-to-air TV

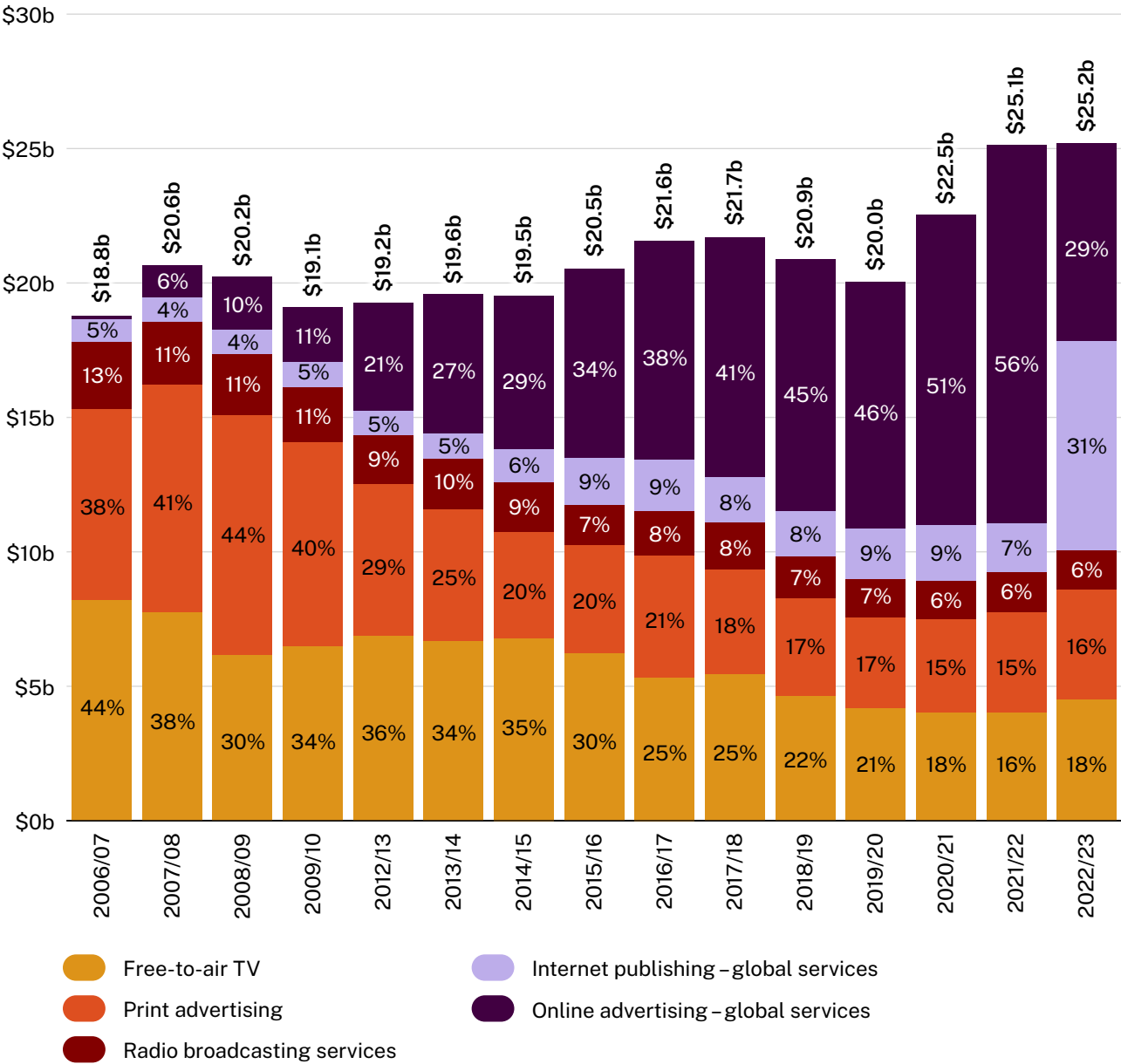
The free-to-air TV sector includes public service and commercial TV broadcasters that transmit their TV services free of charge using the broadcasting services bands of the radiofrequency spectrum. Transmissions are made available without cost to the viewer.<sup>80</sup> Commercial TV broadcasters' main source of revenue is advertising, while public service TV's most important income source is government funding.

Free-to-air TV is the third-largest screen sector, generating **\$1.9 billion in 2023/24, 16.7% of total screen GVA**. It is in decline, with its GVA falling by an annual average of **3.6% between 2016/17 and 2023/24** (Figure 36). Its largest drop in GVA was in 2018/19, prior to the COVID-19 pandemic, coinciding with its share of total Australian advertising expenditure falling from 21% to 18%.<sup>81</sup> The decline of free-to-air TV is the result of technological change and globalisation, with it losing audience share and advertising revenue to new online services (Figure 36). **Expenditure on commercial broadcaster advertising services have more than halved since the 2000s as commercial broadcasters lost advertising business to online:** the same “rivers of gold” that had already abandoned Australia’s newspaper and magazine publishing industry now flow offshore to the digital platforms Google and Meta.

<sup>80</sup> The ABS defines free-to-air broadcasting as “mainly engaged in free-to-air television broadcasting of visual content, in the form of electronic images together with sound, through broadcasting studios and facilities. These units may also produce or transmit visual programming to affiliated broadcast television stations, which in turn broadcast the programs on a pre-determined schedule. Transmissions are made available without cost to the viewer”. Product code: 56210010. ABS 2013, *5621 Free-to-Air Television Broadcasting Australian and New Zealand Standard Industrial Classification (ANZSIC)*, accessed 15 April 2026.

<sup>81</sup> Based on the time series first published on page 23 of *Australian Television Drama's Uncertain Future: How Cultural Policy is Failing Australians* (2024), by Making Australian TV in the 21st Century Research Team at Queensland University of Technology.

Figure 35: Expenditure on advertising services by Australian businesses (2024/25 dollars)

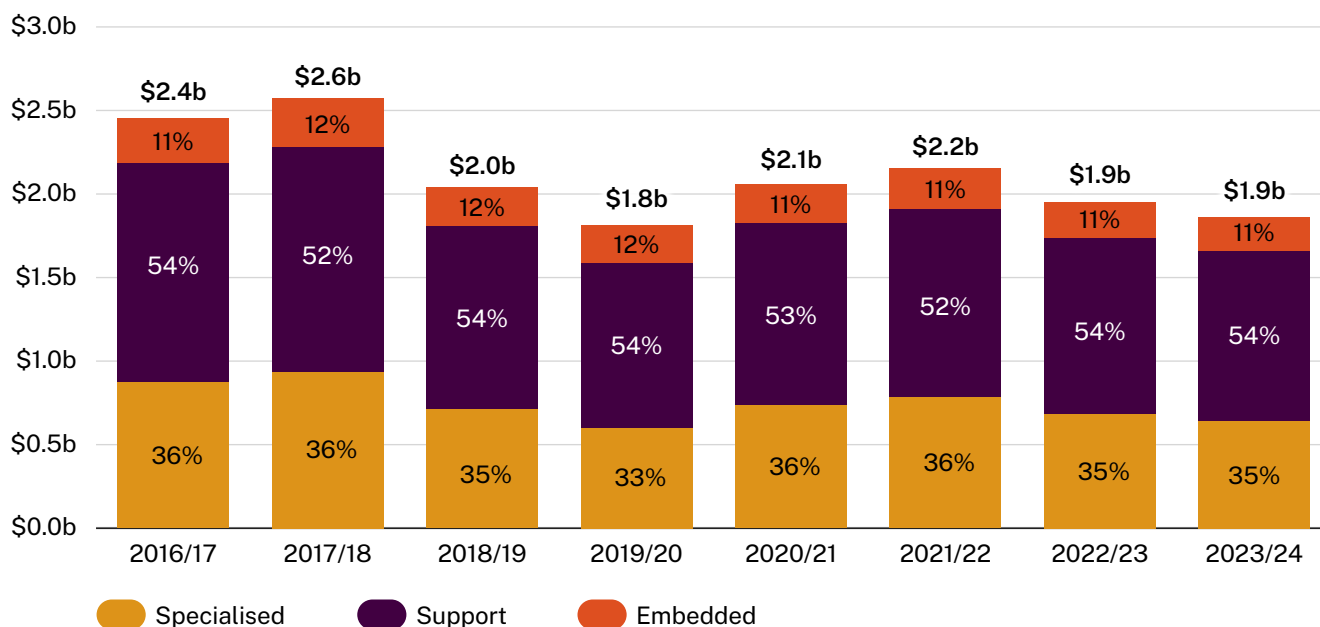


Note: The value of online advertising as estimated by IAB Australia and PWC includes expenditure with domestic and international providers. Here the value of domestic internet publishing is subtracted from the IAB total to obtain an estimate of Australian advertising expenditure on global services. The time series is adjusted for inflation using the CPI. 2022/23 was the first year that the ABS began to incorporate the Australian activities significant global digital platforms, resulting in the increase here of the estimate of the value of domestic internet advertising services, with a commensurate decrease in global services.

Sources: ABS National Accounts Input Output Tables, IAB Australia internet advertising expenditure.

More than one-third of GVA is generated by **specialised free-to-air TV activities** and one half as **support activities within the free-to-air TV sector**. 11% is generated as **embedded activity** within other industries (Figure 36).




**Figure 36: Free-to-air TV services GVA by trident category, 2016/17 to 2023/24**


Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.

**Table 18: Free-to-air TV services GVA and GDP, 2016/17 to 2023/24**

| Year                         | Gross value add<br>\$m | Net taxes<br>\$m | Gross domestic<br>product | Share of total screen<br>and games GVA<br>% |
|------------------------------|------------------------|------------------|---------------------------|---------------------------------------------|
| 2016/17                      | 2,447.5                | 5.6              | 2,453.2                   | 22.8%                                       |
| 2017/18                      | 2,571.5                | 2.4              | 2,573.8                   | 23.7%                                       |
| 2018/19                      | 2,039.0                | 2.7              | 2,041.7                   | 20.2%                                       |
| 2019/20                      | 1,809.9                | 2.3              | 1,812.1                   | 18.9%                                       |
| 2020/21                      | 2,057.3                | 1.1              | 2,058.4                   | 22.1%                                       |
| 2021/22                      | 2,151.2                | 1.7              | 2,152.9                   | 21.7%                                       |
| 2022/23                      | 1,949.7                | 2.8              | 1,952.5                   | 18.6%                                       |
| 2023/24                      | 1,858.9                | 1.7              | 1,860.7                   | 16.7%                                       |
| <b>Average annual growth</b> |                        |                  |                           |                                             |
| 2016/17 – 2023/24            | -3.6%                  | -11.5%           | -3.6%                     |                                             |
| 2020/21 – 2023/24            | -4.0%                  | 18.0%            | -4.0%                     |                                             |

Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.

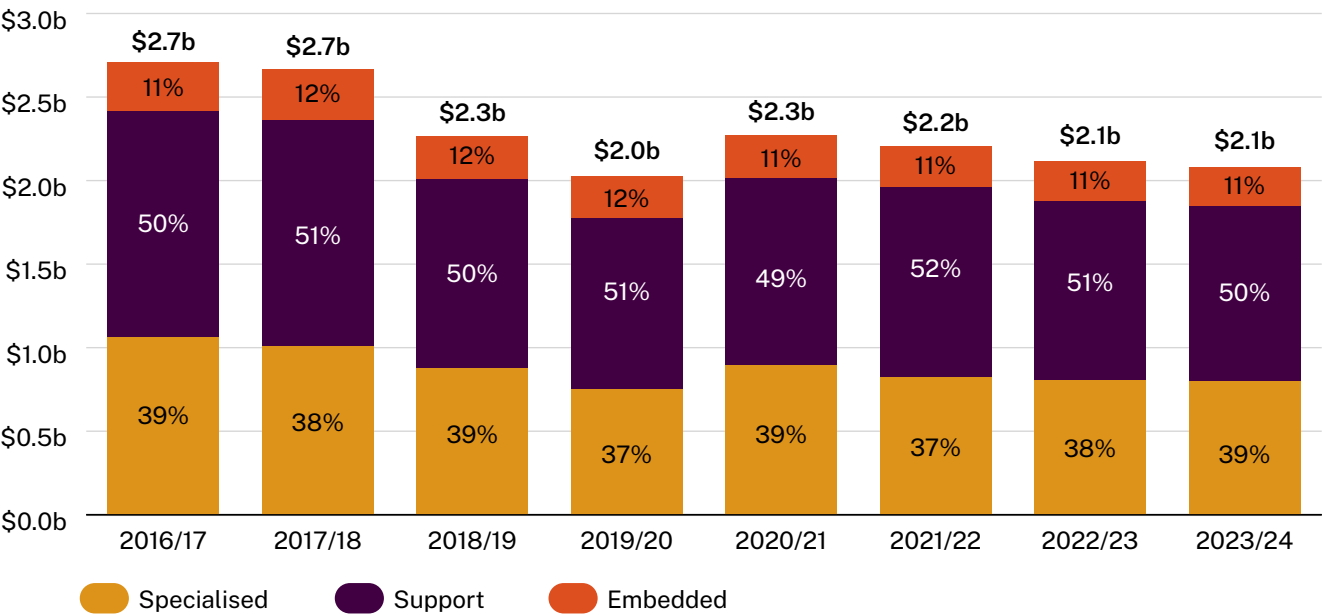
## Subscription TV

The subscription TV sector is involved in bundling TV channels and transmitting them to customers via cable or satellite services.<sup>82</sup> Subscription broadcasting services generally earn income through selling subscriptions, and advertising as a secondary income source. Services recorded in this sector include Foxtel and Fetch and are known colloquially as “pay TV”.

Subscription TV was the second-largest screen sector in 2023/24, generating **\$2.1 billion in GVA, 20% of all GVA for the total screen industry**. GVA generated by the subscription TV sector is also in decline: it fell by an annual average of 3.5% between 2016/17 and 2023/24. Technological change and globalisation have not only affected free-to-air TV services, subscription TV was also impacted as new international services launched in Australia, competing for subscription revenues. Note that this category may capture some businesses that were originally established as subscription TV channels that have been re-launched as streaming services.

The amount of activity captured by the subscription TV sector is broad and includes wholesale network services as well as retail TV subscriptions. While nearly 40% of the GVA generated in the subscription TV sector was generated by **specialised subscription broadcasting services**, half (generated GVA of as much as \$1 billion each year) came from **support activity**. Support activity includes in-house production services, legal and regulatory services, technical support and infrastructure installation services and telecommunications services using subscription TV network infrastructure.

Figure 37: Subscription TV GVA, 2016/17 to 2023/24



Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.

82 The ABS defines this sector as “mainly engaged in broadcasting television programs on a subscription or fee basis (such as subscription cable or satellite television broadcasting) to viewers”. Product code: 56220010. ABS 2013, *5622 Cable and Other Subscription Broadcasting Australian and New Zealand Standard Industrial Classification (ANZSIC)*, accessed 15 April 2026.



Table 19: Subscription TV GVA and GDP, 2016/17 to 2023/24

| Year                         | Gross value add<br>\$m | Net taxes<br>\$m | Gross domestic<br>product | Share of total screen<br>and games GVA<br>% |
|------------------------------|------------------------|------------------|---------------------------|---------------------------------------------|
| 2016/17                      | 2,702.6                | 6.2              | 2,708.9                   | 25.2%                                       |
| 2017/18                      | 2,666.9                | 2.4              | 2,669.3                   | 24.6%                                       |
| 2018/19                      | 2,266.4                | 3.0              | 2,269.5                   | 22.4%                                       |
| 2019/20                      | 2,025.6                | 2.4              | 2,028.0                   | 21.2%                                       |
| 2020/21                      | 2,270.5                | 1.2              | 2,271.8                   | 24.4%                                       |
| 2021/22                      | 2,206.4                | 1.8              | 2,208.2                   | 22.2%                                       |
| 2022/23                      | 2,113.9                | 3.0              | 2,116.9                   | 20.2%                                       |
| 2023/24                      | 2,075.3                | 1.9              | 2,077.3                   | 18.6%                                       |
| <b>Average annual growth</b> |                        |                  |                           |                                             |
| 2016/17 – 2023/24            | -3.5%                  | -11.2%           | -3.6%                     |                                             |
| 2020/21 – 2023/24            | -3.1%                  | 18.9%            | -3.1%                     |                                             |

Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.

## Internet broadcasting

**Internet broadcasting is not specifically defined by the ABS in the ANZSIC or in the input-output table product codes. Rather it is a sub-set of the Internet publishing and broadcasting sector.<sup>83</sup>**

Here the scope of the GVA estimates have been narrowed so they are limited to the value of video-related activities within Internet publishing and broadcasting. Internet broadcasting has been defined to capture the value of SVOD services and other video services transmitted over the Internet and consumed via apps and web browsers (including YouTube and TikTok).<sup>84</sup> It does not include audio content such as podcasts or publishing services such as eBooks and audio books. Internet publishing services earn revenue through advertising and selling subscriptions.

**Internet broadcasting has been the largest screen sector since 2018/19**, and in 2023/24 generated \$3.4 billion in GVA, 29.4% of the entire screen sector. Internet broadcasting GVA grew steadily between 2016/17 and 2023/24, at an average rate of

3.1% per annum. Note that Australian expenditure on international subscription and streaming service is not visible in the ABS input-output tables – so, while Australians are spending more on subscription TV and streaming services,<sup>85</sup> this is not visible in Figure 38.

The way the internet broadcasting sector generates value across specialised, support and embedded services is very different to other screen sectors. **The specialised component for internet broadcasting is very small, while 40% is generated by support activities and more than half is generated by embedded activity in other industries.** Here specialised content is the transmission of video content specifically created for internet broadcasting: this is a niche activity as internet broadcasters tend not to be directly involved with content creation, but instead commission and acquire it from production companies or provide a platform for user-generated content to be shared. Internet broadcasters generate value through their support activities: SVODs sell curated catalogues of

83 Industry: 5700 Internet Publishing and Broadcasting Industry. The ABS defines the Internet publishing and broadcasting industry as “mainly engaged in publishing and/or broadcasting content on the internet. Units in this class provide textual, audio and/or video content of general or specific interest on the internet. These units do not provide traditional (non-internet) versions of the content they publish or broadcast.” Product: All screen products. ABS 2013, *5700 Internet Publishing and Broadcasting Australian and New Zealand Standard Industrial Classification (ANZSIC)*, accessed 15 April 2026.

84 Products: 55140010 Post-production services and other motion picture and video activities Industry, 55120010 Motion picture and video distribution services, 55120020 Copyright leasing - motion pictures and videos, 55130010 Motion picture theatre services, 56210010 Free-to-air television broadcasting services, 56220010 Cable (Pay TV) and other subscription broadcasting services : 5700 Internet Publishing and Broadcasting Industry.

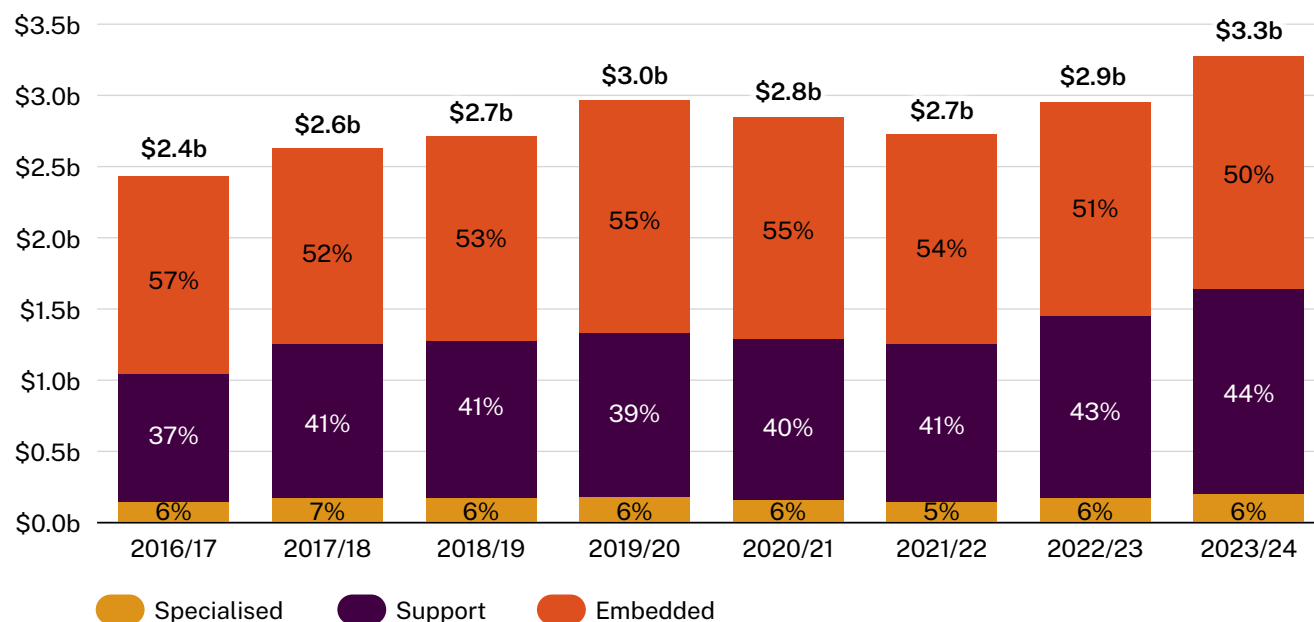
85 Potter A and McCutcheon M 2025, *Australian Cultural Policy Unravelling: The Digital Demise of National Television Drama*, Routledge, Oxon and New York, p. 57.

professional content to subscribers and social media entertainment services provide platforms for content sharing in return for being able to sell audience attention to advertisers.

**Embedded activity contributes a greater share of GVA in this domain than for other screen sectors.** There are two types of embedded activity

generating value. The first is accrued in the internet sector through delivering online video (e.g. access, search and hosting). The second is activity associated with online video in other sectors (the most prominent is VOD services offered by free-to-air TV and subscription TV broadcasting services).

**Figure 38: Internet broadcasting GVA, 2016/17 to 2023/24**



Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.

**Table 20: Internet broadcasting GVA and GDP, 2016/17 to 2023/24**

| Year                         | Gross value add<br>\$m | Net taxes<br>\$m | Gross domestic<br>product | Share of total screen<br>and games GVA<br>% |
|------------------------------|------------------------|------------------|---------------------------|---------------------------------------------|
| 2016/17                      | 2,429.5                | 3.5              | 2,433.0                   | 22.7%                                       |
| 2017/18                      | 2,624.4                | 3.0              | 2,627.4                   | 24.2%                                       |
| 2018/19                      | 2,706.7                | 4.4              | 2,711.1                   | 26.8%                                       |
| 2019/20                      | 2,963.0                | 4.9              | 2,968.0                   | 31.0%                                       |
| 2020/21                      | 2,841.8                | 5.8              | 2,847.6                   | 30.5%                                       |
| 2021/22                      | 2,720.5                | 6.7              | 2,727.2                   | 27.4%                                       |
| 2022/23                      | 2,943.3                | 6.0              | 2,949.2                   | 28.1%                                       |
| 2023/24                      | 3,273.1                | 3.5              | 3,276.6                   | 29.4%                                       |
| <b>Average annual growth</b> |                        |                  |                           |                                             |
| 2016/17 – 2023/24            | 3.1%                   | 5.8%             | 3.1%                      |                                             |
| 2020/21 – 2023/24            | 5.0%                   | -16.3%           | 5.0%                      |                                             |

Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.





## Digital games development

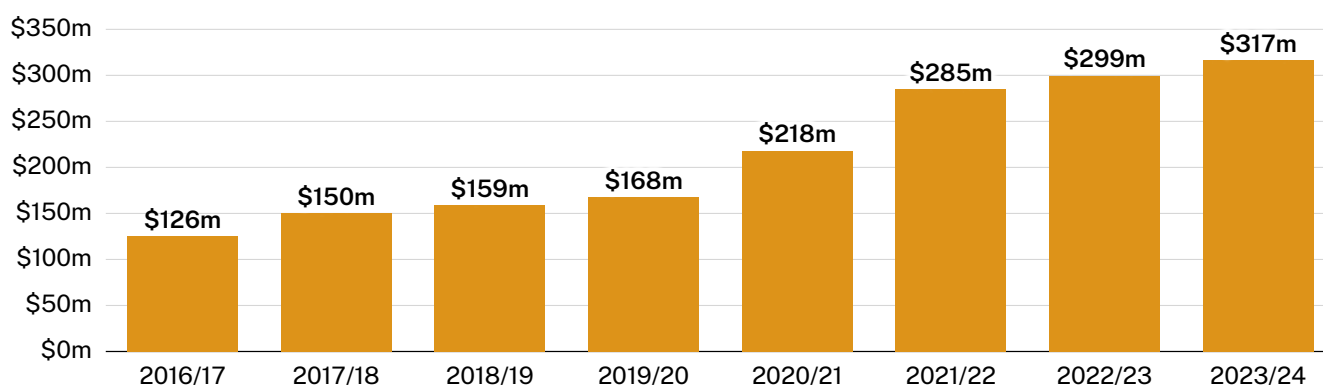
Digital games development is not defined either as a separate product or industry by the ABS. GVA and GDP figures rely on estimates calculated by BCARR for its cultural and creative satellite accounts.<sup>86</sup> Note that BCARR does not disaggregate its estimates into specialised, support and embedded value, so they are not able to be presented here.

Digital games developers earn revenues through selling access to their games through digital platforms such as Steam, through ecosystems

associated with particular hardware such as Microsoft Xbox and Nintendo Switch, and through platforms such as Apple Games and Google Play.

Computer games development is the smallest sector included in this study, generating **\$317 million in 2023/24 or 2.8% of all screen sector GVA**. It is also the fastest growing sector, with its GVA more than doubling between 2016/17 and 2023/24. The introduction of the Digital Games Tax Offset from 2022 appears to have resulted in an up-tick in digital games development GVA, in the order of \$100 million between 2020/21 and 2023/24.

Figure 39: Digital games development GVA, 2016/17 to 2023/24



Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.

Table 21: Digital games development GVA and GDP, 2016/17 to 2023/24

| Year                         | GVA<br>\$m | Net taxes<br>\$m | GDP<br>\$m | Share of total screen<br>and games GVA<br>% |
|------------------------------|------------|------------------|------------|---------------------------------------------|
| 2016/17                      | 126        | 0.6              | 126.6      | 1.2%                                        |
| 2017/18                      | 150        | 0.5              | 150.5      | 1.4%                                        |
| 2018/19                      | 159        | 1.3              | 160.3      | 1.6%                                        |
| 2019/20                      | 168        | 1.1              | 169.1      | 1.8%                                        |
| 2020/21                      | 218        | 1.6              | 219.6      | 2.3%                                        |
| 2021/22                      | 285        | 2.1              | 287.1      | 2.9%                                        |
| 2022/23                      | 299        | 2.2              | 301.2      | 2.9%                                        |
| 2023/24                      | 317        | 3.0              | 320.0      | 2.8%                                        |
| <b>Average annual growth</b> |            |                  |            |                                             |
| 2016/17 – 2023/24            | 14.2%      | 24.4%            | 14.0%      |                                             |
| 2020/21 – 2023/24            | 11.7%      | 19.3%            | 10.0%      |                                             |

Source: University of Canberra estimates based on ABS National Accounts Input-Output tables.

86 BCARR 2025, *Cultural and creative activity in Australia 2014-15 to 2023-24, Visual summary*.



Floodland

## Employment in screen and games industry sectors by gender and geographical distribution

This appendix provides further detail on employment and income estimates for separate screen and games industries.

### Production

**Employment in production grew by an annual average rate of 5% between 2008/09**, the strongest growth rate of any sector in this study other than the emerging industries of internet broadcasting and digital games development.

**The proportional distribution of employment by gender appears fairly stable** in this major segment of screen employment (Figure 40a). **However, the overall sector view masks improvement in women's representation in key roles. Other research has highlighted that the screen industry is highly gendered**, with women under-represented in some roles such as writing, directing, camera, sound and lighting, and over-represented in set design, costume, hair and makeup.<sup>87</sup> **Screen Australia's Gender Matters programs, including its KPI, are**

**working to address the imbalance in key creative roles. In 2024/25, 56% of key creative roles** (producer, director, writer) across approved Screen Australia development and production funding were held by women, non-binary and/or gender diverse people.<sup>88</sup> There are also signs of positive change in the pipeline to leadership in camera roles, with women's representation in core camera roles improving between 2011 and 2019 in most occupations.<sup>89</sup>

Looking at the distribution of employment in production by state, it appears to be static, suggestive of a mature industry segment with deep rooted protocols and **largely fixed geographical dynamics** (Figure 40b). This is despite numerous attempts by state governments to attract a greater share of screen production into their respective states or territories.

87 SDIN 2022, *Everyone Counts Report*.

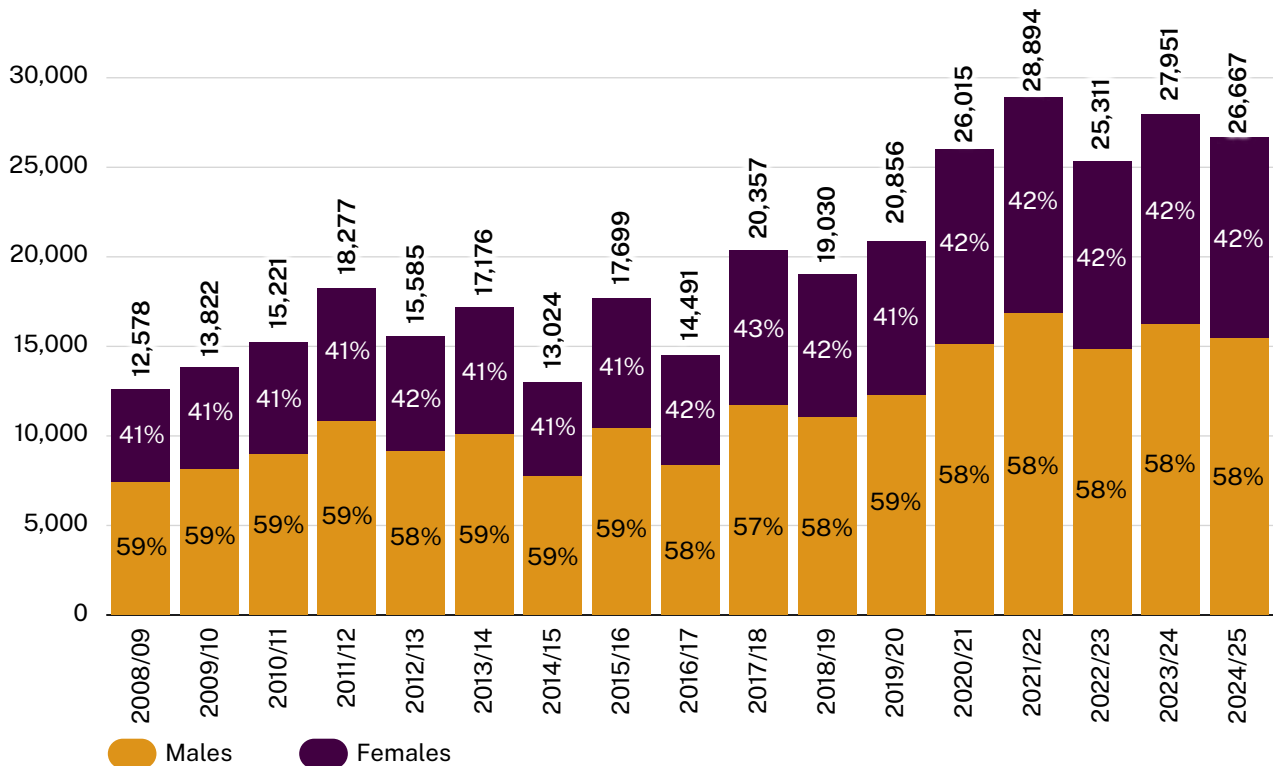
88 Screen Australia 2025, *Screen Australia reflects on 10 years of the Gender Matters KPI with 'steady and consistent' 2024/25 update*, accessed 15 April 2026.

89 Coles A et al. 2022, *A Wider Lens: Australian camera workforce development and diversity*, Australian Cinematographers Society.

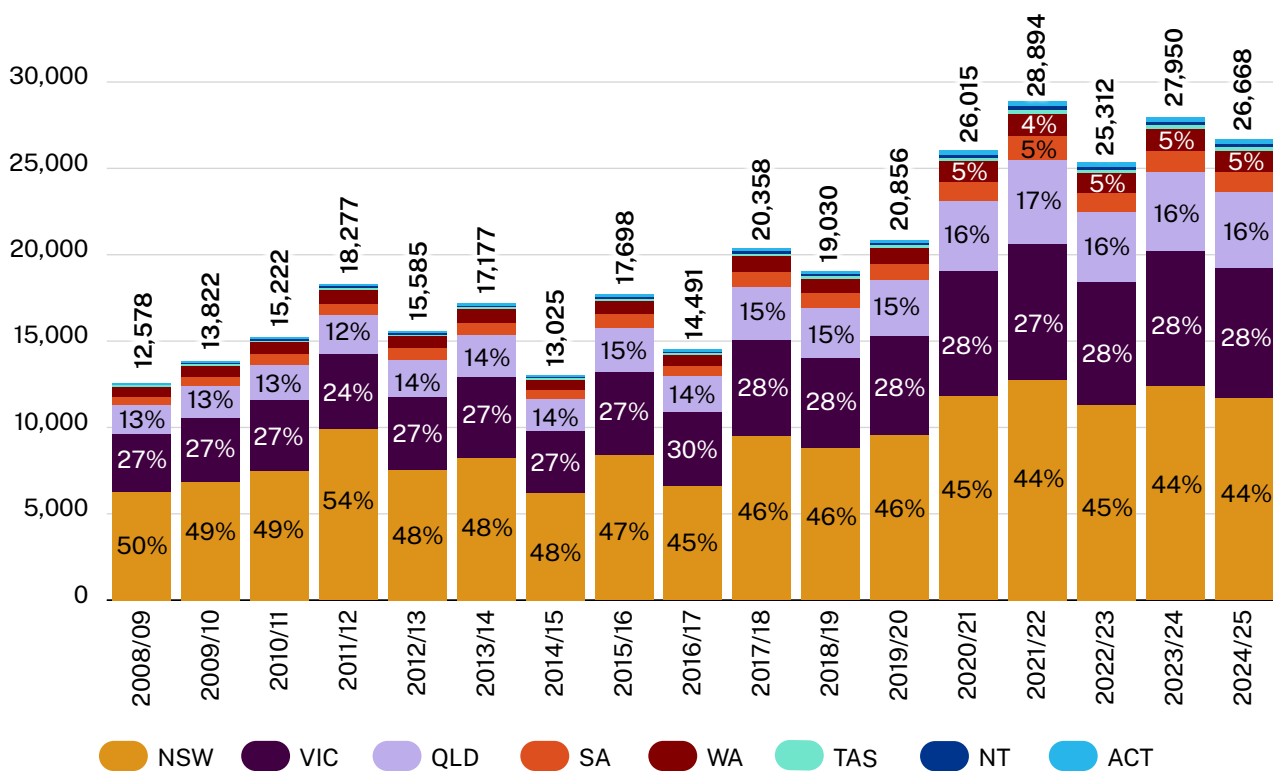


Figure 40: Production sector, 2008/09 to 2024/25

a. Employed persons by gender



b. Employed persons by state/territory



Source: UC estimates based on the ABS Labour Account, ABS Labour Force Survey and ABS Jobs in Australia (TableBuilder).

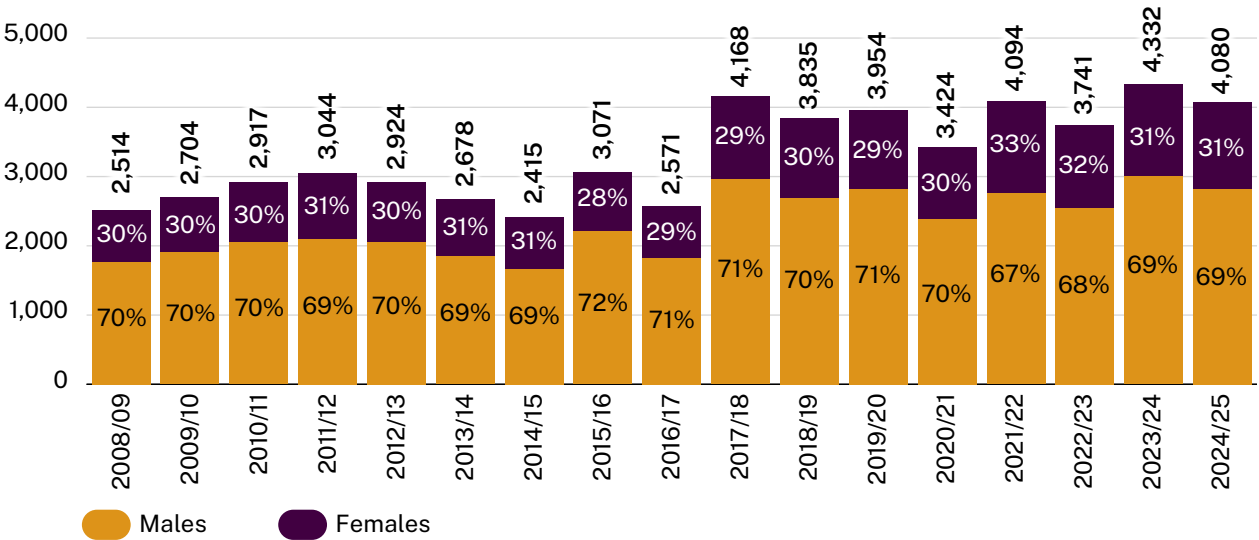
# Post-production

A higher tech segment of the screen industry, **post-production features much higher proportions of males** than production. Despite employment in post-production peaking in 2017/18 and 2018/19, this boost was not maintained: **average growth over the time series is a relatively low at 1% per annum.**

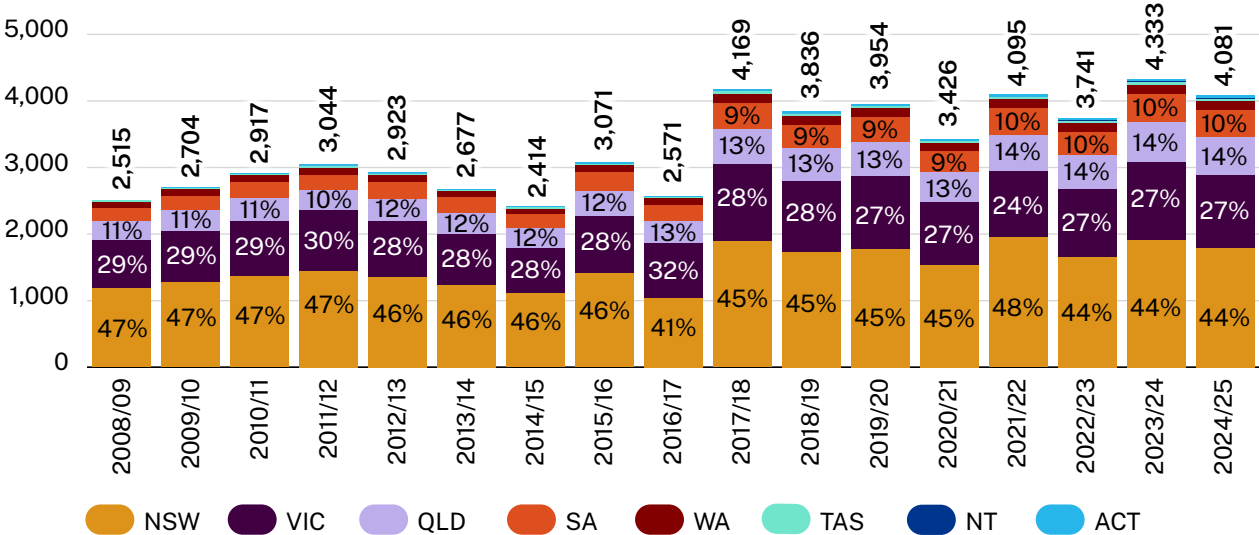
The sub national breakdown suggests that there may be benefits in post-production locating near production activity, with the proportional distribution of **employment by state being very similar to that of production**, and not changing significantly over time.

Figure 41: Post-production sector, 2008/09 to 2024/25

## a. Employed persons by gender



## b. Employed persons by state/territory



Source: UC estimates based on the ABS Labour Account, ABS Labour Force Survey and ABS Jobs in Australia (TableBuilder).



## Distribution

The distribution sector includes management and professional services workers as well as advertising and marketing expertise which are employment categories with strong female representation.

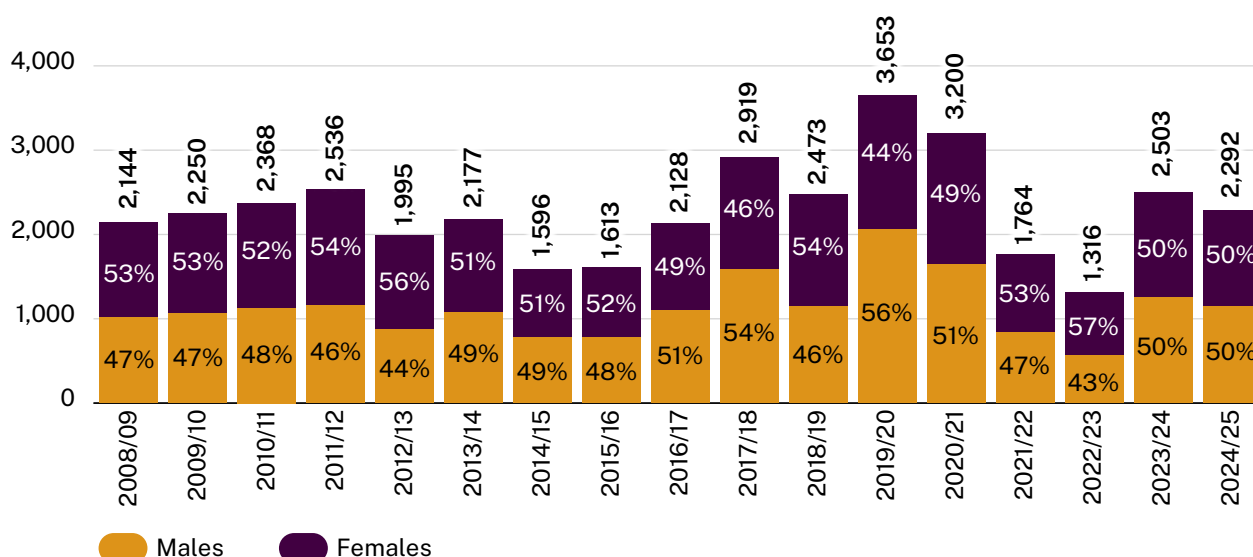
Employment in this sector has shrunk substantially, falling by more than two-thirds between 2019/20 and 2024/25. It appears to have operated as a safe haven during the COVID-19 pandemic, particularly for male workers, despite declining use of distribution services as locally-owned production fell during COVID. The increase

in distribution employment in 2019/20 and 2020/21 appears to coincide with decreases in employment in production and may be explained by production workers changing tack to leverage existing IP during the pandemic. It has since reverted to historic gender proportions.

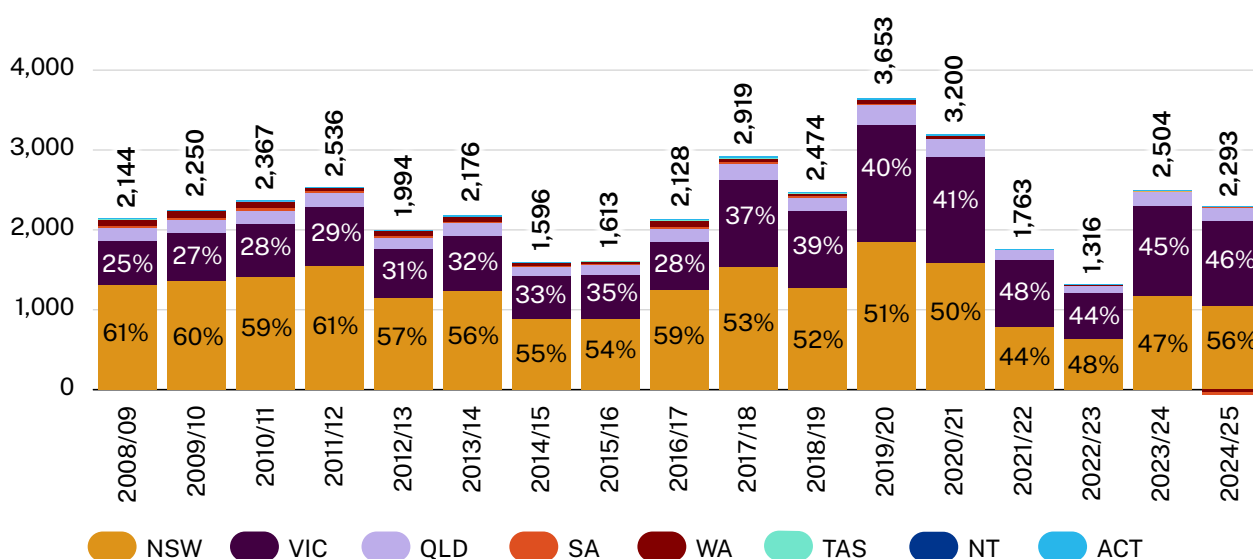
Looking at employment by state, the distribution of employees in this sector is different to production and post-production, with **Victoria being the leading employment location** in this segment of the industry as it is the location of several major distribution businesses' headquarters.

Figure 42: Distribution sector, 2008/09 to 2024/25

### a. Employed persons by gender



### b. Employed persons by state/territory



Source: UC estimates based on the ABS Labour Account, ABS Labour Force Survey and ABS Jobs in Australia (TableBuilder).

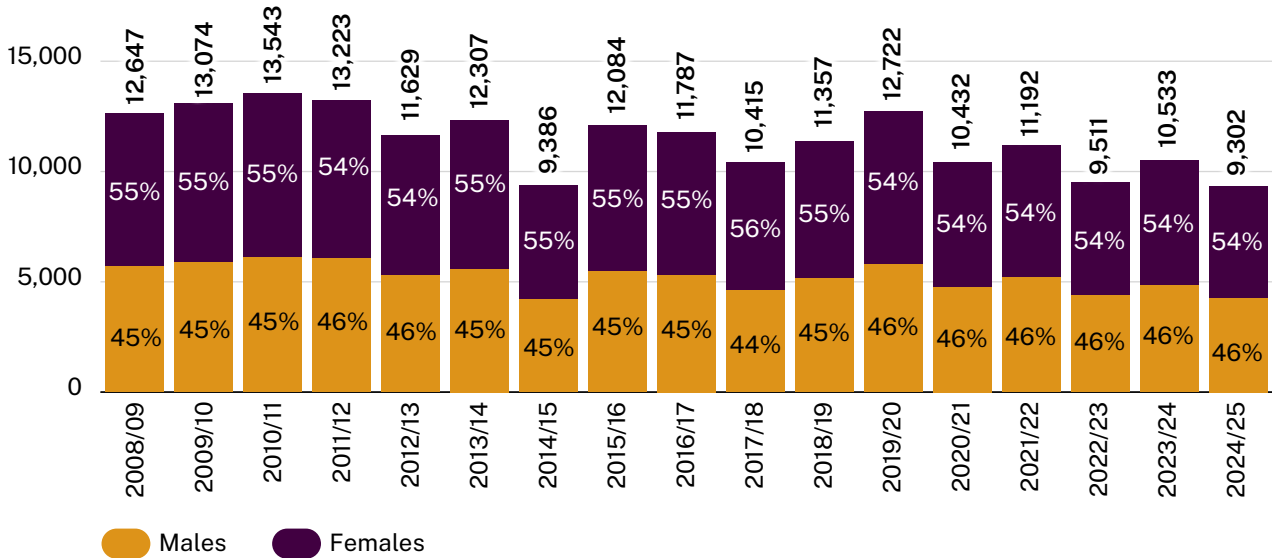


# Exhibition

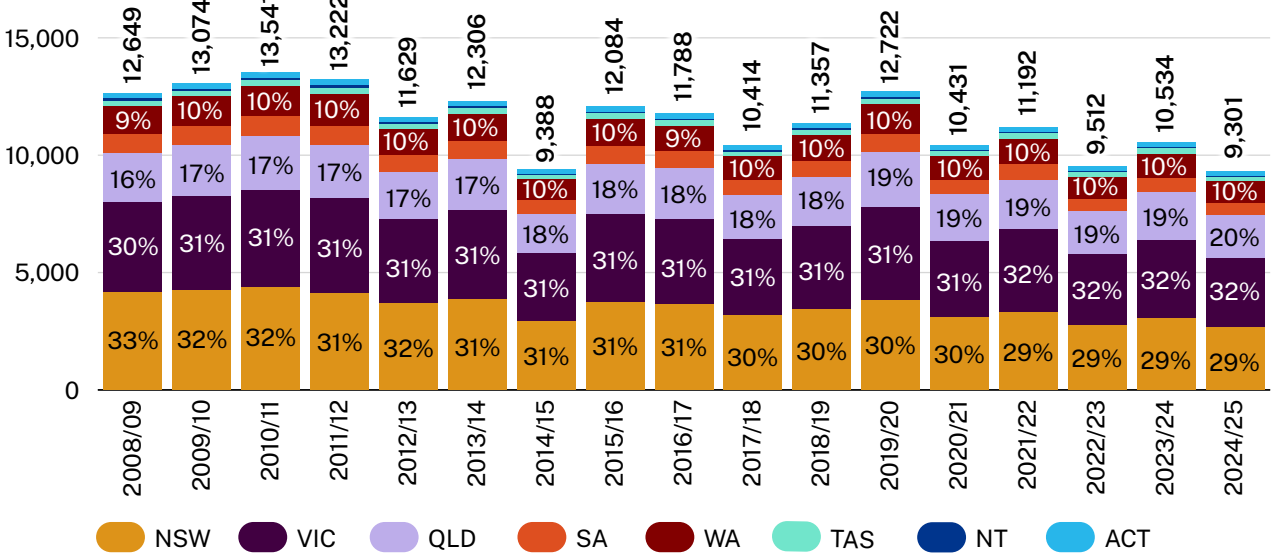
**Employment in exhibition fell steadily between 2008/09 and 2024/25**, by an annual average of 2%. The exhibition sector relies on a range of management, professional services, advertising and marketing professionals as well as retail services staff to operate cinemas, and to run and promote film festivals. **Gender proportions are static** throughout the time series, with approximately 45% of workers being females. **The distribution of cinemas around Australia makes this segment the most broadly dispersed** at the sub national level of all screen sectors.

Figure 43: Exhibition sector, 2008/09 to 2024/25

## a. Employed persons by gender



## b. Employed persons by state/territory



Source: UC estimates based on the ABS Labour Account, ABS Labour Force Survey and ABS Jobs in Australia (TableBuilder).

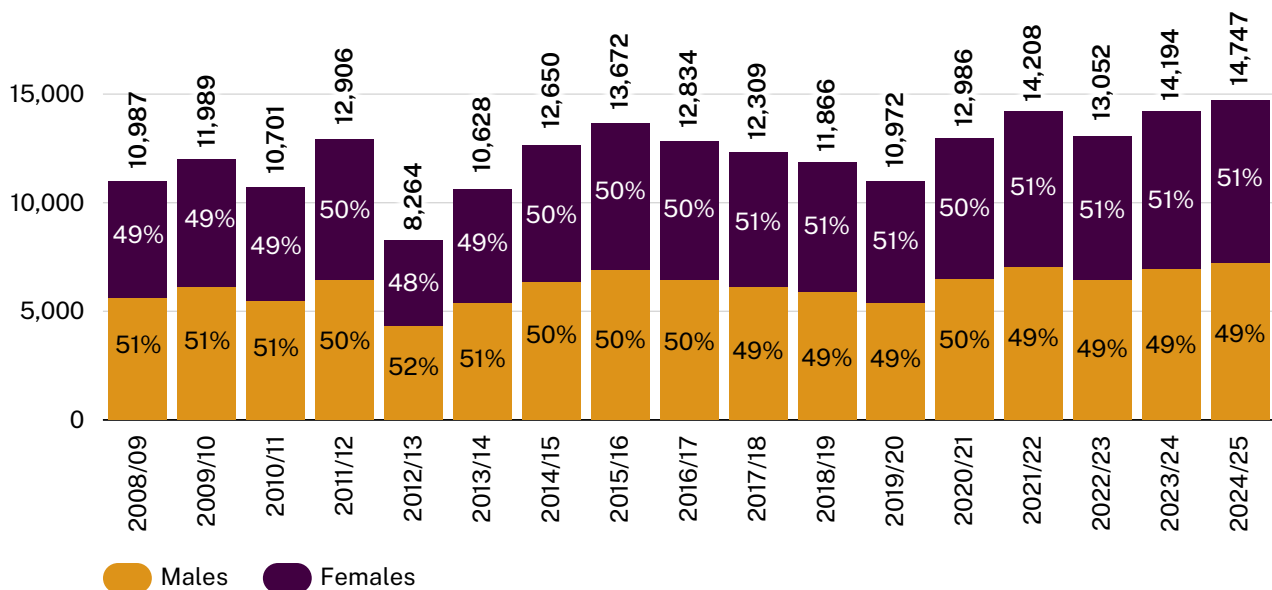


## Free-to-air TV

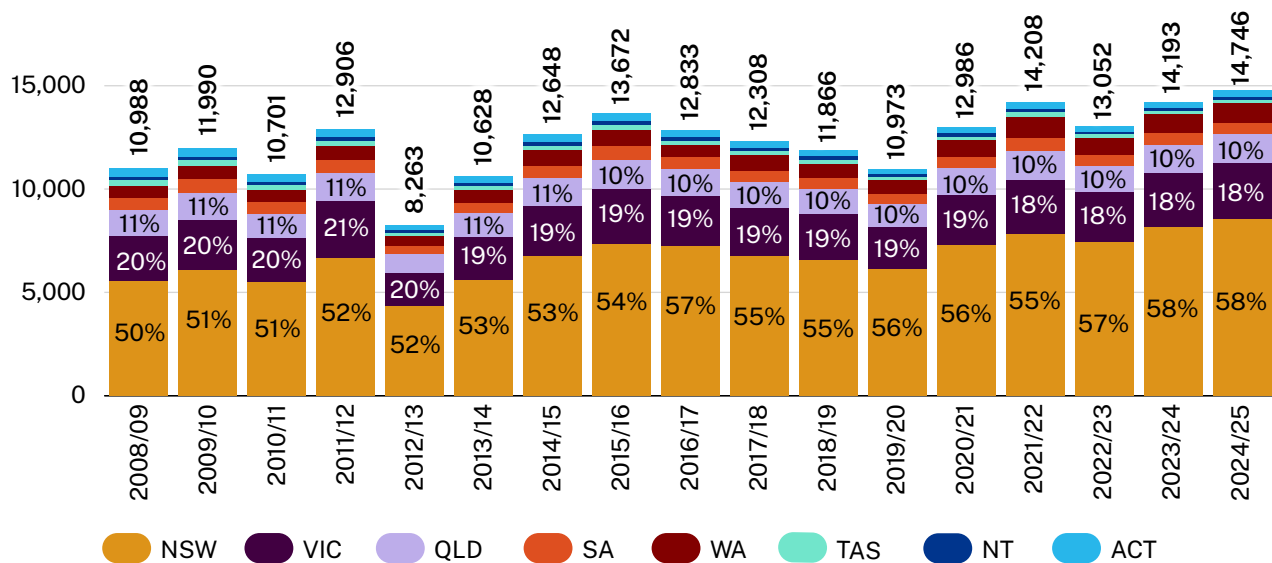
**Free-to-air TV has maintained its workforce, with it growing slightly at an annual average rate of 2% between 2008/09 and 2024/25. Very static gender proportions suggest a mature industry segment with deep rooted protocols and practices.** The sub national breakdown of employment underlines the centralisation and consolidation of activity of free-to-air TV broadcasting in **Sydney** as the segment's economic size contracts.

Figure 44: Free-to-air TV sector, 2008/09 to 2024/25

### a. Employed persons by gender



### b. Employed persons by state/territory



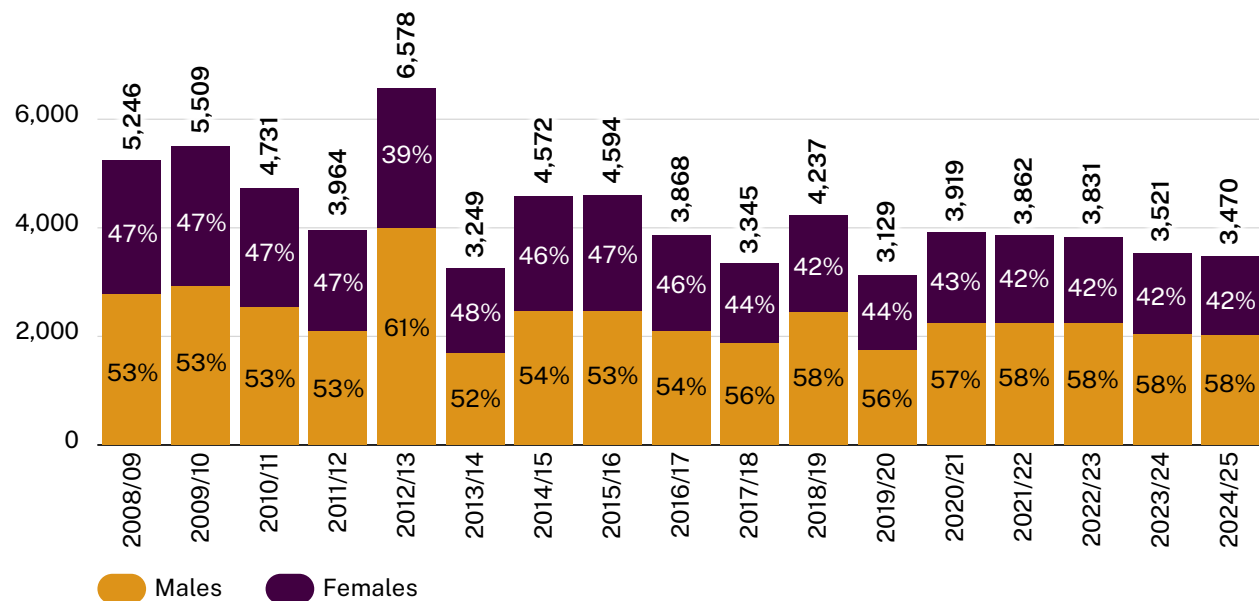
Source: UC estimates based on the ABS Labour Account, ABS Labour Force Survey and ABS Jobs in Australia (TableBuilder).

## Subscription TV

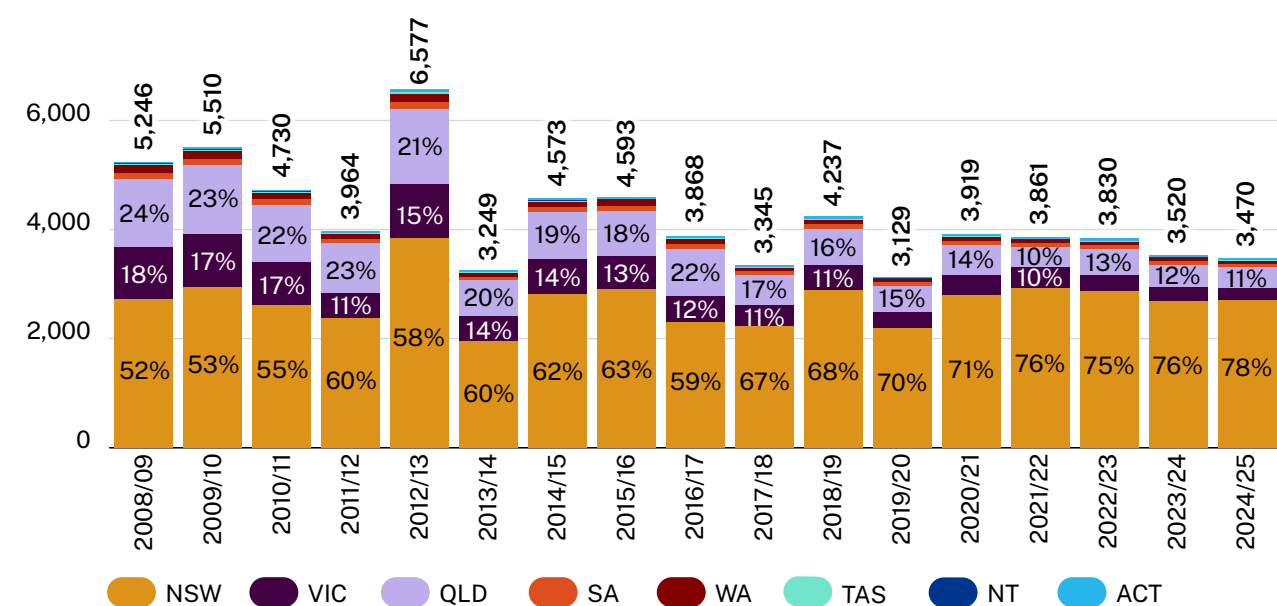
**Employment in the subscription TV sector fell** over the study period, at an average annual rate of 3% between 2008/09 and 2024/25. Subscription broadcasting is an employment segment characterised by a management layer, professional services (accounting, advertising and marketing) and account management layer. **Male predominance has increased** over time, while the workforce in this smaller sector is **highly centralised in Sydney**.

Figure 45: Subscription TV sector, 2008/09 to 2024/25

### a. Employed persons by gender



### b. Employed persons by state/territory



Source: UC estimates based on the ABS Labour Account, ABS Labour Force Survey and ABS Jobs in Australia (TableBuilder).



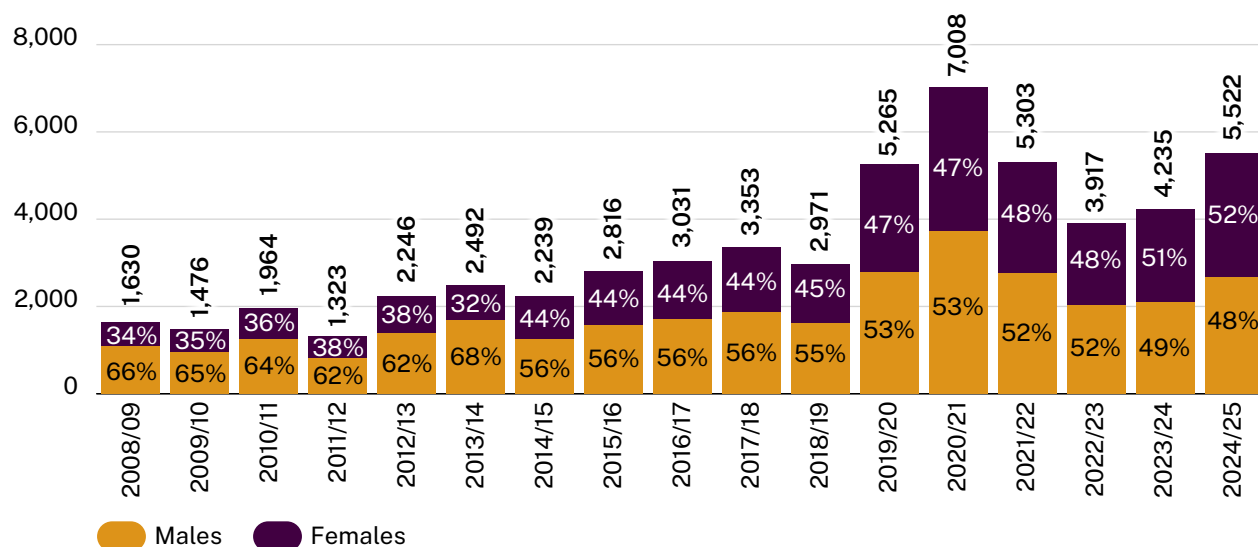
## Internet broadcasting

**Employment in internet broadcasting is growing rapidly**, at an annual average rate of 9% between 2008/09 and 2024/25. The internet broadcasting workforce peaked at more than 7,000 during COVID, with creators turning online, and appears as though it is yet to stabilise. This rapidly growing

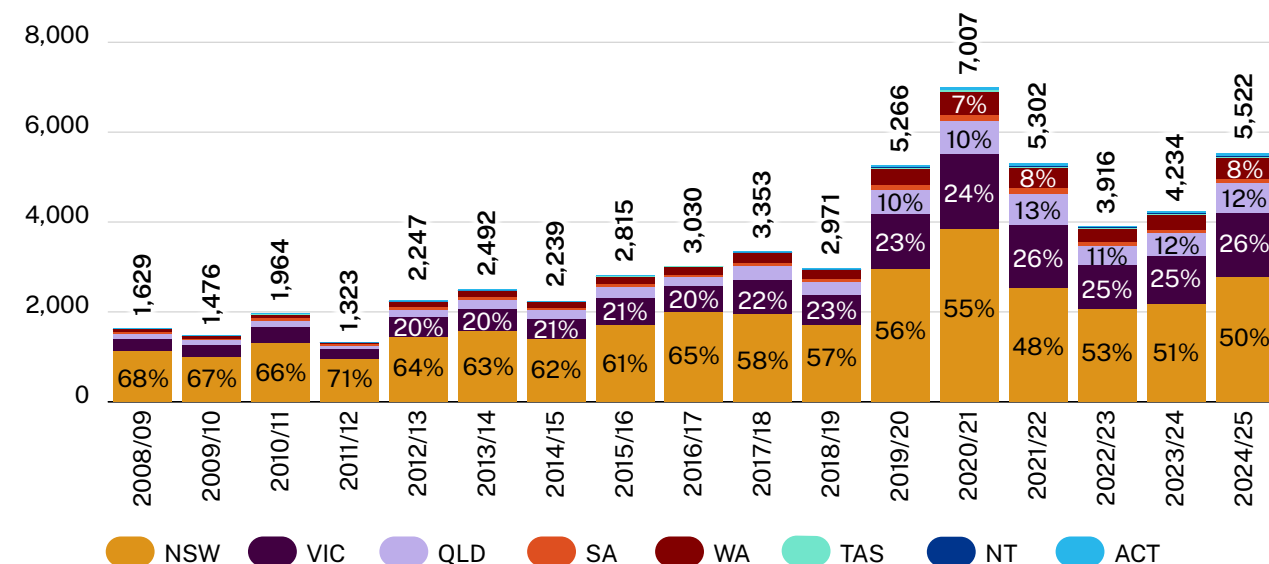
employment segment displays very little variation in the distribution of gender, with **males comprising a slight majority across the study period**. The state/territory profile is very similar to the traditional geographical breakdown of production activity, **concentrated in New South Wales and Victoria**.

**Figure 46: Internet broadcasting sector, 2008/09 to 2024/25**

### a. Employed persons by gender



### b. Employed persons by state/territory



Source: UC estimates based on the ABS Labour Account, ABS Labour Force Survey and ABS Jobs in Australia (TableBuilder).

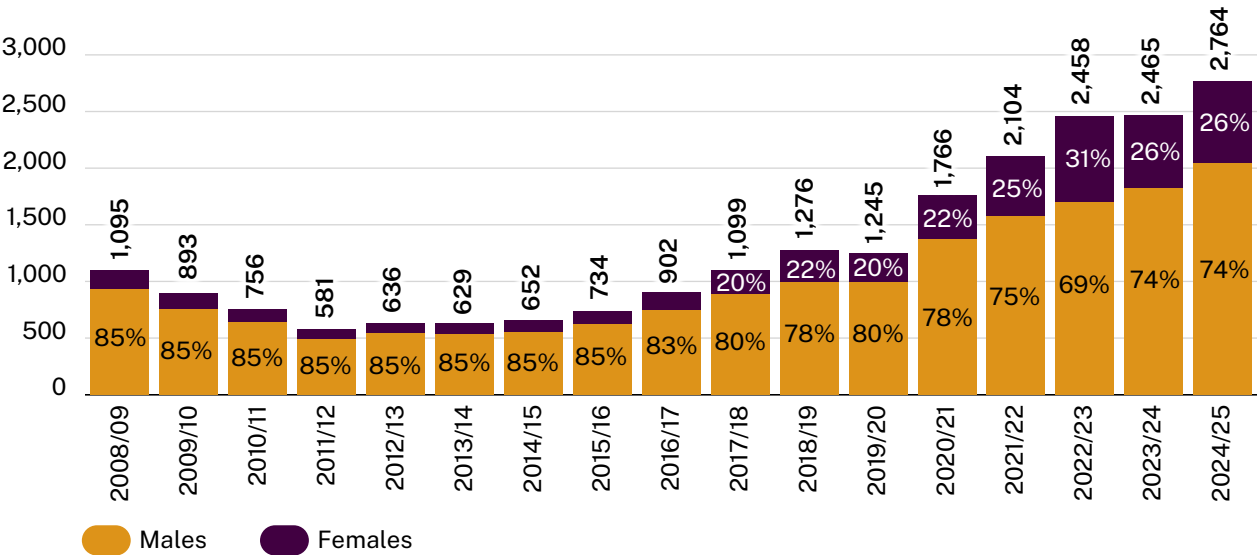
# Digital games development

**Employment growth in digital games development is faster than all the screen sectors**, at an annual average of 9% between 2008/09 and 2025/25 and 14.6% from 2016/17. An industry that has long suffered from a suboptimal gender profile has shown **a significant shift in the presence of females in its workforce which has increased from around one in seven in 2015/16 to more than one in four in more recent years.**

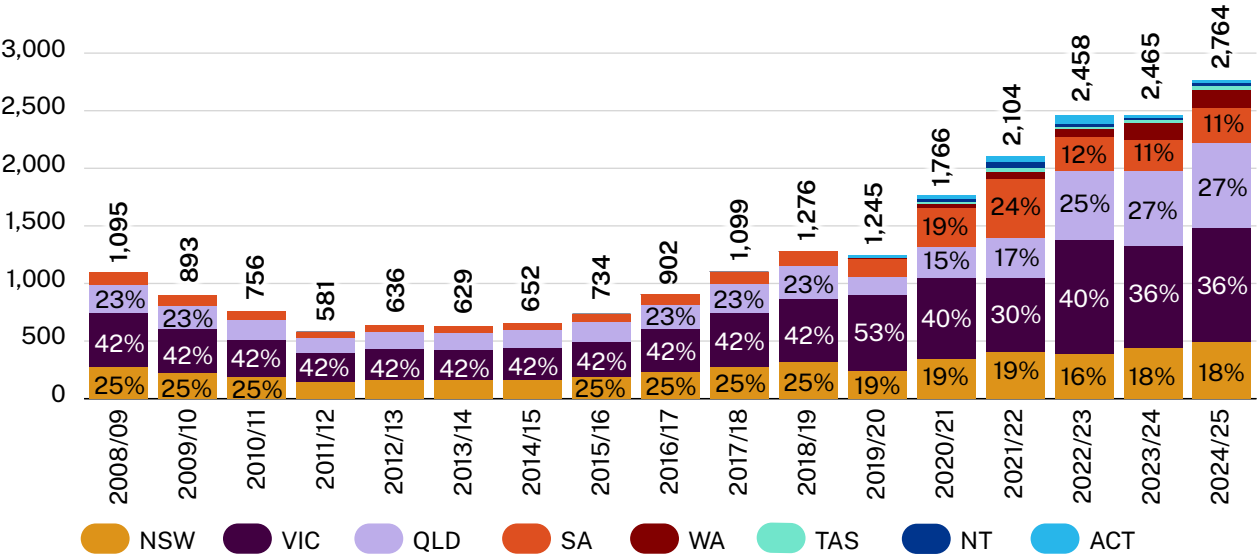
It also stands out from the more typical state/territory profile as being **dominated by Victoria and Queensland** rather than in New South Wales. This could present as a case of successful competitive federalism compared with the outcomes of state support of production. The Victorian and the Queensland state governments nurtured an expansion of the industry from 2020/21, with the federal government’s introduction of a Digital Games Tax Offset from 2022 providing further support.

Figure 47: Digital games development sector, 2008/09 to 2024/25

## a. Employed persons by gender



## b. Employed persons by state/territory



Source: UC estimates based on the ABS Labour Account, ABS Film TV and Digital Games Survey, IGEA Australian Game Development Survey.





# Median incomes by screen industry sector

Figure 48: Production employment counts and median incomes by occupation, 2021/22

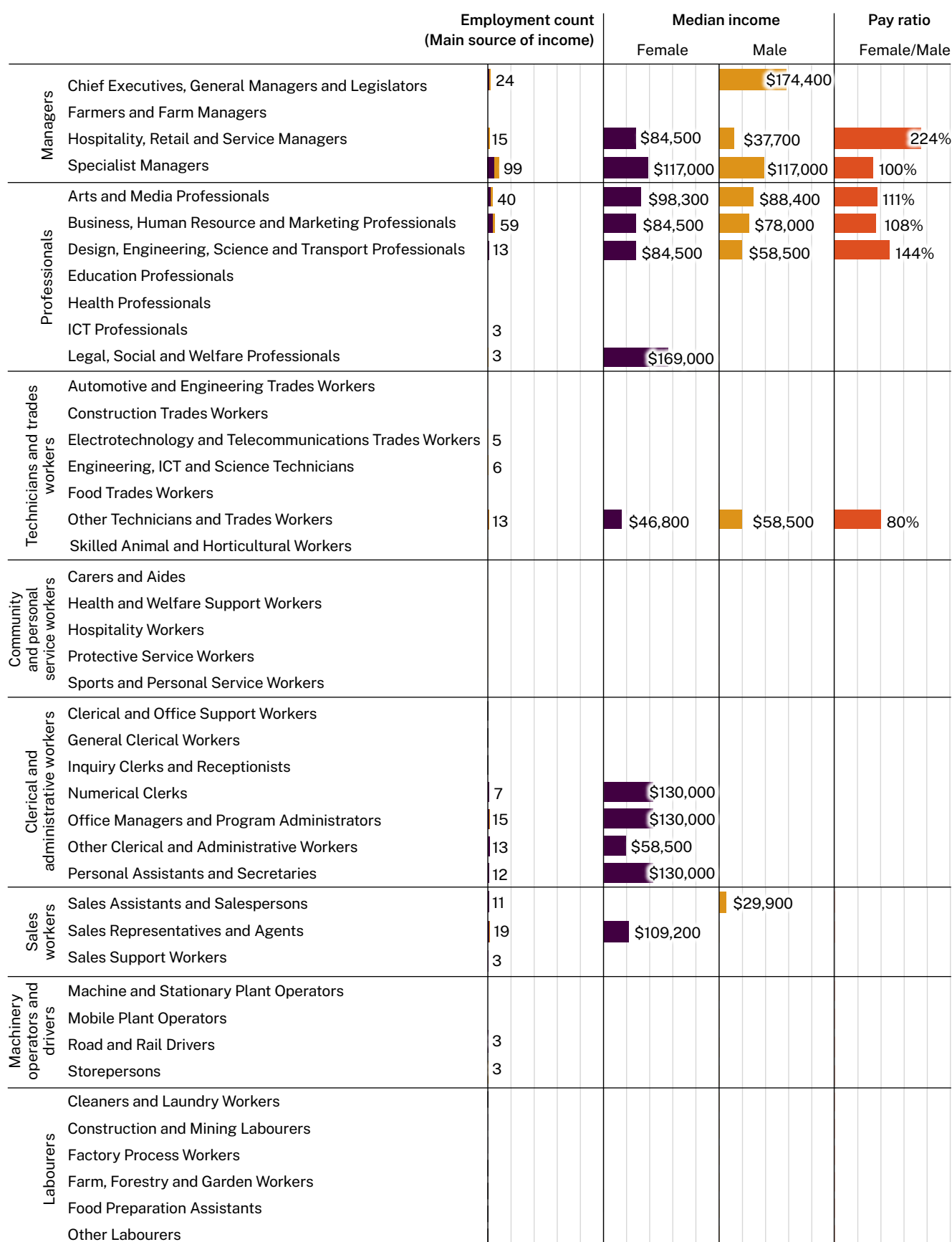
|                                        |                                                          | Employment count<br>(Main source of income) |  | Median income |           | Pay ratio   |
|----------------------------------------|----------------------------------------------------------|---------------------------------------------|--|---------------|-----------|-------------|
|                                        |                                                          |                                             |  | Female        | Male      | Female/Male |
| Managers                               | Chief Executives, General Managers and Legislators       | 246                                         |  | \$121,300     | \$123,900 | 98%         |
|                                        | Farmers and Farm Managers                                |                                             |  |               |           |             |
|                                        | Hospitality, Retail and Service Managers                 | 107                                         |  | \$78,000      | \$91,900  | 85%         |
|                                        | Specialist Managers                                      | 425                                         |  | \$100,000     | \$113,800 | 88%         |
| Professionals                          | Arts and Media Professionals                             | 7,102                                       |  | \$82,300      | \$79,500  | 104%        |
|                                        | Business, Human Resource and Marketing Professionals     | 465                                         |  | \$85,800      | \$86,900  | 99%         |
|                                        | Design, Engineering, Science and Transport Professionals | 750                                         |  | \$65,300      | \$79,600  | 82%         |
|                                        | Education Professionals                                  | 34                                          |  | \$80,200      | \$11,700  | 685%        |
|                                        | Health Professionals                                     | 44                                          |  | \$95,600      | \$113,800 | 84%         |
|                                        | ICT Professionals                                        | 132                                         |  | \$82,900      | \$87,800  | 94%         |
|                                        | Legal, Social and Welfare Professionals                  | 39                                          |  | \$94,300      | \$182,000 | 52%         |
| Technicians and trades workers         | Automotive and Engineering Trades Workers                | 34                                          |  |               | \$94,300  |             |
|                                        | Construction Trades Workers                              | 121                                         |  | \$75,200      | \$90,200  | 83%         |
|                                        | Electrotechnology and Telecommunications Trades Workers  | 46                                          |  |               | \$63,800  |             |
|                                        | Engineering, ICT and Science Technicians                 | 71                                          |  | \$115,100     | \$108,700 | 106%        |
|                                        | Food Trades Workers                                      |                                             |  |               |           |             |
|                                        | Other Technicians and Trades Workers                     | 2,151                                       |  | \$74,300      | \$73,400  | 101%        |
|                                        | Skilled Animal and Horticultural Workers                 | 11                                          |  | \$46,800      |           |             |
| Community and personal service workers | Carers and Aides                                         | 11                                          |  |               |           |             |
|                                        | Health and Welfare Support Workers                       | 9                                           |  |               |           |             |
|                                        | Hospitality Workers                                      | 12                                          |  | \$33,800      |           |             |
|                                        | Protective Service Workers                               | 16                                          |  | \$58,500      | \$71,500  | 82%         |
|                                        | Sports and Personal Service Workers                      | 29                                          |  | \$83,600      | \$29,900  | 280%        |
| Clerical and administrative workers    | Clerical and Office Support Workers                      | 3                                           |  |               |           |             |
|                                        | General Clerical Workers                                 | 112                                         |  | \$39,000      | \$52,800  | 74%         |
|                                        | Inquiry Clerks and Receptionists                         | 12                                          |  | \$45,800      |           |             |
|                                        | Numerical Clerks                                         | 141                                         |  | \$65,000      | \$67,600  | 96%         |
|                                        | Office Managers and Program Administrators               | 124                                         |  | \$72,300      | \$117,000 | 62%         |
|                                        | Other Clerical and Administrative Workers                | 777                                         |  | \$64,700      | \$65,200  | 99%         |
|                                        | Personal Assistants and Secretaries                      | 106                                         |  | \$72,300      | \$84,500  | 86%         |
| Sales workers                          | Sales Assistants and Salespersons                        | 18                                          |  | \$74,800      | \$24,700  | 303%        |
|                                        | Sales Representatives and Agents                         | 35                                          |  | \$76,400      | \$72,600  | 105%        |
|                                        | Sales Support Workers                                    | 36                                          |  | \$78,000      | \$84,500  | 92%         |
| Machinery operators and drivers        | Machine and Stationary Plant Operators                   | 37                                          |  | \$62,400      | \$62,400  | 100%        |
|                                        | Mobile Plant Operators                                   | 3                                           |  |               | \$52,000  |             |
|                                        | Road and Rail Drivers                                    | 90                                          |  | \$50,300      | \$51,400  | 98%         |
|                                        | Storepersons                                             | 5                                           |  |               |           |             |
| Labourers                              | Cleaners and Laundry Workers                             | 14                                          |  | \$35,100      |           |             |
|                                        | Construction and Mining Labourers                        | 41                                          |  | \$97,500      | \$83,100  | 117%        |
|                                        | Factory Process Workers                                  | 23                                          |  | \$18,200      |           |             |
|                                        | Farm, Forestry and Garden Workers                        | 5                                           |  |               |           |             |
|                                        | Food Preparation Assistants                              | 11                                          |  |               | \$53,500  |             |
|                                        | Other Labourers                                          | 94                                          |  |               | \$85,800  |             |

Source: ABS Australian Census of Population and Housing, TableBuilder

**Figure 49: Post-production employment counts and median incomes by occupation, 2021/22**

|                                        |                                                          | Employment count<br>(Main source of income) |  |  | Median income |           | Pay ratio   |  |
|----------------------------------------|----------------------------------------------------------|---------------------------------------------|--|--|---------------|-----------|-------------|--|
|                                        |                                                          |                                             |  |  | Female        | Male      | Female/Male |  |
| Managers                               | Chief Executives, General Managers and Legislators       | 17                                          |  |  |               | \$118,300 |             |  |
|                                        | Farmers and Farm Managers                                |                                             |  |  |               |           |             |  |
|                                        | Hospitality, Retail and Service Managers                 |                                             |  |  |               | \$130,000 |             |  |
|                                        | Specialist Managers                                      | 88                                          |  |  | \$106,000     | \$123,200 | 86%         |  |
| Professionals                          | Arts and Media Professionals                             | 680                                         |  |  | \$55,100      | \$70,600  | 78%         |  |
|                                        | Business, Human Resource and Marketing Professionals     | 67                                          |  |  | \$75,100      | \$112,700 | 67%         |  |
|                                        | Design, Engineering, Science and Transport Professionals | 683                                         |  |  | \$64,700      | \$77,800  | 83%         |  |
|                                        | Education Professionals                                  | 4                                           |  |  |               |           |             |  |
|                                        | Health Professionals                                     |                                             |  |  |               |           |             |  |
|                                        | ICT Professionals                                        | 109                                         |  |  | \$93,800      | \$103,000 | 91%         |  |
| Technicians and trades workers         | Legal, Social and Welfare Professionals                  | 3                                           |  |  |               |           |             |  |
|                                        | Automotive and Engineering Trades Workers                |                                             |  |  |               |           |             |  |
|                                        | Construction Trades Workers                              |                                             |  |  |               |           |             |  |
|                                        | Electrotechnology and Telecommunications Trades Workers  | 3                                           |  |  |               |           |             |  |
|                                        | Engineering, ICT and Science Technicians                 | 17                                          |  |  | \$46,800      | \$71,500  | 65%         |  |
|                                        | Food Trades Workers                                      |                                             |  |  |               |           |             |  |
| Community and personal service workers | Other Technicians and Trades Workers                     | 166                                         |  |  | \$50,300      | \$68,900  | 73%         |  |
|                                        | Skilled Animal and Horticultural Workers                 |                                             |  |  |               |           |             |  |
|                                        | Carers and Aides                                         |                                             |  |  |               |           |             |  |
|                                        | Health and Welfare Support Workers                       |                                             |  |  |               |           |             |  |
|                                        | Hospitality Workers                                      |                                             |  |  |               |           |             |  |
|                                        | Protective Service Workers                               |                                             |  |  |               |           |             |  |
| Clerical and administrative workers    | Sports and Personal Service Workers                      |                                             |  |  |               |           |             |  |
|                                        | Clerical and Office Support Workers                      |                                             |  |  |               |           |             |  |
|                                        | General Clerical Workers                                 | 49                                          |  |  | \$41,600      | \$36,400  | 114%        |  |
|                                        | Inquiry Clerks and Receptionists                         |                                             |  |  |               |           |             |  |
|                                        | Numerical Clerks                                         | 19                                          |  |  | \$33,000      |           |             |  |
|                                        | Office Managers and Program Administrators               | 17                                          |  |  | \$92,300      |           |             |  |
| Sales workers                          | Other Clerical and Administrative Workers                | 45                                          |  |  | \$58,900      | \$58,500  | 101%        |  |
|                                        | Personal Assistants and Secretaries                      | 10                                          |  |  | \$92,600      |           |             |  |
|                                        | Sales Assistants and Salespersons                        |                                             |  |  |               |           |             |  |
| Machinery operators and drivers        | Sales Representatives and Agents                         | 3                                           |  |  |               |           |             |  |
|                                        | Sales Support Workers                                    |                                             |  |  |               |           |             |  |
|                                        | Machine and Stationary Plant Operators                   | 5                                           |  |  |               |           |             |  |
|                                        | Mobile Plant Operators                                   |                                             |  |  |               |           |             |  |
| Labourers                              | Road and Rail Drivers                                    |                                             |  |  |               |           |             |  |
|                                        | Storepersons                                             |                                             |  |  |               |           |             |  |
|                                        | Cleaners and Laundry Workers                             | 6                                           |  |  |               |           |             |  |
|                                        | Construction and Mining Labourers                        | 6                                           |  |  |               |           |             |  |
|                                        | Factory Process Workers                                  |                                             |  |  |               |           |             |  |
|                                        | Farm, Forestry and Garden Workers                        |                                             |  |  |               |           |             |  |
|                                        | Food Preparation Assistants                              |                                             |  |  |               |           |             |  |
|                                        | Other Labourers                                          |                                             |  |  |               |           |             |  |

Source: ABS Australian Census of Population and Housing, TableBuilder.


**Figure 50: Distribution employment counts and median incomes by occupation, 2021/22**


Source: ABS Australian Census of Population and Housing, TableBuilder.

**Figure 51: Exhibition employment counts and median incomes by occupation, 2021/22**

|                                        |                                                          | Employment count<br>(Main source of income) | Median income |           | Pay ratio   |
|----------------------------------------|----------------------------------------------------------|---------------------------------------------|---------------|-----------|-------------|
|                                        |                                                          |                                             | Female        | Male      | Female/Male |
| Managers                               | Chief Executives, General Managers and Legislators       | 165                                         | \$78,900      | \$135,200 | 58%         |
|                                        | Farmers and Farm Managers                                |                                             |               |           |             |
|                                        | Hospitality, Retail and Service Managers                 | 1,349                                       | \$41,100      | \$46,000  | 89%         |
|                                        | Specialist Managers                                      | 348                                         | \$85,500      | \$115,900 | 74%         |
| Professionals                          | Arts and Media Professionals                             | 392                                         | \$51,700      | \$59,400  | 87%         |
|                                        | Business, Human Resource and Marketing Professionals     | 183                                         | \$76,500      | \$92,800  | 82%         |
|                                        | Design, Engineering, Science and Transport Professionals | 103                                         | \$59,300      | \$96,200  | 62%         |
|                                        | Education Professionals                                  | 39                                          | \$28,600      | \$14,600  | 196%        |
|                                        | Health Professionals                                     | 9                                           |               |           |             |
|                                        | ICT Professionals                                        | 81                                          | \$50,700      | \$112,700 | 45%         |
|                                        | Legal, Social and Welfare Professionals                  | 23                                          | \$159,300     |           |             |
| Technicians and trades workers         | Automotive and Engineering Trades Workers                | 32                                          |               | \$72,000  |             |
|                                        | Construction Trades Workers                              | 29                                          |               | \$62,400  |             |
|                                        | Electrotechnology and Telecommunications Trades Workers  | 34                                          |               | \$61,800  |             |
|                                        | Engineering, ICT and Science Technicians                 | 41                                          |               | \$79,100  |             |
|                                        | Food Trades Workers                                      | 91                                          | \$38,900      | \$32,100  | 121%        |
|                                        | Other Technicians and Trades Workers                     | 170                                         | \$60,500      | \$57,800  | 105%        |
|                                        | Skilled Animal and Horticultural Workers                 | 10                                          |               |           |             |
| Community and personal service workers | Carers and Aides                                         | 4                                           |               |           |             |
|                                        | Health and Welfare Support Workers                       | 5                                           |               |           |             |
|                                        | Hospitality Workers                                      | 389                                         | \$18,900      | \$20,700  | 91%         |
|                                        | Protective Service Workers                               | 16                                          |               | \$54,200  |             |
|                                        | Sports and Personal Service Workers                      | 22                                          | \$29,900      |           |             |
| Clerical and administrative workers    | Clerical and Office Support Workers                      |                                             |               |           |             |
|                                        | General Clerical Workers                                 | 54                                          | \$44,500      | \$58,500  | 76%         |
|                                        | Inquiry Clerks and Receptionists                         | 35                                          | \$29,900      | \$29,900  | 100%        |
|                                        | Numerical Clerks                                         | 82                                          | \$61,600      | \$63,900  | 96%         |
|                                        | Office Managers and Program Administrators               | 50                                          | \$65,000      | \$97,500  | 67%         |
|                                        | Other Clerical and Administrative Workers                | 55                                          | \$41,600      | \$62,800  | 66%         |
| Sales workers                          | Personal Assistants and Secretaries                      | 21                                          | \$97,500      |           |             |
|                                        | Sales Assistants and Salespersons                        | 714                                         | \$17,000      | \$16,700  | 102%        |
|                                        | Sales Representatives and Agents                         | 31                                          | \$73,100      | \$88,800  | 82%         |
| Machinery operators and drivers        | Sales Support Workers                                    | 2,675                                       | \$13,400      | \$14,600  | 92%         |
|                                        | Machine and Stationary Plant Operators                   | 99                                          | \$38,400      | \$39,000  | 98%         |
|                                        | Mobile Plant Operators                                   | 4                                           |               |           |             |
|                                        | Road and Rail Drivers                                    | 11                                          |               | \$37,700  |             |
|                                        | Storepersons                                             | 8                                           |               |           |             |
| Labourers                              | Cleaners and Laundry Workers                             | 173                                         | \$20,400      | \$19,800  | 103%        |
|                                        | Construction and Mining Labourers                        | 10                                          | \$46,800      |           |             |
|                                        | Factory Process Workers                                  | 13                                          | \$37,700      | \$46,800  | 81%         |
|                                        | Farm, Forestry and Garden Workers                        |                                             |               | \$29,900  |             |
|                                        | Food Preparation Assistants                              | 68                                          | \$27,300      | \$24,900  | 110%        |
|                                        | Other Labourers                                          | 429                                         | \$14,100      | \$14,700  | 96%         |

Source: ABS Australian Census of Population and Housing, TableBuilder.


**Figure 52: Free-to-air TV employment counts and median incomes by occupation, 2021/22**

|                                        |                                                          | Employment count<br>(Main source of income) | Median income |           | Pay ratio   |
|----------------------------------------|----------------------------------------------------------|---------------------------------------------|---------------|-----------|-------------|
|                                        |                                                          |                                             | Female        | Male      | Female/Male |
| Managers                               | Chief Executives, General Managers and Legislators       | 168                                         | \$132,900     | \$171,400 | 78%         |
|                                        | Farmers and Farm Managers                                |                                             |               |           |             |
|                                        | Hospitality, Retail and Service Managers                 | 113                                         | \$88,800      | \$110,500 | 80%         |
|                                        | Specialist Managers                                      | 918                                         | \$120,500     | \$147,000 | 82%         |
| Professionals                          | Arts and Media Professionals                             | 6,596                                       | \$86,500      | \$98,500  | 88%         |
|                                        | Business, Human Resource and Marketing Professionals     | 1031                                        | \$87,100      | \$97,600  | 89%         |
|                                        | Design, Engineering, Science and Transport Professionals | 524                                         | \$76,300      | \$89,200  | 86%         |
|                                        | Education Professionals                                  | 9                                           |               |           |             |
|                                        | Health Professionals                                     | 21                                          | \$110,500     |           |             |
|                                        | ICT Professionals                                        | 552                                         | \$97,500      | \$116,000 | 84%         |
|                                        | Legal, Social and Welfare Professionals                  | 113                                         | \$128,900     | \$156,000 | 83%         |
| Technicians and trades workers         | Automotive and Engineering Trades Workers                | 4                                           |               | \$130,000 |             |
|                                        | Construction Trades Workers                              | 11                                          |               |           |             |
|                                        | Electrotechnology and Telecommunications Trades Workers  | 245                                         | \$76,700      | \$87,100  | 88%         |
|                                        | Engineering, ICT and Science Technicians                 | 317                                         | \$82,900      | \$92,900  | 89%         |
|                                        | Food Trades Workers                                      |                                             |               |           |             |
|                                        | Other Technicians and Trades Workers                     | 1,362                                       | \$65,500      | \$83,400  | 79%         |
|                                        | Skilled Animal and Horticultural Workers                 |                                             |               | \$46,800  |             |
| Community and personal service workers | Carers and Aides                                         | 3                                           | \$58,500      |           |             |
|                                        | Health and Welfare Support Workers                       |                                             |               |           |             |
|                                        | Hospitality Workers                                      |                                             |               |           |             |
|                                        | Protective Service Workers                               | 17                                          |               | \$58,500  |             |
|                                        | Sports and Personal Service Workers                      | 9                                           | \$71,500      |           |             |
| Clerical and administrative workers    | Clerical and Office Support Workers                      | 25                                          | \$45,900      | \$84,500  | 54%         |
|                                        | General Clerical Workers                                 | 209                                         | \$57,900      | \$59,300  | 98%         |
|                                        | Inquiry Clerks and Receptionists                         | 74                                          | \$44,200      | \$58,500  | 76%         |
|                                        | Numerical Clerks                                         | 153                                         | \$69,100      | \$71,500  | 97%         |
|                                        | Office Managers and Program Administrators               | 178                                         | \$86,800      | \$105,400 | 82%         |
|                                        | Other Clerical and Administrative Workers                | 566                                         | \$59,700      | \$62,000  | 96%         |
|                                        | Personal Assistants and Secretaries                      | 95                                          | \$88,700      |           |             |
| Sales workers                          | Sales Assistants and Salespersons                        | 59                                          | \$46,100      | \$58,500  | 79%         |
|                                        | Sales Representatives and Agents                         | 523                                         | \$68,100      | \$88,700  | 77%         |
|                                        | Sales Support Workers                                    | 35                                          | \$68,700      | \$130,000 | 53%         |
| Machinery operators and drivers        | Machine and Stationary Plant Operators                   | 6                                           |               |           |             |
|                                        | Mobile Plant Operators                                   |                                             |               |           |             |
|                                        | Road and Rail Drivers                                    | 8                                           |               | \$37,700  |             |
|                                        | Storepersons                                             | 6                                           |               |           |             |
| Labourers                              | Cleaners and Laundry Workers                             | 10                                          | \$25,400      | \$33,000  | 77%         |
|                                        | Construction and Mining Labourers                        | 7                                           |               | \$71,500  |             |
|                                        | Factory Process Workers                                  | 14                                          | \$58,500      | \$66,600  | 88%         |
|                                        | Farm, Forestry and Garden Workers                        |                                             |               |           |             |
|                                        | Food Preparation Assistants                              |                                             |               |           |             |
|                                        | Other Labourers                                          | 43                                          |               | \$36,400  |             |

Source: ABS Australian Census of Population and Housing, TableBuilder.



**Figure 53: Subscription broadcasting employment counts and median incomes, 2021/22**

|                                        |                                                          | Employment count<br>(Main source of income) |  | Median income |           | Pay ratio   |
|----------------------------------------|----------------------------------------------------------|---------------------------------------------|--|---------------|-----------|-------------|
|                                        |                                                          |                                             |  | Female        | Male      | Female/Male |
| Managers                               | Chief Executives, General Managers and Legislators       | 24                                          |  | \$91,000      | \$112,000 | 81%         |
|                                        | Farmers and Farm Managers                                |                                             |  |               |           |             |
|                                        | Hospitality, Retail and Service Managers                 | 31                                          |  | \$114,000     | \$63,400  | 180%        |
|                                        | Specialist Managers                                      | 293                                         |  | \$127,000     | \$154,000 | 82%         |
| Professionals                          | Arts and Media Professionals                             | 517                                         |  | \$90,000      | \$102,700 | 88%         |
|                                        | Business, Human Resource and Marketing Professionals     | 301                                         |  | \$96,300      | \$109,500 | 88%         |
|                                        | Design, Engineering, Science and Transport Professionals | 72                                          |  | \$70,200      | \$112,700 | 62%         |
|                                        | Education Professionals                                  |                                             |  |               |           |             |
|                                        | Health Professionals                                     |                                             |  |               |           |             |
|                                        | ICT Professionals                                        | 206                                         |  | \$109,000     | \$127,700 | 85%         |
|                                        | Legal, Social and Welfare Professionals                  | 9                                           |  | \$104,000     |           |             |
| Technicians and trades workers         | Automotive and Engineering Trades Workers                |                                             |  |               |           |             |
|                                        | Construction Trades Workers                              |                                             |  |               |           |             |
|                                        | Electrotechnology and Telecommunications Trades Workers  | 210                                         |  | \$65,000      | \$63,600  | 102%        |
|                                        | Engineering, ICT and Science Technicians                 | 43                                          |  |               | \$102,400 |             |
|                                        | Food Trades Workers                                      |                                             |  |               |           |             |
|                                        | Other Technicians and Trades Workers                     | 100                                         |  | \$72,300      | \$76,000  | 95%         |
|                                        | Skilled Animal and Horticultural Workers                 |                                             |  |               |           |             |
| Community and personal service workers | Carers and Aides                                         |                                             |  |               |           |             |
|                                        | Health and Welfare Support Workers                       |                                             |  |               |           |             |
|                                        | Hospitality Workers                                      |                                             |  |               |           |             |
|                                        | Protective Service Workers                               | 3                                           |  |               |           |             |
|                                        | Sports and Personal Service Workers                      |                                             |  |               |           |             |
| Clerical and administrative workers    | Clerical and Office Support Workers                      |                                             |  |               |           |             |
|                                        | General Clerical Workers                                 | 42                                          |  | \$48,100      | \$53,600  | 90%         |
|                                        | Inquiry Clerks and Receptionists                         | 33                                          |  | \$44,900      | \$58,500  | 77%         |
|                                        | Numerical Clerks                                         | 26                                          |  | \$54,600      | \$104,000 | 53%         |
|                                        | Office Managers and Program Administrators               | 56                                          |  | \$104,000     | \$144,400 | 72%         |
|                                        | Other Clerical and Administrative Workers                | 76                                          |  | \$56,100      | \$60,700  | 92%         |
|                                        | Personal Assistants and Secretaries                      | 20                                          |  | \$71,500      |           |             |
| Sales workers                          | Sales Assistants and Salespersons                        | 11                                          |  |               | \$58,500  |             |
|                                        | Sales Representatives and Agents                         | 60                                          |  | \$71,500      | \$104,000 | 69%         |
|                                        | Sales Support Workers                                    | 13                                          |  |               |           |             |
| Machinery operators and drivers        | Machine and Stationary Plant Operators                   | 3                                           |  |               |           |             |
|                                        | Mobile Plant Operators                                   |                                             |  |               |           |             |
|                                        | Road and Rail Drivers                                    | 13                                          |  |               |           |             |
|                                        | Storepersons                                             |                                             |  | \$37,700      | \$46,800  | 81%         |
| Labourers                              | Cleaners and Laundry Workers                             |                                             |  |               |           |             |
|                                        | Construction and Mining Labourers                        |                                             |  |               |           |             |
|                                        | Factory Process Workers                                  | 6                                           |  | \$42,900      |           |             |
|                                        | Farm, Forestry and Garden Workers                        |                                             |  |               |           |             |
|                                        | Food Preparation Assistants                              |                                             |  |               |           |             |
|                                        | Other Labourers                                          | 4                                           |  |               |           |             |

Source: ABS Australian Census of Population and Housing, TableBuilder.


**Figure 54: Internet publishing employment counts and median incomes by occupation, 2021/22**

|                                        |                                                          | Employment count<br>(Main source of income) |  | Median income |           | Pay ratio   |
|----------------------------------------|----------------------------------------------------------|---------------------------------------------|--|---------------|-----------|-------------|
|                                        |                                                          |                                             |  | Female        | Male      | Female/Male |
| Managers                               | Chief Executives, General Managers and Legislators       | 98                                          |  | \$96,100      | \$139,800 | 69%         |
|                                        | Farmers and Farm Managers                                |                                             |  |               |           |             |
|                                        | Hospitality, Retail and Service Managers                 | 83                                          |  | \$94,300      | \$135,200 | 70%         |
|                                        | Specialist Managers                                      | 364                                         |  | \$126,100     | \$152,000 | 83%         |
| Professionals                          | Arts and Media Professionals                             | 525                                         |  | \$63,200      | \$75,400  | 84%         |
|                                        | Business, Human Resource and Marketing Professionals     | 470                                         |  | \$87,500      | \$104,500 | 84%         |
|                                        | Design, Engineering, Science and Transport Professionals | 93                                          |  | \$67,400      | \$78,000  | 86%         |
|                                        | Education Professionals                                  | 36                                          |  | \$31,900      | \$11,700  | 273%        |
|                                        | Health Professionals                                     | 7                                           |  |               |           |             |
|                                        | ICT Professionals                                        | 211                                         |  | \$112,700     | \$116,500 | 97%         |
|                                        | Legal, Social and Welfare Professionals                  | 32                                          |  | \$121,300     | \$91,000  | 133%        |
| Technicians and trades workers         | Automotive and Engineering Trades Workers                | 3                                           |  |               |           |             |
|                                        | Construction Trades Workers                              | 3                                           |  |               | \$71,500  |             |
|                                        | Electrotechnology and Telecommunications Trades Workers  | 11                                          |  |               |           |             |
|                                        | Engineering, ICT and Science Technicians                 | 60                                          |  | \$66,100      | \$66,900  | 99%         |
|                                        | Food Trades Workers                                      | 11                                          |  | \$58,500      | \$29,900  | 196%        |
|                                        | Other Technicians and Trades Workers                     | 51                                          |  | \$35,800      | \$69,300  | 52%         |
|                                        | Skilled Animal and Horticultural Workers                 |                                             |  |               |           |             |
| Community and personal service workers | Carers and Aides                                         | 27                                          |  | \$42,900      |           |             |
|                                        | Health and Welfare Support Workers                       | 9                                           |  | \$46,800      |           |             |
|                                        | Hospitality Workers                                      | 17                                          |  | \$23,400      | \$37,700  | 62%         |
|                                        | Protective Service Workers                               |                                             |  |               |           |             |
|                                        | Sports and Personal Service Workers                      | 7                                           |  | \$29,900      |           |             |
| Clerical and administrative workers    | Clerical and Office Support Workers                      | 3                                           |  |               |           |             |
|                                        | General Clerical Workers                                 | 35                                          |  | \$34,800      |           |             |
|                                        | Inquiry Clerks and Receptionists                         | 85                                          |  | \$53,500      | \$48,500  | 110%        |
|                                        | Numerical Clerks                                         | 46                                          |  | \$86,100      | \$130,000 | 66%         |
|                                        | Office Managers and Program Administrators               | 23                                          |  | \$69,300      |           |             |
|                                        | Other Clerical and Administrative Workers                | 23                                          |  | \$61,300      | \$32,200  | 190%        |
|                                        | Personal Assistants and Secretaries                      | 25                                          |  | \$73,700      |           |             |
| Sales workers                          | Sales Assistants and Salespersons                        | 83                                          |  | \$43,000      | \$82,900  | 52%         |
|                                        | Sales Representatives and Agents                         | 239                                         |  | \$81,900      | \$121,100 | 68%         |
|                                        | Sales Support Workers                                    | 19                                          |  | \$54,600      |           |             |
| Machinery operators and drivers        | Machine and Stationary Plant Operators                   |                                             |  |               |           |             |
|                                        | Mobile Plant Operators                                   |                                             |  |               |           |             |
|                                        | Road and Rail Drivers                                    |                                             |  |               |           |             |
|                                        | Storepersons                                             | 5                                           |  |               | \$29,900  |             |
| Labourers                              | Cleaners and Laundry Workers                             |                                             |  |               |           |             |
|                                        | Construction and Mining Labourers                        |                                             |  |               |           |             |
|                                        | Factory Process Workers                                  | 20                                          |  |               | \$50,700  |             |
|                                        | Farm, Forestry and Garden Workers                        |                                             |  |               |           |             |
|                                        | Food Preparation Assistants                              | 8                                           |  | \$20,800      | \$37,700  | 55%         |
|                                        | Other Labourers                                          | 3                                           |  |               |           |             |

Source: ABS Australian Census of Population and Housing, TableBuilder.

Note: This figure is for the entire internet publishing and broadcasting industry. It is indicative of the distribution of incomes in internet broadcasting (which is a subset of that industry).

# Appendix 3:

## Information gaps

### Data limitation

- Trends reported for each screen sector are sensitive to how businesses are recorded and classified in economic statistics.
- It is important to note that economic statistics up to 2022/23 do not record earnings by multinational companies that do not have a business presence in Australia. The ABS is extending National Accounts data from 2023/24 to include estimates for digital services, targeting the “most significant multinational enterprises providing digital services” – this may result in future changes in economic time series for the screen sectors.
- A further issue is that foreign firms may not be assigned to an industry category that best fits their actual activity in Australia. This means that subscription video on demand (SVOD) services such as Disney+ and UKTV, whose first business presence in Australia was as subscription TV channels, may be recorded as subscription TV services rather than internet broadcasters.

### Calculating gross value added

- The ANZSIC industry class “Post-production and other motion picture and video activities” (post-production) captures an extremely wide range of activities. It would be useful to be able to separate out these activities, but this is not possible with current industry and product definitions.
- The value through support activities by subscription TV services is probably not as large as estimated here. The ANZSIC industry class includes cable and satellite network services as well as subscription TV. Like the global streamers, subscription TV offerings are integrated with communications businesses – further research is required to differentiate the value associated with each

- Digital games development does not have its own ANZSIC industry class, it is not possible to observe it directly in economic statistics. Future reviews of the ANZSIC classification system should consider introducing a new industry class for this growing industry.
- The data presented here runs to 2023/24.

### Employment

- Employment estimation method has not been applied to embedded screen employment.

### Production trends

- Broadcaster expenditure on local content is not consistent across broadcaster types. Reporting for commercial and subscription TV licensees is a function of regulatory requirements – SVOD data up to 2025 exists only thanks to monitoring. There are no sources of expenditure by public service broadcasters.
- Documentaries: It may be the case that creators are seeking opportunities online rather than sales to domestic broadcasting services, which might explain the increases in theatrical releases since 2016 as documentaries are launched locally before moving online. This, however, is conjecture – knowledge of trends in Australian documentary production would benefit from further research.
- Games: Data comparable to screen production is not readily available.
- Government support: Local government support on screen are not captured in the ABS government expenditure dataset. Expenditure by local government such as the Gold Coast and Cairns have not been included in this analysis.
- Australian feature films: Missing information about production company headquarter locations.





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## Funding

- An additional data gap is the value of state and local government indirect support of production and post-production activity in Australia.
- The DITRDCSA report records government outlays and would benefit from the inclusion of indirect support and support provided by local governments. One approach here could be collating local government expenditure estimates from the ABS publication Government Finance Statistics – this, however, bundles together screen and broadcasting-related activity in two categories (0821 Film production services and 0831 Broadcasting services), and does not differentiate between production, post-production or games production, or between TV, online or radio broadcasting.

## Exports

Screen exports have increasingly been missed in Australian trade statistics.

- Content commissioned by local business establishments operated by international SVOD services are recorded as domestic sales rather than exports.<sup>90</sup>
- SVOD service's preference for cost-plus financing contracts has led to lower rights returns over time, reducing secondary rights revenues (backend).
- Foreign productions filming in Australia usually operate out of a locally-registered SPV, a legal entity used to manage all local financing arrangements. Production services supplied to a local SPV are recorded as local sales rather than exports.
- Broadcasters export both their own content and their broadcasting services. Available economic statistics do not differentiate between these.

The additional data sources and methods used have aimed to address the gap around locally-registered SPVs, but gaps remain around international streamers and total screen sector exports should not be interpreted as representing the full extent of the value of screen production exports.

<sup>90</sup> An SPV is treated by the Australian Taxation Office as a standard Australian company, regardless of whether it is owned locally or by a foreign entity. This means that all sales to foreign-owned SPVs are recorded as occurring domestically and are not recorded as exports.



Australian Government

