Screen Currency 2026

Understanding the value of Australian screen and games

A study in 5 reports with supporting case studies

Report 5 of 5

Global Insights

Australian Government

Screen Australia

THE GIST.

Screen Currency 2026

Understanding the value of
Australian screen and games

Global Insights

This report covers new research into the reception of Australian screen and games in key global markets, and the impacts and spillovers generated by these forms of international exchange and engagement.

It provides an evidence base for the many global impacts of Australia's screen and games production and distribution – including how much our neighbours and partners know and understand of contemporary Australia, their perceptions of our creativity, skills and culture, and how that can lead to greater connection, tourism and trade.

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 Georgie McClean at The Gist.

It has been based on input from 89 Degrees East, McAtamney & Advisors, Queensland University of Technology, Swinburne University, University of Canberra, the University of the Sunshine Coast, Mandy Whitford at Impact Words consulting and Screen Australia's Strategic Policy and Insights team.

Attribution: Screen Australia 2026, *Screen Currency 2026: Global Insights*, developed by Georgie McClean, The Gist.

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.

The Kimberley

Force of Nature: The Dry 2

About Screen Currency 2026 and this report

The *Global 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 2026 is a multifaceted research study that comprises 5 reports with supporting case studies.

1. Insights Overview			
2. Audience Insights	3. Industry Insights	4. Economic Insights	5. Global Insights
Supporting case studies			

This *Screen Currency Global Insights* report is also referred to as **"the global study"**. This report addresses an existing need for evidence on the global impact of Australia's screen and games sector.

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

Insights Overview
Industry Insights
Case Studies
Audience Insights
Economic Insights

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Memoir of a Snail

Executive summary

The screen and games industry is global, and central to contemporary culture and the digital economy. Film, TV and interactive video games travel easily across borders, reaching audiences of unprecedented scale. Australian creators operate within this highly globalised marketplace, producing content that reflects local stories, while competing and collaborating internationally.

This global study forms part of Screen Currency 2026, a multidisciplinary program of research examining the social, cultural and economic value of Australian screen and games. International engagement is an area in which these forms of value intersect. Cultural influence generates soft power, a more compelling national brand and economic impacts in trade and tourism. Similarly, the social impact of engagement with content can build cultural affinity and positive associations with a place and its people, strengthening global connections and regional ties.

Screen Currency's *Global Insights* report covers new research into the reception of Australian screen and games in key global markets, distribution pathways and industry dynamics and the impacts and spillovers generated by these forms of global exchange and engagement. It integrates findings from surveys with international audiences of Australian film and TV and international video game players, analysis of online reviews and video responses, sales and export data, interviews with Australian screen stakeholders, a survey of the Australian screen and games industry, and industry data sources (see Overview of data sources).

In doing so, this report provides an evidence base for the many global impacts of Australia's screen and games production and distribution – including our global neighbours' and partners' understanding of contemporary Australia, their perceptions of our creativity, skills and culture and how that might lead to an appetite for greater connection.

The global study should be considered alongside the other studies that comprise Screen Currency 2026, which include an audience study, industry study, economic study, an overview 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.

Key findings

Australia has long outperformed for the size of our local industry and market – with globally recognised talent, in-demand skills and stories that travel. Increasingly our content is made to travel: sales to, and success in, international territories are becoming ever more important in global, digitally distributed markets. As a location, we are among the most attractive in the world, fostering links with global studios and attracting foreign productions and growing inward investment. The digital games sector was "born global" – with distribution models that rely on global communities of video game players. **When Australian film, TV and games perform well on the world stage, the forms of value they generate go far beyond the bottom line.**

Awareness and appeal

- **Australian screen content has global appeal.** International audiences frequently describe Australian content as high quality (including 70% of survey respondents in India), authentic (including 70% of respondents in China), and enjoyable to watch (including 67% of respondents in New Zealand). Online reviews show programs like *Bluey* – the most streamed show in the US in 2025 and the most widely recognised title across the international markets surveyed – can be powerful cultural ambassadors.
- **Global awareness of Australian film and TV varies across international markets.** When asked if they had seen or heard of 10 recent Australian screen titles, 88% of respondents in both the UK and New Zealand and 80% in India had watched or recognised the programs, followed by 67% of respondents in the US, 65% in China, 61% in Canada, 60% in Singapore and 46% in Germany.
- **With awareness comes appeal.** Respondents in the markets most aware of Australian screen content (India, New Zealand and the UK) are more likely to describe it as appealing (59%, 54% and 42% respectively), as are respondents from China (49%). Respondents from other markets, including those least exposed to Australian content, register large numbers of "neutral" responses, indicating untapped engagement potential due to a lack of exposure.
- **Australia's digital games industry was born global.** Its reliance on global markets means commercial outcomes are shaped more by international platform access, publisher relationships and global marketplace visibility than by domestic demand. Games development workers with specialised skills are in demand globally.

> "In games, it's not always about Australian stories – we talk about 'Australians telling stories'."
>
> – games executive, industry stakeholder interview

- **Country of origin cues can be lacking in video games, and awareness of Australian games varies considerably by both market and title.** Over a third (approximately 36%) of Indian video game players surveyed were able to identify high profile game titles as Australian, while in the US, awareness was below 10% across the games asked about.[1] Recently released *Hollow Knight: Silksong* was most commonly identified as an Australian game, by a third (33%) of all global survey respondents, including over half (56%) of respondents in the UK.
- **Australian video games have achieved global impact** and provided various types of value to players. Australian games such as *Hollow Knight: Silksong* and *Untitled Goose Game* have won prestigious international awards and achieved commercial success. The vast majority of international survey respondents who had played these games rated them as high quality games and reported positive emotional and social value from their engagement with them.

1 *Unpacking*, *Hollow Knight: Silksong* and *Untitled Goose Game*.

Cultural affinity and diplomacy

- **Australian screen content has significant cultural influence and is a powerful tool for public diplomacy and soft power.** Australian content helps viewers better understand Australian culture and way of life, including among respondents in China (74%), India (70%) and the US (47%). Its influence is particularly evident in our region, with respondents in India and China agreeing that viewing Australian film and TV strengthened their emotional connections to the country (66% and 53% respectively).
- **Engagement with Australian screen stories creates favourable perceptions of Australia.** At least 3 in 5 respondents in India and China (67% and 60% respectively) and more than half (55%) in the UK agree that Australian film and TV give a positive impression of Australia and its people. Exposure to Australian film and TV contributes positively to national perceptions across all markets surveyed.
- **Australians are proud of our screen and games content on a global stage, and ways it reflects our distinctive identities.** The Screen Currency audiences study found more than 3 in 4 Australians say well-made screen content makes them feel proud to be Australian (77%), agree Australian productions contribute to our distinctive identity in the world (78%) and agree Australian screen stories represent who we are as a nation – our people, our sense of humour and our lifestyle (76%). Focus groups highlighted that video game players – when they are aware games are made in Australia – also feel a sense of pride. Both screen and games audiences have strong support for their local industry.

Tourism and trade

- **Exposure to Australian screen content boosts interest in business, trade and tourism.** 65% of respondents in India and 53% in China are more interested in engaging with Australian products after watching Australian films and TV shows, and 68% in both markets are more interested in visiting the country.
- **Engagement with screen content can influence intention to travel to Australia as a tourist destination.** In addition to travel interest, Australian film and TV are considered influential on intentions to visit Australia by 51% of respondents in India, 30% in China and 27% in Singapore. Respondents in these markets are significantly more likely than respondents in other markets to have visited Australia or be considering or planning a visit as a result of seeing Australian screen content.

Export value

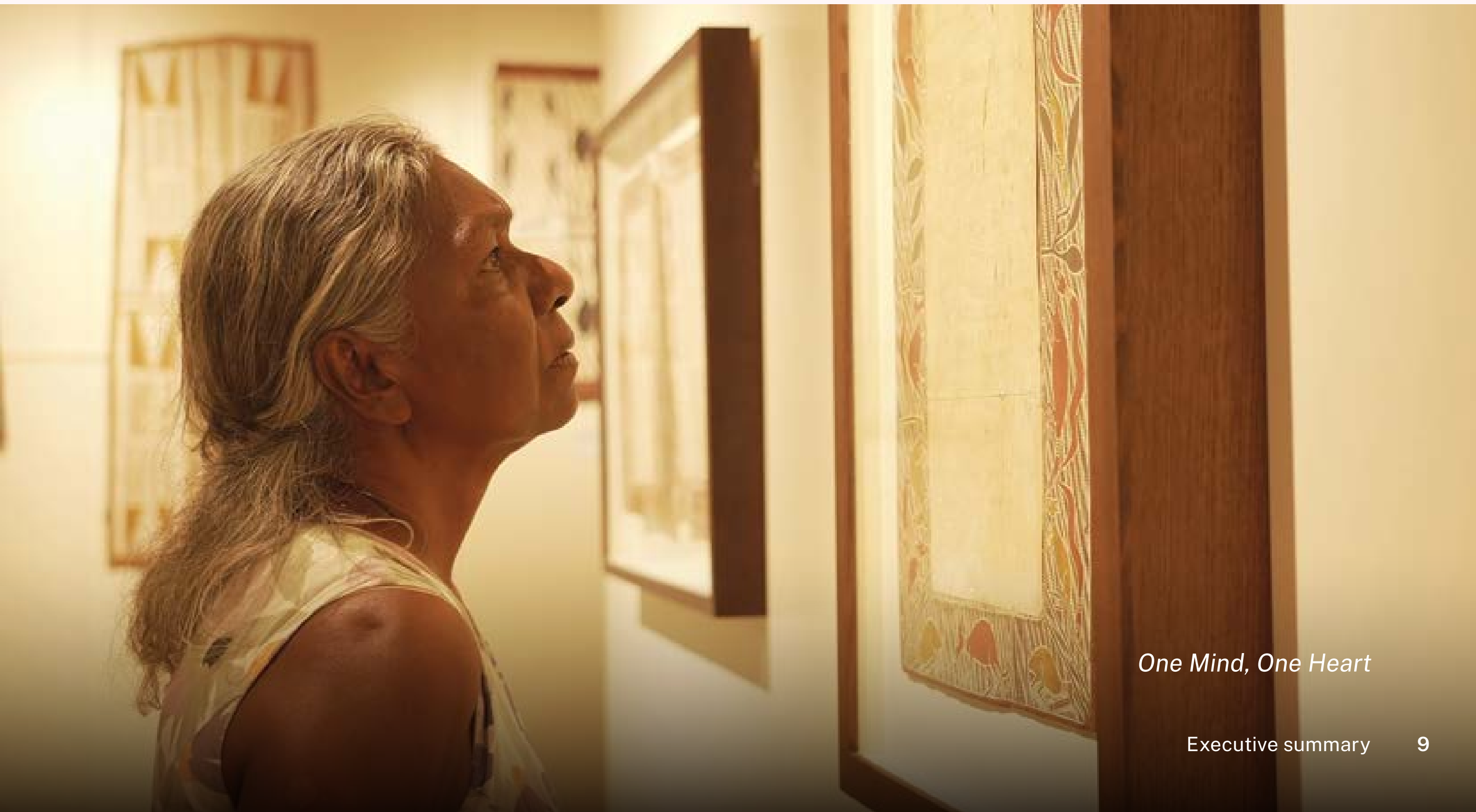
- **Australian screen content holds strong resonance in key global markets with growth potential.** The strongest appeal is reported in India (59%), New Zealand (54%), China (49%) and the UK (42%). Perceptions of value are comprehensive among respondents in India and China with many agreeing Australian content is enjoyable (68% and 64% respectively), authentic (67% and 70%), visually distinctive (65% and 66%) and high quality (70% and 59%). These findings indicate the important cultural and commercial role Australian content plays in these high growth markets.
- **The Australian screen and games industry is a significant – and growing – contributor to export revenue**, aligned with the Australian Government's agenda to diversify Australia's exports.[2] A total of $1.6 billion in 2023/24 was made up of $1.3 billion in screen exports and $323 million in digital games exports. Screen exports have doubled in real terms since the introduction of the producer and location offsets, increasing by an annual average of 4.7% between 2008/09 and 2023/24. They are likely to increase to $1.9 billion in 2024/25 with an increase in foreign drama expenditure. The digital games industry is growing rapidly and experiencing faster export growth than screen, at an **average annual rate of 15.4%** between 2016/17 and 2023/24, although this was off a smaller base and measured over a shorter period.

2 Senator the Hon Don Farrell, 'Trade Diversification Network activated' (Media Release, January 2026).

- **Screen production, post-production, digital games and internet broadcasting (including the streamers and other video on demand services) are driving export growth.** These sectors have continued to grow in real terms since digitisation, generating the largest proportions of exports in 2023/24: screen production and post-production (67% of total screen and games exports), digital games (20%) and internet broadcasting (8%). Export revenues have fallen for the distribution, free-to-air TV and subscription TV (e.g. Foxtel) sectors.
- **Foreign drama productions in Australia are the screen industry's largest export service.** Total foreign drama expenditure continues to increase, reaching $1.6 billion in 2024/25, more than six times the $260 million recorded in 2010/11, noting that annual figures can fluctuate significantly with the international production pipeline. This reflects the attractiveness of Australia as a production location, with strong capabilities, skills and infrastructure, a range of extraordinary landscapes, low risk of disruption and competitive offsets and incentives.
- **Screen royalty exports are returning to growth, at $415 million.** International competition for quality screen content in a global market has driven up the value of content rights, returning royalty exports to growth after a period of decline.

The long-term value of Australian IP in global markets

- **Global platforms are playing a growing role in IP ownership, distribution, and market and audience access.** Interviews and survey results in our industry study highlight the challenges this presents for Australian creators and businesses seeking to earn sustainable income and to retain a share of the long-term value their work generates. This points to a gap between what government can most readily support – largely via grants and production incentives, which are tied to production activity – and the factors that influence how much of that value is retained in Australia.
- **Culturally valuable work may become more reliant on ongoing public support, despite its long-term value accruing overseas.** Stakeholder interviews indicated that the parts of the sector likely to thrive commercially are those that are globally oriented – export-oriented games, international service work, and businesses able to operate at scale in global markets. However, these segments do not support creation of Australian content by default. This highlights a need for policy and funding settings to better engage with platform-led audiences and revenue models, so that Australia can continue to reap the social and cultural value of our world-class screen and games.



One Mind, One Heart

Overview of data sources

Insights informing this *Global Insights* report have been drawn from across the multidisciplinary Screen Currency 2026 project, including:

- **An international screen audiences survey** consisting of questions included in the Ipsos Global Advisor Omnibus study using established, broadly representative online panels in 8 international markets (the US, China, Germany, the UK, Canada, India, Singapore and New Zealand). Sample sizes were 1,000 or 500 depending on the country, with fieldwork over late November 2025 and early December 2025.
- **An international video game players survey** recruited via an online market research panel company, Dynata, in key markets of the UK (n=405), US (n=419), Canada (n=400) and India (n=386). These key international marketplaces represent large video game player populations and mostly share a common language.
- **Analysis of 5,638 online reviews and video responses** to 13 Australian screen and games titles across Letterboxd (26 million users), IMDb (83 million registered users), Steam (69 million daily users), Common Sense Media (hosts 40,000 reviews), Rotten Tomatoes, YouTube and TikTok.
- **Screen and games industry stakeholder interviews** – 32 in-depth interviews with experienced screen and games practitioners.
- **An industry and workforce survey** of 765 screen and games practitioners and organisations, covering industry dynamics including sources of income, sales and greatest areas of risk, return and perceived potential.
- **New analysis of available exports data** including ABS business and balance-of-payments data, Screen Australia foreign expenditure data and data from the IGEA Australian Game Development Survey.
- **Industry data sources**, including Newzoo games data, tourism research and industry reports.
- **An Australian screen audiences survey** (n=2,404 Australians).
- **An Australian video game players survey** (n= 2,208 Australian video game players).
- **Case studies of 16 Australian screen and games titles**, including their international sales and global reception.

For further information, see Appendix 1 – Details of method.

Phenomena

Screen insights

Awareness, appeal and value in global markets

Screen | **Awareness, appeal and value** | Cultural understanding | Business, travel and tourism | Talent, creativity and collaboration | Exports and IP

This chapter examines international awareness of Australian screen content, its appeal and perceived value across global markets.

Awareness varies significantly by territory and title, with recognition often driven by a small number of highly visible programs. Where exposure is limited, audiences tend to express neutrality rather than rejection, indicating unrealised engagement potential rather than low regard.

Appeal is strongest in markets with higher levels of familiarity, where Australian screen content is more likely to be described as enjoyable, accessible and high quality. In these contexts, audiences respond to distinctive, authentic Australian storytelling, suggesting that cultural proximity and distribution play an important role in enabling resonance.

Strong international resonance, appeal and impact are evident through online engagement around Australian screen stories. Reviews, highly creative video responses and strong social media interaction evidence the impact some titles have had on their audiences around the world.

Shipwreck Hunters Australia

MasterChef Australia

Awareness

The international screen audiences survey highlighted that global awareness and exposure to Australian TV and film **varies widely by market and genre, with iconic titles driving recognition** among the titles tested.

A total of **11 titles** across a range of genres, formats and distribution mechanisms were tested across key markets (the US, China, Germany, the UK, Canada, India, Singapore and New Zealand).

Of survey respondents, **88% in both the UK and New Zealand and 80% in India had watched or recognised the programs**, followed by 67% of respondents in the US, 65% in China, 61% in Canada, 60% in Singapore and only 46% in Germany.

Animated children's program *Bluey* is the most widely recognised Australian title and the only one recognised by at least 1 in 5 respondents in every market surveyed — from 60% in New Zealand to 20% in Germany (Table 1). However, *Bluey* ranked second for recognition among survey respondents in the **UK** (55%), where awareness is led by long-running (and long-exported) beachside serial *Home and Away* (60%).

In **India and Singapore**, *MasterChef* dominates awareness (recognised by 49% and 38% of respondents respectively), with respondents in India also showing strong recognition for drama and film titles.

New Zealand respondents demonstrate consistently high awareness across most Australian titles, while respondents in more mature markets such as **Germany and Canada** show comparatively lower awareness overall – despite being significant territories for sales of Australian content.

Read about selected Australian screen titles in:

Case Studies

Table 1: Exposure and awareness of selected Australian titles by market

	UK	US	New Zealand	Canada	Germany	Singapore	India	China
Bluey	55% ▲	48% ▲	60% ▲	36%	20% ▼	26% ▼	22% ▼	29% ▼
MasterChef Australia	31%	9% ▼	69% ▲	16% ▼	6% ▼	38% ▲	49% ▲	14% ▼
Furiosa: A Mad Max Saga	27%	24%	27%	21%	16% ▼	15% ▼	26%	30% ▲
Bondi Rescue (ALL-ex UK)	–	5% ▼	58% ▲	11% ▼	4% ▼	11%	14%	9% ▼
Colin From Accounts	24% ▲	5% ▼	28% ▲	4% ▼	5% ▼	5% ▼	15%	14%
Heartbreak High	14% ▲	4% ▼	16% ▲	5% ▼	7% ▼	7% ▼	17% ▲	10%
The Dry	9%	5% ▼	18% ▲	4% ▼	5% ▼	7%	18% ▲	15% ▲
Talk to Me	8%	10%	7%	8%	8%	9%	19% ▲	7% ▼
Mystery Road	6% ▼	6% ▼	7% ▼	5% ▼	7% ▼	5% ▼	25% ▲	15% ▲
Boy Swallows Universe	6% ▼	3% ▼	17% ▲	3% ▼	3% ▼	5%	15% ▲	10% ▲
Home and Away (UK only)	60% ▲	–	–	–	–	–	–	–
Other	5% ▲	1%	4% ▲	2%	1% ▼	1%	1%	0% ▼
None of these	12% ▼	33%	12% ▼	39% ▲	54% ▲	40% ▲	20% ▼	35% ▲
Column n=	1,001	1,001	501	1,001	1,000	501	501	1,001

Note: Result is significantly higher (arrow up ▲)/lower (arrow down ▼) than the international total result at the 95% confidence interval. Source: Responses to the international screen audience survey question "Which of the following Australian films or television shows have you seen or heard of?"

Appeal

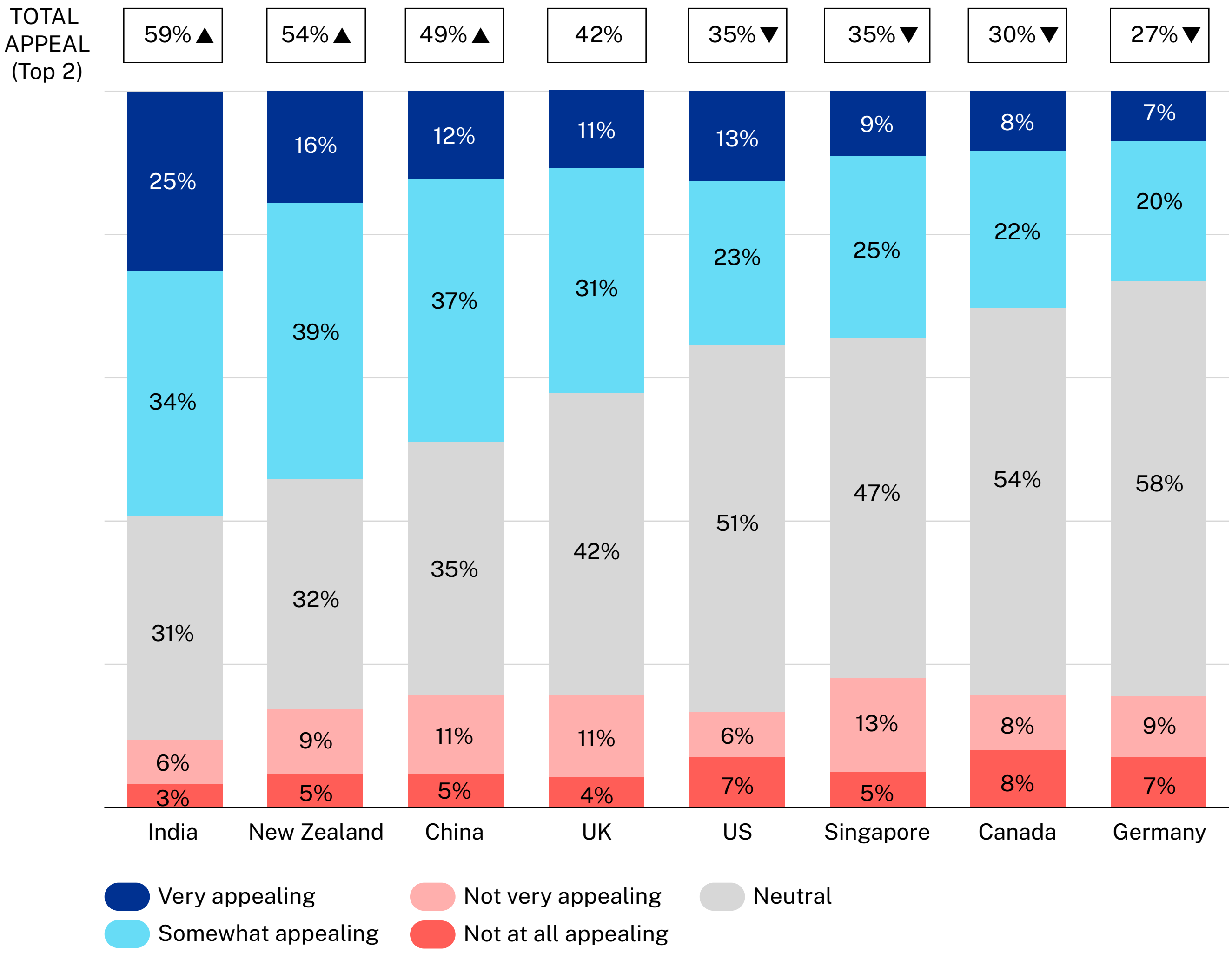
Australian screen content has **strong appeal in high-growth and strategically important markets**, creating clear export and audience growth opportunities. The strongest resonance is reported in India (by 59% of respondents), New Zealand (54%), China (49%) and the UK (42%) (see Figure 1).

India and New Zealand standout as the most engaged markets, with higher proportions of respondents finding Australian content either very or somewhat appealing.

Respondents in the US, Singapore, Germany and Canada are less committal about the appeal of Australian programs, with respondents more likely to feel neutral. With the exception of the US, respondents in these markets were also the least likely to have watched the titles we tested, so this **neutrality may reflect non-exposure.**

These findings highlight both established strengths and untapped potential across different regions.

Figure 1: Appeal of Australian-made films and TV by market



Note: Result is significantly higher (arrow up ▲)/lower (arrow down ▼) than the international total result at the 95% confidence interval. Source: Responses to the international screen audience survey question “How appealing do you find Australian-made films and television shows overall?” n=1,000 respondents in each market except India, Singapore and New Zealand where n=500.

Value

Across markets, there are perceptions that Australian screen content is distinctive, authentic, high-quality and entertaining. Among respondents in the US, enjoyment (49%) and production quality (46%) are the strongest associations of value. These perceptions are also dominant among respondents in Germany (both 40%), Canada (45% and 43% respectively), Singapore (both 47%) and New Zealand (67% and 64%) (see Table 2).

In **India and China**, value perceptions are more comprehensive, with strong agreement across measures of enjoyment (68% in India and 64% in China), authenticity (67% and 70%), accessibility (66% and 53%), aesthetics (65% and 66%) and quality (70% and 59%). This indicates the particularly **important cultural and commercial role Australian content plays in these high growth markets**.

Read more about *Furiosa: A Mad Max Saga* in:

Case Studies

Analysis of ***Furiosa: A Mad Max Saga's* social media impact** found wide user engagement and creativity, evidencing its impact and appeal to international audiences. Around 19% of the *Furiosa*-related videos in our TikTok/YouTube sample were user-generated.

Most of these TikTok and YouTube videos were in English, but we also found videos in Spanish, Hindi, Urdu, Bangla, Bahasa Indonesia, Kurdish and Aramaic.

The most common *Furiosa* YouTube videos were explainers, in which creators offer production or story background to the movie. Some of these videos attracted **hundreds of thousands of views**. On TikTok, cosplay videos were the most common genre, with some featuring striking home-made designs for *Furiosa* costumes, make-up and hairstyles.

Some of this user-generated content reflects **great effort and imagination**. In one popular TikTok, a Kenyan bus driver shows off his matatu (privately owned minibus) which is lovingly hand-painted with *Furiosa* and Immortan Joe imagery.

This engagement highlights **the wide circulation of the Mad Max franchise internationally**, and ways it has fired the imagination of audiences, who take the film's distinctive style into their daily lives.

Furiosa: A Mad Max Saga

Table 2: Perceived value of Australian screen content in international markets

	UK	US	New Zealand	Canada	Germany	Singapore	India	China
Australian films and TV shows are well-made and of high quality	57% ▲	46% ▼	64% ▲	43% ▼	40% ▼	47% ▼	70% ▲	59% ▲
Australian stories are visually and artistically distinctive	48%	43% ▼	57% ▲	39% ▼	33% ▼	46%	65% ▲	66%▲
Australian films and TV shows are easy to find and watch on the platforms I use	49%	36% ▼	61% ▲	30% ▼	33% ▼	42%	66% ▲	53% ▲
Australian films and TV depict real and diverse aspects of Australian life and culture	51%	40% ▼	54%	38% ▼	36% ▼	43% ▼	67%▲	70% ▲
Australian films and TV shows are enjoyable to watch	59% ▲	49% ▼	67% ▲	45% ▼	40% ▼	47% ▼	68% ▲	64% ▲
Column n=	1,001	1,001	501	1,001	1,000	501	501	1,001

Note: Result is significantly higher (arrow up ▲)/lower (arrow down ▼) than the international total result at the 95% confidence interval. Source: Responses to the international screen audience survey question "Thinking about Australian films and TV shows...How much do you agree or disagree that each of the following makes them valuable to you personally? Please rate each statement on a 7-point scale, where 1 = Strongly disagree and 7 = Strongly agree?"

Filmed in regional Western Australia, TV series ***Mystery Road's*** **quality, distinctiveness and contribution to international crime drama** is frequently noted in online reviews. Some reviews emphasised continuity within international crime traditions.

"As good as anything I've ever seen on TV."
– online review

"When you run out of *Bosch*, go to *Mystery Road*!"
– online review

Read more about *Mystery Road* in:

Case Studies

Others appreciated ***Mystery Road's*** **difference from other international crime fiction.**

"For fans of crime dramas who are looking for something a little different."
– online review

"We should welcome good drama that comes from a different place and perspective. Not all police procedurals should be based in the USA."
– online review

"I have watched many [crime] movies and shows from Australia and they do a better job making quality shows than the US."
– online review

Perceptions of Australian screen content also impact Australians, who feel proud of our screen content on a global stage and the ways it reflects our distinctive identities. The national screen audience survey conducted for Screen Currency[3] found 78% of Australians agree Australian screen productions contribute to our distinctive identity in the world, and 76% agree Australian screen stories represent who we are as a nation – our people, our sense of humour and our lifestyle. 77% agree well-made films and TV make them feel proud of being Australian. Across the qualitative research, audiences also reported feeling pride in Australian screen content, with some titles emerging as cultural touchstones over time.

> "It's pretty cool to know that the country I live in is big enough to produce a lot of world-famous games and films."
>
> – visitor at the Australian Centre for Moving Image (ACMI)

While the international survey indicated Western Sydney-based multicultural high school drama ***Heartbreak High*** has attracted less international recognition than some of the other titles tested, analysis of online engagement found it has had strong resonance among its international audiences for its **authenticity and cultural specificity**.

> "Australian version of *Sex Education* almost but better."
>
> – online review

TikTok clips from the show attracted **hundreds of thousands of likes and comments**, including comments in Portuguese, Spanish, Russian, French, Hebrew, Arabic, Burmese and Turkish.

Read more about *Heartbreak High* in:

Case Studies

Diverse content and characters in shows like *Heartbreak High* present a contemporary image of Australia – broadening out the dominant narratives shaped by hugely popular 1980s exports like *Crocodile Dundee* – and can showcase diaspora communities' experiences. Our audiences study found the future state described by Australian audiences is one in which Australian screen content continues to reflect **a complex, evolving national identity**, rather than a single definition of Australianness. For **First Nations audiences** in particular, the future state includes a stronger presence of contemporary First Nations stories that sit alongside historical narratives.

Read more about Australian audience perspectives in:

Audience Insights

Heartbreak High

3 Based on a nationally representative sample of 2,404 Australians.

Global screen award recognition highlights for Australian titles in 2025

- ***Better Man***
  Nominated – Special Visual Effects – Luke Millar, David Clayton, Keith Herft, Peter Stubbs
  British Academy of Film and Television Arts UK
  Nominated – Best Visual Effects – Luke Millar, David Clayton, Keith Herft, Peter Stubbs
  Academy Awards
  Nominated – Best Original Song
  Golden Globe Awards
- ***Colin From Accounts* Season 2**
  Nominated – International – Production Team
  British Academy of Film and Television Arts UK
- ***Fwends***
  Won – Caligari Film Award
  Berlin International Film Festival Germany
- ***I'm The Most Racist Person I Know***
  Won – Special Jury Award
  South by Southwest Film & TV Festival (SXSW) US
- ***Lesbian Space Princess***
  Won – Teddy Award
  Berlin International Film Festival Germany
  Won – Noves Visions Best Film and Best Animated Film – Emma Hough Hobbs, Leela Varghese
  Sitges International Fantastic Film Festival Spain
- ***Mix Tape***
  Won – TV Spotlight Audience Award
  South by Southwest Film & TV Festival (SXSW) US
- ***Unspoken***
  Won – International Grand Prix
  Clermont-Ferrand International Short Film Festival France

Lesbian Space Princess

Cultural understanding and connection: soft power

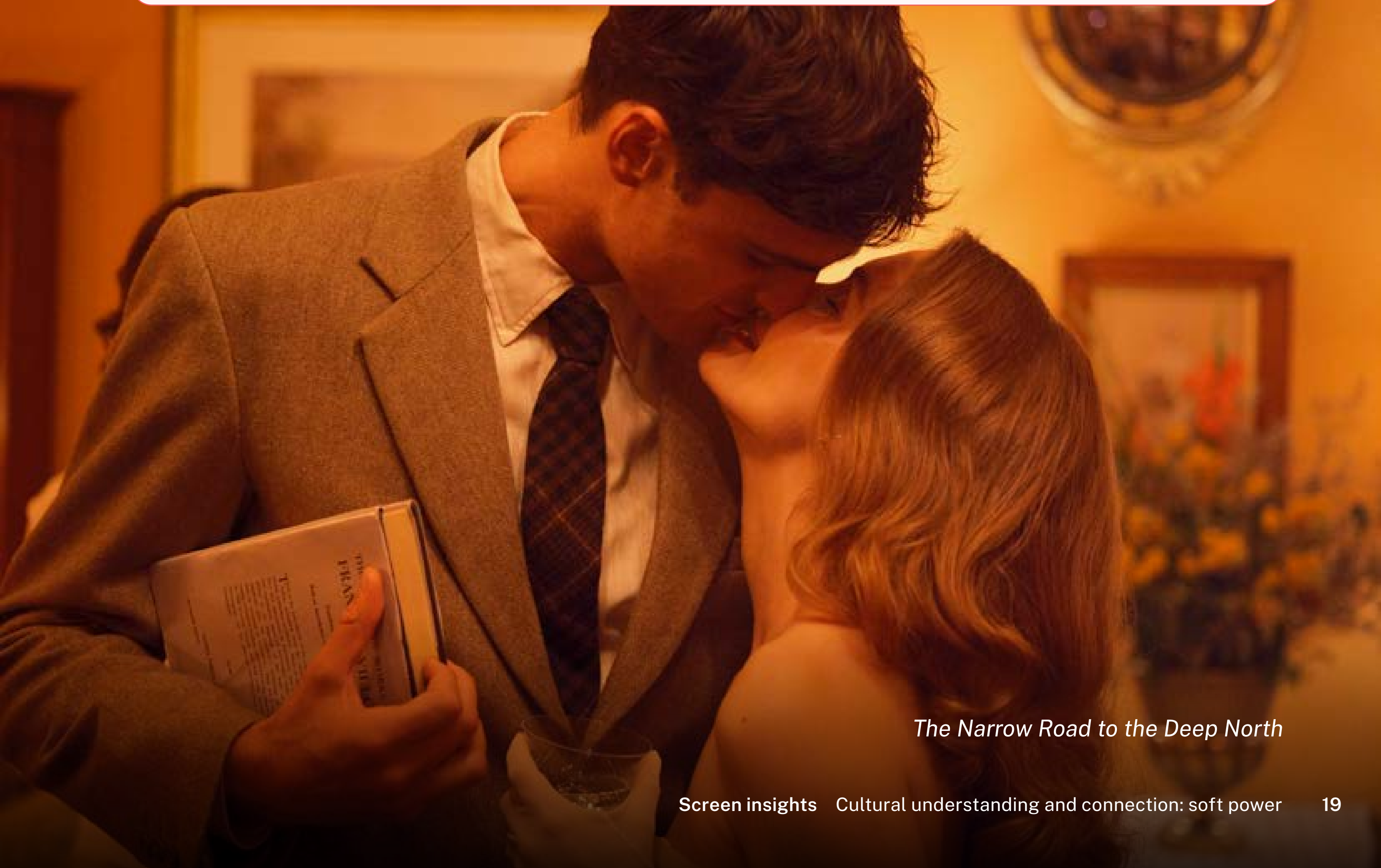
Screen > Awareness, appeal and value > **Cultural understanding** > Business, travel and tourism > Talent, creativity and collaboration > Exports and IP

This chapter examines how Australian screen content contributes to cultural understanding, emotional connection and soft power in global markets.

Engagement with Australian stories can make Australia feel more familiar and accessible to international audiences, supporting learning about culture, ways of life and social dynamics through character, setting and everyday detail.

Australian screen stories foster connection not by overtly promoting national identity, but by enabling identification with characters and shared human experiences. This process is most evident when audiences encounter authentic, culturally specific storytelling that feels grounded and credible, allowing perceptions of place and people to emerge organically rather than didactically.

Where resonance is strongest, engagement with Australian screen content contributes to more favourable perceptions of Australia and its people, strengthening cultural affinity and emotional connection. These effects are particularly pronounced in regional markets, where screen stories can play a meaningful role in shaping understanding across cultural, linguistic and geographic distance.



The Narrow Road to the Deep North

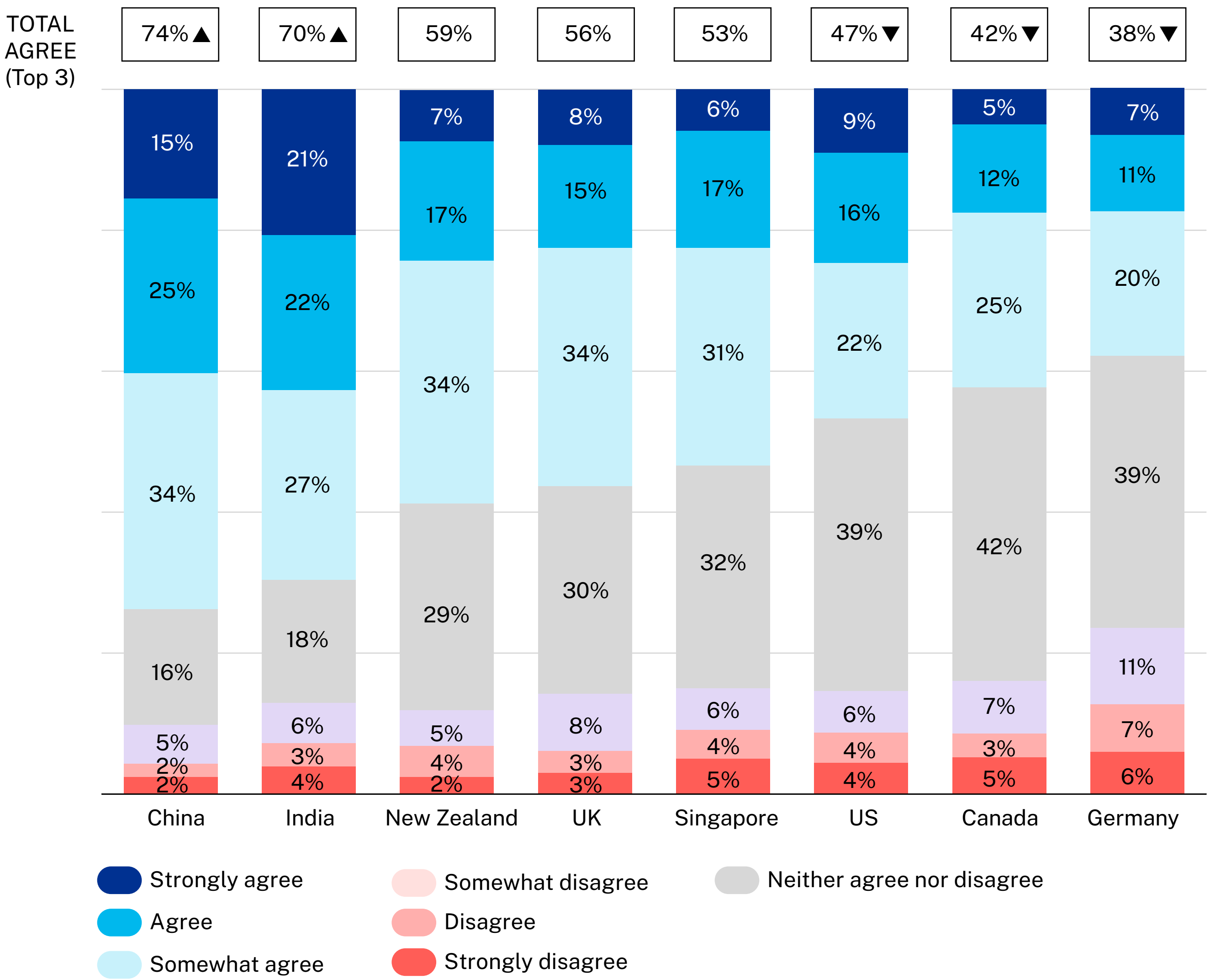
Cultural understanding and connection

Public diplomacy and soft power can be built through Australian screen stories, which can strengthen cultural understanding and emotional connection with Australia. This is particularly true in China and India, where respondents are most likely to agree that watching Australian films and TV shows helps them understand Australian culture and way of life (74% and 70% respectively) (Figure 2) and makes them feel more connected to Australia (53% and 66% respectively) (Figure 3).

This connection is important in contexts where different cultural, religious and linguistic heritages and influences may seem most pronounced and carries **profound benefits for Australia** and its strategic positioning and priorities globally, particularly across the region.

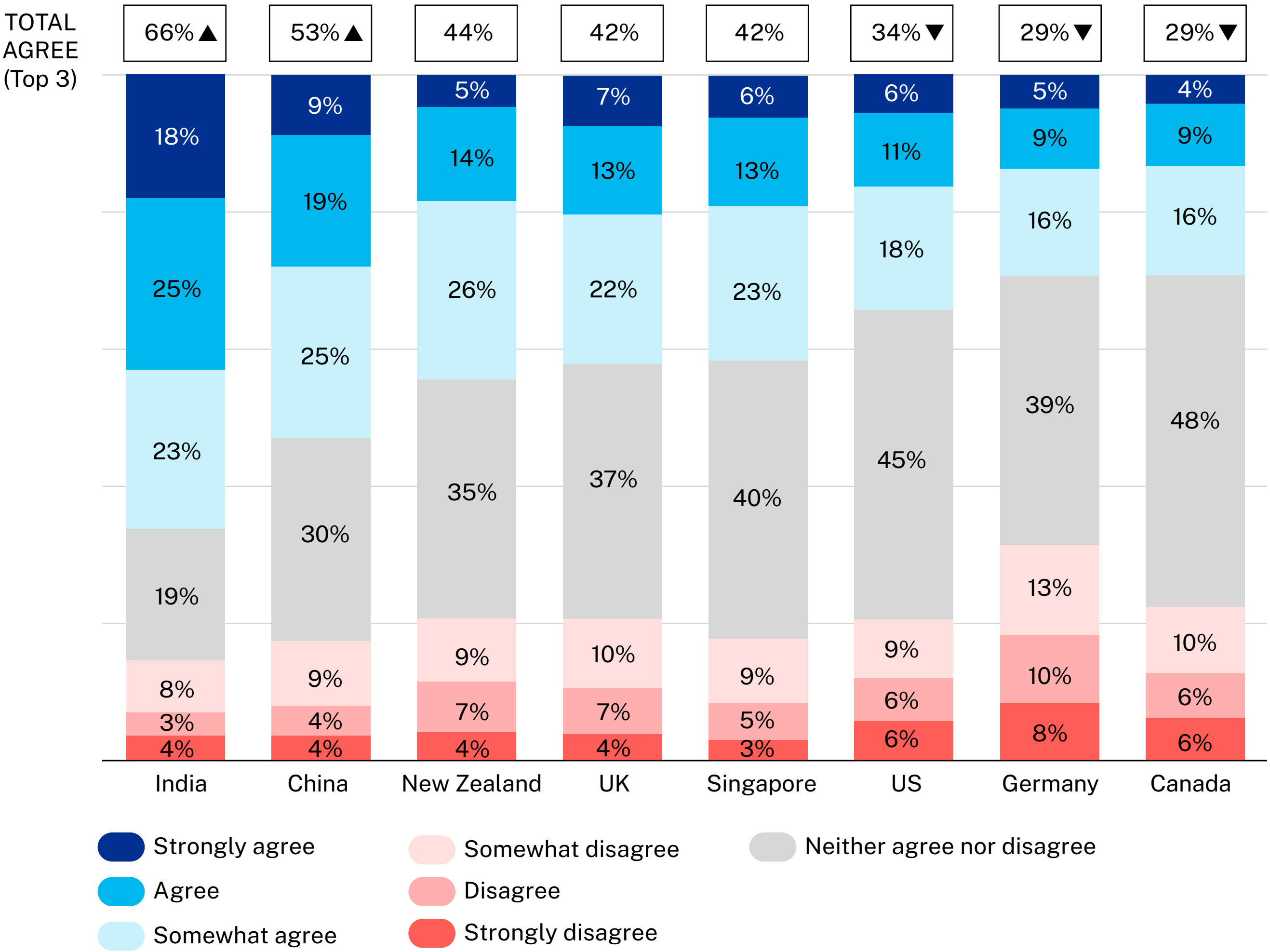
Identification with characters and their stories can help build a sense of shared humanity and can be a powerful source of **empathetic connection.** Similarly, exposure to settings, social dynamics and political environment can make a place or context feel more familiar and less "foreign".

Figure 2: Agreement Australian screen "helps me understand Australian culture and way of life"



Note: Result is significantly higher (arrow up ▲)/lower (arrow down ▼) than the international total result at the 95% confidence interval. Source: Responses to the international screen audience survey question "Thinking about Australian films and TV shows you have watched, how much do you agree or disagree with the following? Please rate each statement on a 7-point scale, where 1 = Strongly disagree and 7 = Strongly agree" n=1,000 respondents in each market except India, Singapore and New Zealand where n=500.

Figure 3: Agreement Australian screen "makes me feel more connected to Australia"



Note: Result is significantly higher (arrow up ▲)/lower (arrow down ▼) than the international total result at the 95% confidence interval. Source: Responses to the international screen audience survey question "Thinking about Australian films and TV shows you have watched, how much do you agree or disagree with the following? Please rate each statement on a 7-point scale, where 1 = Strongly disagree and 7 = Strongly agree" n=1,000 respondents in each market except India, Singapore and New Zealand where n=500.

Programs like ***Bluey* – the most streamed show in the US in 2025** – can be powerful cultural ambassadors. Online reviews suggest Bluey has fostered understanding of Australian culture overseas, with some international reviewers describing how the show prompted them to **learn about Australia.**

"I had to look up slang used on *Bluey*."
– online review

Online reviewers outside Australia also stated that they valued ***Mystery Road*** as a way to learn about First Nations and Australian cultures.

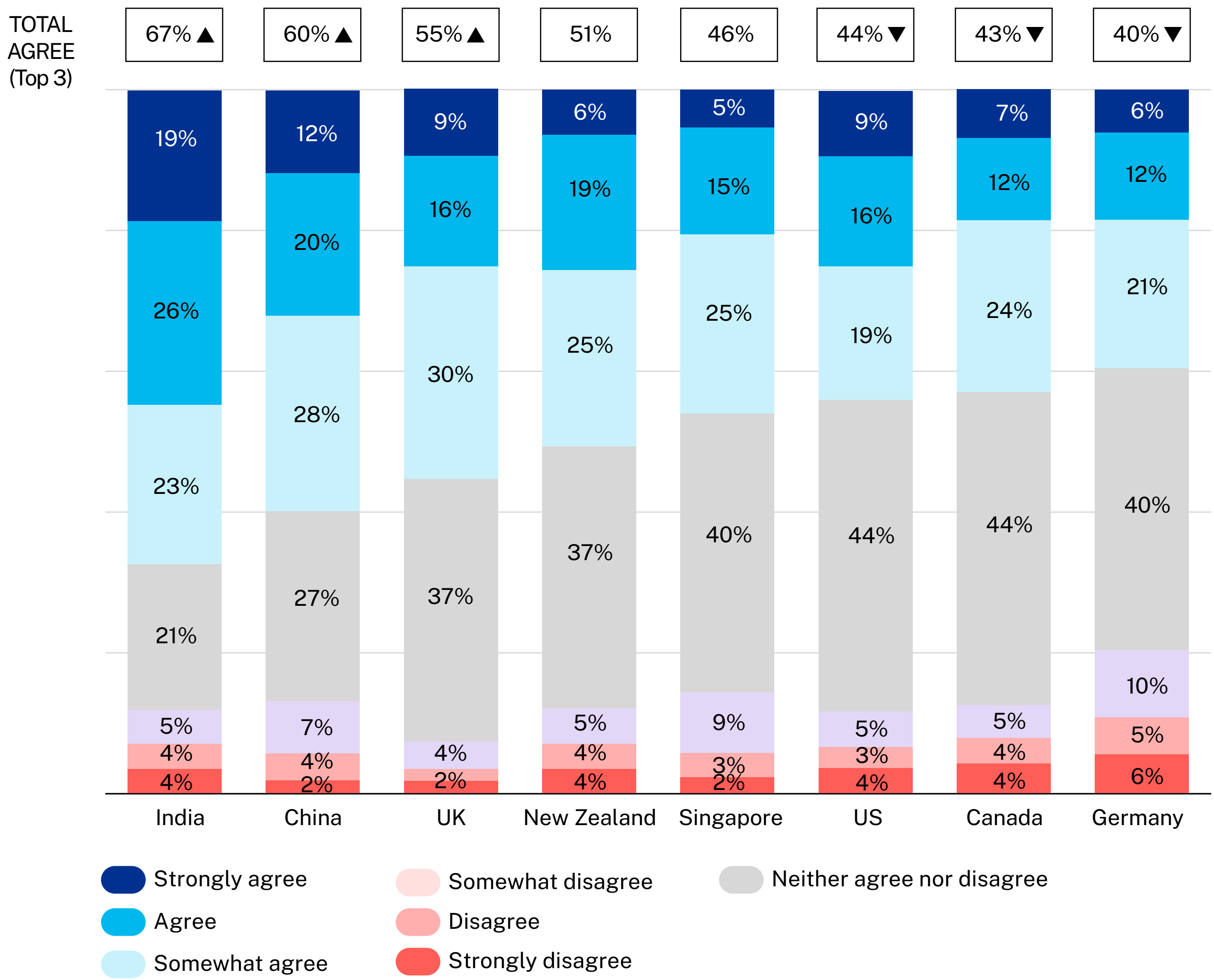
"Interesting and informative (not pedantic) look into Aboriginal people's culture and general Australian culture and dynamics."
– online review

Read more about *Mystery Road* in:
Case Studies

Influence on perceptions of Australia

Enjoying Australian screen content can influence – for the better – how international audiences view Australia and its people. Exposure to Australian film and TV contributes positively to national perceptions across all markets surveyed (Figure 4). Strongest agreement is seen in India (67%) and China (60%), followed by the UK (55%). Positive perceptions are also evident in New Zealand (51%), Singapore (46%), the US (44%), Canada (43%) and Germany (40%). These findings highlight the role of Australian storytelling as an ambassador for us all – **shaping global understanding of Australia as a nation and strengthening its international reputation.**

Figure 4: Agreement that Australian screen gives a positive impression of Australia and its people



Note: Result is significantly higher (arrow up ▲)/lower (arrow down ▼) than the international total result at the 95% confidence interval. Source: Responses to the international screen audience survey question "Thinking about Australian films and TV shows you have watched, how much do you agree or disagree with the following? Please rate each statement on a 7-point scale, where 1 = Strongly disagree and 7 = Strongly agree" n=1,000 respondents in each market except India, Singapore and New Zealand where n=500.

Online reviews suggest *Bluey* has influenced positive perceptions of Australian culture overseas. A US-based parent on Common Sense Media said:

> "This show is developed and created in Australia, where lifestyles and culture are much different than here in America... Honestly, they have a better quality of life too."
> – online review

One in 5 reviewers on IMDb highlighted *Bluey's* distinctive Australian setting and humour.

> "I love the Aussie accents and themes. Of course some things go over our American heads, but my husband and I LOVE watching this show with our five year old son."
> – online review

Read more about *Bluey* in:

Case Studies

Bluey

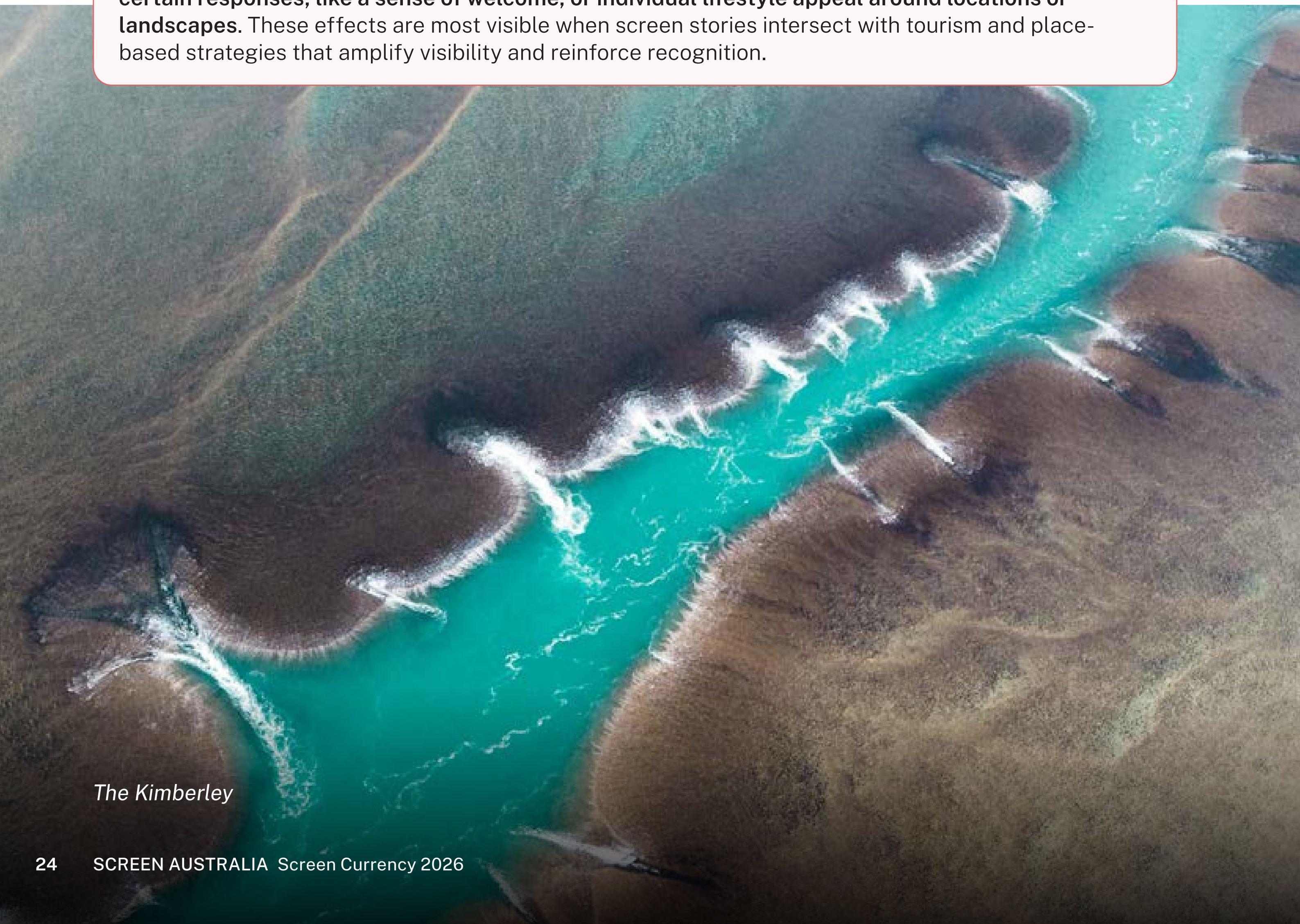
Influence on business, travel intentions and tourism

This chapter examines how engagement with Australian screen content can influence international audiences' interest in Australia as a place to visit, work with and do business.

Exposure to Australian film and TV is associated with increased curiosity about Australia beyond the screen, contributing to interest in travel, trade and broader economic engagement.

Screen content shapes these outcomes indirectly, by building familiarity with Australian places, lifestyles and social settings. When audiences feel emotionally connected to stories or settings, Australia becomes more imaginable and appealing, with screen exposure often strengthening positive associations rather than acting as a sole driver of decision making.

The influence of Australian screen content on travel intentions can be salient when viewing prompts certain responses, like a sense of welcome, or individual lifestyle appeal around locations or landscapes. These effects are most visible when screen stories intersect with tourism and place-based strategies that amplify visibility and reinforce recognition.

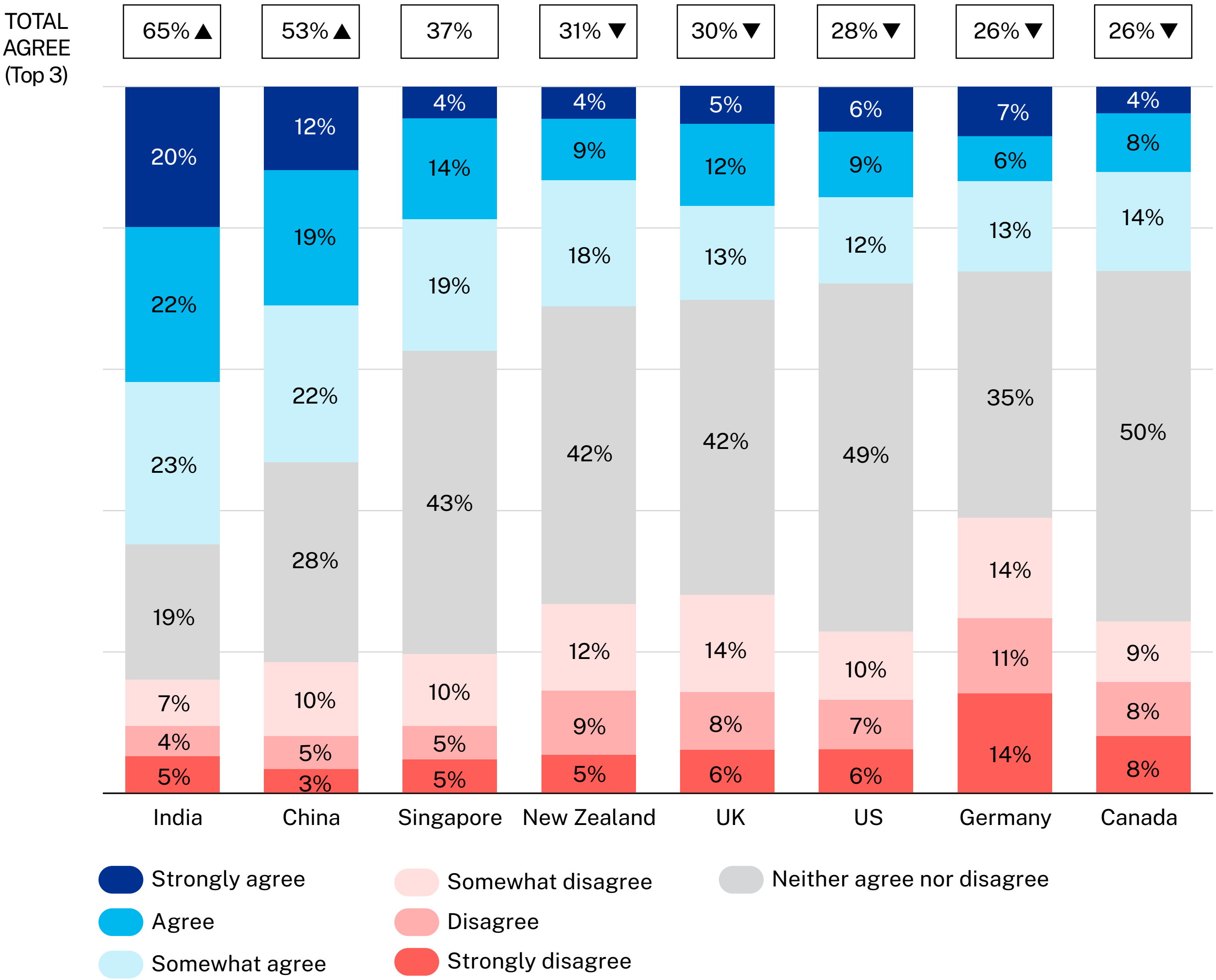


The Kimberley

Business

Screen exposure supports broader economic outcomes, including trade, business and tourism interests. The international survey highlights that it generates tangible commercial interest among international audiences. Two in 3 respondents in India (65%) and more than 1 in 2 in China (53%) report that watching Australian content makes them more interested in working, doing business with, or purchasing products from Australia (Figure 5).

Figure 5: Agreement that Australian screen "makes me interested in working, doing business or buying products from Australia"

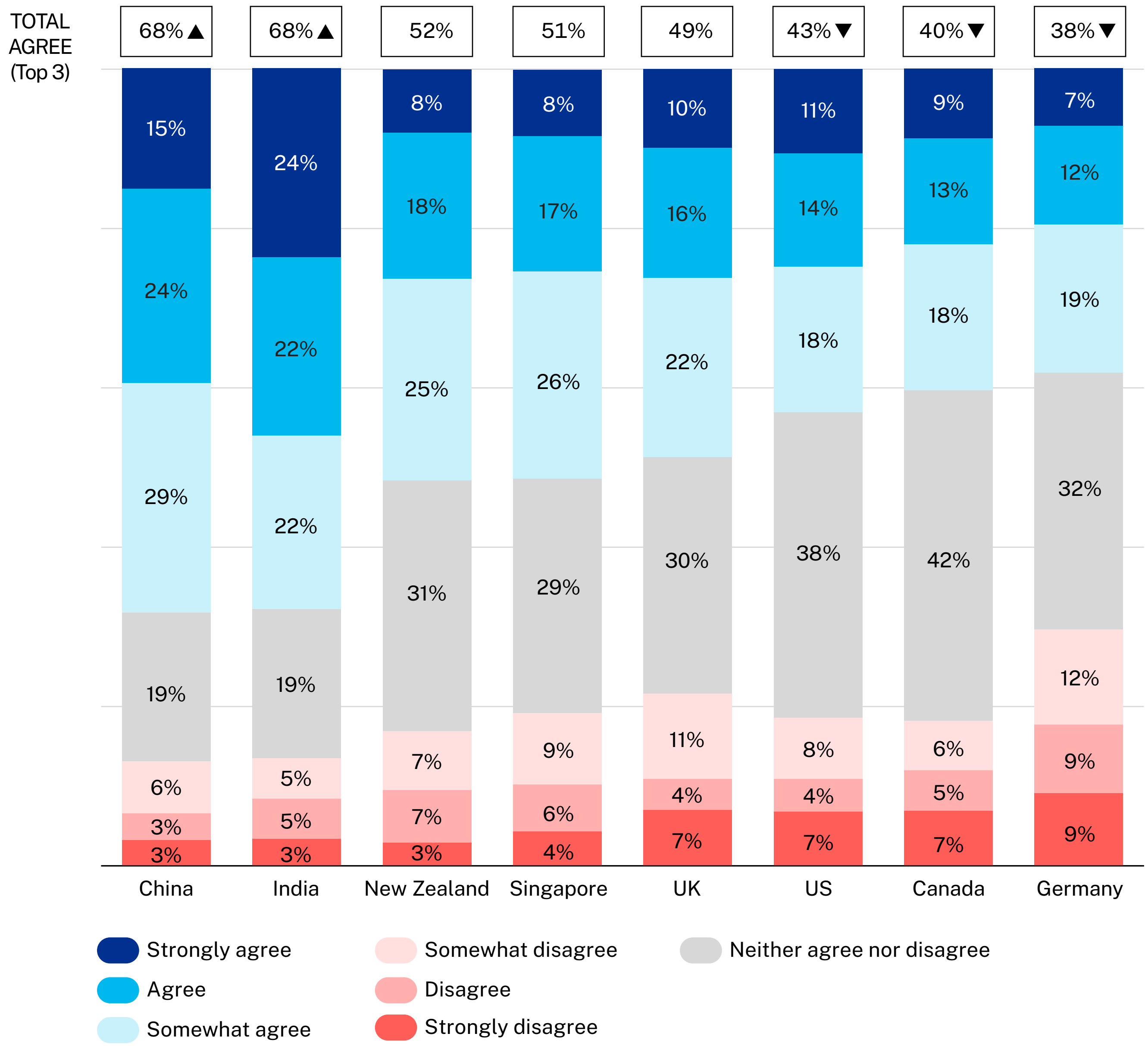


Note: Result is significantly higher (arrow up ▲)/lower (arrow down ▼) than the international total result at the 95% confidence interval. Source: Responses to the international screen audience survey question "Thinking about Australian films and TV shows you have watched, how much do you agree or disagree with the following? Please rate each statement on a 7-point scale, where 1 = Strongly disagree and 7 = Strongly agree" n=1,000 respondents in each market except India, Singapore and New Zealand where n=500.

Travel interest and intentions

Screen exposure also influences travel interest. More than 2 in 3 respondents in China and India (68% respectively) and around 1 in 2 respondents in New Zealand (52%), Singapore (51%) and the UK (49%) agree watching Australian film and TV makes them more interested in visiting Australia (Figure 6).

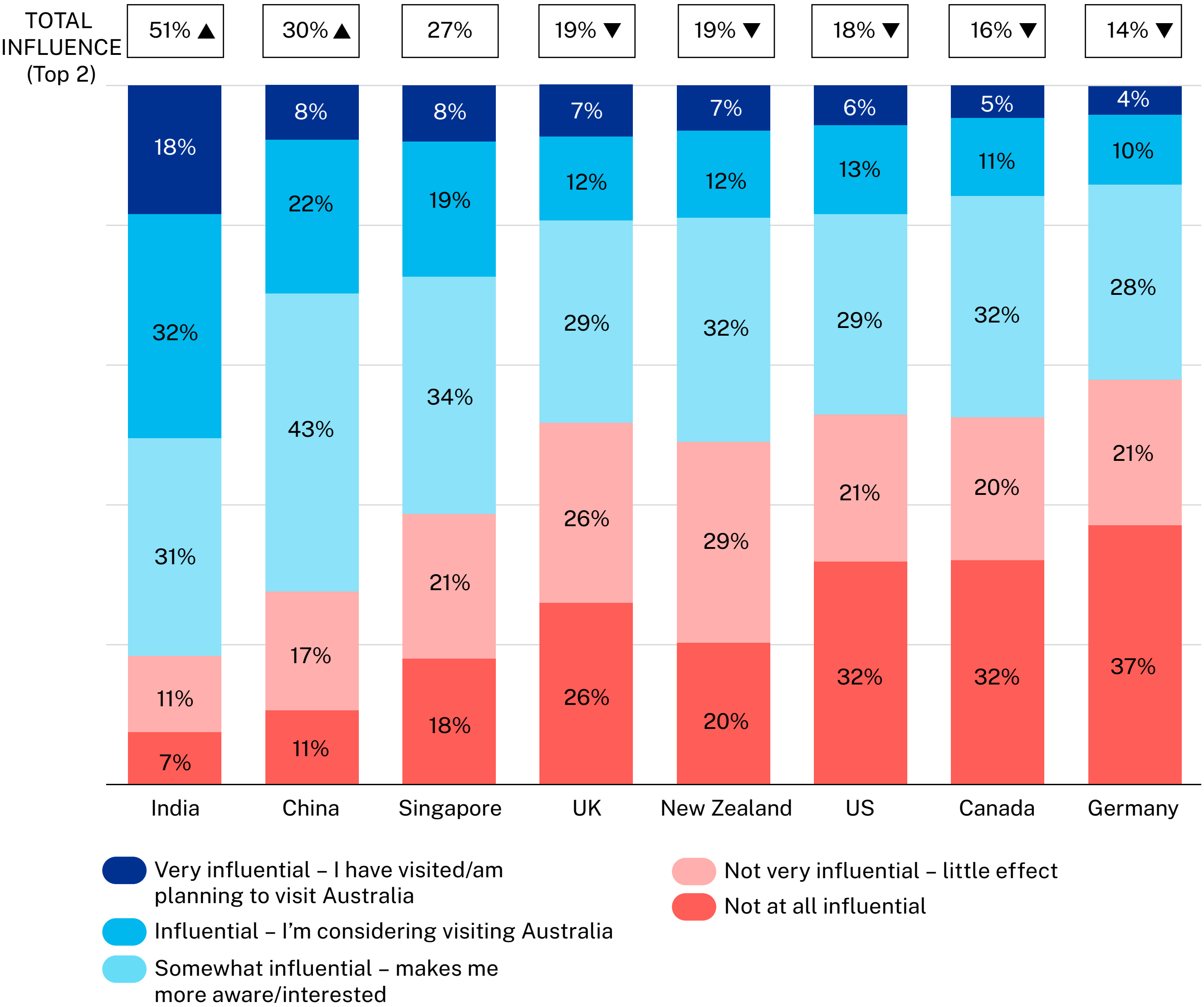
Figure 6: Agreement that Australian screen "makes me interested in visiting Australia one day"



Note: Result is significantly higher (arrow up ▲)/lower (arrow down ▼) than the international total result at the 95% confidence interval. Source: Responses to the international screen audience survey question "Thinking about Australian films and TV shows you have watched, how much do you agree or disagree with the following? Please rate each statement on a 7-point scale, where 1 = Strongly disagree and 7 = Strongly agree" n=1,000 respondents in each market except India, Singapore and New Zealand where n=500.

Beyond interest, screen exposure influences travel intentions. Over half of respondents in India (51%) say watching Australian film and TV is influential on their travel intentions, including a notable 18% who reported they have visited or are actively planning a trip (Figure 7). 30% of respondents in China and 27% in Singapore say they have visited, are planning or are considering a visit as a direct result of Australian screen content.

Figure 7: Agreement that Australian screen influences travel intentions



Note: Result is significantly higher (arrow up ▲)/lower (arrow down ▼) than the international total result at the 95% confidence interval. Source: Responses to the international screen audience survey question "How much does watching Australian films or TV shows influence your interest in visiting Australia for a holiday?" n=1,000 respondents in each market except India, Singapore and New Zealand where n=500.

Screen Currency's findings on the value of Australian screen to Australian businesses and tourism are supported by a recent study commissioned by the **Australia New Zealand Screen Association (ANZSA)** exploring the impact of Australian-made content in overseas territories, with a focus on the UK and Brazil.

The report found that **viewers of Australian-made content** on global streaming services are:

- 2 times more likely to **buy Australian products**
- 1.8 times more likely to **find Australian cuisine appealing**
- 1.7 times **more interested in travelling to Australia** in the future.

2CV 2025 (unpublished), *Impact of Filming on Cultural Affinity & Tourism, ANZSA*.

"For every dollar invested in tourism attraction, Australia receives a $14 return which helps to support more than 700,000 jobs and 360,000 businesses. The Australian Government is supporting the industry to continue building and setting new records."

– Tourism Research Australia

These findings reinforce the broader economic value of Australian screen.

Read about economic value and trends in:

Economic Insights

Impacts can be strongest when different actors, like tourism bodies and screen agencies, can work together and coordinate campaigns, timing and opportunities. Stakeholders interviewed for our industry study highlighted the value of coordinated public sector approaches where screen funding agencies, tourism bodies and investment attraction functions work in concert, often within the same portfolio or through established cross-agency arrangements. In these cases, support extends beyond production into marketing, audience reach and place-based outcomes, recognising the long tail of screen exposure and its spillover benefits for tourism and trade.

"I think tourism agencies have really realised and come to appreciate the salience factor of screen production."

– screen agency representative, industry stakeholder interview

To learn more about industry stakeholder views, read:

Industry Insights

The *Kangaroo* campaign delivered in partnership between Tourism and Events NT, STUDIOCANAL and Screen Territory was noted as a **recent stand-out example** in industry stakeholder interviews.

Kangaroo Testing Research conducted by McGregor Tan for Tourism and Events NT found that **the 2025 family feature film *Kangaroo* strengthened the NT's image.**[4] Among viewers, the film drove strong agreement that the NT is welcoming, unique, and worth visiting, with the biggest gains on uniqueness compared to other locations.

83% of respondents in this study agreed that the movie showcased the NT landscapes in a memorable way and 79% said the movie made the NT feel welcoming. 77% said the movie "gave me a positive impression of the NT overall" and 74% said the movie "made NT seem like a place I would enjoy visiting". While these findings were with interstate (rather than international) visitors, they highlight the **salience and distinctiveness that screen content can create around settings, contexts and locations**.

4 Department of Tourism and Hospitality (NT) 2026, *Kangaroo* market research findings, independently undertaken by an external market research agency using proprietary, non-publicly available data.

Kangaroo

Australian talent, creativity and collaboration

This chapter examines how Australian screen content promotes national creative capability and underpins Australia's reputation as home to a skilled, collaborative and internationally connected screen industry.

Australian stories and productions generate value not only through what appears on screen, but through the visibility they provide to Australian talent, technical expertise and creative practice across global markets.

Australian screen content produces "halo effects" across the broader creative industries, amplifying the profile of writers, performers, directors, technical practitioners and related creative sectors such as music, literature and design. Engagement with Australian screen stories frequently prompts discovery of connected cultural works, reinforcing perceptions of Australia as a source of distinctive, high quality creativity.

Australia has world class screen capabilities, including its skilled workforce, production infrastructure and technical expertise, which continue to attract international productions and investment. These strengths position Australia as a globally competitive production partner, supporting both economic activity and opportunities for skill development, collaboration and knowledge exchange.

Shut Your Big Fat Mouth John Safran

Local screen content promotes Australian creativity

Local screen content promotes Australian skills, innovation and talent, and produces "halo effects" that impact the broader creative industries. Beyond the cast and crew featured, TV shows and films profile connected content and creatives, for example: novelists who may have contributed original IP for adaptation to screen (as in *Boy Swallows Universe*), musicians featured on soundtracks, the chefs and culinary culture featured in *MasterChef*, and other content connected to creative teams (such as the horror comedy YouTube videos of the Philippou brothers, the writers and directors of *Talk to Me*, known online as RackaRacka).

Read about *Talk to Me* in:

Case Studies

Many online reviews analysed for Screen Currency commented on soundtracks or a desire to read other books by the author of the text on which a film or TV show was based, such as other titles by ***The Dry's* author Jane Harper.** The Church's much-loved track ***Under the Milky Way*** was also discovered by a new audience via *The Dry's* soundtrack. A Letterboxd review translated from Norwegian described how the film prompted them to *"put the song on my playlist"*. Another review in Russian noted:

> "There's a cover of my favourite song by the Australian band The Church, albeit in campfire singalong form – which was a nice touch."
>
> – online review

Read more about *The Dry* in:

Case Studies

Several of the **recording artists featured on *Heartbreak High's* soundtrack** – including emerging musicians such as First Nations artist Miss Kaninna, Korean-Australian hip-hop group 1300 and Sydney based Somali-Indonesian artist Maina Doe[5] – received substantial global exposure and profile from being involved in the series. The music has been a significant part of the *Heartbreak High* cultural phenomenon.[6]

ANZSA's recent study exploring the impact of Australian-made content in overseas territories, with a focus on the UK and Brazil, also highlights that Australian screen supports Australian creativity.

The study found that **viewers of Australian-made content** on global streaming services are:

- 1.6 times more likely to be **interested in Australian literature**
- 1.4 times more likely to be **interested in Australian music**
- 1.4 times more likely to be **interested in Australian cultural festivals.**

2CV 2025 (unpublished), *Impact of Filming on Cultural Affinity & Tourism*, ANZSA.

5 Triple J Unearthed 2024, "*Meet The Heartbreak High Unearthed Class Of Season 2*", ABC.
6 Quinn K 2024, "Jemma grew up reading and didn't listen to pop music. Now she's the musical gatekeeper on a hit show", Sydney Morning Herald.

World class talent, capability and infrastructure

Australia has internationally competitive screen capability. The strength of our creative workforce and the structures underpinning it have created strong demand for Australian **skills, services and content**. Australia has long outperformed for the size of our local industry and market – with globally recognised talent, in-demand workers, and stories that travel.

Screen Currency's industry stakeholder interviews highlighted the world class skills and talent of our sector, with **Australian skills in demand**.

> "Australia's above- and below-the-line production workforce has a strong international reputation for skills and quality, particularly known for its problem-solving capability and cross-functional skill sets."
>
> – industry stakeholder interview

These skills and infrastructure have been important in attracting global productions to film in Australia, contributing to foreign drama production expenditure more than six times the 2010/11 level (see Export value) and reaching the top 5 filming locations as ranked by studio executives according to ProdPro's 2025 TV and Film Outlook Report.[7] Docklands Studios Melbourne's Super Stage (Stage 6) is described as one of the largest and most versatile sound stages in the Southern Hemisphere.

> "The scale of Stage 6 was a game-changer. It gave us the space to dream big – every set, every performance sequence, every technical element came together without compromise."
>
> – *Better Man* director Michael Gracey[8]

Along with our infrastructure, and the skills and capabilities of the local workforce, inward investment and foreign productions are associated with factors such as the **competitiveness of Australia's incentive settings, exchange rate movements and available production capacity.**

Australia's screen location tax offset offers globally competitive incentives intended to attract the economic benefits of the spending power of major global projects to Australia. Introduced in 2007 at 15%, the Location Offset rose to 16.5% in 2011. From 2018 it was supplemented by discretionary top-ups under the Location Incentive Program. The rate was formally increased to 30% from 1 July 2023.

Australia's internationally focused members-based organisation Ausfilm (a partnership between private industry and government) markets the location and PDV offsets internationally and profiles local businesses that support screen production, from aerial cinematography, scanning and virtual production to sound stages and specialist financial, legal and production services.

Production activity and expenditure in Australia have boomed in recent years, driven in part by inward investment, with **foreign TV and video on demand (VOD) drama production expenditure reaching $458 million** in 2024/25 – more than 4 times the level recorded in 2023/24 – and a record **$1 billion generated from 20 internationally produced feature films.**[9]

Foreign productions can have a range of benefits to local infrastructure and economies – including boosts for businesses servicing productions and production staff, upgrades to infrastructure used during production and the development of new relationships and opportunities for Australian creatives to collaborate on new work.

Like other Australian industries, production and post-production companies are vulnerable to fluctuations in the Australian dollar, with the correlation between total foreign expenditure on feature and drama production (adjusted for inflation) and the USD/AUD exchange rate between 2007 and 2025 being strong, at 0.72.[10]

7 ProdPro 2025, *2025 TV & Film Outlook Report*.
8 Docklands Studios Melbourne 2025, *Case Study: Better Man*, accessed 30 May 2026.
9 Screen Australia 2025, *Drama Report 2024/25*.
10 Screen Australia 2025, *Drama Report 2024/25*.

Internationally connected activity (including inbound production and demand for animation and PDV services) **is strengthening parts of the ecosystem.** It was noted in our industry stakeholder interviews, however, that Australia has finite capacity in high-end animation and PDV, which can limit scalability during periods of high global demand.

One of the core rationales for incentivising major productions to film in Australia is industrial. These projects provide opportunities for the local workforce to get roles and new skills contributing to large-scale productions, and provide opportunities for local production service businesses – from set builders to special effects. This increased activity is seen to produce a more sustainable industry.

However, skills shortages in critical production roles can limit capacity for inbound production (or have knock-on effects for local production). The rapid expansion of production activity in Australia, including growth in large-scale international productions, has contributed to workforce and infrastructure capacity constraints, increasing competition for skilled labour and production facilities and adding upward pressure to production costs.[11]

Substantial work has been undertaken in the sector in recent years to **identify and address current skills shortages and develop Australia's workforce** – particularly in-demand below-the-line technical roles – by a range of agencies and collaborations. Resources for this activity have been developed through Ausfilm's Workforce Capability project,[12] Service and Creative Skills Australia[13] (the Australian Government's Jobs and Skills Council for the creative industries) and Screen Australia's recent Production Infrastructure and Capacity Analysis (PICA) study.

Read more about the screen workforce in:

Economic Insights >

Industry Insights >

Australian screen talent have long been ambassadors for Australian attractiveness, skills, culture, humour and energy. Global campaigns by Tourism Australia have featured internationally recognised and successful screen actors Rose Byrne and Chris Hemsworth.

Global events such as dedicated trade and tourism promotion G'Day USA in LA, showcasing at the Toronto International Film Festival (TIFF), and Australia's presence at the Cannes Film Festival highlight Australia through high profile talent – both on and off screen – building both Australian content's global reach and impact and broader awareness of Australia as a creatively rich source of world class storytelling.

Australians have won 21 Academy Awards from 87 nominations over the last 25 years. Australian talent across visual effects, cinematography, documentary, acting and animation were nominated for **7 Academy Awards in 2025.**

The nominees were:

- Rodney Burke for Best Visual Effects: *Kingdom of the Planet of the Apes*
- Nelson Sepulveda-Fauser for Best Visual Effects: *Alien: Romulus*
- Smriti Mundhra, Maya Gnyp for Best Documentary Short Film: *I Am Ready, Warden*
- Greig Fraser for Best Cinematography: *Dune: Part Two*
- Luke Millar, David Clayton, Keith Herft, Peter Stubbs for Best Visual Effects: *Better Man*
- Adam Elliot, Liz Kearney for Best Animated Feature: *Memoir of a Snail*
- Guy Pearce for Best Supporting Actor: *The Brutalist*

11 Screen Australia 2026, *Production Infrastructure and Capacity Analysis* (PICA).
12 Ausfilm 2023, *Research report to the Workforce Working Group*.
13 Creative Australia and Service and Creative Skills Australia (SaCSA) 2025, *Creative Workforce Scoping Study*.

Collaborations and co-productions

Australia's global engagement through screen includes a range of production collaborations, including formal co-productions. Australians are known as excellent collaborators. This may be in part because our local industry has not been based around a studio system, in which decisions are made by a few powerful executives. Rather, our sector requires producers to manage relationships with a range of funding partners to build a finance plan. As a result, Australian creatives and producers tend to be experienced and skilled in collaboration and partnership.

New partnerships and co-productions were identified in the industry survey as the highest potential area of opportunity for screen and games companies. Co-productions can offer up access to finance in other countries as well as easier access to markets in those territories. The industry survey found 62% of screen businesses and 61% of games businesses identify partnerships and co-productions that unlock scale/finance as the most significant opportunity influencing their business outlook.

Read more about the industry's outlook in:

Industry Insights

Although they can be administratively challenging, **Official Co-productions** (see breakout box on the following page) offer creative collaborations and provide producer access to government funding in both (or all) countries, share costs, and provide ready support to reach audiences in each territory.

The most significant **advantage of co-productions** is the access to extra finance that the structure offers. Co-productions also provide a pathway for Australian producers into international markets, creating visibility to audiences in partner countries. Additionally, a project sold in 2 territories can inspire a confidence that a single territory sale may not, encouraging further sales to broadcasters or distributors elsewhere. Due to the collaborative nature of co-productions, they naturally draw on a wider pool of talent, taking advantage of the special skills, expertise or industry infrastructure available in each participating country.

Previous Screen Australia research highlights a range of advantages of these collaborations – particularly across our region.

This earlier research points to the benefits that can flow from a genuinely collaborative approach to our relationships with Asian partners and markets.[14] One of the important findings of the research was that Australians are seen as "natural partners". Interviews with partners across the region revealed that Australia has some key advantages in collaborations: **we are liked and trusted, our skills are valued, we are seen as having affinity with the region and we create stories with international appeal**.

Both local producers and overseas interviewees for that report saw **Australia's shared history with Asian countries and the experiences of Asian Australian individuals and communities** as a rich source of story content with the potential to appeal to audiences in Australia and the focus countries.

14 Screen Australia 2013, *Common Ground: Opportunities for Australian screen partnerships in Asia*.

Official Co-productions

An Australian Official Co-production is a project that has received approval by both Screen Australia and the relevant foreign competent authority, as having complied with the provisions of the co-production arrangement (treaty or memorandum of understanding (MOU)) between Australia and the co-producing country.

Australia has current Co-production treaties with 12 countries:

- Canada
- China
- Germany
- India
- Ireland
- Israel
- Italy
- Korea
- Malaysia
- Singapore
- South Africa
- UK

And is a signatory to MOUs with:

- France
- New Zealand

Australia participated in 66 Official Co-productions with 11 countries between 2015/16 and 2025/26. Twenty-eight of these were feature films (including 5 children's films and 4 animations), 16 were TV drama series (including 14 children's, 10 of which were animated), and documentaries made up 22 of these titles (including 13 documentary feature films and 6 documentary series). Our main collaborators were Canada with 19 projects, New Zealand with 15, the UK and Northern Ireland with 11 and Ireland with 7. There were 4 projects in this time period involving 3 collaborating countries.

Some standouts in audience engagement included:

David Attenborough's *Life in Colour* released on Nine in Australia, BBC 1 in the UK and Netflix worldwide. It was broadcast as 3 episodes on Nine in Australia with an average audience of 544,000 (metro, regional, 28 days consolidated). It was released as 2 episodes on BBC 1 in the UK and had a total audience of 5.7 million for episode 1 and 5.4 million for episode 2.

Stuff the British Stole season 1 had an average audience on the ABC of 574,000 viewers, season 2 averaged 539,000 viewers (metro, regional, 28 days consolidated). It was released on CBC in Canada to strong ratings and was well received (numbers not available). Season 2 was nominated for Best History Program/Series at the Canadian Screen Awards. Season 3 is due for release in 2026.

Sources: OzTAM, RegionalTAM, Barb.

The Surfer

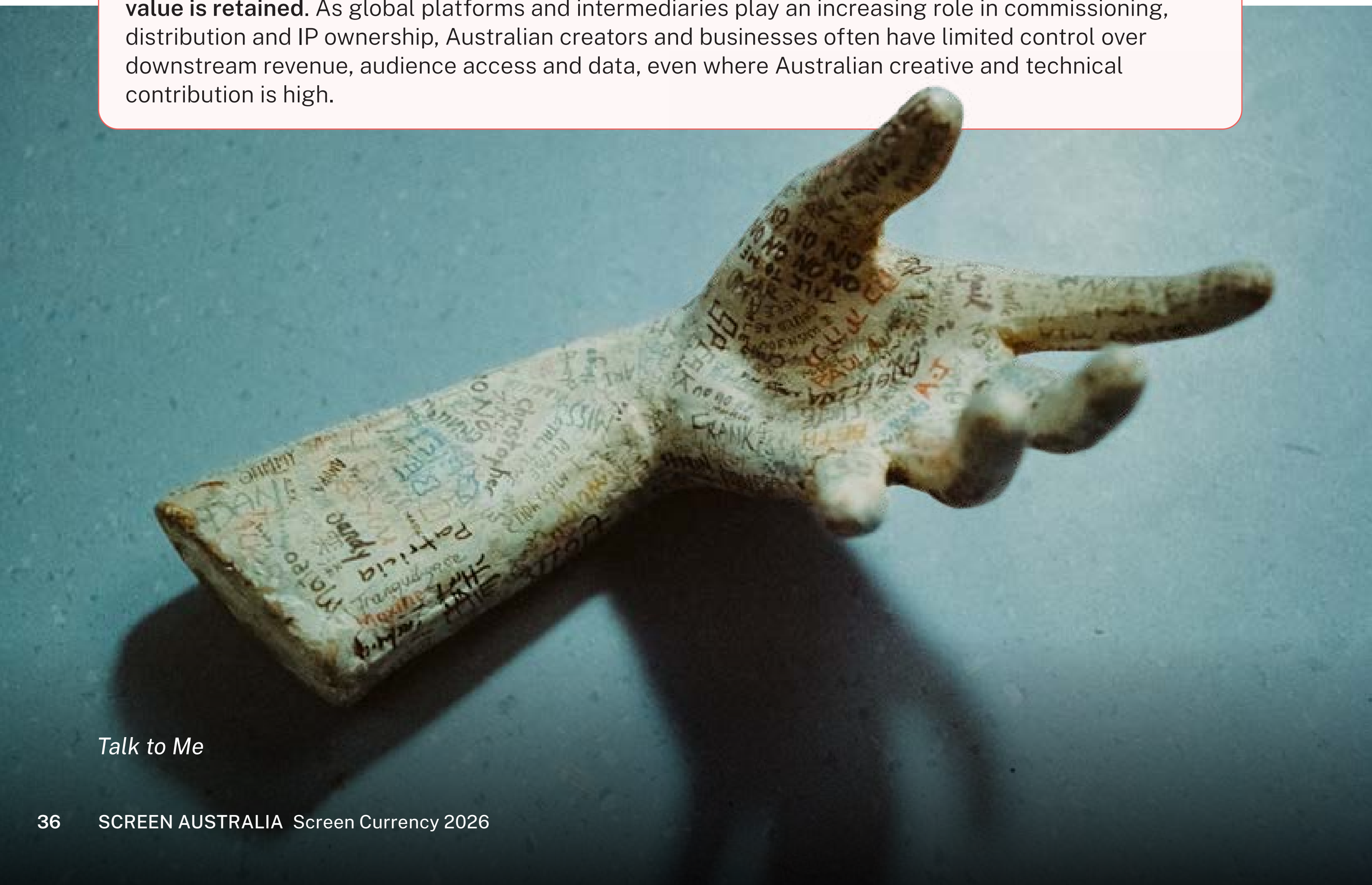
Export and IP value of Australian screen content

This chapter examines the economic value generated by Australian screen content in global markets, alongside the factors shaping how long-term value from Australian intellectual property is created, captured and retained.

Australian screen exports contribute significant economic returns through production, post production, royalties and inward investment, reflecting strong international demand for Australian skills, services and content.

Export growth has been driven by Australia's competitiveness as a production location, the international circulation of Australian screen content, and rising global demand for high quality programming in digitally distributed markets. These export outcomes reinforce Australia's position as an outward looking, globally engaged screen industry, generating value well beyond domestic audiences.

Findings highlight a growing disconnect between where value is created and where long-term value is retained. As global platforms and intermediaries play an increasing role in commissioning, distribution and IP ownership, Australian creators and businesses often have limited control over downstream revenue, audience access and data, even where Australian creative and technical contribution is high.



Talk to Me

Export value

The following findings are drawn from analysis conducted for Screen Currency by the University of Canberra using a range of best available sources to build an evidence base, including ABS business data (BLADE[15]), ABS Balance of Payments data and Screen Australia Drama Report data on international expenditure.

For more information on the method, including challenges reporting export data for the screen sector, see:

Economic Insights

Screen exports in 2023/24 totalled $1.3 billion (Figure 8). This is an underestimate, as it does not include local program sales to global platforms like Netflix – a fast growing part of the screen industry.[16] It also does not capture international productions operating out of locally-registered special purpose vehicles (SPVs).[17]

The sectors generating the largest proportions of exports are production and **post-production** (67% of total screen and games exports in 2023/24, including foreign production expenditure).

Screen exports have doubled since the introduction of the producer and location offsets, **increasing by an annual average of 4.7%** since 2008/09. While 2023/24 total screen exports were down from $1.6 billion in the previous year, they are likely to increase again in 2024/25 following an increase in foreign drama expenditure.

Foreign drama expenditure is the largest export revenue source for production and post-production. Foreign expenditure in Australia from footloose[18] global feature and TV drama production has increased dramatically since the 2007 introduction of the location offset and its subsequent rate increases from **$260 million in 2010/11 to $1.6 billion in 2024/25.** This growth reflects the competitiveness of local incentives, the relative affordability of production in Australia due to the value of the Australian dollar, and the attractiveness of Australia as a production location – based on the strong capabilities, skills and infrastructure of the local industry, relatively low risk of disruption (especially during COVID-19 and US writers and actors strikes) and Australia's extraordinary range of landscapes (see World class talent, capability and infrastructure).

15 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.

16 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).

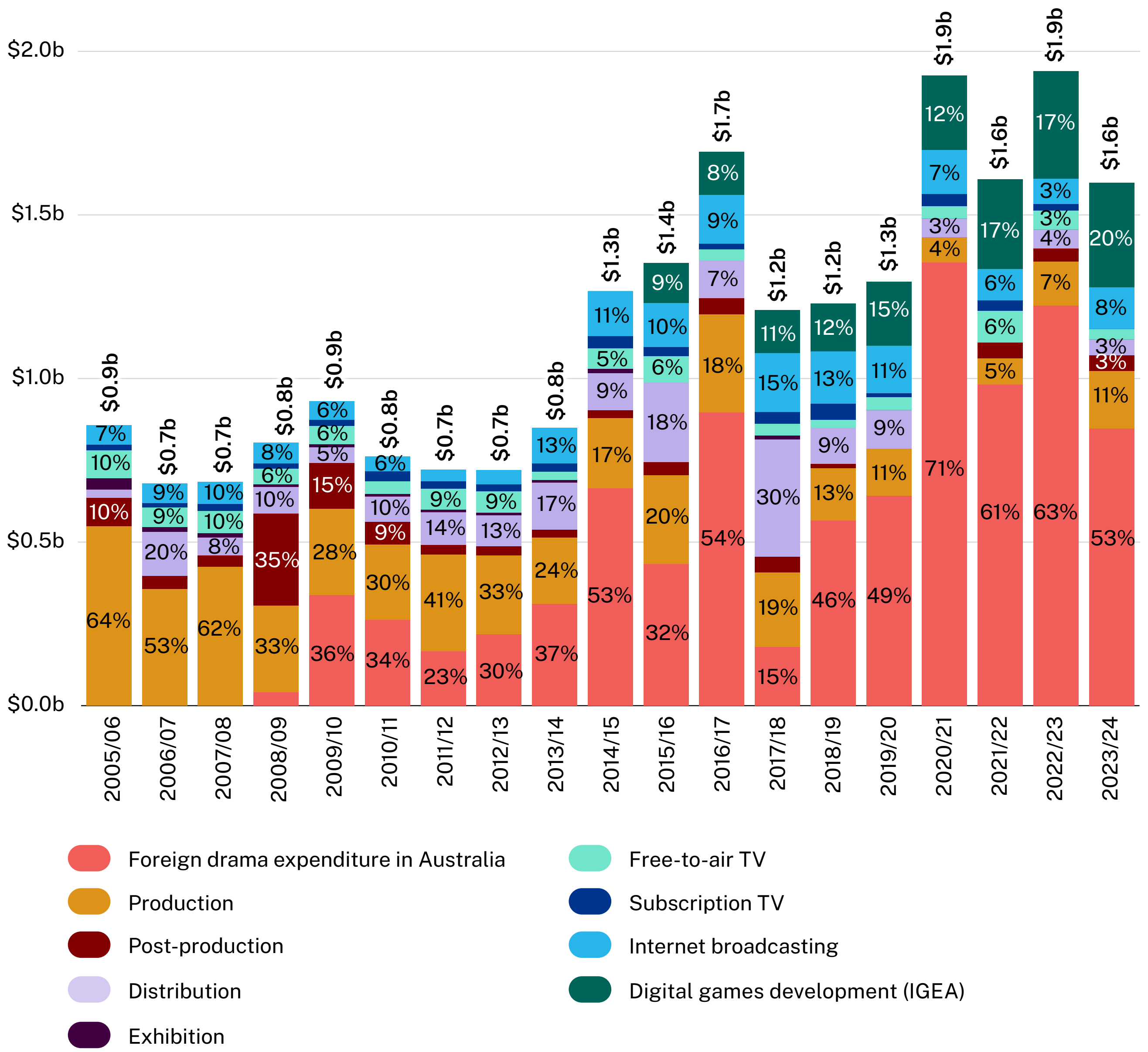
17 Separate legal entities created to deliver individual projects, often used to manage financing, risk and contractual arrangements. In screen production, these entities are commonly wound up once a project is completed.

18 Footloose productions are international screen projects that are not tied to a specific place and can locate in different jurisdictions depending on incentives, costs and infrastructure.

In contrast, **export revenues have fallen for the screen distribution** (rights acquisition and sales) and exhibition (cinema and film festival) sectors by respective annual averages of 2.7% and 18.6% between 2008/09 and 2023/24 (in line with their decreasing share of GVA). This has mainly resulted from disruption to business models by globalisation and the increasing vertical integration of larger companies (combining commissioning, release, marketing and audience measurement within a single platform), giving them greater control of the value chain and cutting out traditional distributors and exhibitors.

Free-to-air TV broadcasting (including the ABC, Seven, Nine Network and Network Ten) and **subscription TV broadcasting** (such as Foxtel) have also been impacted by globalisation and digitisation and have seen a drop in export earnings, which fell by an annual average of 1.8% and 3.1% between 2008/09 and 2023/24.

Figure 8: 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.

Australia's screen producers and distributors also generate export revenue in a range of ways:

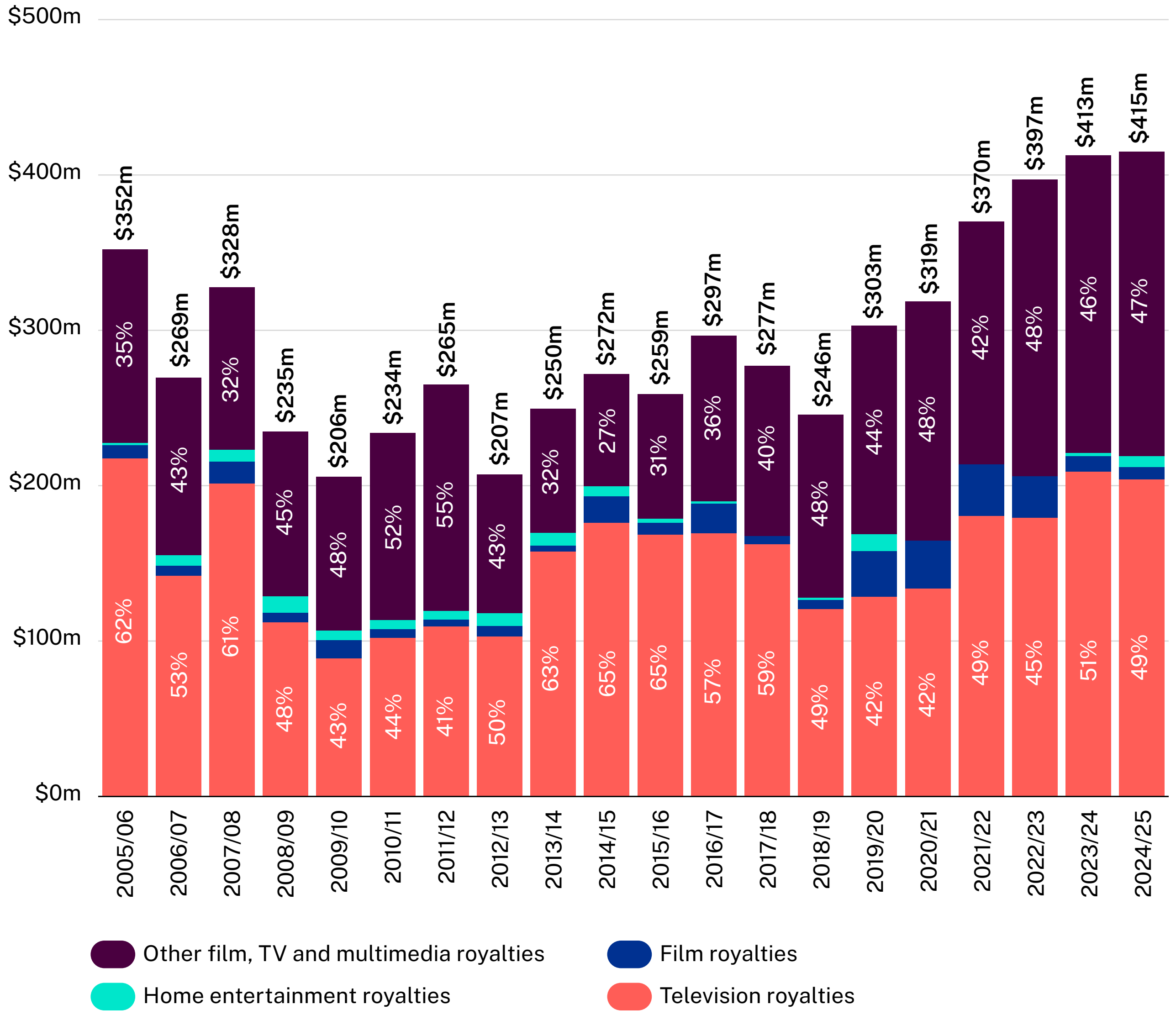
- selling **program broadcast rights** to international broadcasters (this comprises 90% of broadcaster sales and 100% of broadcaster revenue for titles with Screen Australia investment)
- **exporting broadcasting services** – broadcasters export both their commissioned programs and their services, including broadcast channels and streaming platforms delivered to audiences in international markets
- **distribution deals** with cinema operators overseas (international pre-sales, which comprise only 20% of pre-sales for titles with Screen Australia investment)
- **licensing program** formats
- **merchandising**, and **brand extensions**.

Royalty exports reached $415 million in 2024/25 (Figure 9) growing by an average annual rate of 4% from 2014/15 for TV royalties and 5% per annum from 2009/10 for other film, TV and multimedia royalty exports. These increases have been driven by international competition for quality content in a global market, which has driven up the value of content.

For further information about the economic value and long-term trends for screen exports, see:

Economic Insights

Figure 9: Royalty exports, 2005/06 to 2024/25 (2024/25 dollars)



Source: ABS Balance of Payments and International Investment Position, Australia, analysis by University of Canberra.

The long-term value of Australian IP in global markets

Many of the key players in Australia's screen landscape – from distribution and commissioning platforms to production companies – **are now internationally owned**, with deep connections to global markets.

Across screen and games, long-term value is determined less by where content is made and more by **who controls IP, audience access, data and distribution scale.** Our industry study points to a gap between what government can most readily support and what most affects whether businesses retain value in Australia – an issue felt more acutely in IP-dependent segments, such as narrative drama and film, rather than evenly across the sector. Interviews and survey results highlight the challenges Australian creators and businesses face in earning sustainable income, as global platforms and large intermediaries take a bigger role in IP ownership, distribution, and market and audience access. Grants and production incentives readily support production activity (and, by extension, jobs), but have less influence over the factors that determine whether businesses can build repeatable income and retain IP – even where local creative and technical contribution is high.

The industry study suggests the commercial value of Australian IP in global markets accrues unevenly. Businesses able to own and exploit IP at scale internationally are best placed to capture it, but in screen, few businesses operate at that scale, and much of the sector's global activity is service work – which sustains jobs without building or retaining Australian-owned IP. The games sector offers a partial counterexample – with a small, established cohort of studios that are built on a different model of owning IP and selling directly into global markets. Global engagement does not necessarily translate into value retained in Australia – that depends on Australian businesses holding and exploiting the IP. This positions cultural exports built on Australian-owned IP as an opportunity, and raises the question of how policy and funding settings might better engage with platform-led audiences and revenue models so that more of this value is realised onshore.

Read more about the industry study's findings in:

Industry Insights

Games insights

Australian games: global markets and capability

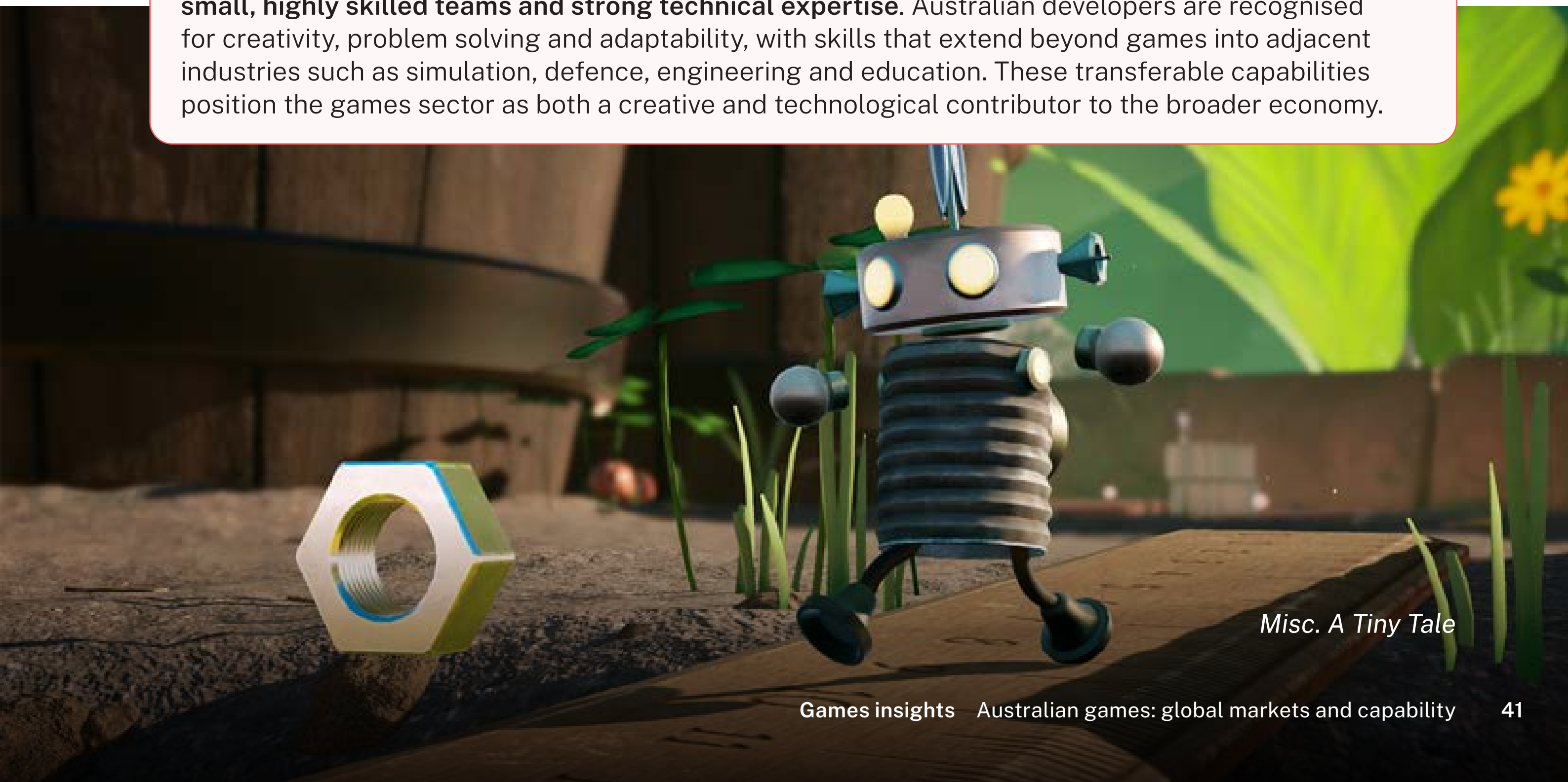
Games | **Global markets and capability** | International recognition | Case study findings

This chapter examines Australian digital games development as a globally oriented industry, shaped by international markets, platforms and distribution systems.

Australian studios operate within a highly competitive global ecosystem, with commercial success driven by international visibility, platform access and player engagement rather than domestic demand. As a result, Australian-developed games circulate internationally with limited emphasis on national origin, competing primarily on genre, gameplay and player experience.

Australian games generate the majority of their revenue overseas, reflecting both the scale of global games markets and the export heavy nature of the sector. Export growth has been driven by digital distribution models that allow even small studios to reach a global audience, as well as by the long-tail value of successful titles that continue to generate revenue and engagement well beyond initial release periods.

This chapter highlights the strength of Australia's games talent and capability, characterised by small, highly skilled teams and strong technical expertise. Australian developers are recognised for creativity, problem solving and adaptability, with skills that extend beyond games into adjacent industries such as simulation, defence, engineering and education. These transferable capabilities position the games sector as both a creative and technological contributor to the broader economy.



Misc. A Tiny Tale

Games in a global marketplace

Australia's games industry has, in many ways, been born global. From its earliest years, local studios have created games designed for international audiences, a pattern reflected today in the industry's export heavy revenue profile. IGEA's 2025 Australian Game Development Survey shows that 95% of Australian game revenue is generated overseas, up 2% from 2024.[19] This reliance on global markets demonstrates that commercial outcomes are shaped far more by international platform access, publisher relationships and global marketplace visibility than by domestic demand.

> "In games, it's not always about Australian stories – we talk about 'Australians telling stories'."
>
> – games executive, industry stakeholder interview

This outward orientation is reflected not only in business strategy but in identity. Developers interviewed for Screen Currency's industry study consistently described themselves as part of a global development ecosystem rather than a nationally bounded industry. Unlike film and TV, Australian game development has never been steered by local content quotas or cultural mandates. While some Australian games do express uniquely local creative perspectives, the industry's creative drivers have historically been aligned with global player engagement, international genres and cross border commercial logic – not national storytelling traditions. The communities that Australian studios seek to reach are global because the markets themselves are global – and extraordinarily large.

The scale of this global opportunity helps explain why the industry has always looked outward. Newzoo estimates that consumer spending in the global games market will reach $288 billion in 2026, up from $273 billion in 2025, and is supported by 3.71 billion players worldwide. In Australia, 17 million Australians played games in 2025 and spent $2.9 billion, up 7% from 2024.[20] By 2028, Australian consumer spending on video games is forecast to reach $3.3 billion, an average annual growth rate of 4.8% between 2025–2028.[21] These figures demonstrate the substantial difference in scale between international participation and the domestic market, situating Australian developers within an entertainment ecosystem characterised by international distribution, IP circulation, and player communities.

The scale of the international audience becomes even clearer when looking at key markets individually. In 2025, India had 452 million video game players, the US around 225 million, UK 43 million, and Canada approximately 24 million. Together, these markets account for more than 744 million players, a substantial share of the 3.58 billion players worldwide.[22]

A further factor shaping this international connection is the way modern games development relies on widely used global tools and distribution systems. Studios in Australia, like those elsewhere, work within shared ecosystems of game engines, digital platforms and publishing networks that are led by a limited number of major industry providers.

19 IGEA 2025, Australian Game Development Survey, Australia's video game industry shows revenue of AU$608.5 million - IGEA.
20 Newzoo 2026, *Global Games Market Report 2025*, accessed via subscription.
21 Newzoo 2026, *Global Games Market Report 2025*, accessed via subscription.
22 Newzoo 2026, *Global Games Market Report 2025*, accessed via subscription.

Slumbering Woods

Engaging in this globally connected industry can also bring challenges. Internationalising a video game requires time, financial resources and specialist skills, and many Australian developers report that meeting these requirements is challenging. Although Australian studios earn most of their revenue from outside Australia, understanding of localisation and internationalisation practices remains limited,[23] particularly among smaller studios that make up much of the sector. Another challenge is the competitive environment itself, where Australian studios – often small and independently funded – must compete for visibility alongside "AAA"[24] games which are backed by substantial budgets, established IP and coordinated global marketing strategies.

Read more about the games industry in:

Industry Insights

Export value

Digital games exports in 2023/24 totalled $323 million, reflecting the international reach of Australian-developed games. While smaller in absolute value than screen production exports, the games sector continues to outperform the broader screen industry in export growth, **increasing by an average annual rate of 15.4%** between 2016/17 and 2023/24.[25] This growth has occurred from a relatively low base but nonetheless demonstrates the sector's accelerating momentum and increasing competitiveness in global markets. Globally, games sector revenues are forecast to grow by 4.9% to 2028, providing continued opportunities for Australian developers to expand export earnings.[26]

Australian game developers earn export revenue through a range of channels. The largest share comes from international sales of games on major global platforms such as Steam, PlayStation, Xbox and Nintendo Switch, giving even small studios worldwide distribution. Revenue also flows from in-game purchases, advertising, downloadable expansions and updates, which allow successful titles to generate income long after release. Additional export value is created through merchandising and licensing, as well as through service-based work undertaken by Australian studios for international publishers, developers and platform owners.

23 Zoraqi A A and Kafi M 2024, "Profiles, perceptions, and experiences of video game translators", *Games and Culture*, vol. 20, no. 7, pp.815-836.

24 The games industry often uses an informal A–AA–AAA classification to indicate production scale and market reach. "AAA" (triple A) games are the highest tier, referring to large budget titles developed by major studios with extensive teams, established IP, and coordinated global marketing and distribution.

25 Screen Australia 2026, *Screen Currency 2026: Economic Insights*, developed by Marion McCutcheon, Yogi Yidyattama and Stuart Cunningham, University of Canberra.

26 Newzoo 2026, *Global Games Market Report 2025*, accessed via subscription.

Australia occupies a small but notable position in the global games marketplace. Newzoo's Global Games Market data demonstrates that Australian demand for both local and international games titles accounted for approximately 1.1% of worldwide games revenue in 2025, within a global industry valued at $273 billion. While modest in absolute terms, this performance represents a significant over index relative to Australia's share of the global population, just over 3 times the Australian population weighted share of global games spending. This highlights the importance of international markets for both Australian developers and Australian gamers – just as gamers appreciate instant access to the world's most popular titles, Australia's games developers are leveraging the ready access to global markets provided by gaming platforms.[27]

> "Not every game is going to be a massive success, but if you're investing in promising creatives in Australia, we do have a much higher hit rate."
> – Sanatana Mishra, Witch Beam

For further information about the economic value of games exports, see:

Economic Insights

World class talent and capability in a global industry

Australia's games sector has undergone significant structural change since the late 2000s. During the 2007/08 global financial crisis, the high Australian dollar and contraction in global work-for-hire production contributed to the closure of several large domestic studios and international subsidiaries operating in Australia. Industry reports from the period indicate a substantial decline in studio employment, with many experienced developers moving overseas as opportunities contracted locally.[28]

Following these closures, the composition of the sector shifted toward smaller, independently operated studios. Today, most Australian games businesses are small and young, typically founder led and operating with lean internal teams. The Screen Currency industry survey indicated that studios employ a median of 4 staff with 2 full time, and engage a median of 4.5 contractors,[29] reflecting a project-based production model common across globally distributed digital games development.

During the 2010s, several state funding initiatives supported early independent studio activity, and limited federal programs were also introduced. In the 2020s, public support expanded, with multiple states increasing investment, the Australian Government introducing the Digital Games Tax Offset in 2023,[30] and committing $12 million over 4 years from 2023/24 to Screen Australia's games funding through the National Cultural Policy *Revive*. These policy settings were introduced alongside measurable increases in studio numbers, employment and production activity reported by national and state agencies.

27 Newzoo 2026, *Global Games Market Report 2025*, accessed via subscription.
28 Screen Australia 2026, *Screen Currency 2026: Industry Insights*, developed by James McAtamney and Samuel Bewick, McAtamney & Advisors.
29 Screen Australia 2026, *Screen Currency Industry and Workforce Survey 2025*, prepared by McAtamney & Advisors.
30 The Hon Tony Burke MP Minister for the Arts 2023, *Media Release: Digital Games Tax Offset to level up Australian industry*. The offset was introduced in 2023, backdated from July 2022.

The Australian Government's Digital Games Tax Offset seeks to encourage investment in established and emerging games studios, supporting growth in the Australian marketplace and new opportunities for skilled workers. It's estimated that Australia's digital games sector could generate **$1 billion annually by 2030 and create 10,000 new highly skilled full-time jobs.**[31]

Video games development also contributes skills and capabilities to other industries. Findings from Screen Currency's industry study indicate that practitioners commonly work with real-time engines, simulation tools and interactive design systems. These capabilities are used not only in games but also in defence, architecture, engineering, mining and education. Data from the industry survey indicates that around half (53%) of practitioners earn income from sectors outside games, demonstrating the transferability of these technical skill sets.[32]

Read more about the industry study's findings in:

Industry Insights

Creative Australia's Creative Workforce Scoping Study highlighted that game development workers with specialised skills are in demand globally. The study indicated an acute shortage of mid-career and senior talent and experience, as well as retention challenges due to the limited availability of senior-level roles and competition from international studios that offer higher salaries and better working conditions.[33] Consultation participants reported high reliance on global talent, especially in senior roles, and visa-related complexity and delays that can put pressure on local teams and production timelines.

> "We've been building up talent, but where do they go now? There aren't enough mid to senior-level opportunities at the right pay levels to keep them."
>
> – games producer

31 Office for the Arts, 2023 *Level up: tax break set to reshape digital games industry*.
32 Screen Australia 2026, *Screen Currency Industry and Workforce Survey 2025*, prepared by McAtamney & Advisors.
33 Creative Australia and Service and Creative Skills Australia (SaCSA) 2025, *Creative Workforce Scoping Study Report: Addressing the challenges with critical skills and sustainable careers*.

International recognition of Australian games

This chapter examines how Australian games are discovered, recognised and understood by international audiences within global digital marketplaces.

Video games typically circulate without prominent markers of national origin, meaning that players encounter them primarily through genre, gameplay, platform algorithms and peer recommendation rather than country of origin cues.

Recognition of Australian provenance varies significantly by market and title. Where awareness does occur, it is more often shaped by media coverage, influencer commentary or community discussion than by information provided at the point of purchase or play. In most contexts, national origin remains secondary to player experience and is frequently unnoticed unless it becomes salient through external framing.

Patterns of discovery play a critical role in shaping visibility. Social media, storefront algorithms, influencers and word of mouth dominate discovery pathways, creating highly competitive conditions in which Australian games must contend alongside global releases with far greater marketing scale. Differences between markets highlight how discovery ecosystems can amplify or obscure smaller international titles.

Crash Course Builder

Recognition of Australian origin

To examine how international players recognise Australian games, Screen Currency conducted an international video game players survey across 4 major markets (UK, US, Canada and India). Participants were shown selected game titles (*Unpacking*, *Hollow Knight: Silksong* and *Untitled Goose Game*). If they indicated they had played the game, they were then asked to identify its country of origin. They were also surveyed on their preferred way to find out about games.

The 3 featured titles represent breakout successes across different genres, audiences, and release contexts within Australian game development, enabling insight into how different forms of Australian creativity are received across different markets. As high profile games, they provide insight into global recognition, however they should not be seen as representative of all Australian games.

Read more about *Unpacking, Untitled Goose Game and Hollow Knight: Silksong* in:

Case Studies

International audiences encounter Australian games through global digital platforms where titles circulate without prominent markers of national origin. As a result, players' awareness of where a game is made often depends on exposure through media, marketing or community discussion rather than at the point of purchase or play.

Across the 4 markets surveyed, recognition of Australian origin varied significantly by market, indicating that national provenance is not consistently recognised by international games audiences. When averaged across the titles shown, identification levels were highest in India and the UK, where around one-third of respondents correctly identified games as Australian made (approximately 36% in India and 32% in the UK) (Figure 10). In contrast, recognition in the US and Canada was consistently low, with fewer than 1 in 10 respondents on average identifying Australian origin (around 7% in the US and 10% in Canada). By comparison, around half of respondents in Australia (50%) were able to correctly identify Australian origin across the titles shown.

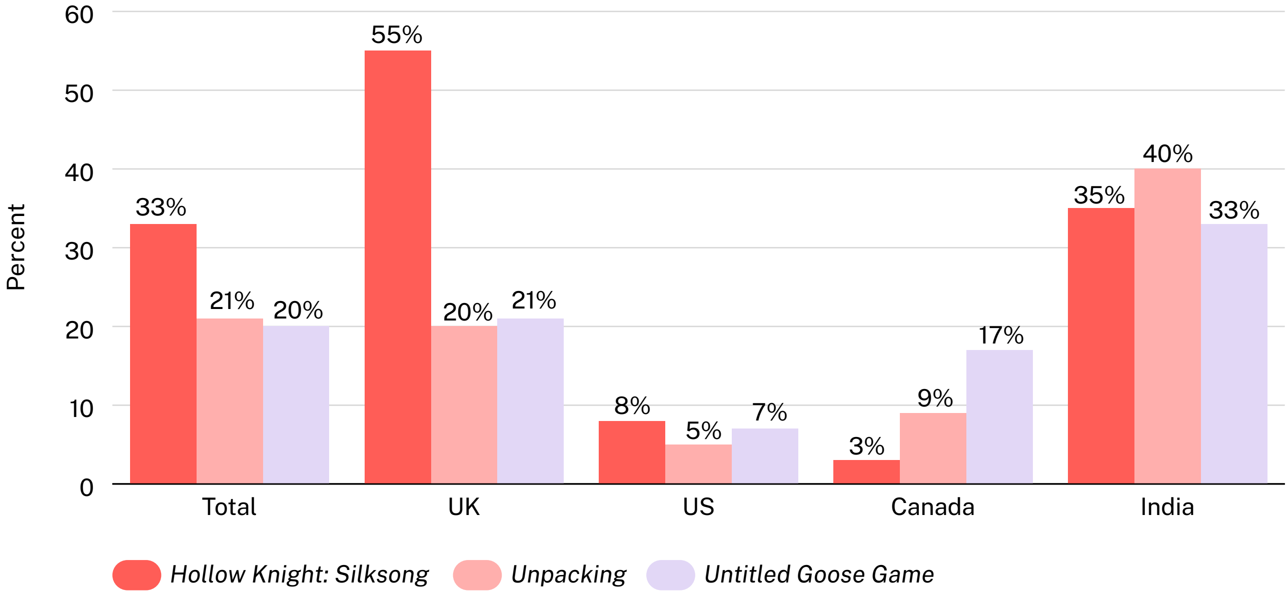
Analysis of user reviews posted on Steam reinforced these patterns. Only a small proportion of players referred to the games' Australian development, even when local cues were embedded in the artwork or storyworld. Instead review discussions focused on gameplay, narrative and aesthetic qualities. The analysis indicated that while international audiences value Australian-made games, they typically engage with them through the lens of genre and player experience rather than cultural provenance.

These findings reflect the globalised nature of games distribution, in which country of origin is weakly signalled, and recognition is shaped by local discovery ecosystems. Differences between markets suggest that national provenance becomes more or less visible depending on patterns of cultural consumption, discussion, marketing exposure and platform level amplification. This is also consistent with Australian video game players' behaviour, as games are typically discovered and selected based on genre, gameplay, aesthetic appeal and recommendation rather than country of production.

Read more about Australian video game players' behaviour, consumption and drivers in:

Audience Insights

Figure 10: Recognition of Australian origin in key markets



Source: International video game players survey, responses to the question "Which country do you think [GAME TITLE] was developed in?" Data shown for UK (survey n=405; subsamples of those who had played each game n=28–55 depending on title), USA (n=419; player subsamples n=15–59), Canada (n=400; n=29–54), and India (n=386; n=21–168).

Discovery pathways

Patterns of discovery play an important role in shaping which games audiences first encounter and, in turn, what becomes recognisable as Australian. In the UK, US and Canada, discovery is largely dominated by friends and family (58–62%) and social media (47–50%) (Table 3). In these markets, Australian titles must compete directly with high budget global releases for initial exposure, limiting the extent to which national origin becomes salient. In contrast, while social media and personal networks are also influential in India, respondents report a wider range of additional discovery channels, including influencers (38%) and podcasts (26%), alongside social media (61%). This broader discovery ecology may support greater visibility for smaller international games where country of origin is more easily discussed.

Table 3: How players discover games: % of respondents selecting each method by market

%	Steam	Other marketplaces	Influencers/ streamers	Social media	Podcasts	Advertising	Friends & family	News outlets	Mainstream news	In-person events	Retail stores
Australia	26	26	20	46	11	27	56	23	12	3.7	13
UK	24	36	24	47	13	33	62	28	17	6.4	14
US	21	26	21	46	11	35	57	23	10	3.1	13
Canada	26	27	25	50	12	35	58	26	15	4.8	12
India	40	40	38	61	26	37	60	42	22	14	11

Source: International video game players survey, responses to the question "How do you find out information about video games (select all that apply)?" in key markets of the UK (n=405), USA (n=419), Canada (n=400) and India (n=386) (total n=1,610).

International Awards

Hollow Knight: Silksong

Steam Awards (2025):

- Game of the Year
- Best Game You Suck At

The Game Awards (2025):

- Best Action/Adventure Game

Untitled Goose Game

D.I.C.E. Awards (2020):

- Game of the Year, Outstanding Achievement for an Independent Game, and Outstanding Achievement in Character

Game Developers Choice Awards (2020):

- Game of the Year

BAFTA Games Awards (2020):

- Best Family and Social Game

The Game Awards (2019):

- Best Independent Game

NAVGTR Awards (2020):

- Multiple wins including Animation (Artistic), Puzzle Game, Game Design (New IP), and Use of Sound (New IP)

ARIA Music Awards (2020):

- Nominated for Best Original Soundtrack

Unpacking

BAFTA Games Awards 2022:

- EE Game of the Year, Best Narrative

D.I.C.E. Awards 2022:

- Outstanding Achievement for an Independent Game

Game Developers Choice Awards (GDCA) 2022:

Best Audio, Innovation Award

SXSW Gaming Awards 2022:

- Matthew Crump Cultural Innovation Award

IGDA Global Industry Game Awards 2022:

- 2D Animation, 2D Environmental Art

Eurogamer:

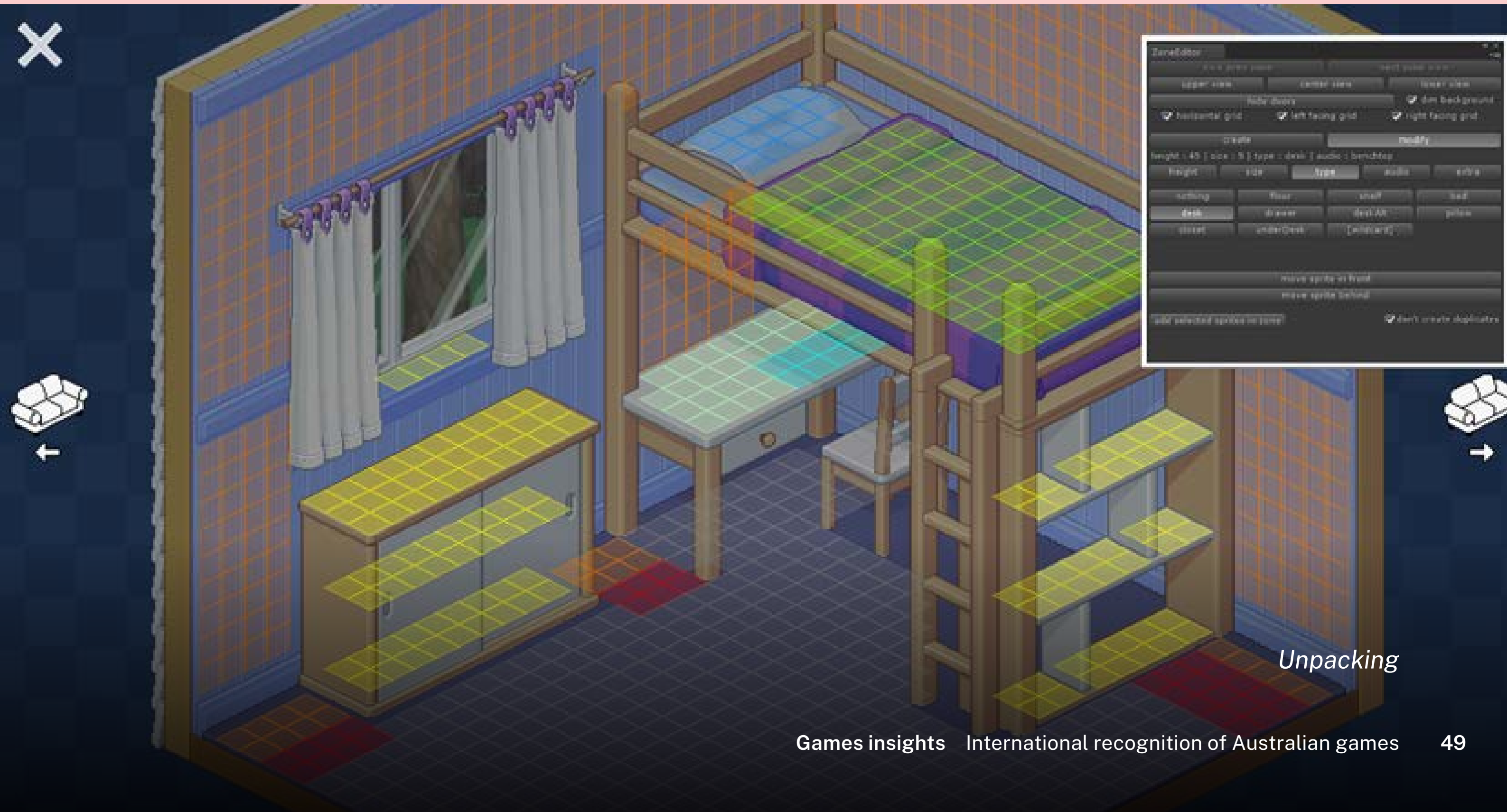
Game of the Year

Australian Game Developer Awards (AGDAs) 2021:

- Game of the Year, Excellence in Accessibility

Gayming Awards 2022:

- Best LGBTQ+ Indie Game, Authentic Representation Award



Unpacking

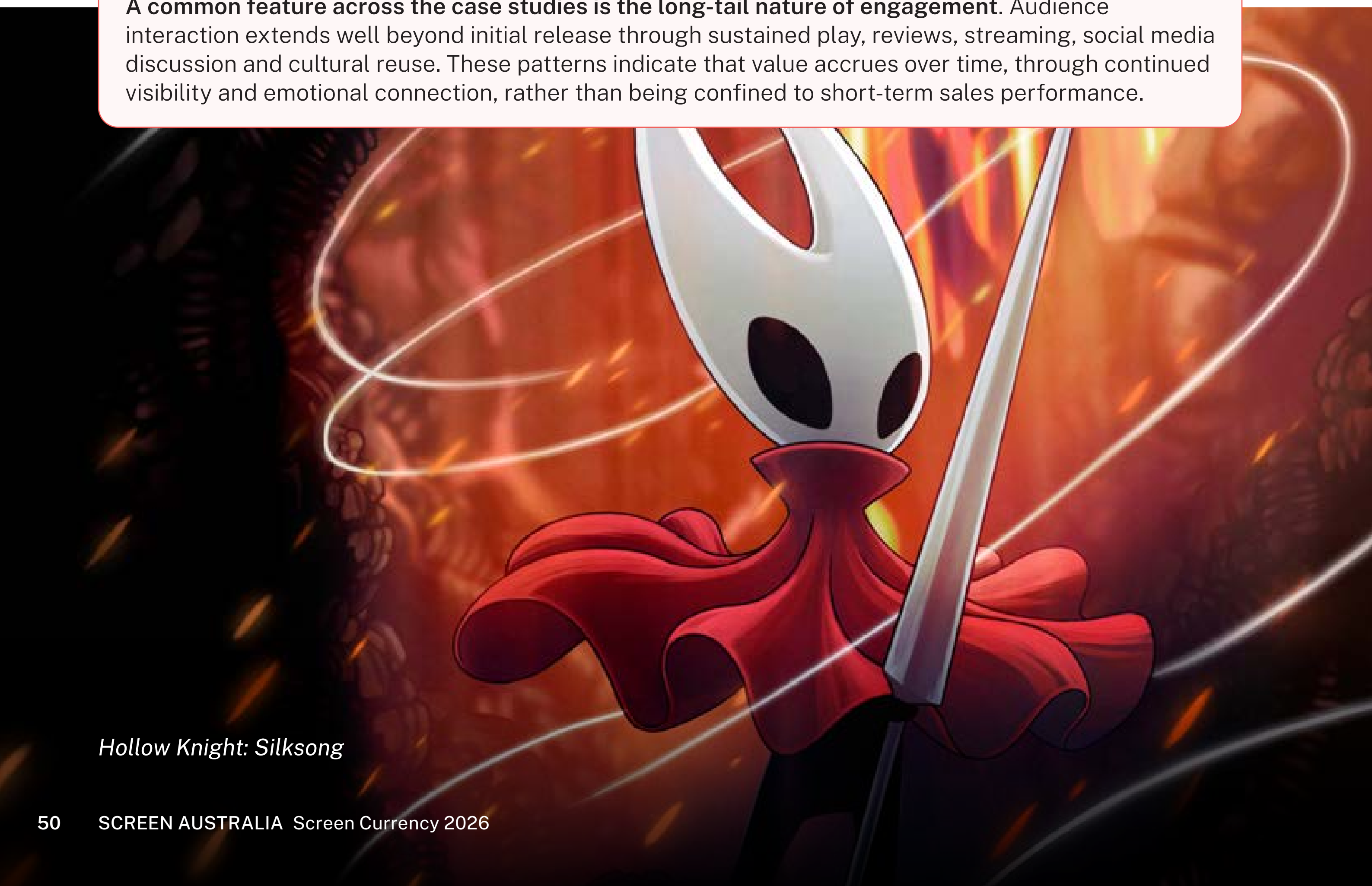
Digital games case study findings: global reach, cultural resonance and Australian creativity

This chapter draws on detailed case studies of *Unpacking*, *Untitled Goose Game* and *Hollow Knight: Silksong* to examine how Australian-developed games can achieve global reach and sustained audience engagement.

The case studies highlight that international success is not confined to a single genre, business model or scale, but can emerge through diverse creative and commercial pathways.

The 3 titles demonstrate different models of global impact: from blockbuster-scale independent success, to viral cultural circulation, to slow-burn narrative resonance. Across these examples, global reach is driven by emotional engagement, distinctive gameplay experiences and strong community response, rather than national framing or explicit promotion of Australian origin.

A common feature across the case studies is the long-tail nature of engagement. Audience interaction extends well beyond initial release through sustained play, reviews, streaming, social media discussion and cultural reuse. These patterns indicate that value accrues over time, through continued visibility and emotional connection, rather than being confined to short-term sales performance.



Hollow Knight: Silksong

Global success on different scales

The 3 case studies illustrate that Australian games achieve global success across a range of commercial and cultural scales. These projects should not be read as representative of all Australian games titles or pathways to success.

"*Untitled Goose Game*, *Unpacking*, *Cult of the Lamb*, or *Hollow Knight*, these are relatively small teams that are able to identify a place or a niche in the market that they're able to really take advantage of and have a large impact, obviously, that method is not necessarily repeatable... success depends on a multitude of factors that are often just not in the control of game makers."

– games executive, industry stakeholder interview

Hollow Knight: Silksong, developed by Adelaide-based independent studio Team Cherry, represents an exceptional example of independent production achieving blockbuster level outcomes. **Within one hour of release, more than 100,000 players were playing the game, rising to over 500,000 concurrent players by the end of its first day**, with multiple digital storefronts reportedly crashing due to demand. In its first 2 weeks, *Silksong* sold more than 4.2 million copies, with a further 1.5 million downloads via Xbox Game Pass, and achieved a Metacritic score of 90 alongside 280,051 Steam reviews in 5 weeks (85% positive) across 29 languages.

"I adore the exploration in this game. It really feels as though the world is so much bigger than *Hollow Knight* and I love that."

– Steam review of *Silksong*

By contrast, ***Untitled Goose Game***, produced by Melbourne studio House House, achieved global success through viral cultural uptake rather than sheer player volume. **The game sold over 100,000 copies in its first 2 weeks on Nintendo Switch alone, topped eShop bestseller charts in Australia and the US, and rapidly became embedded in internet meme culture.**

"People aren't writing about this [*Untitled Goose Game*] as a piece of media. They're writing about it as if it's a cultural fad."

– Co-creator, Nico Disseldorp

Unpacking, developed by Brisbane based studio Witch Beam, demonstrates yet another pathway to global success. **A slow-burn narrative puzzle game with no dialogue or fail state, *Unpacking* surpassed 1 million copies sold in its first year**, an uncommon outcome for a reflective, narrative-driven independent title. Its success underscores that Australian games can achieve strong international reach without relying on spectacle or franchise familiarity.

[One reviewer, writing from Ukraine, reminisces about having to leave Kyiv]: "...It was such a healing experience [to play *Unpacking*]. I don't know why but unpacking someone's happy life helps to keep myself sane. It is... soothing. Comforting. Thank you."

– Steam review of *Unpacking*

Sustained engagement and long-tail value

The 3 case studies demonstrate sustained forms of international engagement with Australian-made games that extend well beyond initial release windows. These patterns indicate that their impact is not limited to short-term commercial performance, but unfolds over time through continued play, commentary, circulation and reassessment.

A month after its release, *Hollow Knight: Silksong* was being watched for approximately 1.3 million hours per week on Twitch, reaching peaks of 357,462 concurrent viewers across 12,838 channels. Review volumes and sentiment remained high despite its unprecedented popularity, countering the typical trend of audience backlash accompanying breakout success.

***Untitled Goose Game* has continued to attract engagement years after release.** Over a 5 year period, the game accumulated more than 23,000 Steam reviews, with over 95% recommending the game, distributed across 29 languages. Engagement persists less through replay depth than through ongoing cultural participation, with “Honk” remaining the most frequently used word across all user reviews, often appearing as a standalone contribution long after players have completed the game.

Similarly, *Unpacking* maintains sustained audience engagement nearly 4 years post release. As of October 2025, **the game continued to generate approximately 13,000 hours of Twitch viewing per week. On Steam, it received 36,926 user reviews, with 93% positive recommendations**, indicating strong ongoing resonance despite its relatively short playtime.

These patterns highlight the long-tail value potential of Australian games, particularly where engagement extends into streaming, community discourse and cultural reuse rather than being limited to initial purchase behaviour.

Small teams with global outcomes

A defining characteristic across all 3 case studies is the small scale of the development teams relative to their global impact. ***Hollow Knight: Silksong*** was produced primarily by 2 to 3 developers over a development period of 7 to 8 years. This disparity between team size and outcome is frequently remarked upon by players.

> “The fact that 2–3 blokes from Adelaide built this almost entirely by themselves is genuinely unbelievable.”
>
> – Steam review of *Hollow Knight: Silksong*

Untitled Goose Game was developed by a 4 person core team embedded within Melbourne’s indie development ecosystem, operating through incremental growth and supplemented by trusted collaborators. The studio deliberately avoided financial overreach, securing funding before leaving day jobs and maintaining a compact team structure.

Unpacking was developed over 3.5 years by a small Brisbane based studio, largely self funded using revenue from a previous title, with public funding used strategically to support early hiring and market access. Witch Beam has explicitly chosen not to scale aggressively.

> “We’ve decided to stay as a fairly small entity… we’d rather be painting the pictures than hiring someone else to paint the pictures for us.”
>
> – Sanatana Mishra, Witch Beam

Social and emotional connection

Despite differences in genre and gameplay, all 3 titles demonstrate a capacity to generate social and emotional connection with audiences.

In *Hollow Knight: Silksong*, meaning is derived through difficulty, mastery and persistence. Players regularly describe the challenge as integral to the experience rather than exclusionary. As one *Guardian* writer observed, “Video games imbue suffering with meaning: you try and fail, try and fail, until you succeed.” The game’s difficulty has also generated extensive online debate, reinforcing its status as a shared experience and at times a point of contention.

***Untitled Goose Game* establishes social connection through humour, accessibility and shared play.** Reviewers frequently cited family participation and cross-generational appeal. The developers’ intent to reach beyond traditional gamer audiences was explicit, with co-creator Stuart Gillespie-Cook stating, “We’re trying to capture a non-gamer audience… when people from outside the gaming sphere seem to be talking about it.”

> “It’s fun for all ages… I wish I could find more games that were actually fun for my son’s age that we could play together.”
>
> – *Untitled Goose Game*, Steam player review

In *Unpacking*, emotional connection is central to the experience. It’s described as “a zen game about the familiar experience of pulling possessions out of boxes and fitting them into a new home” at different life stages.[34] According to analysis of Steam reviews, 29% of sampled comments referenced the game’s emotional value, while many players described deeply personal identification with the protagonist’s life trajectory. This resonance extends across cultures and contexts, including players experiencing displacement or upheaval, who described the game as “soothing” and “comforting”.

> “People really connect with it [*Unpacking*]… they see themselves in it in a way that’s quite personal.”
>
> – Sanatana Mishra, Witch Beam

Multiple pathways to success

These case studies demonstrate that the Australian games sector can generate both cultural impact and commercial success in diverse non-linear ways. *Unpacking*, *Untitled Goose Game* and *Hollow Knight: Silksong* illustrate that global reach is not dependent on a single genre, production model, or scale of spectacle. Instead, success emerges through different combinations of emotional resonance, cultural circulation, community engagement and sustained visibility over time.

While these titles represent exceptional outcomes rather than typical industry results, they nonetheless demonstrate the scale of success that Australian games can achieve within a globalised games market. Their international performance highlights how Australian creativity can compete alongside the world’s most prominent releases, challenging definitions of success that are based solely on short-term sales or studio growth, and underscoring the sector’s capacity to engage global audiences through multiple, evolving models of impact.

Copycat

34 Nintendo 2021, Unpacking.

Appendix 1 – Details of method

Insights informing this *Global Insights* report have been drawn from across the multidisciplinary Screen Currency 2026 project. The following provides an overview of methods for key data sources, and where to find further information.

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.

Screen data sources and methods

International screen audiences survey

The international screen audiences survey was designed by 89 Degrees East and administered as part of the Ipsos Global Advisor Omnibus public opinion tracker across 8 international markets. The Ipsos Global Advisor tracker is a monthly tracking study using established online panels of adults aged 18–74 (or 16–74 in some countries), with samples structured to be broadly representative of the online population within each market.

Throughout the report, **statistically significant differences** (at the 95% confidence level) are denoted with ▲ (significantly higher) and ▼ (significantly lower).

The survey results presented in this report are **rounded** to the nearest whole number. As a result, percentages may not add up to exactly 100%.

Research approach

- **Five questions were included in the Ipsos Global Advisor Omnibus study** with fieldwork conducted in 8 selected international markets between 21 November and 5 December 2025.
- **Sample sizes are set at n=1,000 or n=500** depending on the country, and there is a standard set of demographic questions. The precision of Ipsos online polls is calculated using a **Credibility Interval**. Country samples of n=1,000 are accurate to +/-3.5 percentage points and a sample of n=500 is accurate to +/-5.0 percentage points in each country's general population.
- The balanced online samples are **weighted to the latest Census information** of the general population in each market.
- **All survey materials were developed in English and translated for non-English speaking markets** by a dedicated translation team of linguists. Another set of linguists review and refine translations to ensure accuracy and cultural relevance. Translated surveys then are reviewed by the operations and service teams to confirm accuracy. Automation software is used for quality-assurance to support the overall review process.

Table 4: International screen audiences survey overview

Country	Survey age frame	Sample size	Survey language
UK	16-74 years	N=1000	English
US	18-74 years	N=1000	English
New Zealand	16-74 years	N=500	English
Canada	18-74 years	N=1000	English & French
Germany	16-74 years	N=1000	German
Singapore	16-74 years	N=500	Chinese & English
India	16-74 years	N=500	English
China	16-74 years	N=1000	Simplified Chinese

Online reviews and video responses

The screen chapter also draws on analysis of 5,638 online reviews and video responses to Australian screen titles across Letterboxd (26 million users), IMDb (83 million registered users), Common Sense Media (hosts 40,000 reviews), Rotten Tomatoes, YouTube and TikTok. The analysis was conducted by researchers at Queensland University of Technology and Swinburne University.

For further details of the method see:

Audience Insights

Games data sources and methods

The games chapters of the *Global Insights* report draw on multiple complementary data sources to examine the international reach, recognition and reception of Australian-developed digital games. Together, these sources provide insight into how Australian games circulate globally, how players engage with them, and how national origin is recognised (or not) in international contexts.

The findings synthesise evidence from international player surveys, focus groups, case studies, analysis of online reviews and commentary, and industry and market data. This approach enables examination of both measurable indicators of reach and engagement, and qualitative accounts of how players experience and interpret Australian-made games.

International video game players survey

An international survey of video game players was conducted to understand awareness, recognition and perceptions of Australian games across key global markets. The survey was designed and delivered by researchers at the University of the Sunshine Coast (UniSC) as part of the Screen Currency research program.

The survey included 1,610 international respondents recruited via an online market research panel across 4 markets:

- UK (n≈405)
- US (n≈419)
- Canada (n≈400)
- India (n≈386)

These markets were selected to reflect large and influential English language game playing populations, different platform ecologies, and varying degrees of exposure to Australian content.

Survey participants were asked about:

- their video game playing behaviours and discovery pathways
- familiarity with selected Australian developed games
- perceptions of game quality, engagement and value
- identification of the country of origin of selected titles.

Only respondents who indicated they had played a given title were asked follow up questions about that game. Responses were analysed using standard statistical software, with results reported descriptively.

Australian video game players survey

In parallel, a national survey of Australian video game players (n=2,208) was conducted as part of the same research program. While the primary focus of this report is international engagement, the Australian survey results are used selectively to provide context on domestic recognition, sentiment and comparative identification of Australian games. The Australian and international survey instruments were aligned to allow comparison across markets where relevant.

For further details of the survey method and sample see:

Audience Insights

Recognition of Australian origin study

To examine how and when international players recognise Australian games as Australian, Screen Currency draws on the findings of the UniSC study, which combined:

- the Australian video game players survey (n=2,208)
- the international video game players survey (n=1610)
- Australian video game players focus groups (n=28).

Participants were shown selected game titles (*Unpacking*, *Hollow Knight: Silksong* and *Untitled Goose Game*) and asked to identify the country in which they believed each game was developed. Recognition rates were analysed by market and title, alongside qualitative explanations of why players did or did not associate games with Australia.

For further details of the focus groups see:

Audience Insights

Case studies of Australian developed games

Three in-depth case studies – *Unpacking*, *Hollow Knight: Silksong* and *Untitled Goose Game* – were developed to illustrate different pathways to global reach and engagement. These titles were selected to reflect diversity in:

- genre and gameplay style
- production scale and studio structure
- release context and distribution pathways.

The case studies draw on:

- sales and download milestones
- player review volumes and sentiment
- streaming and viewing data where available
- industry interviews and secondary sources.

The purpose of the case studies is not to represent the Australian games sector as a whole, but to demonstrate how Australian made games generate reach, value and sustained engagement in global markets through different mechanisms.

For more on the methods used to select, frame and analyse the Screen Currency case studies, see:

Insights Overview

To read the full case studies go to:

Case Studies

Analysis of online reviews and video responses

To supplement survey and case study findings, analysis of online player reviews and commentary was conducted across major global platforms, including Steam and other community and review environments relevant to digital games. The analysis was conducted by researchers at Queensland University of Technology and Swinburne University.

Steam is the leading distribution and review platform for PC games, with 69 million daily users. More than just a storefront, Steam provides the ability for users to review and recommend any game. Steam users are overwhelmingly enthusiast gamers, as opposed to the more casual video game audiences that primarily play on consoles or mobile. This inevitably skews the review culture towards young men, but Steam remains a crucial platform for video game developers and audiences alike despite this limitation.

The top 200 Steam reviews for each game were augmented with a quantitative analysis of review metadata (20,000 reviews per game), including average playtime and review score per language.

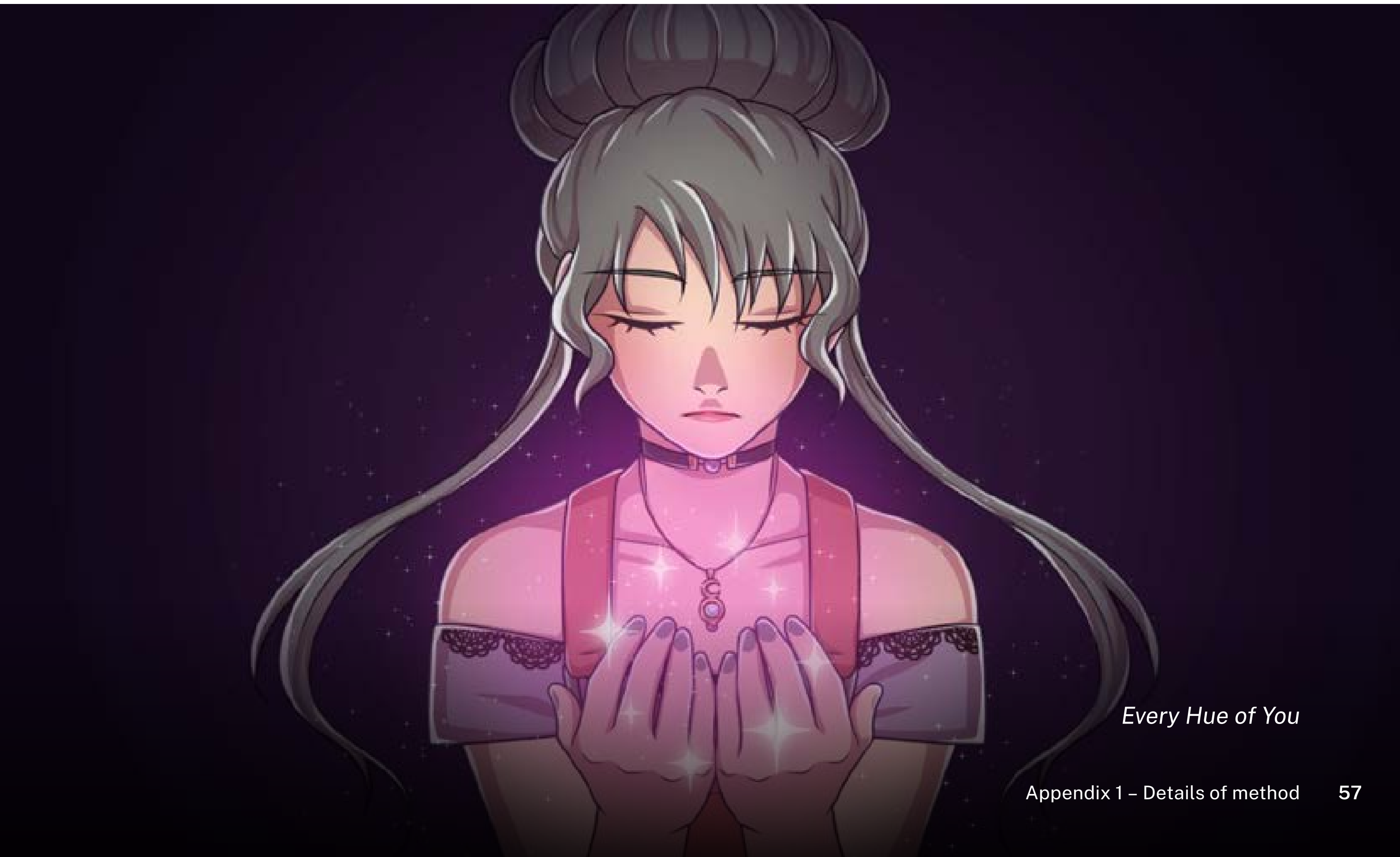
This analysis focused on:

- how players describe their experience of Australian made games
- the language used to discuss quality, enjoyment and engagement
- whether and how national origin is referenced in player discourse.

This material provides insight into how value is articulated organically by players outside research settings.

Industry and market data

The games chapter also draws on secondary industry data sources, including export statistics and market data from organisations such as IGEA and Newzoo, to contextualise Australian games within the global games economy. These sources are used to describe market scale, export orientation and growth trends rather than to make causal claims about player behaviour.



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