Screen Currency 2026

Understanding the value of Australian screen and games

A study in 5 reports with supporting case studies

Report 1 of 5

Insights Overview

Australian Government | Screen Australia | THE GIST.

Screen Currency 2026

Understanding the value of
Australian screen and games

Insights Overview

This report summarises Screen Currency's key findings and explores interactions in the screen and digital games industry in Australia.

It surfaces what local and global audiences value in Australian screen content and games, what they are watching and playing, and the drivers of those choices. It summarises industry and economic dynamics that are shaping engagement, and how they impact production and discoverability of local content and its outcomes.

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, the 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 and Georgie McClean (The Gist) 2026, *Screen Currency 2026: Insights Overview.*

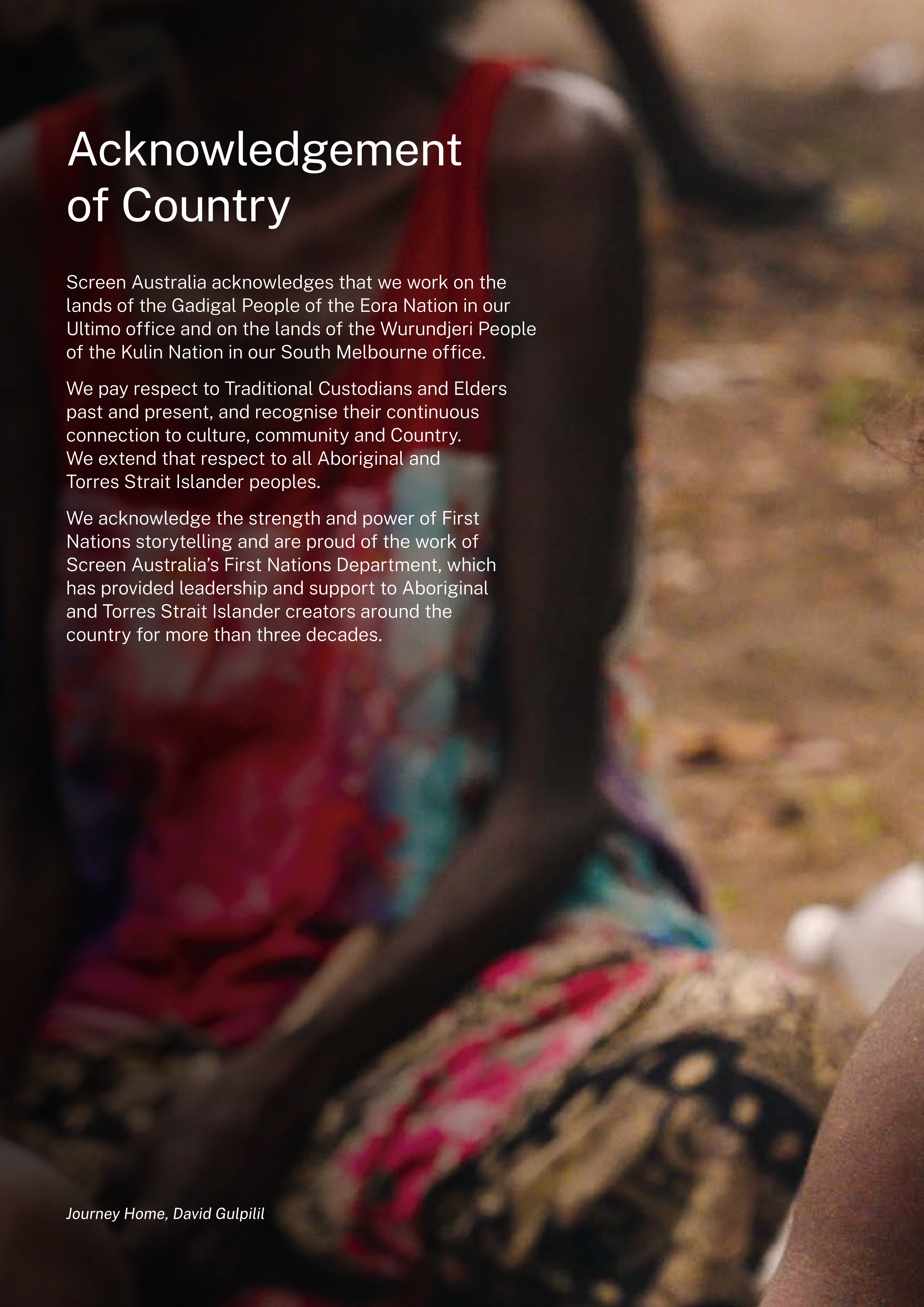
Colin from Accounts

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.



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About Screen Currency 2026 and this report

Insights Overview **is the first report in the Screen Currency 2026 suite of research. It presents a Value Framework** to discuss and measure the social, cultural and economic value of Australian screen and games.

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

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

1. Insights Overview			
2. Audience Insights	3. Industry Insights	4. Economic Insights	5. Global Insights
Supporting Case Studies			

This *Insights Overview* report provides a summary of the findings and the story that has emerged from across the multiple underpinning research components. For deeper exploration of each component, we encourage you to engage with the reports that underpin this overview.

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 social media 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

Audience Insights >
Economic Insights >
Case Studies >
Industry Insights >
Global Insights >

CEO foreword

Screen Currency 2026 addressed the ambitious brief to draw on a range of original research, methodologies and insights to build an evidence base for the social, cultural and economic value of screen and games in Australia. The study updates, and significantly expands, Screen Currency 2016.

Much has changed in the intervening decade. Audiences have more content choice than ever and are increasingly guided by algorithms to shape those choices. Fragmented and personalised forms of engagement have come with new behavioural defaults, which have resulted from, and reinforced market transformation. Media consolidation, new technologies and the expansion of platforms have had a tremendous impact on the economics of screen and games production. Australian creators and businesses face new paths to sustainable production. Future success will depend on how effectively they compete for attention, build intellectual property and engage global audiences.

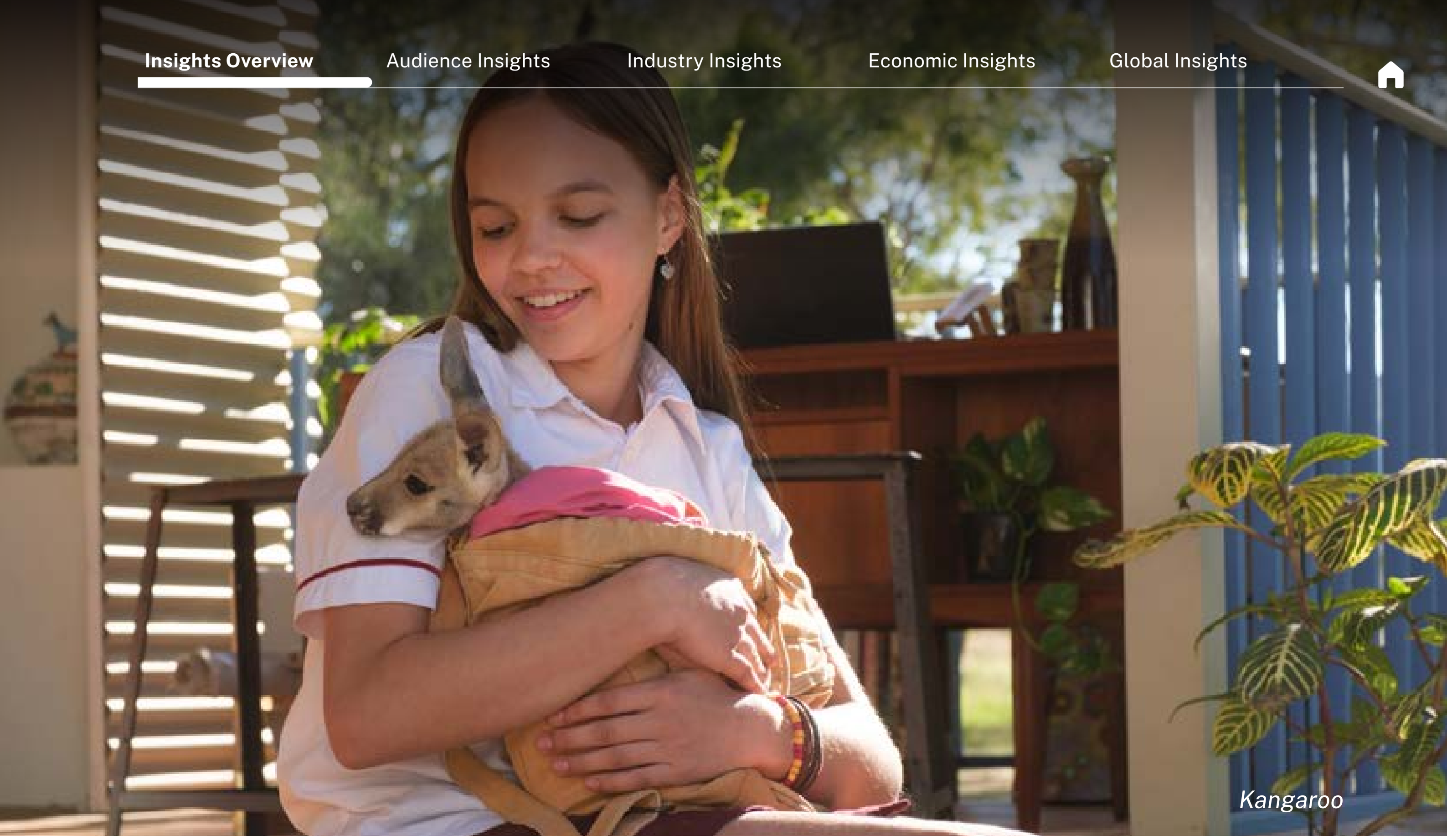
Globally, this environment highlights the importance of government to ensure local audiences have access to forms of content that matter to them culturally: reflecting their lives as well as the experiences of others, connecting Australians with the world around them.

Screen content continues to play a central role in the lives of Australians. In 2016, researchers were able to assert that Australians had a preference for local content. Today, that picture is much more complex. However, in such a crowded content landscape, it is important and gratifying to see how deeply Australians value their local screen stories and games. Screen Currency 2026 has uncovered what a wide range of creative expression means for us, as audiences and as Australians.

The research was conducted amidst a convergence of local and global influences, including: ongoing cost-of-living pressures, regulatory changes to social media use for under 16s, the impact of local content obligations on streaming services, debate about Australia's identity, geopolitical turmoil, and high-profile cultural reckonings around freedom of expression and social cohesion.

Screen Currency 2026 takes a holistic view of value, how it is produced by the screen and games sectors, how it is captured and how Australians feel about it. The research found that while Australians value local content in many ways, this does not always align with their consumption habits and preferences. Even if they choose not to watch local content themselves, its existence – and others' engagement with it – delivers benefits such as mutual understanding and stronger social connection among their wider community.

Australian screen and games continue to deliver social impact, but the industry is also a significant contributor to Australia's creative economy, skills base, innovation potential and export performance.



Kangaroo

The research highlights the extraordinary capability of Australian businesses and workers and the areas of adaptation required to drive growth through an unprecedented market evolution.

This project set out to develop an integrated framework that recognises the contemporary dynamics of screen and games production, from how it is produced to how it is received by audiences. In addressing these questions, the research drew on collaboration between highly respected researchers and subject matter experts to understand a range of dynamics from multiple perspectives. It employed cross-disciplinary methodologies – reviews of existing evidence, multi-day online audience forums, focus groups, location-based deep-dive conversations, national surveys, industry stakeholder interviews, new analysis of national data sources, systematic analysis of online responses on a range of platforms, global surveys and case studies.

The emerging picture offers insights that are both a snapshot of where we find ourselves and a baseline for future research. Deeper dives can be found in accompanying reports on audience attitudes and behaviours, industry dynamics, economic contribution and global impact, along with 16 supporting case studies.

Screen Currency 2026 was commissioned by Screen Australia and designed and directed by Georgie McClean at The Gist. It draws on the expertise of social researchers at 89 Degrees East and Ipsos iMob, the analysis skills of McAtamney & Advisors, and senior academics with applied industry-aligned experience from The University of Canberra, Swinburne University, Queensland University of Technology and The University of the Sunshine Coast. The preparation of reports for final publication has been supported by Mandy Whitford at Impact Words Consulting.

My sincere thanks to our many consultees, collaborators and contributors – including state agencies, our research advisory group, global counterparts, Australian screen and games practitioners, businesses and industry leaders, and the thousands of audience members that have shared their views and insights, all of which have enabled this ambitious research project to be realised.

We hope Screen Currency 2026 provides a resource for policymakers, practitioners and researchers for years to come. I know that this landmark research will inform Screen Australia's efforts to deliver on our purpose, to build a vibrant and sustainable screen industry that reflects the depth and diversity of Australian stories.

Deirdre Brennan
CEO Screen Australia

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Invisible Boys

Executive summary

This Screen Currency 2026 overview report provides an ecosystem view of Australian screen and games: how audiences engage with content, what it means to them, what gets created, and how it is financed and made available to viewers and players.

In doing so, the report presents a holistic understanding of the social, cultural and economic value generated by Australian screen and games for individuals, communities, industries, the economy and the nation.

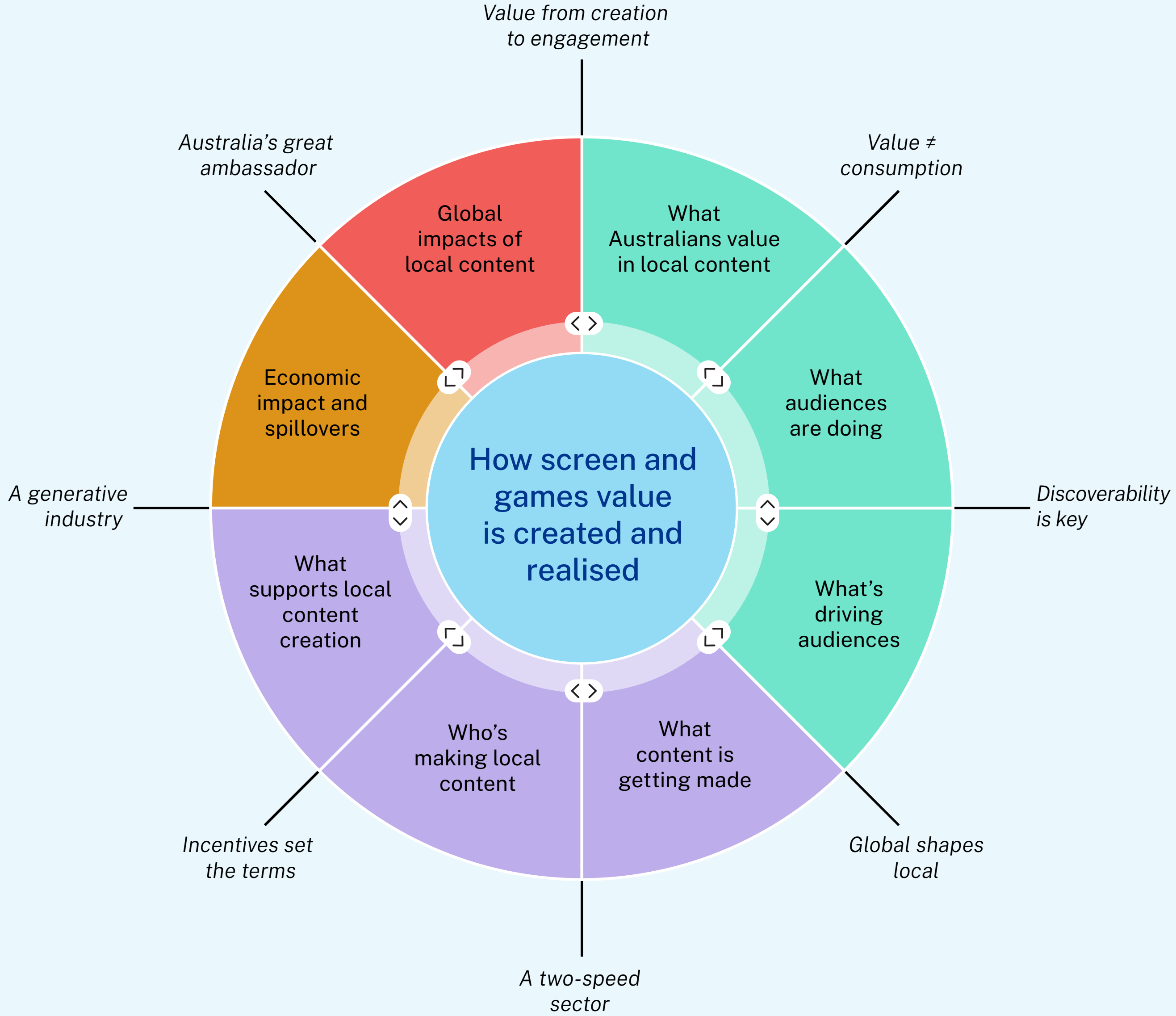
This overview report integrates findings from across the multidisciplinary studies that make up Screen Currency 2026, including studies on audiences, industry dynamics, economic trends and global insights, and case studies that illustrate a range of forms of value and impact. The findings will support development of the next National Cultural Policy, empower the screen industry through insights and research to better understand their audiences, markets and collective impact, and contribute to the *State of Australian Culture* report created by Creative Australia.

Screen Currency 2026 is an ambitious landmark research project. Informed by more than 40 stakeholder consultations, it has brought together expertise from 18 research partners across 5 research teams, commissioned by Screen Australia, to deliver new research and analysis. This has included surveys of industry and of audiences in Australia and internationally, focus groups, forums, interviews, and analysis of online reviews and video responses, as well as new analysis of existing data sources. More than 13,750 people participated in the Screen Currency 2026 research including 13,550 respondents to 6 surveys in Australia and key global markets (see Data sources overview and Appendix 3: Acknowledgements).

The Screen Currency Value Framework (Figure 1) presents an overview of how value is generated by Australian screen and games, how we have measured it, and how insights and indicators are presented in this report. The research reveals interconnected forms of value generated through local screen content and games, including how they are experienced by Australians, how their value is produced by the industry, their economic impacts and their cultural influence around the world.

Australia: An Unofficial History

Figure 1: The Screen Currency Value Framework overview



Source: Developed by The Gist for Screen Currency.

Screen Currency's insights overview

Over the past decade, the ways Australians engage with content has been reshaped by changes in the global media landscape. Screen Currency explores the profound impacts that the increasing personalisation and fragmentation of media and culture have had on the market and the dynamics of our local content creation industry.

Our audience study highlights that Australians have never had greater choice in what they watch – but that abundance comes at a cost to local content. Australian screen stories must now compete for attention across fragmented platforms, where they are less visible and discovery requires deliberate effort from audiences with no shortage of alternatives.

Both Australian screen audiences and video game players express support for our local production industry. However, the value that is generated by this highly skilled industry is under pressure from market conditions that are challenging established business models and require new ways of working.

Australian audiences recognise the value of local screen content and Australian-made games. Australian audiences care about qualities like **authenticity, local resonance and cultural preservation** in screen stories, but these attitudes are not always reflected in what they spend time with on their couches, commutes or consoles.

Video game players in our focus groups expressed pride in great games that are made locally but consider knowing a game was made in Australia as a "value add" rather than a driver of choice.

Viewing and gaming choices are primarily driven by a desire for relaxation and entertainment, which can be a gateway to higher order cultural value. Choices are both enabled and reinforced by now-ubiquitous platforms embedded with technological and behavioural defaults. Many research participants felt that local content can be hard to discover within today's platform environments.

Small production companies and independent game studios are central to Australia's creative ecosystem, generating much of the industry's intellectual property, creative capability and entrepreneurial activity. They make up the majority of businesses operating in screen and games creation and production, where new ideas, formats and stories are developed and brought to market.

Australian screen stories can foster belonging, shared understanding and social cohesion. Audiences recognise the role local content plays in helping people connect with each other, understand different experiences and engage with contemporary Australian identity.

Our industry and economic studies demonstrate that market, technology and regulatory changes have transformed pathways to audience and sources of finance. This means some forms or genres of content now have fewer commissioning options, making them higher risk and more difficult to produce.

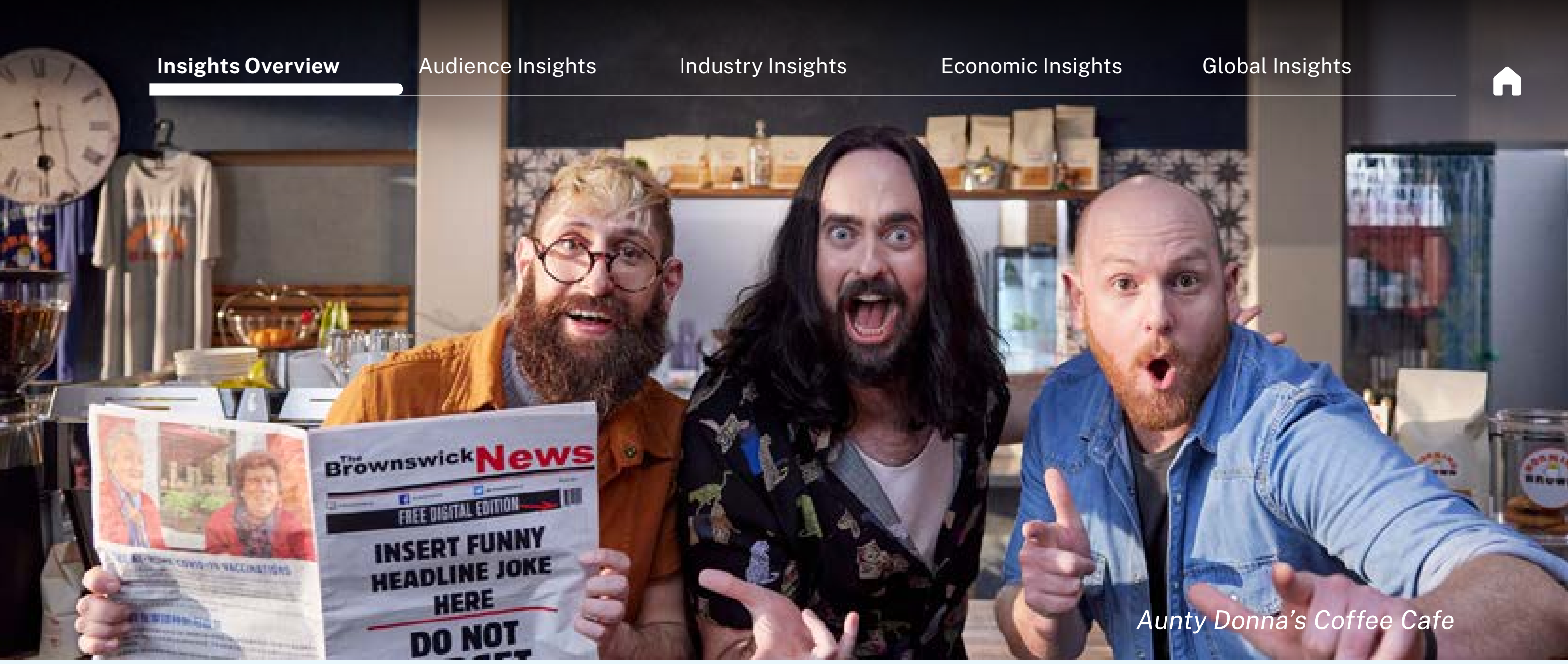
Analysis of production trends highlights the increasingly important role public broadcasters play in supporting Australian drama production and ensuring audiences continue to have access to local stories. Their contribution is particularly significant in the current landscape where fewer hours of locally produced TV drama compete for audience attention alongside an expanding volume of global content.

Australian children's TV production has decreased dramatically, driven by audience fragmentation across digital platforms, a shift in commissioning towards on-demand streaming services and the removal of commercial free-to-air sub-quotas. Australian feature films are still being produced at volume, but with overall lower investment, and less audience reach, than they had a decade ago.

Digital content and games continue to find success in global marketplaces, reaching international audiences and communities at scale. Their ability to compete in global markets creates significant opportunities for Australian creators and businesses to build audiences, expand their reach and drive future growth.

The industry study evidences how much of the value in the screen and games industry is crystalised in intellectual property (IP) rights in creative works such as screenplays, programs, features, games and characters. The study shows that this IP is often generated by small production companies or independent games studios made up of highly skilled teams, but **it is becoming more challenging for these companies to hold onto a share of the rights in their IP.**

Market concentration in distribution enabled by scale, audience access and control of performance data, has left small to mid-size



Aunty Donna's Coffee Cafe

production businesses vulnerable. Access to production finance has become, for many smaller players, tied to what they have to give up as part of emerging deal terms: all territories rights, access to audience feedback loops and ongoing revenue from their content. These concessions can mean that Australian production companies are less able to build their own capital and invest in their own businesses.

Screen Currency's industry study maps the impacts of this changing market through a contemporary value chain that explores industry dynamics, points of pressure and areas of adaptation and innovation.

These insights are set against market shifts evident in national data sets analysed in the economic study. The data reveal **significant tipping points** in a transformed set of sectors, where total government support is approaching commercial broadcasters on TV production spend, and new players have overtaken spend from traditional sectors.

Despite all this, Australian creative talent, independent screen production companies and games studios are operating at the highest levels of the global industry, achieving a breadth of creative, commercial and cultural outcomes.

Screen Currency's global study explores the impacts of Australian content in a range of global markets, and reveals that, particularly for our neighbours and growth markets across the region, Australian screen content contributes to positive perceptions of Australia, cultural affinity and intention to visit our shores.

Case studies of programs with differing forms of success explore how individual games and programs can evidence a range of forms of value, offering holistic ways of understanding how impact is generated across the value chain.

Despite all the disruptions and transformations, the rationales for public investment in content and infrastructure remain unchanged. Support for a dynamic local industry drives Australian creativity, innovation and jobs, while producing culturally successful expressions of contemporary Australian identity that benefit Australians and are projected to the world as cultural exports.

Screen Currency highlights the current challenge: to ensure the social and cultural benefits of this production continue to flow to Australians, together with a share of the economic benefits.

While the screen and games industry ecosystem benefits from government intervention and investment – from offsets, incentives and funding, to training, broadcast licences and infrastructure (including the NBN) – **interventions need to keep pace with changed market conditions and new opportunities** to ensure they meet the outcomes intended by policymakers.

Healthy and resilient ecosystems tend to be both diverse and highly interconnected, enabling them to resist threats and adapt to new conditions.[1]

The Screen Currency 2026 overview report explores where – and how – the Australian screen and games industry is finding ways to adapt to change, and collates an evidence base to inform discussions around where further adaptation, evolution or support may be required.

1 Globally respected ecologist and University of Melbourne Vice Chancellor, the late Professor Emma Johnston, quoted in Matchett S 2026, *Emma Johnston's Plan for Melbourne*.

Boss Cat

Key findings

What screen audiences value

- **Australians strongly support local screen content.** 84% say it is important that Australians have access to local content and 75% express interest in watching more. Participants in the audience study highlighted that Australian screen content is vital for preserving culture, reflecting diversity and portraying real-life issues.
- **Entertainment is a gateway to a range of forms of value.** It is the primary driver for Australian's screen engagement, although what is considered entertaining varies. Audiences prioritise relaxation, enjoyment and emotional engagement before recognising other forms of value like social, cultural or educational significance.
- **Australians recognise the quality of local screen content.** Around 3 in 4 agree local screen content is visually distinctive and/or as well-made as international content.
- **Audiences judge quality across multiple dimensions.** Production polish is just one element of quality – narrative strength and authenticity also matter – and audiences appreciate when these elements are aligned.
- **Authenticity and relatability matter.** For content to feel "Australian", it must be authentic and relatable, featuring familiar accents, humour, landscapes and characters. Forced national identity symbols or exaggerated portrayals risk being perceived as inauthentic.
- **Diversity and representation are increasingly important.** Audiences increasingly seek diverse and current representations of Australia and portrayal of a more complex and evolving national identity. First Nations focus groups highlighted a desire for more contemporary First Nations stories grounded in day-to-day life, and the value of culturally specific storytelling and humour.
- **Australian screen stories help build shared understanding, social cohesion and a confident national identity.** Around 2 in 3 Australians agree our screen stories support feelings of belonging and connectedness, and make them think about their identity as an Australian. Almost 7 in 10 agree they help new migrants learn about Australian culture and everyday life, with agreement higher among culturally and linguistically diverse (CALD) respondents.[2]
- **First Nations screen stories can be a tool for education, truth-telling and social dialogue.** First Nations focus groups articulated their significant role in promoting awareness and healing, especially around historical trauma. Across the research phases, non-First Nations participants discussed ways First Nations screen stories had impacted their understanding of First Nations culture, history and communities.
- **Watching screen stories supports Australians' emotional wellbeing, with a particular role for local content.** More than 7 in 10 Australians watch screen content to relax and unwind, and almost 1 in 4 say they watch to deal with stress, anxiety or depression. Australian content can play a particular role given its familiarity and emotional resonance, and capacity to reflect Australians' lived experiences on screen.
- **Cultural value extends beyond who watches.** Australian screen content holds both "use value" (benefits of personal viewing) and "non-use value" (the value people place on the existence or preservation of something, even if they never directly use it). The vast majority of Australians acknowledge broader social and cultural benefits of Australian screen content.

2 There are no widely accepted standard definitions of cultural diversity and identity, which are multifaceted. "Culturally and linguistically diverse (CALD)" is an umbrella term that has been used in Australia for some time and while contested, it continues to be used in data collection and reporting on Australia's cultural makeup.

What video game players value

- **Australian video game players express support for our local games industry.** Players feel it's important that Australia has a video game industry and want to see it supported. Focus groups described Australian games as being marked by creative risk-taking and originality, with humour a distinctive marker.
- **Australian video games matter to Australian players, despite low visibility in a highly globalised market.** Players express goodwill toward Australian-made games and confidence and pride in local creative capability. However, this does not always translate into clear awareness of which games are Australian – our national survey found around 3 in 5 players don't know if they have played an Australian game.
- **Players do not focus on where a game is made.** Knowing a game was made in Australia is seen as a "value add" rather than a major incentive to buy or play. Players place importance on the existence and sustainability of Australian games development even when this does not directly shape their immediate play choices.
- **Game play supports Australians' emotional wellbeing.** Players consistently report playing games for emotional regulation, relaxation and stress relief – nearly 3 in 4 Australian players use video games to relax and manage stress. At the same time, the audiences study recognises that not all gaming experiences are positive, with risks linked to specific environments and design practices rather than to video game play as a whole.
- **Representation and inclusion carry significance for Australian video game players.** More than 3 in 5 players report feeling represented in the games they play, and agree games should reflect a wide range of cultures and backgrounds, indicating the value of inclusive design.
- **Games generate social value even when play is solitary.** Although nearly 2 in 3 Australian players prefer to play alone, video games continue to support social connection through shared reference points, conversation, community participation and cultural exchange. Around 1 in 5 Australian players actively participate in video game communities. Social value emerges around games through discussion and shared meaning in addition to co-play.

What screen audiences are doing

- **Watching screen content plays a central role in the lives of Australians.** More than 8 in 10 say it's important to their daily routine and 1 in 3 say it's very important.
- **Support for local content is high, consumption is lower.** While 84% of Australians recognise the importance of access to local stories and 75% are interested in watching more, only 35% spend more than a third of their viewing time watching Australian content. Discovery can be a barrier in a fragmented, platform-driven environment.
- **Engagement is now more concentrated in smaller, niche audiences.** The value of Australian screen content is no longer tied to mass simultaneous viewing or household co-viewing, as audience experiences are increasingly personalised and fragmented across platforms. This can offer opportunities for cultural recognition across different communities and audiences.
- **Viewing screen content remains deeply social.** While viewing is more individualised, Australians watch content to stay connected with others, join cultural conversations, and bond over shared references. Social impact is now more likely to be cumulative and relational, built through many stories rather than a single national narrative.
- **There are generational differences in how screen content is both valued and consumed**, with older Australians more likely to watch free-to-air TV and younger audiences demonstrating more fragmented viewing behaviours across devices and platforms. Older Australians aged 65+ are more likely to recognise the importance of access to Australian screen content and its cultural value, while younger audiences aged 16–24 are less likely to express supportive attitudes.
- **Australian screen content often provides educational insights.** More than 1 in 3 Australians watch screen content to learn new things or stay informed. Some content offers lasting educational value – often indirectly – especially documentaries, historical content, and First Nations-led stories that foster understanding and reflection on social issues.

- **Action can be inspired by content.** Seven in 10 Australians report taking action after viewing local screen content, such as seeking more information, changing behaviour or engaging with issues raised. Analysis of online reviews and video responses identified more than 40 different ways that audiences use or respond to Australian content, including behaviour change, self-education, parenting advice, family connection and emotional support.
- **Australians are returning to cinemas, but Australian films are capturing a smaller share of that audience.** While the economic activity of the exhibition sector (cinemas and festivals) has rebounded following the COVID-19 pandemic, Australian films continue to experience long-term declines in box office and rights revenues. Recovery in exhibition has not translated into improved market performance for local titles.

What video games players are doing

- **Video games play an important role in Australian life, though that role varies in depth and intensity.** More than 3 in 4 Australians report playing a video game in the past 6 months, with nearly half of players saying games are a significant part of their life. While some players engage deeply with game culture, many play regularly without strong identification with gaming communities or a gamer identity.
- **Video game play is a mainstream, everyday cultural practice shaped by flexibility.** Participation spans age, gender and life stage, with many Australians engaging in flexible, low-intensity play embedded within daily routines. Mobile is the dominant platform for game play in Australia and play on mobile tends to be relatively short: almost 1 in 2 players spend 2 hours per week or less playing.
- **Australians are spending more on video games.** In 2025, Australians spent approximately A$2.9 billion on video games, an increase of 7% from 2024, supported by an estimated 17 million Australian players. By 2028, Australian consumer spending on video games is forecast to reach A$3.3 billion, an average annual growth rate of 4.8% between 2025–2028.[3]

What's driving screen audiences

- **Most Australians engage with screen content for relaxation (72%) or entertainment (69%).** Smaller proportions are driven by a desire for learning or information (36%) or for shared experiences with family or friends (28%).
- **Viewing offers both entertainment and emotional support.** Watching screen content helps audiences relax, feel grounded and manage stress. These emotional benefits are particularly felt by younger audiences and people from historically underrepresented backgrounds.
- **Audiences rarely actively seek out Australian content.** Instead, it is discovered through social, cultural and algorithmic recommendation networks – 4 in 10 Australians say their viewing choices are driven by recommendations on streaming platforms. Older audiences (65+) rely more on advertising and personal networks, while younger audiences (aged 16–24) lean more on social media for recommendations.
- **Discoverability is a barrier.** Only 1 in 3 Australians say it's easy to find Australian content. Audience forum participants expressed a desire for streaming services to feature Australian content more prominently.

Deeper

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

What's driving game play

- **Country of origin is not a deciding factor.** Players expect Australian video games to meet the same standards as international titles and evaluate them first and foremost as leisure experiences.
- **Enjoyment is the key driver of engagement.** Australian players most commonly frame their engagement with video games in terms of enjoyment, flexibility and emotional payoff.
- **Many Australians play video games to relax and de-stress.** Surveyed players most commonly cited having fun (87%), passing time (76%) and de-stressing (72%) as the reasons for playing video games.
- **Learning, creative expression and social connection are also drivers of game play.** Around 1 in 2 Australian players report playing games to improve their skills or be creative, and more than 1 in 3 say socialising is a reason they play.
- **Discovery of games is shaped by social and platform-driven environments, with uneven influence across the player population.** Around 1 in 2 players typically encounter games through recommendations from friends, family or social media, rather than deliberate search. Younger players are more active in networks through which games are discussed and circulated.

What's getting made

- **Recent growth in screen production spend** has been driven by increased expenditure on high budget domestic and foreign drama production.[4]
- **Streaming services are now the biggest commissioners of Australian TV drama.** Even before a content obligation for streamers was announced in 2025, streamers were commissioning more titles and spending more on Australian drama collectively than other broadcasters.
- **Local TV drama now has higher budgets, but there's less of it.** Drama budgets have increased substantially to compete in the global streaming marketplace and meet audience expectations. However, streamers' commissions have not compensated for commercial TV's retreat from drama: first-release hours (excluding serials) have halved in the past 20 years, which means fewer opportunities for consistent work.
- **Australian children's TV production has decreased.** As the audience continued to fragment across digital platforms, commissioning shifted further towards on-demand streaming services, and the local content sub-quota obligations for children's TV drama were removed, commercial broadcasters effectively stopped commissioning the genre. Australian children's TV production, a highly regarded sector with a history of export success, has declined rapidly.
- **Documentary TV continues to be commissioned**, with commercial free-to-air broadcasters still programming documentary formats that can attract substantial audiences. However, beneath this overall level of activity, the mix of commissioned content has shifted. While public service broadcasters (ABC and SBS) remain the largest commissioners of documentary content, their commissioning of titles and hours, along with that of subscription TV services such as Foxtel, has declined compared with a decade ago, with impacts felt most acutely in some specialist sub-genres.
- **More Australian features films are being made, but at lower budgets and lower returns, reaching smaller audiences.** The numbers of feature films produced each year has increased steadily since the early 2000s, though with lower audience engagement and box office returns.
- **Local indie studios are producing quality games with an eye to the global marketplace**, but breakout hits are rare and hard to replicate. High-profile commercial successes can lift visibility and confidence in the sector, but the conditions behind breakout performance are highly project-specific and not easily engineered.
- **Australia is creating world-class content but losing control over its long-term value.** Australian skills are in-demand, but long-term outcomes are increasingly shaped after projects are made, based on control of rights, distribution, market access and audience data. As global platforms and large intermediaries control discovery and monetisation, it is harder for local creators and businesses to convert their skills and critical success into sustained income and growth.

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

Who's making local content

- **The screen and games workforce is highly skilled but fragmented.** Specialised industry skills are dispersed through a mobile workforce, commonly engaged across multiple jobs and project-based work. This lack of stability can limit career development and, skills continuity.
- **Content creation is fragmenting and expanding, while traditional commissioning and distribution pathways are narrowing.** The screen production sector includes a large number of small businesses that tend to be flexible and adaptable but limited in their bargaining power. Increasingly, these businesses are seeking to manage risk by diversifying financing sources, partnerships and market reach, rather than relying on a single commissioning or funding pathway.
- **Current deal terms can place pressure on creatives to relinquish aspects of IP ownership or control.** For screen production companies, global streamers' up-front ("cost-plus") fee deals may mean that some producers are unable to retain ongoing rights and limit long-term value. For games studios, IP retention is achievable but uneven and closely shaped by project finance structures, deal terms and a developer's ability to secure publishing relationships.
- **Increasingly uneven ("two-speed") outcomes are emerging within both the screen and games sectors.** Some screen businesses working in foreign production and post, digital and visual effects (PDV) services have grown and built revenue in global markets. In games, a small number of breakout titles and well-positioned studios reach significant global markets.A long tail of screen businesses and games teams operate with thin margins, high volatility, weaker traditional pathways and limited routes to sustained value.
- **Global distribution platforms increasingly shape the industry.** They have growing control over what people discover, what gets promoted, how audiences are reached and how revenue is earned. Australians continue to watch, play and engage in large volumes, but the results for Australian businesses are increasingly shaped by platform terms, and limited control over audience access.
- **Commercial TV remains an important part of the screen industry**. Despite a declining share of gross value added (GVA) and the disruptions of the global digital landscape, Australian commercial free-to-air broadcasters still employ more than 10,000 people, far more than streaming services. They also continue to spend more overall on local production, but investment has shifted from TV drama and children's programming towards news, current affairs, lifestyle and sport.
- **The creators of screen stories are paid less and in less stable jobs than those who distribute content and manage IP**. Working in distribution and broadcasting, as well as in sector management, accounting and legal services, tends to pay better than creative roles or jobs in production and post-production. Over the course of a year, 34% of the production workforce holds multiple jobs, suggesting people churn in and out of roles.

The New Boy

What supports local content creation

- **Support for content creation draws on a web of public and private sources.** The Screen Currency industry study describes how no single financier typically funds a project. Production in Australia relies on stacked financing, combining public grants, commissioned/client work, broadcaster and platform licence fees, internal finance and private capital.
- **Government funding (direct and indirect) represents a major and growing share, but not the whole picture.** Total state and federal support for screen production has grown substantially and is now the dominant source of funding for narrative drama, documentary and children's programming. It sits alongside, and is designed to leverage, private investment and commissioning.
- **Cultural value is not always rewarded by the market.** Creating and distributing local work is costly, audience attention is fragmented, and competition is global. Local businesses have limited influence over discoverability that depends on platform algorithms, storefront placement and distribution terms. This leaves culturally valuable work more reliant on ongoing public support, without strengthening business models, careers or capacity to reinvest.
- **Commercial and cultural value can be in tension.** Businesses most likely to thrive commercially in the current environment – including export-oriented games, international service work, and businesses able to operate at scale in global markets – support jobs and capability but this activity is not always oriented towards Australian content. Many of these businesses are also developing Australian stories, yet the pull to deliver globally facing work, with its greater revenue certainty, can make sustained investment in local content harder to prioritise.
- **Federal and state governments support infrastructure and capability, not just individual titles.** Investment extends to soundstage and studio capacity, workforce and skills development, residency programs, and a coordinated network of agencies, guilds and peak bodies that underpin talent development, market access and international attraction.
- **Policy and funding frameworks need to evolve with industry change.** Policy levers built around earlier production-and-release models can struggle to target what now drives long-term sustainability – rights and IP outcomes, distribution leverage, access to audience data, and how value is shared through platforms and intermediaries. This leaves a gap between what government can most readily support through grants and production incentives (production volume and, by extension, jobs) and the factors that determine whether businesses can build repeatable income and retain value in Australia.

Mad Max: Fury Road

MasterChef Australia

Economic impacts and spillovers

- **Screen and games contributed $11.1b to the economy in 2023/24 in gross value added (GVA).** This is similar to the GVA generated by the air and space transport industry, and exceeds that of the electricity generation and sport and recreation industries. Of this, $10.8 billion was generated by screen and $317 million by games. Growth in GVA has been driven by production, post-production and digital games development, offset by a decline in broadcasting (including commercial free-to-air and pay TV providers like Foxtel and Fetch).
- **The screen sector generates substantial activity**, but growth does not necessarily accrue to individual Australian businesses, and value retention differs across the value chain, impacting sustainability.
- **Content creation is central to the screen and games industry, but broadcasting and streaming have the biggest economic impact.** Free-to-air TV, subscription TV (such as Foxtel) and streaming services (such as Stan or Netflix) contribute 65% of the total industry's GVA, while the sectors that create IP – production, post-production and digital games development – generate 22%.
- **Content creation is labour intensive – most company income goes into to wages, not profit margins.** Production, post-production and games development companies are typically very small and distribute most of their earnings to their employees. In contrast, more than half the value generated by both traditional and internet-based broadcasters has historically been capital returns. Returns to labour are increasing modestly in dollar terms, though rising sharply as a share of a declining broadcasting GVA base.
- **Digital games development is our fastest growing sector**. In terms of GVA, employment and exports, games are growing faster than all screen sectors. The value contributed by games to the Australian economy has more than doubled since 2016/17, albeit off a small base. Games exports are estimated to account for 20% of Australia's total screen and games export earnings.
- **Screen and games directly employed 68,844 people in 2024/25.** Of these jobs, 66,080 were in the screen industry, and 2,764 were in digital games development. The screen production and post-production sectors employ 45% of the screen and games workforce, though these sectors have experienced challenging workforce shortages since the COVID-19 pandemic. The number of people working in digital games development has continued to increase, with growth rates far outpacing the screen industry. Games development skills are in demand across the economy.
- **Beyond direct economic impacts, screen and games have economic and social spillovers**, in areas ranging from innovation, technology, regional development, tourism, trade and soft power to wellbeing, education, intercultural understanding and social cohesion. Australian content can create shared cultural references and common language, facilitate social interaction and help audiences connect to culture, history and each other. Australians benefit from the social, cultural and economic value of Australian screen and games, regardless of whether they directly engage with the content.

Global impacts of local content

- **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 recognised title among international survey respondents – can be powerful cultural ambassadors.
- **Global awareness of Australian screen titles varies across international markets.** When asked if they had seen or heard of 11 recent Australian program examples across a range of genres, 88% of respondents in both the UK and New Zealand and 80% in India recognised the titles, followed by 67% in the US, 65% in China, 61% in Canada, 60% in Singapore and 46% in Germany.
- **Australian film and TV holds strong appeal in key international markets with growth potential.** The strongest appeal is reported in India, New Zealand, China and the UK. These markets show high engagement with Australian stories, representing a significant opportunity for future screen exports. Perceptions of value are particularly comprehensive among respondents in India and China, with the majority agreeing Australian content is visually distinctive and high quality, which contributes to its cultural and commercial value.
- **Australian screen content has significant cultural influence and is a powerful tool for public diplomacy and soft power.** Watching Australian screen content positively influences international audiences' perceptions of Australia; boosts interest in business, trade and tourism; and enhances our global connections. This is particularly evident in India and China, where the majority of respondents agree Australian film and TV has created positive impressions of Australia.
- **Australian video games have achieved impact internationally.** In a globally distributed industry, some Australian games have achieved breakout commercial and/or critical success and a loyal international fan base (see *Hollow Knight: Silksong, Untitled Goose Game* and *Unpacking* case studies).
- **Screen and games exports are significant and growing, with games a remarkable export success story.** A total of $1.6 billion in 2023/24 was made up of $1.3 billion in screen exports and $323 million in games exports. Screen exports have more than doubled since the introduction of the producer, location and PDV offsets, increasing by an annual average of 4.7% between 2008/09 and 2023/24. Games are experiencing faster export growth than screen, at an average annual rate of 15.4% between 2016/17 and 2023/24, off a smaller base (measured over a shorter period).
- **Screen production, post-production, digital games and internet broadcasting (including streaming 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: production and post-production (64% of total exports), digital games (20%) and internet broadcasting (8%). Export revenues have fallen for the distribution, free-to-air TV and subscription broadcasting sectors.
- **Royalty exports are returning to growth, at $415 million.** International competition for quality content in a global market has driven up the value of content rights, returning royalty exports to growth after a period of decline.
- **Foreign drama expenditure represents the screen industry's largest export service.** Total foreign drama expenditure continues to increase, reaching $1.6 billion in 2024/25. 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.

How value flows

- **Screen Currency's findings support a nuanced understanding of how forms of value can accrue to Australians** as individuals, communities, the screen and games industry, the broader economy and the nation (Figure 2).
- **These forms of value accrue and flow in relationship** – the categories represented in the Screen Currency beneficiaries framework all interact with one another. For example, learning at the individual level can lead to community discussion and industry recognition. A dynamic industry with community support has spillover economic benefits and builds trust and national pride. Similarly, individual responses to authentic representations of diversity can generate mutual community engagement, shared understanding and social cohesion. Diversity on screen represents an inclusive contemporary Australia, which can influence global perceptions and travel intentions. This generates economic benefit through tourism and, in parallel, supports a more nuanced and inclusive national identity.
- **An ecosystem lens of industry includes where energy and investments enter the ecology, and where they are lost.** Screen Currency reveals that the dynamics of the current system mean that many of the core things that drive value – IP rights, revenue, attention, business ownership and control of decision making, are impacted by global platforms, which increasingly influence what is distributed, discovered and monetised.
- **This highlights the need for policy interventions that keep pace with transformed market conditions** to help ensure that value flows to the Australian screen and games industry and supports their broader cultural and economic impacts, while also benefiting Australians as audiences, communities and citizens.

Figure 2: Screen Currency beneficiaries framework

Individuals	Community	Industry	Economy	Nation
Entertainment	Social connection	IP	GVA contribution	Cultural sovereignty
Relaxation	Shared understanding	Innovation in production/ approach	Complexity economy	Inclusion & connection
Relatability	Mutual engagement	Career progression	Technology innovation	National pride
Authenticity	Discussion & exchange	New models & partners	Employment	Diversified industries
Diversity	Social action	Business models	Skilled workforce	Australian creativity
Relevance	Social change	Volume of production	Skills transfer	Cultural affinity
Learning & information	Digital literacy	Work opportunities	Exports	Soft power
Emotional wellbeing	Education outcomes	Community support	Tourism impacts	Confident national identities
Quality	Resources	Recognition	Regional spend	Social cohesion
Cultural resonance	Representation	Talent development	Productivity – empowerment & advances	Optimism
Identity	Pride			Trust
Skills	Cultural continuity			

Source: The Gist for Screen Currency. Note: These benefits are not an exhaustive list, nor do they accrue universally or evenly to all communities in Australia. There may be ambivalence about some categories for some stakeholders (such as the contested concept of "national pride"), whereas they are vital to others.

Screen Currency highlights in numbers

What Australians value in local content

84%
of Australians
agree it's important for Australians to have access to local screen content

78%
of Australians
agree local screen stories help preserve and share our unique culture

78%
of Australians
agree Australian content contributes to our distinctive identity in the world

77%
of Australians
agree well-made screen content makes them feel proud to be Australian

73%
of Australians
agree local content is well-made and as good as international

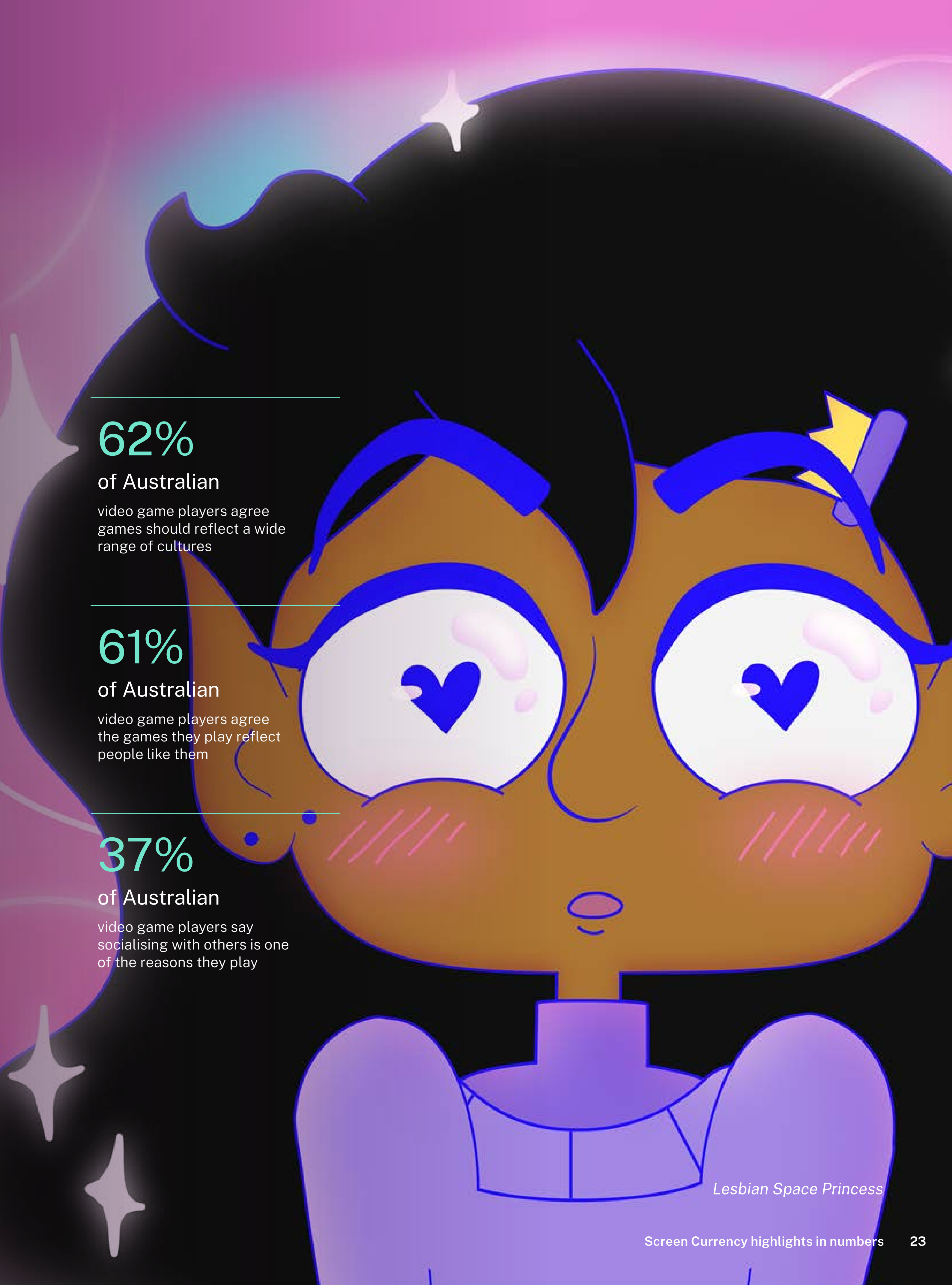
65%
of Australians
agree local screen stories make them think about their identity as an Australian

75%
of Australians
agree local screen stories reflect the diversity of Australian people and voices

75%
of Australians
agree local content ensures our stories are remembered for future generations

67%
of Australians
agree local screen stories support feelings of belonging and connectedness

See Data sources overview and Appendix 1: Indicators, measures and sources for details of data sources and sample sizes.



62%

of Australian

video game players agree games should reflect a wide range of cultures

61%

of Australian

video game players agree the games they play reflect people like them

37%

of Australian

video game players say socialising with others is one of the reasons they play

Lesbian Space Princess

What audiences are doing

85%
of Australians
say watching screen content is an important part of their daily routine

35%
of Australians
watch more than 30% local content
(excluding news and sport)

75%
of Australians
are interested in watching more local content

36%
of Australians
say it is easy to find local screen content

78%
of Australians
played video games in the past 6 months

19%
of Australian
video game players are actively involved in online communities

71%
of Australians
take action after viewing local content (e.g. seeking info, changing behaviour, or deepening engagement)

59%
of Australians
relate to Australian stories and often share or discuss them socially

What's driving audiences

72%
of Australians
watch screen content to relax or unwind

36%
of Australians
watch to learn new things or stay informed

72%
of Australian
Australian video game players play to de-stress

51%
of Australians
video game players play to improve skills

See Data sources overview and Appendix 1: Indicators, measures and sources for details of data sources and sample sizes.

What's getting made

403
TV drama hours
broadcast on average per year 2020–24, down 12.4% from 2000–19

65
children's TV hours
broadcast on average per year 2021–24, down 42% from 2000–20

386
hours of
documentary programming broadcast on average per year 2021–24, down 3.7% from 2009–20

40
drama feature film titles
produced on average per year 2021–24, up 43% from 2000–20

24
theatrical feature documentaries
produced on average per year 2016–24, up 234% from 2009–15

See Data sources overview and Appendix 1: Indicators, measures and sources for details of data sources and sample sizes.

The Narrow Road to the Deep North

Who's making local content

73%
of screen
industry employees hold a bachelor's degree or higher

16%
of income
earned by screen industry employees comes from outside the screen sector

34%
of the screen
production workforce hold multiple jobs

63%
of screen
businesses have been operating >10 years
Median 4 employees

83%
of games
industry employees hold a bachelor's degree or higher

27%
of income
earned by games industry employees comes from outside the games sector

188
digital games
businesses in 2021/22
+15.3% average annual growth from 2015/16

51%
of digital games
businesses have been operating ≤ 5 years
Median 4 employees

What supports content creation

$387.6m
direct federal & state
government support for screen in 2023/24

+7.9%
average annual growth
in direct federal & state government support for screen since 2015/16

$1.1b
indirect federal
support for screen in 2024/25

+7.6%
average annual growth
in indirect federal support for screen and games since 2015/16

See Data sources overview and Appendix 1: Indicators, measures and sources for details of data sources and sample sizes.

Economic impacts

$11.1b
GVA
in 2023/24 generated by screen ($10.8b) and games ($317m) activity

+5.8%
average annual
GVA growth in screen since 2020/21

+11.7%
average annual
GVA growth in games since 2021/22

+14.6%
average annual
employment growth in games from 2016/17

2,764
employed
in the games industry 2024/25

+3.1%
average annual
employment growth in screen from 2016/17

66,080
employed
in the screen industry 2024/25

See Data sources overview and Appendix 1: Indicators, measures and sources for details of data sources and sample sizes.

Australia

Global impacts

$1.6b
total exports
from screen and games in 2023/24

+15.4%
average annual
export growth for games since 2016/17

$1.6b
total foreign
drama expenditure in 2024/25

$415m
royalty exports
from screen in 2024/25

50%
of audiences
in priority international markets agree Australian screen content gives them a positive impression of Australia and its people

50%
of audiences
in priority international markets agree Australian screen content has increased their interest in visiting

35%
of audiences
in priority international markets agree Australian screen content makes them interested in working, doing business or buying products

95%
of games
revenue received by Australian games studios comes from overseas

See Data sources overview and Appendix 1: Indicators, measures and sources for details of data sources and sample sizes.

Hot Potato: The Story of the Wiggles

Data sources overview

Screen Currency 2026 draws on a range of new qualitative and quantitative research delivered by multidisciplinary teams of researchers from 89 Degrees East, McAtamney & Advisors, Swinburne University, QUT, the University of Canberra and the University of the Sunshine Coast.

For further details of the research methods and data sources, see the component Screen Currency reports.

Audience insights

Screen

Australian screen audiences survey
Nationally representative survey of 2,404 Australians (weighted)

Screen audience forums
3-day online forums with 40 participants from targeted audience demographic groups

First Nations screen focus groups
3 focus groups with 10 First Nations participants

Contextual inquiries
14 home visits or online immersions with targeted audience demographic groups

ACMI intercepts
63 visitor surveys and discussions at the Australian Centre for Moving Image

Games

Australian video game players survey
National survey of 2,208 Australian video game players

Video game players focus groups
4 focus groups with 28 Australian video game players

Third party data
New analysis of Australian datasets from the 2025 Newzoo Global Gamer Study of 1,620 Australian video game players

For more information, see:

Audience Insights >

Industry insights

Industry and workforce survey
A survey of 765 screen and games practitioners and organisations

Screen and games industry interviews
32 in-depth interviews with experienced screen and games practitioners

Industry value chain
Developed based on existing research and stakeholder interviews

For more information, see:

Industry Insights >

Economic insights

Economic value analysis
New analysis of national accounts data

Workforce numbers
New analysis of ABS labour market and Census data

Workforce characteristics
New analysis based on Census and other data sources

Exports
New analysis of available data including ABS business and balance-of-payments data, and data from Screen Australia and IGEA

Screen production trends
New analysis of Screen Australia, ACMA and Australian Government data

Government support
New analysis of Cultural Funding by Government, Screen Australia and ATO data

For more information, see:

Economic Insights >

Global insights

International screen audiences survey
Questions in an Ipsos survey with 6,500 respondents in 8 markets (US, China, Germany, UK, Canada, India, Singapore and New Zealand, 500 or 1,000 in each)

International video game players survey
A survey of 1,610 respondents in 4 markets (UK, US, Canada and India)

Third party data
Additional analysis of the 2025 Newzoo Global Games market report

Online reviews and video responses
Analysis of 5,638 reviews and user-generated video responses for 13 screen and games titles on Letterboxd, IMDb, Steam, Common Sense Media, Rotten Tomatoes, YouTube and TikTok

For more information, see:

Global Insights >

Case studies

Supporting case studies
Case studies of 16 Australian screen and games titles, including interviews with producers

For more information, see:

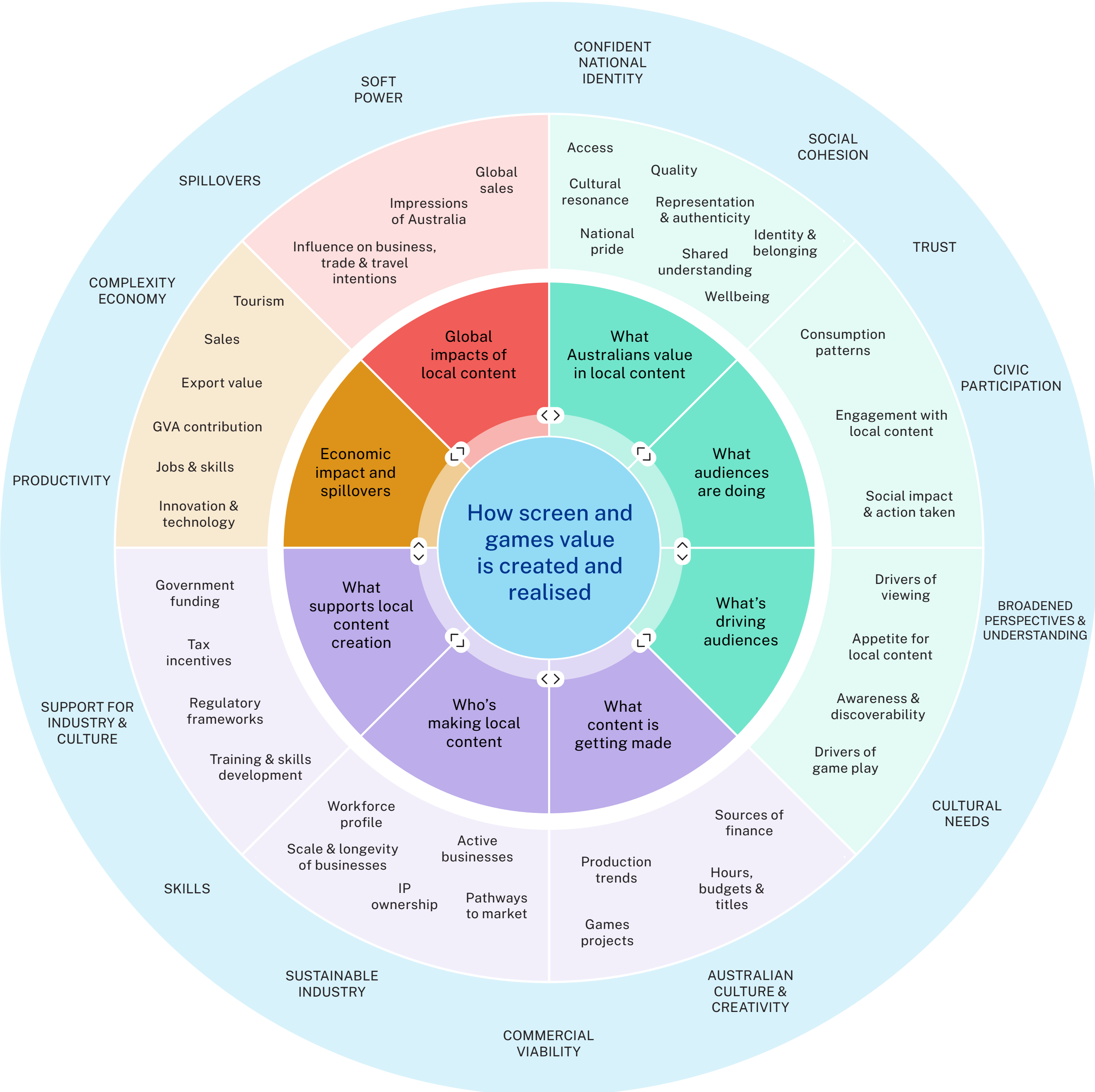
Case Studies >

Rosehaven

Screen Currency Value Framework 2026 – indicators

Figure 3 shows the Screen Currency Value Framework, including a map of the insights, indicators and outcomes discussed in this overview report. This is followed by a summary of findings against our Screen Currency 2026 measures. See Appendix 1 for further details on the Screen Currency indicators and measures, including data sources and sample sizes.

Figure 3: Screen Currency Value Framework: map of insights, indicators and outcomes



Source: Developed by The Gist for Screen Currency.

Screen Currency 2026 indicators and measures

Audience indicators

What Australians value in local content

Indicators	Screen measures	Games measures
1. Importance of access to local content	84% of Australians agree it's important for Australians to have access to local screen content	N/A. Focus groups expressed strong support for the continued development of Australian games
2. National pride & confident national identity	77% of Australians agree well-made screen content makes them feel proud to be Australian 78% agree Australian content contributes to our distinctive identity in the world 76% agree it represents who we are as a nation – our people, our humour & lifestyle	N/A. Focus groups expressed pride in local creative success
3. Cultural resonance	78% of Australians agree local screen stories help preserve & share our unique culture 71% agree screen stories connect them with Australia's past & cultural heritage 75% agree screen content ensures our stories are remembered for future generations	N/A. Country of origin is not usually a key component of game content
4. Quality	73% of Australians agree local content is well-made & as good as international 76% agree Australian stories are visually & creatively distinctive	N/A
5. Representation & authenticity	75% of Australians agree local screen stories reflect the diversity of Australian people & voices 72% agree they portray real issues & perspectives of Australians 70% agree they are an authentic portrayal of traditions & culture	61% of Australian video game players agree the games they play reflect people like them 62% agree games should reflect a wide range of cultures & backgrounds
6. Identity, belonging & social cohesion	67% of Australians agree local screen stories support feelings of belonging & connectedness 65% agree they make them think about their identity as an Australian 69% agree local screen stories help new Australians learn about Australian culture	37% of Australian video game players say socialising with others is one of the reasons they play video games

	Indicators	Screen measures	Games measures
What audiences are doing	7. Engagement with local content	35% of Australians watch more than 30% local content 66% watch more than 10% local content *(excluding sport and news)* 75% are interested in viewing more Australian screen content	60% of Australian video game players are unsure if they play Australian games Country of origin is not a feature of games engagement according to focus groups
	8. Social impact & action	71% of Australians take action after viewing local content (e.g. seeking information, changing behaviour, or deepening engagement with issues raised) 60% agree Australian content inspires them to learn more about themselves, their country, and places, stories or experiences shown 59% relate to Australian stories and often share or discuss them socially	19% of Australian video game players are actively involved in games communities 16% often post about video games
What's driving audiences	9. Drivers of engagement	72% of Australians watch to relax or unwind 69% watch for entertainment 36% watch to learn new things or stay informed	87% of Australian video game players play to have fun 76% play to pass the time 72% play to de-stress 51% play to improve skills
	10. Discoverability	36% say it is easy to find local screen content	N/A. Country of origin rarely travels with games at the point of discovery

Industry indicators

	Indicators	Screen measures	Games measures
What content is getting made	11. Production trends	\$3.0b total production expenditure in 2024/25 +11.1% increase from 2023/24 403 hours of adult TV drama broadcast on average per year 2020–24 -12.4% decrease from 2000–19 65 hours of children's TV broadcast on average per year 2020–24 -42% decrease from 2000–20 386 hours of documentary programming broadcast on average per year 2021–24 -3.7% decrease from 2009–20 40 drama feature film titles produced on average per year 2021–24 +43% increase from 2000–20 24 theatrical documentary features produced on average per year 2016–2024 +243% increase from 2009–2015	376 project applications to Screen Australia games funds in 2024/25 +59% average annual increase since 2021/22

	Indicators	Screen measures	Games measures
Who's making local content	12. Sources of finance	**Current screen projects average % of financing:** 23% government funding 16% client fees/commissions 12% broadcaster or platform licence fees 11% own investment *Note findings are directional due to sample size.*	**Current games projects average % of financing:** 4% government funding 35% client fees/commissions 29% own investment *Note findings are directional due to sample size.*
	13. Pathways to market	**Typical screen project distribution arrangements:** 45% of businesses use international distributor/sales agent 39% use Australian distributor/sales agent 25% use direct deal with platform (e.g. SVOD) 23% use self-distribution/publishing 14% use client-delivered *(multiple options allowed)* *Note findings are directional due to sample size.*	**Typical games project distribution arrangements:** 33% of businesses use an international distributor/sales agent 17% use an Australian distributor/sales agent 25% use direct deal with publisher (e.g. app store) 67% use self-distribution/publishing 58% use client-delivered *(multiple options allowed)* *Note findings are directional due to sample size.*
Who's making local content	14. IP ownership	**Equity/IP ownership at first release (typical project):** 39% of screen businesses own all 16% of screen businesses own some 45% of screen businesses own none **Average earnings from IP for screen businesses in 2024/25:** 45% from own new IP 26% from own existing IP 29% from others' IP *Note findings are directional due to sample size.*	**Equity/IP ownership at first release (typical project):** 45% of games businesses own all 15% of games businesses own some 40% of games businesses own none *Note findings are directional due to sample size.*
	15. Workforce profile	**Of screen industry employees:** 73% hold a bachelor's degree or higher 16% of income is earned outside screen 46% in current role for ≤ 2 yrs	**Of games industry employees:** 83% hold a bachelor's degree or higher 27% of income is earned outside games 48% in current role for ≤ 2 yrs
	16. Growth in "active" businesses	**Creation and production:**[5] +7% 10-year average annual growth to 2023/24 **Distribution, broadcast, streaming & exhibition:** -1% 10-year average annual growth to 2023/24	**Digital games:** 188 businesses in 2021/22 +15.3% average annual growth from 2015/16
	17. Scale & longevity of businesses	**Screen businesses 2024/25:** Average 28/median 4 employees Average 35/median 5 contractors 63% operating ≥10 years 25% operating ≤ 5 years	**Digital games businesses 2024/25:** Average 17/median 4 employees Average 21/median 4.5 contractors 37% operating ≥10 years 51% operating ≤ 5 years

5 Includes post-production.

	Indicators	Screen measures	Games measures
What supports local content	18. Government	**Direct federal & state government support:** $387.6m in 2023/24 +7.9% average annual growth since 2015/16 **Indirect federal government support:** $1.1 billion in 2024/25 +7.6% average annual growth since 2015/16	N/A. Federal direct support includes a $12m, 4-year allocation from 2023 through *Revive*, invested in the Games Production Fund, the Emerging Gamemaker's Fund & Future Leaders Delegation Indirect support includes the Digital Games Tax Offset

Economic indicators

	Indicators	Screen measures	Games measures
Economic impacts	19. Employment	66,080 employed in screen industry 2024/25 +3.1% average annual growth since 2015/16	2,764 employed in games industry 2024/25 +14.6% average annual growth since 2015/16
	20. GVA contribution	$10.82b GVA generated by screen activity in 2023/24 +5.8% average annual growth since 2020/21	$317m GVA generated by games in 2023/24 +11.7% average annual growth since 2021/22

Global indicators

	Indicators	Screen measures	Games measures
Global impacts	21. Global sales	$1.3b total screen exports in 2023/24 +4.7% average annual growth since 2008/09 $415m screen royalty exports in 2024/25 21% of financing for current screen projects came from overseas	$323m total games exports in 2023/24 +15.4% average annual growth since 2016/17 29% of financing for current games projects came from overseas
	22. Global impact	50% of audiences in priority markets agree Australian screen content gives them a positive impression of Australia and its people 35% agree it makes them interested in working, doing business or buying products from Australia 50% agree it has increased their interest in visiting	95% of games revenue received by Australian games studios comes from overseas

Discussion of insights

The following chapters of this overview report integrate insights from across the Screen Currency studies, structured around the Screen Currency Value Framework.

Measures are featured where they are relevant to the story and where data are available.

The discussion begins at the centre of the framework: how screen and games value is created and realised at the intersection of industry and audiences, and where value flows in the ecosystem – including where energy and investments enter the ecology, and where they are lost.

We then dive into audience insights: what Australians value in local content and ways it supports national outcomes such as a confident national identity and social cohesion; **what audiences are doing** and ways their engagement can support trust, civic participation and social impact; followed by **what's driving audiences** amidst the crowded market of our contemporary attention economy – which has outcomes for the commercial viability and sustainability of Australian screen content and games.

Next, we explore production trends and industry insights: what content is getting made and the outcomes of production trends for Australian culture, creativity and audiences; **who's making local content**, and the dynamics and challenges of industry in adapting to change and achieving sustainability; and **what supports local content creation**, including government support for industry and culture.

We then discuss economic impacts and spillovers, followed by global impacts – including the role of screen and games in generating soft power. These sections explore how screen and games contribute to a range of social, cultural and economic outcomes in a complexity economy: one in which specialised knowledge, creativity, technology and collaboration across skilled industries generate value far beyond the direct act of production.

Mystery Road

How value is created and realised

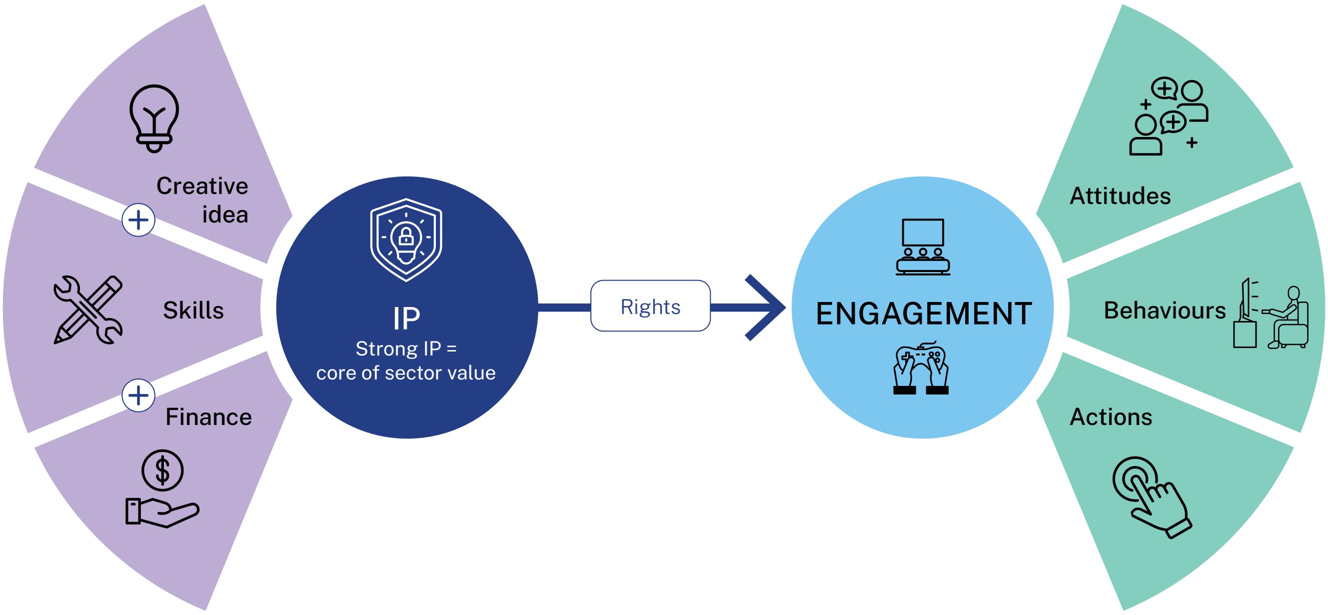
Value Framework

Screen Currency's audience research confirms that stories – and storyworlds – are powerful. Our audience report reveals that creative and culturally resonant stories and cultural experiences can transform, challenge or affirm – and offer various forms of value. When they are timely and well-told, they can capture a zeitgeist and have real-world impact on hearts, minds and outcomes. Our case studies describe how substantial value can be generated through activity across the whole value chain, including through skills development and transfer, innovation, and location-based economic spillovers. The case studies evidence how unique forms of value and appeal are produced through the way programs and games are made – part of what makes them special, authentic and resonant.

Case Studies

The Screen Currency studies describe how this value is crystallised in two main elements: intellectual property (IP) and audience engagement.

Figure 4: Value realisation through IP and audience engagement



Source: The Gist for Screen Currency.

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

The value in IP is most commonly translated into rights – copyright monetised through box office, broadcast or subscription video on demand (SVOD) licences, international sales, formats and remakes, technology/platform bundles and/or the right to sell or rent the game or program to consumers.

IP can have both immediate and longer-term, or “long-tail” value. The ways IP is developed, managed and licensed reflect efforts to retain and extract value from IP as a central currency of the sector.

Engagement: in its many forms, across many devices, is the outcome that all activity around screen and games production are oriented towards. It is both a source of revenue (e.g. subscriptions, advertising or games purchases) and a sign of the relevance, resonance and creative excellence of cultural product.

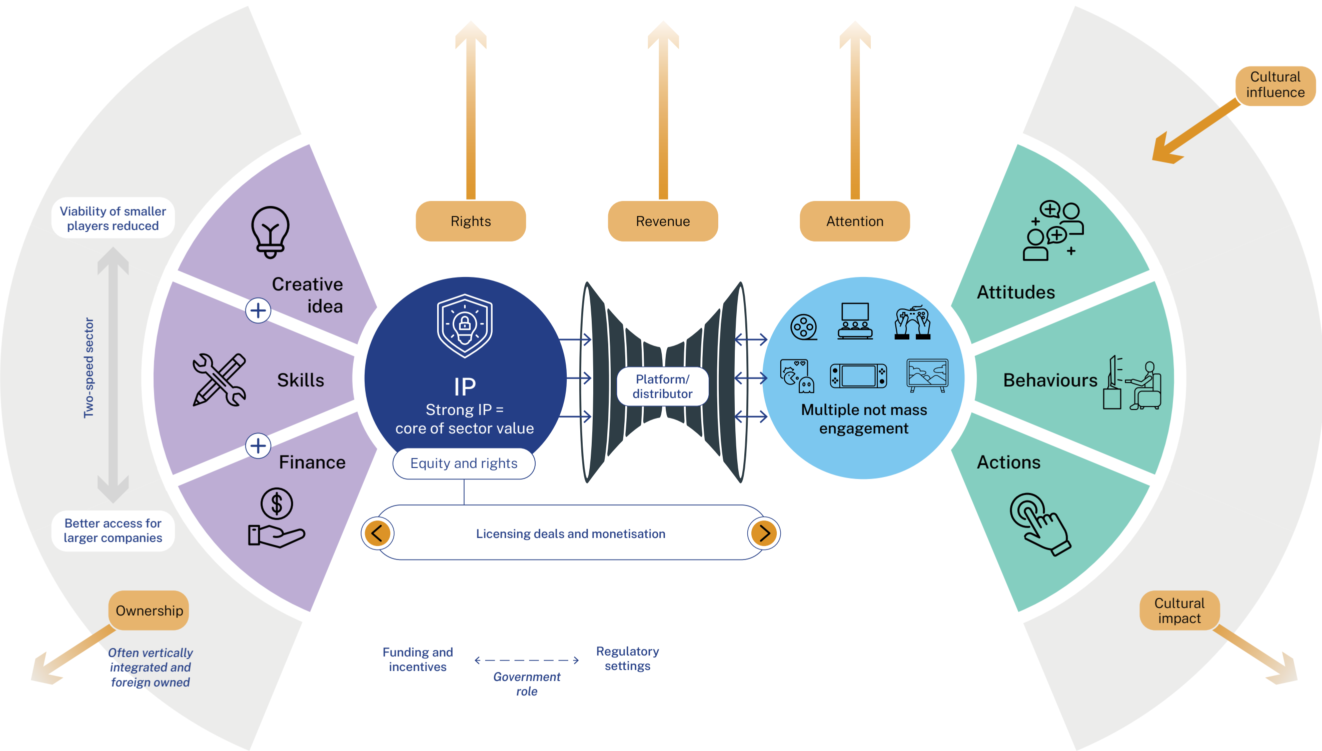
Engagement is a product of the attitudes, behaviours and actions of audiences. It is both a measure of performance in the attention economy and a source of public value (as a shared “public good” that supports a range of non-economic benefits).

Much of the contemporary industry has been driven by the imperative to maximise, capture and – where possible – monetise engagement.

An ecosystem lens of industry includes where energy and investments enter the ecology, and where they are lost (in ecology, energy and energy losses are understood as "trophic flows"[6]). Figure 5 shows how the twin forms of value in the sector – IP rights and engagement – are funnelled through the nexus of distribution, affording substantial influence and dealmaking power to fewer gatekeepers in a concentrated market.

Global platforms and distribution networks have expanded the ability of Australian screen and games businesses to reach audiences, generate revenue and participate in international markets. Within that ecosystem, IP rights, audience attention, revenue and data increasingly concentrate, diminishing the control and long-term value of the IP developed by Australian businesses and creators. The opportunity is to strengthen their position – ensuring the benefits of success are shared more broadly across the local industry.

Figure 5: How energy and investments move into and out of the screen ecology



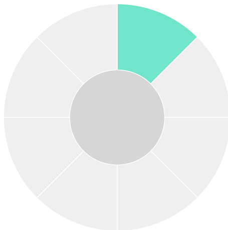
Source: The Gist for Screen Currency.

These conditions are not unique to Australia. Globally, the screen and games sectors are navigating rapid change as streaming, digital platforms and changing audience behaviours reshape content discovery, distribution, monetisation and rights ownership.[7] Global media and content industries are continually disrupted by technological developments, vertical integration and the consolidation of business ownership – factors that are increasingly determining what gets made and how audiences can access it. Screen Currency provides insights into how the global and the local interact, in the context of the local incentives, capabilities and industry dynamics informing the production of Australian content and its reception by audiences.

6 For further exploration on how ecologies of culture can be understood, see David Maggs 2021, *Art and the World After This*, Metcalf Foundation.

7 Vertical integration is a structural feature of commercial activity whereby a number of parts of the value chain of a product or service is owned or controlled by the same enterprise. For example, distribution companies acquiring production businesses, giving them greater control and market power; or streaming services combining the steps from commissioning to audience measurement within a single platform.

What Australians value in local content



Audiences

Importance of access to local content

Screen

Our national survey of Australians found the great majority agree it's important that Australians have access to local screen stories (84%) and 3 in 4 are interested in engaging more (75%). This is despite most Australians (60%) watching less than 30% local content (excluding news and sport) across their media diet, and 29% watching less than 10% local content.

Engagement is not the only measure of value – our research found substantial evidence of "non-use" value from local screen content (the value people place on the existence or preservation of something, even if they are not directly using it). The vast majority of Australians acknowledge the broader social and cultural benefits of Australian screen content, including its role in engendering shared understanding and the preservation of stories for future generations.

> "Australian screen content shows our own culture, places and humour in a way international content can't. It reflects real Aussie life and helps us see ourselves on screen."
>
> – Audience forum participant, CALD male, parent, aged 44–65, Vic

> "We have different stories to tell that are worth telling."
>
> – Visitor at the Australian Centre for Moving Image (ACMI), Melbourne

Games

In games, the landscape is more globally skewed. Games distribution mechanisms and communities of players have always been international.

Within this environment, country of origin rarely travels with games at the point of discovery. Our survey of Australian video game players found that only 50% could identify the case study games[8] as Australian and 60% were unsure if they play Australian games.

Despite this limited awareness, Australian players express strong support for the continued development of Australian-made games. Focus group participants described feeling good about playing Australian games – if players know a high-quality game is Australian, this is considered a "bonus."

> "If it's a good game, that should stand on its own. The Australian part just makes it better."
>
> – Video game players focus group participant

> "When I realised this game was created and based in Brisbane (where I live) I fell in love with this game immediately. Seeing ... things that are associated with Australia where I am at the moment makes me smile every time I play this game."
>
> – Online review of *Unpacking*

8 *Hollow Knight: Silksong* created by Team Cherry, *Untitled Goose Game* created by House House, and *Unpacking*, created by Witchbeam.

84% of Australians

agree it's important for Australians to have access to local screen content

Australian video game

players express strong support for the continued development of Australian games

Cultural resonance and a confident national identity

Screen

Audiences describe content as feeling "Australian" when it feels authentic and is grounded in lived experience and recognisable places, people and social interactions. This was evident across the qualitative research phases of our screen audience study, including the First Nations focus groups.

Distinctive markers include accents, language, humour, scenery, voices and talent. Audiences place value on authenticity: real characters, recognisable settings, and stories that reflect everyday Australian life in all its diversity.

See *Mystery Road* case study:

Case Studies

Culturally resonant content can help build national pride and a confident national identity. More than 3 in 4 Australians say well-made screen content makes them feel proud to be Australian (77%) and agree Australian content contributes to our distinctive identity in the world (78%).

Audiences are finely attuned to false notes and annoyed by content they perceived to be "trying too hard" to appear Australian with exaggerated portrayals. Audiences respond most positively when "Australianness" emerges organically from story and character.

Australians recognise that local screen stories offer forms of cultural value that international content cannot replicate. In our audience forums, participants described Australian content as culturally grounding, socially relevant and emotionally resonant. Our Australian screen audiences survey found the majority of Australians agree that local screen stories connect them to Australia's past and cultural heritage (71%) and help preserve and share our unique culture (78%).

The cultural resonance and value of local content can vary between individuals, across contexts and over time, informed by life-stage or lived experience. For example, audience forum and contextual inquiry discussions highlighted that parents of young children prioritise local children's TV as a source of cultural transmission – to ensure children are immersed in local stories, accents and cultural references. Our survey found 3 in 4 parents of dependent children agree that Australian screen content helps provide positive role models for Australian children as they grow up (75%), higher agreement than for respondents overall (70%).

See *Bluey* case study:

Case Studies

77% of Australians agree well-made screen content makes them feel proud to be Australian

78% agree Australian content contributes to our distinctive identity in the world

71% agree screen stories connect them to Australia's past and cultural heritage

78% agree screen stories help preserve and share our unique culture

Programs can have multiple forms of value, which can be deepened over time. For example, *First Australians*, a documentary series first broadcast in 2008 that tells the history of Australia's early colonisation from First Nations perspectives, was seen by audiences (including survey respondents and online reviewers) as holding ongoing historical value, social impact and ability to generate ethical reflection.

> **"This documentary is really the first time that mainstream Australia has been exposed to what happened over the last 200 years to the Aboriginal people of this land... I hope more people watch this documentary."**
>
> – *First Australians* review, 21-year-old First Nations reviewer, Whirlpool Forum

See *First Australians* case study:

Case Studies

Some programs can lose relevance while others can increase in value, resonance and the power of nostalgia. Nostalgia was a recurring theme in discussions of cultural value, particularly among older research participants who referenced programs they watched in their childhood and early adulthood as sources of comfort and familiarity. Older viewers (aged 65+) – who would recall a time before local content on our screens began to benefit from government quotas and support – are more likely than younger Australians to value local screen stories.

Games

Australian video game players in our focus groups had clear ideas about what constitutes an Australian game: they expected Australian games to be made in Australia, by Australians.

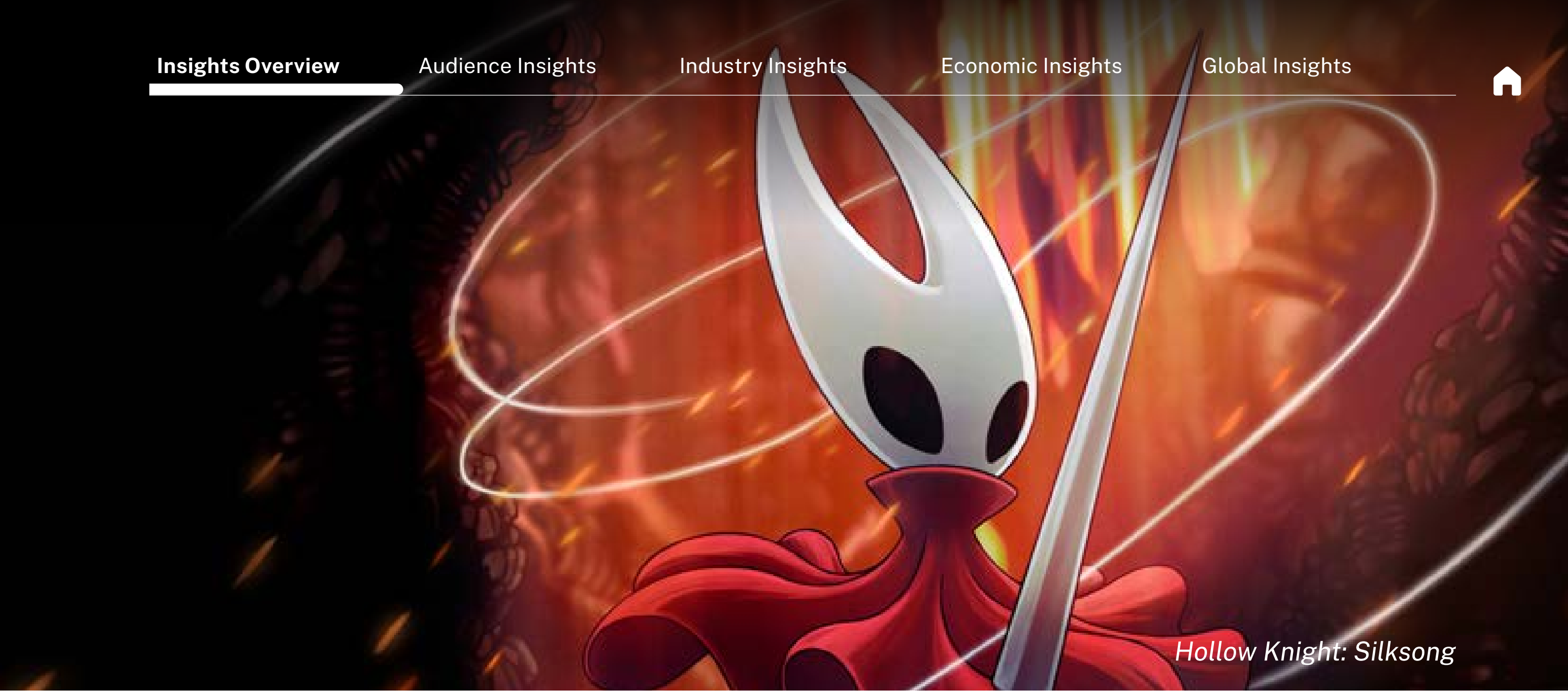
Australian players express pride in local creative success. Some focus group participants described feeling good about playing Australian games and supporting local developers, framing this support as an expression of broader cultural values rather than a deliberate purchasing strategy.

Support for the local industry was not framed solely in terms of individual consumption. Focus group participants linked the success of Australian games to conditions of care, time and funding support, expressing concern that under-resourced studios may struggle to realise their creative ambitions. In this sense, support for the local industry reflects a form of non-use value: players place importance on the existence and sustainability of Australian game development even when this does not directly shape their immediate play choices.

Rather than a single defining aesthetic, participants described Australian games as being marked by creative risk-taking and originality. Many linked this to a perceived willingness to experiment with unconventional ideas, mechanics or narratives, positioning Australian games as offering "something different" rather than competing directly with large-scale international blockbusters.

> **"...the innovative Australian or native skill set, and our ability to sort of think outside the box... It gives us a unique advantage in regards to doing technically excellent things or different storylines or different or more unique art styles."**
>
> – Video game players focus group participant

Humour emerged as a particularly distinctive marker. Participants frequently described Australian games as having an "oddball," self-aware or tongue-in-cheek sensibility, often expressed through understated comedy or playful subversion of genre conventions. This humour is seen as distinctly Australian in its sensibilities, resonating with audiences through tone rather than overt national symbolism.



Hollow Knight: Silksong

Quality

Screen

Perceptions of quality, including the credibility and craft of writing, the aesthetics of execution and the calibre of acting were often described by audience research participants as a precondition for entertainment and other forms of value.

Australians' perceptions of the quality of Australian screen content are strong. The survey found that around 3 in 4 agree Australian screen content is creative, original and enjoyable (77%), visually and creatively distinctive (76%) and as well-made as international content (73%).

Screen Currency's audience research found that screen stories need to be well-made, but not necessarily high budget, to engage viewers. Participants consistently emphasised that believable stories matter more than spectacle, and that lower-budget productions can be perceived as high quality when they feel genuine and well observed. However, programs that are not well-made, with unconvincing writing or weak acting, were seen to undermine authenticity and create barriers to engagement.

Games

Our video game players research, and analysis of online reviews, confirmed that players are discerning in the ways they critique and analyse games. To our focus group participants, games do well and are fun to play because they were developed with care and attention to detail. Players recognise that this requires support and funding – a sentiment linked to their strong support for the Australian video game industry.

> "It's just dependent on the funding, and how much they actually care about the game, that they're making, how much effort that they're going to put into it."
>
> – Video game players focus group participant

Online reviews of games reveal that players are highly attuned to the quality of the design and narrative, the aesthetics of the audiovisual style and the soundtrack.

See *Hollow Knight: Silksong* case study:

Case Studies

76%

of Australians agree Australian screen stories are visually and creatively distinctive

73%

agree local screen content is well-made and as good as international

Representation and authenticity

Screen

Our audience research made it clear that authentic representation matters. Audiences increasingly seek diverse and contemporary representations of Australia, and participants noted progress in representation on Australian screens. Our Australian screen audiences survey found the majority of Australians agree local screen stories reflect the diversity of Australian people and voices (75%), and that they portray real issues and perspectives (72%) and authentic depictions of traditions and culture (70%).

These expectations sit alongside a broader ambivalence about the idea of a single Australian identity: audiences increasingly recognise that Australia's cultural landscape is complex, diverse and evolving, and they want stories on their screens to reflect this complexity.

> "It tells our stories and challenges our understanding of what it means to be Australian."
>
> – Audience forum participant, male, parent with disability, aged 45–64, NT

> "I love that we are a diverse country and so one film or TV show can't really capture that."
>
> – Visitor at ACMI, Melbourne

Participants in our qualitative research, particularly from younger cohorts, revealed **a level of critical disengagement with many traditional portrayals of Australian identity** – dominated by "blokes in the bush."

> "I do recall seeing quite a lot of outback movies... the multiculturalism of our cities isn't really well noted in films. Feels like films mainly portray us as a kangaroo-filled desert."
>
> – Audience online forum participant, male, aged 25–44, WA

Audiences want to see Australian content move beyond stereotyped characters, storylines and settings. While audiences note progress in representation, the qualitative research phases surfaced appetite for a broader range of more sophisticated, contemporary and varied portrayals. *Heartbreak High* was frequently cited as an example of a program that does this well, including in online reviews.

> "Finally! The first accurate representation of Generation Z through a diverse cast. This series was a great way to address different social, ethnic, sexual/gender and neurodiverse issues within society."
>
> – *Heartbreak High* review, Rotten Tomatoes

See *Heartbreak High* case study:

Case Studies >

Authentic representation is particularly important for audience groups whose stories have been historically underrepresented or poorly told. First Nations focus groups cited authenticity as being central to engagement and social value, including culturally specific humour. Participants cited *Black Comedy* and *Mystery Road*, among others, as examples of what participants want to see more of: Aboriginal people represented in contemporary settings with agency and complexity.

> "[*Black Comedy's*] just funny. And you can see things like in your everyday life that you have to deal with...some of the comments and reactions...you can see and relate to a lot of it."
>
> – First Nations focus group participant, male, aged 25–44, SA

75%

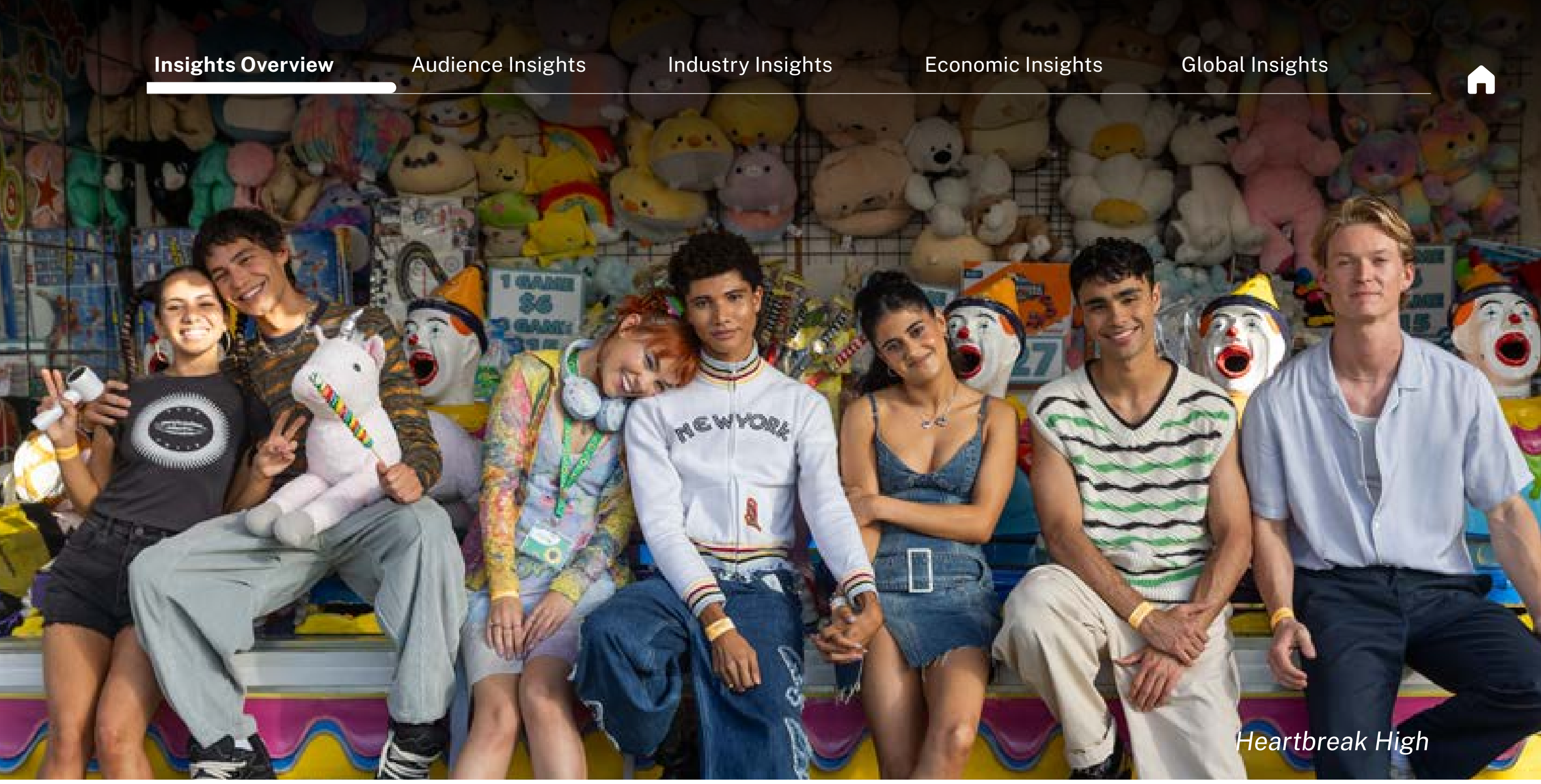
of Australians agree local screen stories reflect the diversity of Australian people and voices

72%

agree they portray real issues and perspectives of Australians

70%

agree they are an authentic portrayal of traditions and culture



Heartbreak High

Games

Representation and inclusion carry meaningful, though varied, significance for Australian video game players. Analysis of Newzoo data found nearly 2 in 3 players report feeling represented in the games they play (61%), suggesting that contemporary games broadly align with the identities, preferences or play styles of many players.

There is also support for diversity at a broader level: nearly 2 in 3 agree that games should reflect a wide range of cultures and backgrounds (62%), suggesting that inclusion is valued not only as a personal experience but as a wider cultural principle.

> “The queer rep[resentation] was amazing and something I didn’t expect to see.”
>
> – *Unpacking* review, Steam

See *Unpacking* case study:

Case Studies >

This sense of representation is not evenly distributed across the Australian player base. It is strongest among younger cohorts, with around two-thirds of Gen Alpha, Gen Z and Millennials expressing agreement, and declines with age. This pattern may reflect both generational expectations and the types of games different age groups engage with.

Representation can also influence behaviour. Almost half of Australian players (49%) say that inclusion and representation are important enough to affect whether they choose to buy a game. This influence is strongest among Millennials and Gen Z, suggesting that expectations around inclusive design could increase in relevance over time.

61%

of Australian players agree games they play reflect people like them

62%

agree games should reflect a wide range of cultures and backgrounds

Shared understanding and social cohesion

Screen

Screen content can support social cohesion by building empathy, connection, and shared understanding around complex issues of life experience and identity.

In First Nations focus groups, for example, multiple participants cited **First Nations-centred screen content as a tool to build cultural understanding**, educate others and spark real-world discussion in workplaces, within families and communities.

Similarly, culturally and linguistically diverse (CALD) research participants described how Australian TV shows could help **shorthand their experiences for friends from other cultural backgrounds.**

> “*Acropolis Now*. That’s my family. Growing up Greek, I could recognise those characters but also I could show my non-Greek friends, and they could understand a bit, this is what I have to live with!”
>
> – Greek Australian female, visitor at ACMI, Melbourne

This form of intercultural learning and exchange tends to flow in multiple directions. CALD audiences surveyed watch a higher level of Australian content: some use it to help them navigate and connect with aspects of Australian life. Our survey found almost 7 in 10 Australians agree local screen content helps new Australians learn about Australian culture and everyday life (69%), including 74% of CALD respondents and 78% of First Nations respondents.

> “It makes up a significant amount of my cultural learning.”
>
> – Australian screen audiences survey respondent, male, aged 55–64

Australian film and TV also fosters social cohesion by strengthening identity and belonging. Our survey found 2 in 3 Australians agree local screen stories support feelings of belonging and connectedness (67%) with similar levels of agreement across groups. Almost 2 in 3 Australians agree local screen stories make them think about their place and identity as an Australian (65%), including 3 in 4 First Nations respondents (74%).

Nuanced and varied portrayals of a range of Australian identities and experiences are seen as important to build empathy and connectedness. While a range of global “niche” content is now accessible, relatable representation of locally-grounded experiences was recognised in our audience research as something only Australian content can provide.

> “It is very important because it connects me to everything about Australia.”
>
> – Australian screen survey respondent, First Nations male, aged 25–44

> “It makes me feel part of a culture and community, teaches me about Indigenous culture and history.”
>
> – Australian screen survey respondent, female, aged 25–44

67%

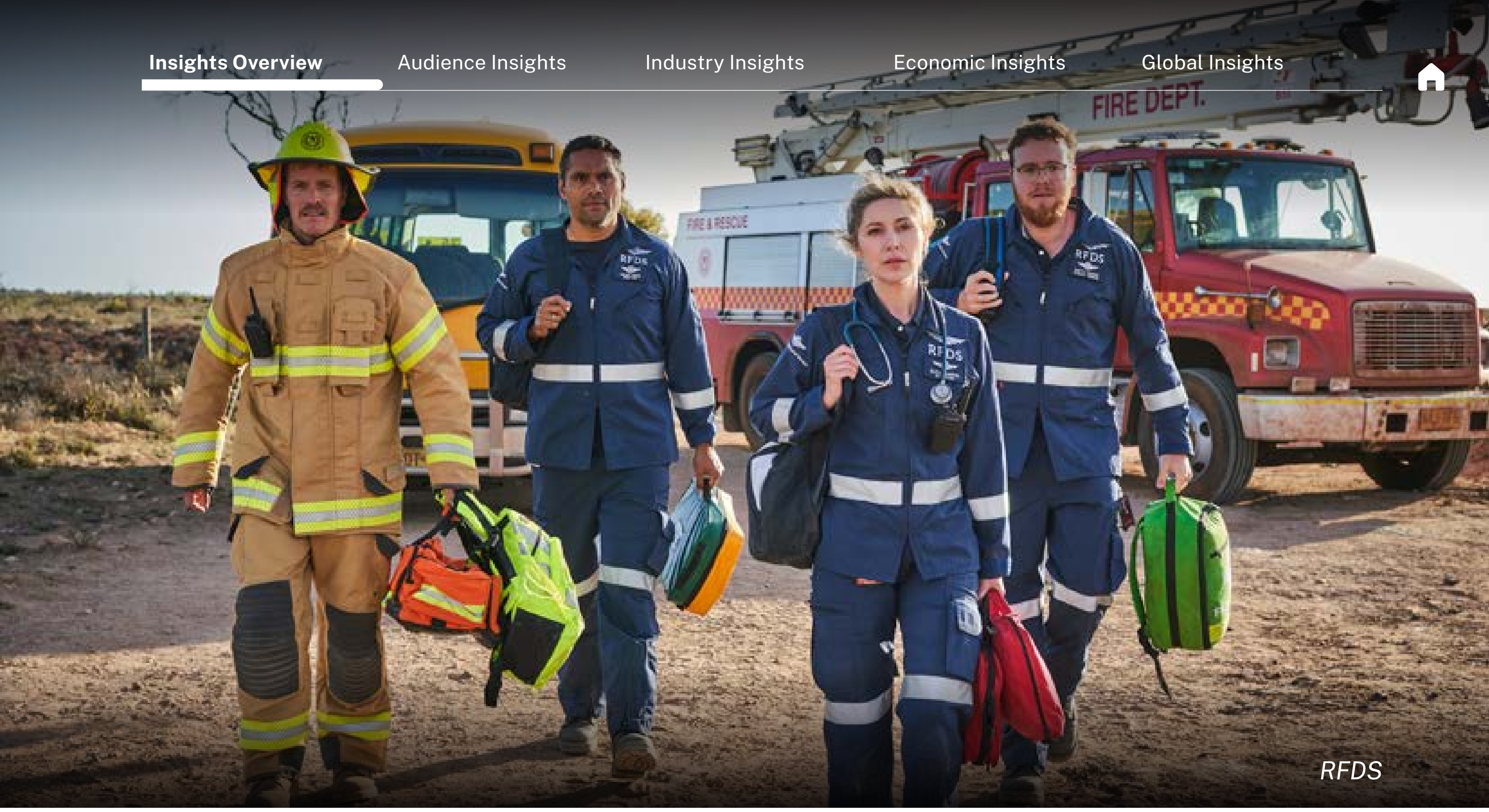
of Australians agree local screen stories support feelings of belonging and connectedness

65%

agree they make them think about their identity as an Australian

69%

agree local screen stories help new Australians learn about Australian culture



RFDS

Games

Games generate social value even when play is primarily solitary. While most Australian players prefer to play alone (63%), with social play representing a smaller share of behaviour, social connection remains part of the experience. Our national survey found that more than 1 in 3 players say socialising is one of the reasons they play (37%).

> "It could even change the dynamic of a game... if you play it by yourself you'll probably be terrified, but then you play with friends and it just turns into one big joke."
>
> – Video game players focus group participant

Social engagement with video games varies by age and mode of play. Among those who play with others, younger players are more likely to participate in cooperative or online play, with around two-thirds of players aged 18–34 engaging in collaborative play (67%), compared with 60% of those aged 35–64.[9] Younger players are also more likely to report forming new social connections through games. Older players, by contrast, more commonly use game play to maintain existing relationships with friends or family.

Social value extends beyond direct co-play. Our survey revealed that around 1 in 5 Australian players actively participate in video game communities (19%) and 16% regularly post about games, pointing to a broader layer of engagement through discussion, reviews and shared experiences. In this way, games can function as social touchpoints even when played alone, generating connection through shared reference and conversation.

9 Interactive Games & Entertainment Association (IGEA) 2025, *Australia Plays 2025*.

37%

of Australian video game players say socialising with others is one of the reasons they play

Emotional wellbeing

Screen

One of the most consistent impacts of screen content described by audiences is around relaxation and comfort. More than 7 in 10 Australians say they watch screen content to relax and unwind (72%), and almost 1 in 4 watch to deal with stress, anxiety or depression (24%) with agreement significantly higher for young Australians aged 16–24 and respondents who are First Nations, CALD, LGBTIQ+ or living with disability. This may reflect higher prevalence of stress, anxiety and depression among these groups, as well as the potential for screen content to be particularly impactful in reflecting their lived experiences.

While these insights relate to how Australians feel about all screen content, regardless of origin, qualitative research phases highlighted that **Australian screen content can play a particular role when it comes to watching for comfort and wellbeing given its familiarity and everyday relevance.**

Australian stories, settings, and voices resonate more deeply with local audiences, who value a broad spectrum of emotional experiences, including comfort, humour, warmth and familiarity, as well as emotionally challenging or thought-provoking narratives that prompt reflection, explore difficult issues, or enable Australians to see their lives reflected on screen.

> “We watched that [*Red Dog*] as a family... and the four of us were just an absolute mess... It’s our culture, and you don’t get that anywhere else, and a medium that shows you both human interactions and the beautiful landscapes, it’s just gold.”
>
> – Contextual inquiry participant, female, parent aged 45–64, Qld

> “When I see representations of my experiences on screen, it makes me feel valued, seen and understood.”
>
> – Audience forum participant, female, aged 16–24, ACT

Games

One of the most consistent impacts of video game play described by Australian players is its role in emotional regulation, relaxation and stress relief. Nearly 3 in 4 players say they use video games to de-stress (72%), with players frequently describing game play as a way to unwind, switch off and create distance from external demands.

> “It’s just a bit of escapism for me from my own life... I can kind of just jump into a different world and forget about everything completely.”
>
> – Video game players focus group participant

Participants also described broader emotional outcomes associated with game play. Focus group discussions highlighted feelings of accomplishment, confidence and control derived from mastering challenges or making progress within games, with these benefits more commonly raised by younger participants. Online reviews highlighted the immersive power and emotional impact of storyworlds.

> “I certainly bawled my eyes out, maybe because it was in a way daunting at times thinking of actually being the person cramming yourself into someone else’s tiny living space you now share... and then moving on... I cried hardest at the end, like a relieved, happy cry.”
>
> – *Unpacking* review, Steam

See *Unpacking* case study:

Case Studies

The Dark Emu Story

What audiences are doing

Audiences

Consumption patterns

Screen

Screen content plays a central role in the lives of Australians. More than 8 in 10 say it's important to their daily routine (85%) and 1 in 3 describe it as a very important part (33%).

Stakeholder insights from our industry study revealed that Australian screen businesses no longer have a clear, shared picture of what audiences are doing, with global streaming platforms holding a greater share of audience data. Given, it's commercial and strategic value, it is closely held. As a result, audience feedback loops to creators and funders have been reduced.

Seemingly endless content libraries are now offered on demand. This includes via:

- **free-to-air multichannels/broadcast video on demand (BVOD)**, such as ABC iview or 7Plus
- **subscription video on demand (SVOD)**, such as Netflix or Stan
- **advertising-based video on demand (AVOD)**, such as YouTube and TikTok
- **free ad-supported streaming TV (FAST)**, such as Tubi or Samsung TV Plus
- **transactional video on demand (TVOD)** where users pay-per-title, such as the Apple TV Store
- **direct purchase platforms**, such as Steam, Switch/Xbox or PlayStation for games.

Many of these platforms now offer a mix of these models, including via "Premium" offers.

SVOD streamers have grown substantially over the past decade and 5 dominate the Australian market:

- **Netflix** with 6.4 million subscriptions
- **Amazon Prime Video** with 5.1 million
- **Disney+** with 3.3 million
- **Stan** with 2.6 million
- **Paramount+** with 2.1 million.[10]

Our Australian screen audiences survey found Netflix is the leading platform used by Australians to watch screen content (69% of Australians), followed by commercial free-to-air TV (Channel Seven, Nine Network and Network Ten) (63%), YouTube (56%), catch-up TV on commercial free-to-air apps (7plus, 9Now, 10 Play) (43%) and public broadcast free-to-air TV (ABC, SBS, NITV) (39%). The rest of Australians' viewing is highly fragmented across on demand and Pay TV platforms (Table 1).

The ways Australians watch film and TV content varies across age groups. Netflix and YouTube dominate for younger viewers aged 16–24, while audiences aged 25–45 tend to spread their engagement across the widest range of platforms. Free-to-air TV viewing is far more popular among those over 45.

10 Telsyte 2025, *Australian Subscription Entertainment Study 2025*.

85%

of Australians say watching screen content is an important part of their daily routine

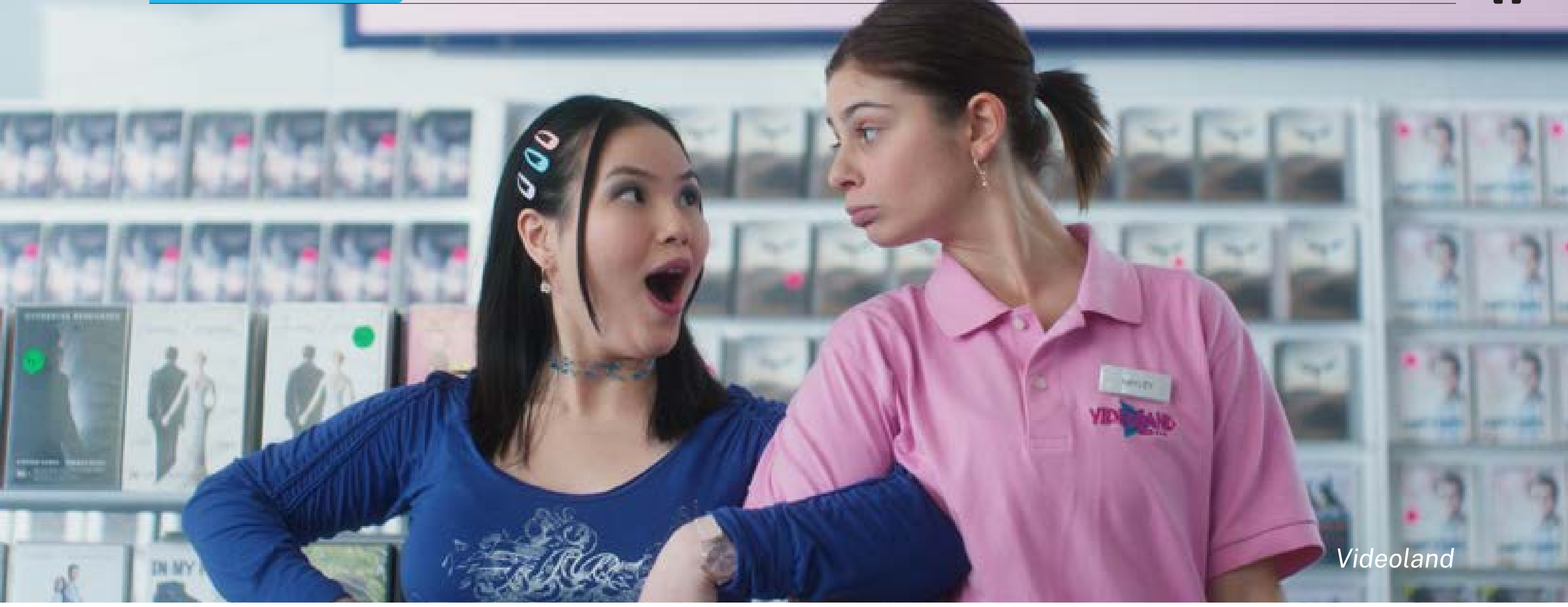


Table 1: Australians' platform usage by age

Platform %	16–24 years	25–34 years	35–44 years	45–54 years	55–64 years	65+ years	Total
Netflix	87%▲	82% ▲	79% ▲	73%	59% ▼	43% ▼	69%
Commercial free-to-air TV (7, 9, 10)	31% ▼	46% ▼	55% ▼	71% ▲	76% ▲	87% ▲	63%
YouTube	67% ▲	63%	65% ▲	64% ▲	49% ▼	33%▼	56%
Catch-up TV on commercial free-to-air apps (7Plus, 9Now, 10 Play)	29% ▼	34% ▼	43%	53% ▲	52% ▲	42%	43%
Public broadcast free-to-air TV (ABC, SBS, NITV)	15% ▼	28% ▼	33% ▼	46% ▲	45% ▲	59% ▲	39%
Disney+	54% ▲	56% ▲	46% ▲	33%	16% ▼	8% ▼	34%
Amazon Prime Video	37%	49% ▲	43% ▲	39%	28% ▼	20% ▼	35%
Catch-up TV on public broadcast TV (ABC iView, SBS On Demand)	10% ▼	20% ▼	36%	39% ▲	38% ▲	37% ▲	31%
Stan	30% ▲	28% ▲	19%	25%	23%	12% ▼	22%
Paramount+	18%	26% ▲	22%	21%	16%	8% ▼	19%
Pay TV (Foxtel, Foxtel Now, Fetch)	8% ▼	18%	15%	19%	19%	22% ▲	17%
Kayo Sports	14%	19% ▲	20% ▲	18%	13%	8% ▼	15%
Apple TV+	12%	23% ▲	22% ▲	13%	7% ▼	4% ▼	14%
Binge	15%	16% ▲	13%	13%	10%	6% ▼	12%
HBO Max	12%	15% ▲	11%	12%	9%	6% ▼	11%
Tubi/Pluto TV/ other free streaming services	2% ▼	4%	9%	10% ▲	8%	6%	6%
Optus Sport	4%	7% ▲	6% ▲	2%	2%	0% ▼	3%
Other	1%	1% ▼	1%	1%	3%	5% ▲	2%
Column n=	304	463	402	403	365	483	2,404

Source: Australian screen audiences survey, responses to the question: "Which types of television or video streaming services do you use to watch content? (Multi-select). Weighted base: n=2,404. Result is significantly higher (arrow up)/lower (arrow down) than the total at the 95% confidence interval.

Ipsos data confirms that viewing habits are most differentiated by generation and stage of life: 14–24 year old "digital natives" are more likely to spend time on social media video (around 11 hours per week) than free-to-air TV (3 hours), whereas those aged over 65 say they spend 13 hours a week watching free-to-air and around 7 hours on socials. The demographics are least differentiated on SVOD platforms, with most age groups watching 12–13 hours a week, except those aged 14–24 who say they watch around 8 hours.[11]

Participants in our audience forums and ACMI intercepts indicated that feature films can still play an important part of the picture and can create cultural "moments". Attendance data from the ABS *Cultural and creative activities* survey showed that cinemas were the most popular cultural venue or event for Australians in 2021/22.[12] However, industry data indicates that Australian box office has declined, with cinema attendance concentrated around international, big-budget action and "event" films.[13]

See *Furiosa: A Mad Max Saga* case study:

Case Studies

Games

Video game play is a hugely popular form of cultural participation. Newzoo data show more than 3 in 4 Australians report having played a video game in the past 6 months (78%). Of these players, nearly half (47%) say that games are a significant part of their life, including around 1 in 5 who feel this strongly (21% strongly agree or completely agree).

Video game play in Australia is characterised by breadth, with participation spanning age, gender, and life-stage. Younger Australians represent the largest share of players, with Gen Z accounting for 33% of players and Millennials 31%. However, participation remains substantial beyond early adulthood, with Gen X comprising 19% of players and Baby Boomers 5%. While younger Australians represent the largest share of players, the fastest growing cohort in 2025 aged 55-64 years.

Mobile gaming accounts for the largest share of time spent playing games in Australia (42%). In terms of time spent, mobile play is typically characterised by relatively short, casual engagement – most commonly 1 to 2 hours per week (27%).

11 Ipsos and IAB Australia 2026, *Ipsos iris Digital Landscape Report*: March 2026.
12 ABS 2023, *Cultural and creative activities*.
13 Screen Australia 2026, *Theatrical Review*.

78%

of Australians played video games in the past 6 months

Engagement with local content

Screen

Despite strong stated support for Australian content, consumption patterns do not align neatly with audience sentiment. While 84% of Australians recognise the importance of access to local stories, and 73% say Australian content is well-made and "as good" as international content, only 35% of Australians spend more than around a third of their viewing time watching local content (excluding news and sport). Discovery can be a barrier in a fragmented, platform-driven global marketplace (see Discoverability). First Nations and CALD respondents are more likely to watch more Australian content, as are older Australians.

The majority (75%) of survey respondents expressed an interest in watching more local stories. Generational differences are evident: older audiences are more likely to value local content and intentionally seek it out.

Content origin is not usually a decision driver. Participants in audience forums said they had "stumbled" across the last piece of Australian screen content they had enjoyed, and most had never thought about the amount of Australian screen content they consumed.

> "I just watch what interests me but would probably watch more Australian if it was available and interested me."
>
> – Audience forum participant, LGBTIQ+ female with disability, aged 65+, NSW

Across the qualitative research, audiences reported that **Australian content is often recognised retrospectively.** They described a process of discovering content, enjoying it, working out its origins, then feeling pleasantly surprised or proud. **"Australianness" added value once entertainment and engagement thresholds were met.**

Games

For video games players in Australia, the country of origin of games is not a strong driver of preference, although some said that knowing a game was local would add some incentive to play or purchase, if they already had an intention to do so.

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

See *Unpacking* case study:

Case Studies

Only 13% of Australian video games players surveyed stated that they played Australian games, although 60% were unsure if the games they played were Australian. In focus groups, many said they could not identify with certainty where their favourite games were made as they do not think about it much. This reflects the global nature of games distribution and marketing. The majority of focus group participants said the provenance of games does not play a significant role in their choices, although it may enhance the experience as a "value add" if they knew a game they enjoyed was Australian.

> "I don't think I necessarily go out of my way to find out where it's from. But if I hear that it's an Australian game, I do pay more attention, because I like to kind of support the arts wherever I can."
>
> – Video games player focus group participant

35%
of Australians watch more than 30% local content

66%
watch more than 10% local content *(excluding news and sport)*

75%
are interested in watching more

60%
of Australian video game players are unsure if they play Australian games


War on Waste

From viewing to civic participation and social impact

Screen

Screen Currency's audience research found that value derived from screen content can be both highly personal and relational, produced collectively. Audience forums and online review analysis confirmed that programs can play a social role: crystalising an issue, educating the community, normalising representation or inspiring action.

Our study highlights that, while viewing may be increasingly individual, its outcomes are social. Even as our forms of engagement have moved away from a shared screen to multiple forms of engagement, across personal devices and viewing profiles, research participants still articulated a sense of collective value from screen content and its ability to generate shared meaning and common reference points, which promote better mutual understanding. The audience survey found 6 in 10 Australians agree Australian content inspires them to learn more about themselves, their country, and places, stories or experiences shown (60%) and that they relate to Australian stories and share or discuss them socially (59%).

Social impact is now more likely to be built through many stories rather than a single national narrative. It is a fertile environment for content that appeals to small, niche audiences, and for sub-genres and different kinds of storytelling across different platforms and screen environments.

Audience forum participants reiterated that **content can spark discussions that reach far beyond the people who originally consumed it.**

> **"Even if content isn't enjoyed by millions of people, I think it only matters that it achieves its purpose, like adding a new perspective, retelling history, or starting a discussion."**
>
> – Audience forum participant, male with disability, aged 16–24, SA

60%

of Australians agree Australian content inspires them to learn more about themselves, their country, and places, stories or experiences shown

59%

relate to Australian stories and often share or discuss them socially

71%

of Australians take action after viewing local content (e.g. seeking information, changing behaviour, or deepening engagement with issues raised)

Analysis of online reviews and video responses found certain titles attract passionate audience engagement that may be disproportionate to their commercial or critical success. The strong response to *Heartbreak High* on TikTok is an example that shows its strong resonance among young culturally diverse people globally with clips from the show attracting hundreds of thousands of likes and comments in multiple languages.

It is evident that engagement with screen content does not end when the credits roll. Our audience insights describe the role that resonant, well-told stories can play in inspiring further action as a powerful source of community engagement and connection.

71% of Australians have taken some action after viewing local content, such as learning more about the topic or story featured (36%), sharing or recommending the program to others (27%), visiting a place or location featured (22%), or being inspired to change something in their daily lives (21%). **More than 1 in 10 Australians have been inspired to get involved in social or community issues after viewing Australian screen content** (12%).

Analysis of online reviews revealed that impact does not result from all local content, it has to resonate personally. It can make viewers want to be better parents (like *Bluey*), more eco-conscious (*War on Waste*) or better informed about our history (*First Australians*). The analysis identified more than 40 different ways that audiences use or respond to Australian content.

> “*Bluey* helped me want to be a good dad in a world that seemed determined to make me regret being a Dad.”
>
> – *Bluey* online review, Letterboxd

> “Going to contact my council to see if they'd be willing to start picking up food scraps.”
>
> – *War on Waste* review, Reddit

Viewing can lead to real world impacts – with tangible attitudinal and behavioural impacts at the level of individuals, communities and systems.

See *War on Waste* case study:

Case Studies

Documentary Australia – an organisation that has facilitated over $50 million of philanthropic funds to support documentary projects since 2008 – has developed a **Documentary Monitoring & Evaluation Framework**[14] to “shift beyond the focus on film release and reach metrics, to capture the changes that occur when powerful documentaries are used strategically as tools for engagement and action.”

This framework recognises a range of outcomes and impacts, including increased public engagement with the issues covered in the film, funds raised for social and environmental initiatives, improved educational outcomes and contribution to systems change. It supports filmmakers to capture evidence for the various ways documentaries contribute to social change.

These might include, for example:

- screenings with key stakeholders and target communities
- post-screening discussions and fora
- increased engagement with campaigns
- funds raised
- aligned educational programs and participation rates
- behavioural change post viewing.

14 Documentary Australia, Impact and Evaluation.

Participants in audience forums and in-depth interviews described discussions around content that can range from politically or culturally significant topics – like racism, domestic violence or mental health covered in drama or documentary programs such as *Mystery Road*, *Heartbreak High* or *In My Blood It Runs* – **to less weighty themes in lighter entertainment programs**. Programs like *Married at First Sight* and *Love Island* can also function as shared social currency – enabling conversation, bonding, and cross-platform interaction (e.g. WhatsApp chats) that extend beyond the screen. They can also surface important social conversations about, for example, gender and social norms.[15]

See ***Mystery Road*** **case study:**

Case Studies

Games

For over a third (37%) of our survey respondents, socialising with others is a key motivating factor for playing video games. Social play of video games was described by focus group participants as an enjoyable way to connect with others.

Australian players also engage with social interaction around game play: 19% are actively and frequently involved in games communities and 16% say they participate in reviewing or commenting on games.

Parents in the video games focus groups said they enjoy playing with their children as it means they can engage in play while also spending time with their family. Similarly, 89% of parents in the *Australia Plays* study described playing video games with their children to connect as a family.[16]

See ***Untitled Goose Game*** **case study:**

Case Studies

Engagement in game play is extended into a range of social interactions, including watching others play games (54% of players surveyed for Screen Currency watch esports at least occasionally) and coming together to discuss, critique and recommend games.

15 See for example, Baird J 2026, "Misogyny at first sight but I'm glad MAFS gave toxic Tyson a platform," *Sydney Morning Herald*.

16 Interactive Games & Entertainment Association (IGEA) 2025, *Australia Plays 2025*.

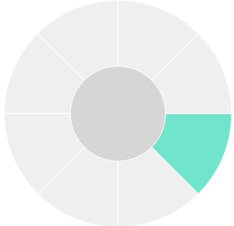
19%

of Australian video game players are actively involved in online communities

16%

regularly post about video games

What’s driving audiences?



Audiences

Drivers of engagement

Screen

Screen Currency evidences that the value Australians place on local stories is, at times, at odds with how they spend their viewing time. Most Australians engage with screen content for relaxation (72%) or entertainment (69%), while a smaller proportion are driven by a desire for learning or information (36%).

The qualitative research made it clear that what individuals find entertaining can be deeply personal and differs between and within demographic groups, generations and according to personal preference and mood. These drivers do, however, convey **a shared desire for ease that may be at odds with a committed active search to find local content.** The research highlighted that direct search by country of origin, Australia or otherwise, is rare.

> “It adds interest for me if it is Australian, but I don’t actively seek it out because of it. The content must stand on its merits.”
>
> – Audience forum participant, male with disability, aged 65+, NSW

> “Normally, I like the big, popular shows that come out on Netflix that everyone’s talking about… I just want to know what it’s about.”
>
> – Contextual inquiry participant, 22-year-old student, Vic

The study also highlights that entertainment is not only found in light or escapist material. Audiences value a broad spectrum of emotional experiences, including comfort, humour, warmth and familiarity, as well as emotionally challenging or thought-provoking narratives when they feel authentic. This was a particular finding from the qualitative research phases. While many viewers return to familiar Australian content for comfort, relaxation and a sense of place, at other times they seek content that prompts reflection or explores difficult issues, provided it remains grounded in credible storytelling. In this sense, **entertainment does not override or cancel out cultural or social value; rather, it serves as the gateway through which those forms of value are accessed.**

> “Australian screen content shouldn’t just be entertaining. Maybe it might make us feel uncomfortable or be challenging to watch. It has to be inclusive and equitable.”
>
> – Contextual inquiry participant, young professional female migrant, SA

Analysis of online reviews and video responses identified more than 40 different ways that audiences use Australian content, including for self-education, parenting support, comfort viewing and emotional catharsis. These multiple, rich uses can be understood as part of the personalisation of media, whereas preferences around entertainment and relaxation remain a threshold for many.

72%
of Australians watch to relax or unwind

69%
watch for entertainment

36%
watch to learn new things or stay informed

Starwisp Hyperdrive

Games

Australian video game players most commonly cite having fun, passing time and relieving stress as their reasons for playing video games. The overwhelming majority of survey respondents reported that they play because it is fun (87%), highlighting the appeal of games as a form of entertainment.

76% are motivated by the desire to pass the time, using the flexibility of games to fill in the commutes, queues and downtime in daily life.

> **"It's just a bit of escapism for me from my own life… I can kind of just jump into a different world and forget about everything completely."**
>
> – Australian video game players focus group participant

Games also play an emotional role. A significant share of players turn to games to de-stress (72%). Many focus group participants said they play video games to unwind from responsibilities such as work or caring for children. Half of Australian players play to improve skills (51%).

87%

of Australian video game players play to have fun

76%

play to pass the time

72%

play to de-stress

51%

play to improve skills

Awareness and discoverability

Screen

This has been described as TV's "era of plenty."[17] Global studies show audiences tend to "love" the choice and access provided by streaming services.[18] This abundance does, however, also generate choice fatigue or overload and can lead to an adoption of behavioural defaults or habits based on the interface design and recommendations built into platforms.[19]

Discoverability is a challenge for audiences globally, and our Australian audience research reflects this broader pattern. Audiences express support for Australian storytelling in principle, value it when they do consume it, but most rely on it being in their path rather than actively looking for it. Audiences feel that discovery pathways do not consistently surface this content for consideration – only 1 in 3 Australians say it's easy to find Australian content (36%).

International research shows that audiences worldwide face two main challenges when navigating streaming platforms: not knowing what they want to watch in the context of large catalogues and knowing what they want to watch but struggling to locate it.[20] Screen Currency's Australian audience survey respondents told us that discovery is largely platform-led. **Audiences across research streams consistently reported that they rarely decide what to watch without some form of recommendation** – social, cultural or algorithmic – with 41% of Australians reporting that their viewing choices are driven by recommendations on streaming platforms.

Deeper discussions in our audience forums revealed a level of mistrust in the role of algorithms and how they are controlling discovery. This mirrors Gracenote's global study which found that more than 46% of viewers agree that it is getting harder to find content they want to watch on streamers and more than 25% don't believe platform recommendations help them find relevant content.[21]

In the qualitative phases of the research, **audiences argued for greater efforts to be made to feature Australian content more prominently across streaming services.**

> **"It would be better if all streaming services had a specific category for Australian-made films and series. That way, it's all in the one place for us to find and browse through."**
>
> – Audience forum participant, female with disability, parent, aged 25–44, TAS

> **"I just don't think there's enough out there. The big streaming platforms only feature big international productions. It would be good to have an Australian section featured across all the streaming services."**
>
> – Audience forum participant, LGBTIQ+ CALD male, aged 25–44, Qld

17 Johnson C, Lobato R and Scarlata A 2025, *Default Viewing: Reconceptualising Choice and Habit in Television Audience Research*, RMIT University, Journal of Media, Culture and Society.
18 Gracenote 2025, *State of Play*.
19 Johnson, Lobato and Scarlata 2025, op cit.
20 Gracenote 2025, *State of Play*.
21 Gracenote 2025, *State of Play*.

36%

of Australians say it is easy to find local screen content

Games

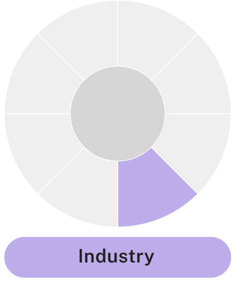
Discoverability plays a central role in shaping which games Australian players encounter and engage with. More than 1 in 2 players learn about new games through friends or family (56%), making interpersonal recommendation the most influential pathway, followed by social media (46%) and advertising (27%). Discovery is typically embedded within everyday digital behaviour, with players encountering games through a mix of social interaction, platform browsing and algorithmic recommendations rather than actively seeking out specific titles.

> **“If I’ve nearly finished a game, I’ll start looking through the store… scan Steam, check Game Pass, see what’s coming.”**
> – Video game players focus group participant

Within this environment, country of origin is not typically salient at the point of discovery. A majority of players report being unsure whether they play Australian-made games (60%), with recognition of Australian origin remaining limited even for well-known titles. Players often recall games in terms of genre or experience rather than place of production.

Letters to Arralla

What's getting made



Sources of finance

Screen

Screen Currency's industry study indicates that making productions for our screens is expensive and becoming more so. Our industry survey found that costs are predicted to increase for many forms of production. The business of screen financing is crucial to what is produced in the professional parts of the ecosystem.

Government funding, offsets and regulation play an important role, intended as both a catalyst for activity and a support for content the market is less likely to fund on its own. Our economic study shows that total state and federal government support for screen production has grown substantially, and for the content types most reliant on it – narrative drama, documentary and children's programming – government is now the dominant source of finance (see What supports content creation).

Traditionally, governments have incentivised certain kinds of production (including more commercially "vulnerable" content such as children's content, high-end locally made TV drama and documentary).[22] Our industry study shows that government funding plays an important role in sustaining production activity in these areas, but does not currently contribute to the long-term sustainability of production companies.

Distributors, broadcasters, platforms and sales agents represent the market in finance plans, offering sources of capital and pathways to audience which can then unlock government support. Screen Currency's Industry study describes a value chain under pressure at both ends. In traditional distribution channels (theatrical, home entertainment and FTA television), revenues are increasingly concentrated among a small number of players.

At the commissioning end, the growing influence of global streaming platforms is reshaping the deal-making landscape for Australian producers, with implications for who controls IP and shares in long-term returns (see Who's making local content).

Private equity makes up a small part of overall finance for typical projects but plays an important role in deficit financing.

As Australian audiences migrate to global platforms and on-demand viewing, the commercial case for investing in high-budget local productions – particularly on free-to-air television – has weakened. As a result, global trends and audiences increasingly influence what content gets made in Australia and on what terms.

One outcome of the globalisation of screen industry has been a series of international acquisitions of Australian independent screen production businesses, creating stronger relationships to global markets and new finance. For media networks seeking to fill streaming libraries and expand into new markets, capable local production businesses, and their access to Australia's screen incentives, have been an attractive proposition.

These relationships connect Australian businesses to significant capital, skills and entry points into new markets. However, these relationships can be vulnerable to the changing priorities and interests of larger overseas-based companies.

22 *Screen Australia Act 2008* (Cth) s6(3)(b), Federal Register of Legislation.

Current screen projects average % of financing:

23%	16%	12%	11%
government funding	client fees/ commissions	broadcaster or platform licence fees	own investment

Findings are directional due to sample size (n=75).

Stakeholders interviewed for our industry study said that **to achieve commercial sustainability or success as an Australian screen business today, programs need to have global appeal and marketability.** They claimed that, increasingly, commissioners, distributors and funders have a view to global, rather than primarily local, audiences. At times, this orientation can be at odds with the cultural priorities of local audiences.

Both the industry and economic studies highlight that screen production incentives are key drivers of activity and investment in the local screen industry, as are the guardrails intended to ensure the incentives support policy outcomes. The Producer Offset, for instance, enables screen producers to at least commence negotiations with equity in their projects, and comprises an eligibility threshold of the Significant Australian Content test (requiring a level of Australian creative involvement in key roles, culturally relevant subject matter and local filming). See What supports content creation for more on government support.

Games

Screen Currency's industry study indicates that financing for game development is typically assembled from multiple sources, with studios drawing on a combination of external partnerships, internal cashflow, and public support to build projects over time. This reflects both the capital intensity of development and the limited availability of upfront finance, particularly at early stages. Industry survey respondents reported that an average of 29% of their financing for current projects came from outside of Australia.

The study highlights that public funding and incentives play an important enabling role, especially in early-stage development. Government support such as Screen Australia funding and the Digital Games Tax Offset are used to initiate new projects or expand existing ones, helping bridge early viability where other capital options are limited. However, this support is competitive and relatively modest in scale, meaning it usually contributes to, rather than underwrites, full project budgets. Industry survey results suggest public funding represents a small share (4%) of project finance on average.[23]

At the same time, commercial financing sources are central to how games are funded in practice. Studios commonly rely on publisher advances, platform deals and commissioned work, alongside internally generated revenue from previous titles or service activity. These arrangements provide essential cashflow and access to distribution, but often involve trade-offs around revenue share, control and IP ownership.

The industry study also shows that self-funding and retained earnings are an important part of the financing mix, particularly for smaller and independent studios. Development is often incremental, with income from contract work or earlier projects reinvested into new IP, rather than secured as a fully financed package upfront.

23 This should be interpreted with caution as the sample size (n=28) and likely skew towards studios below Digital Games Tax Offset thresholds may mean these results understate the role of public funding in games development finance.

Current games projects average % of financing:

4%	35%	29%
government funding	client fees/commissions	own investment

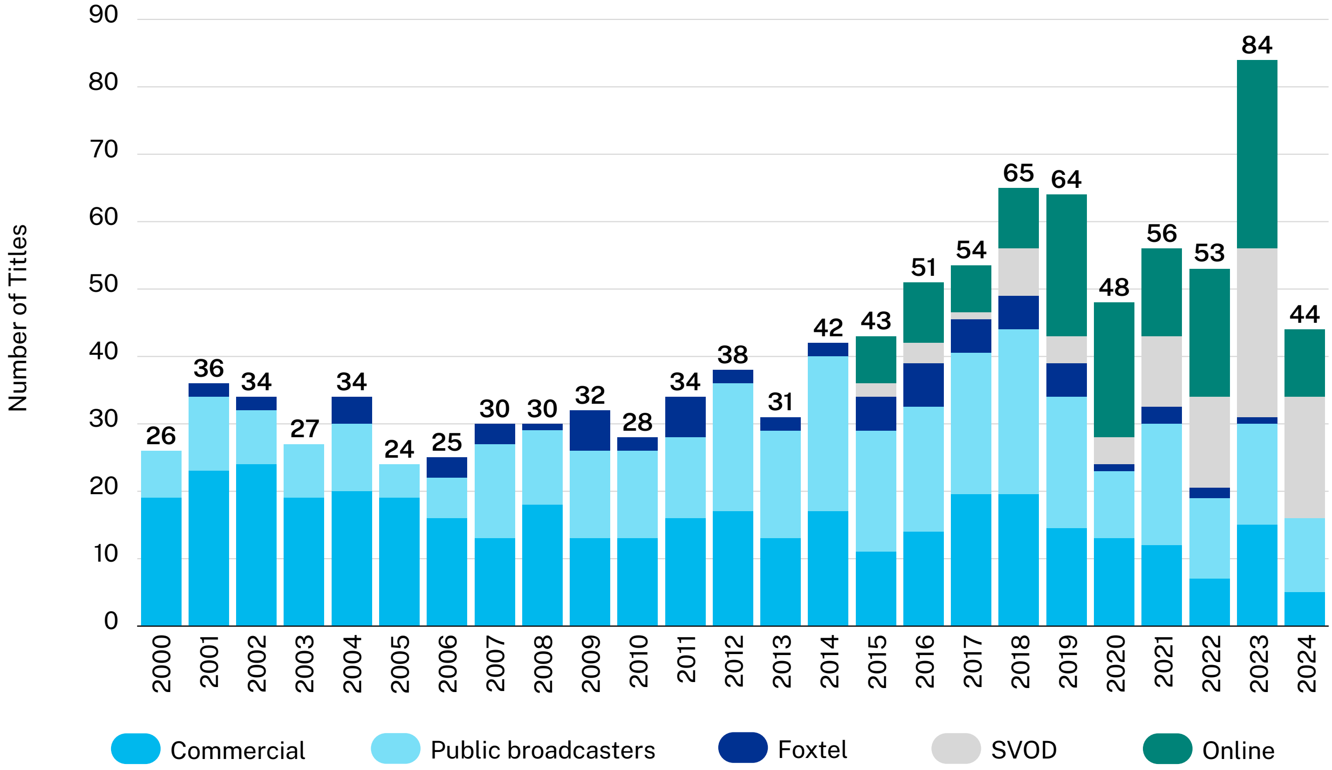
Findings are directional due to sample size (n=28).

Trends in local production

Screen

In 2024/25, total expenditure on drama and documentary production in Australia reached $3.0 billion, an 11.1% increase from 2023/24. While this represents substantial growth, driven by increased expenditure on high budget local and foreign drama production, some of the deeper data that underpin it reveal a more complex picture. Analysis presented in our economic study highlights significant changes in commissioning by broadcaster type with the shift to a streaming environment (Figure 6), which has affected budgets, titles and hours of Australian screen content.

Figure 6: First release Australian adult TV drama titles by broadcaster type



Source: Screen Australia custom dataset.

Adult TV drama

Data from Screen Australia's Drama Report highlights a shift in the sources of investment and commissioning for Australian TV drama. While **commercial free-to-air broadcasters play a smaller role than they once did, public broadcasters and streaming services have become increasingly important contributors to local drama production**. By 2025, streaming services had overtaken all other sources of investment in TV drama.

$3.0b

total production expenditure in 2024/25

+11.1%

increase from 2023/24

Netflix prefers to buy shows outright. According to head of content for Australia and New Zealand, Amanda Duthie, this means they are able to make more locally relevant programs, undiluted by international co-financing (required by most other broadcasters and SVOD platforms): "If the global glow comes, that is great," she claims, "but it's local audiences first."

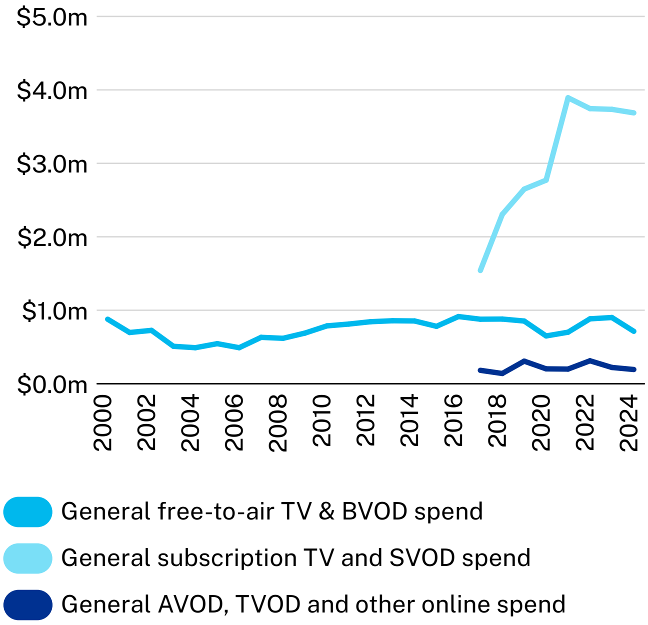
This is encouraging; however, global streamers operate as multinational businesses with global audiences, strategies and commercial priorities. Enthusiasm for Australian stories can drive meaningful outcomes that are best supported by structural settings that help sustain investment in local content over the long term.

Recognising this, **in late 2025 the Australian Government passed much-anticipated legislation to set local content obligations on streaming services for a minimum level of investment in Australian drama** – either 7.5% of Australian revenue or 10% of Australian expenditure on new Australian content.

This legislation is intended to support the creation of Australian content on these platforms. Where current Australian content spending already meets or exceeds the proposed thresholds, the requirement is likely to act as a floor that protects existing investment rather than a driver of additional expenditure.

In the new global streaming environment, TV drama budgets have gone up (see Figure 7), sometimes to feature film levels, while hours and titles have gone down. First-release hours in 2024 were half that of the early 2000s (excluding serials). Increased budgets may mean more "dollars on screen" and higher production quality, which can translate to breakout hits. However, it also means fewer commissions, and fewer work opportunities for the local sector; and for audiences, it means fewer freely available options in some local content genres.

Figure 7: Mean Australian TV drama production budget, 2000–2025



Source: Screen Australia Drama Report.

403

adult TV drama hours broadcast on average per year 2020–24

-12.4%

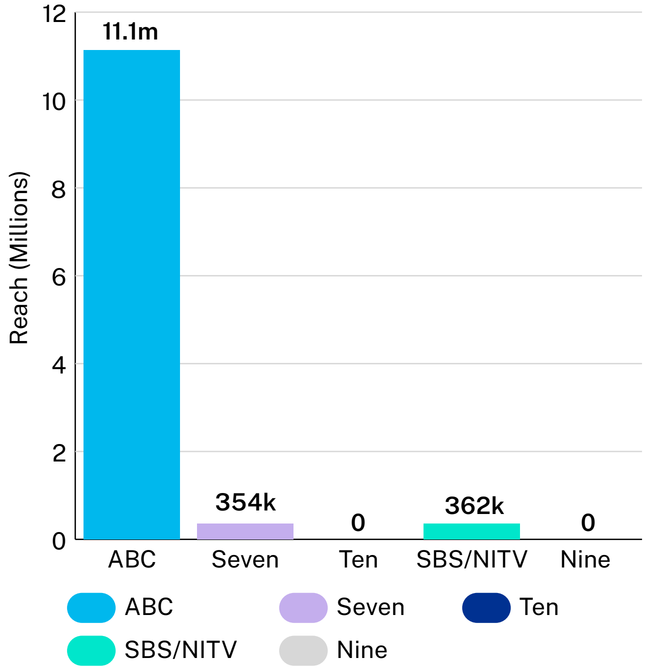
decrease from 2000–19

Children's TV

Local children's TV has experienced a stark decline. As ACMA documented in 2015, the children's audience on commercial FTA had been falling steadily since the early 2000s, with viewers moving first to the ABC and subscription television and later to online and on-demand platforms[24] – YouTube now reaches around 89% of Australian children aged 6–13, an estimated 2.5 million children[25]. The subsequent removal of sub-quota requirements in 2021 accelerated a decline that was already well established. Since then, the commercial free-to-air broadcasters have mostly stopped commissioning local children's TV.

The ABC has become almost the sole commissioning "door" for children's production. Figure 8 shows first-run children's TV reach in Australia in 2025 was predominantly via the ABC, with limited programming by SBS/NITV and Seven. This reduction in the commissioning landscape has resulted in the loss of production companies active in creating TV for Australian children. Concern has also been expressed from the sector about limited commissioning pathways and the potential for key organisations to act as gatekeepers, concentrating decision making within a small number of people.[26]

Figure 8: Total reach of first-run Australian produced children's TV by network in 2025



Source: VOZ 2026, total reach of first-run Australian children's TV by network, for the period 1 Jan-31 Dec 2025, linear broadcast and BVOD.

Source note: Pooches at Play was excluded from reported first-run Australian children's programming results for Channel Ten following review of VOZ metadata and ACMA compliance reporting, which indicated the program was likely miscategorised as children's content.

Australia's public broadcasters – ABC, SBS and NITV – are not subject to content quotas but operate under their own charters, which require them to provide Australian-centric, entertaining, informative and educational content. Only the ABC has the budget capacity to regularly invest at a substantial volume in drama and children's content. Over 3 years from 2025, the ABC received **a $50 million funding boost to support the production of drama and children's content.**

24 Australian Communications and Media Authority, Children's television viewing, March 2015.
25 Roy Morgan 2026, *YouTube for Young Australians Survey December 2025*.
26 Baker D, Burke L, Balanzategui J, McIntyre J and Boyle E 2025, Producers' *Perspectives on Australian Children's Television in the Streaming Era*, Swinburne University of Technology and RMIT University.

65

hours of children's TV broadcast on average per year 2021–24

-42%

decrease from 2000–20

Documentary

Documentary programming continues to play an important role across Australian television, with both public service and commercial free-to-air broadcasters maintaining a presence in the genre. While commissioning activity persists and some formats continue to deliver strong audience outcomes, the overall scale and composition of documentary production has evolved over time. These shifts in commissioning have not been evenly distributed, with some culturally significant specialist areas, such as history, science and natural history, experiencing declines in commissioning activity, hours and dedicated programming strands.

As with drama, the move has been towards fewer, higher budget titles, which often require an international partner to achieve their budgets and audience reach. Again, this means fewer commissions among a smaller pool of producers and production companies. Lower cost factual entertainment and formatted unscripted programming has remained comparatively stable, with free-to-air commissioning concentrated in returning series “brands” and established formats.

In contrast to TV broadcast trends, the number of theatrical documentary feature titles produced has more than tripled since 2015. Titles produced have increased from an average of 7 between 2009–2015, to an average of 24 titles between 2016–2024, an increase of +243%.

Drama feature film

In contrast to the trends in adult TV drama, Australian feature film titles have grown significantly since Screen Australia was established in 2008, but budgets have gone down and the economics have deteriorated. A greater number of Australian films are now competing for a share of a declining box office, increasingly dominated by high-budget international action and franchise releases, meaning more titles are chasing fewer dollars. Box office returns have been in decline over the past decade, reflecting the compounding pressures of uneven cinema attendance, a more competitive exhibition landscape, and the appeal of global content on Australian screens.

In line with this, the industry study found a long-term shift where **features are attracting fewer and lower value minimum distribution guarantees** (advances from distributors).[27] From 2014 to 2024, the total value decreased by an annual average of 8.7% per year and the number of minimum distributor guarantee-backed contracts decreased by 10.4% per year. Advances represent an important, but declining, part of financing deals. Among our screen industry survey respondents, just 4% reported distribution advances to be a main source of finance for a typical project, while 17% reported broadcaster or platform licence fees or advances.

27 A minimum guarantee is a contractual provision in film distribution in which a distributor commits to paying a fixed upfront amount to a producer or rights holder for the rights to distribute a title, regardless of its commercial performance. The distributor recoups this amount from the title’s earnings before any further revenue share applies.

386

hours of documentary programming broadcast on average per year 2021–24

-3.7%

decrease from 2009–20

24

theatrical documentary feature titles produced on average per year 2016–2024

+243%

increase from 2009–2015

40

drama feature film titles produced on average per year 2021–24

+43%

increase from 2000–20

Foreign production

Foreign production using Australia as a location has become an increasingly significant part of screen production economics (increasing to $1.6b in 2024/25), and a substantial part of the sector's export income. Throughout the COVID-19 pandemic and 2023 US screenwriters and actors strike, Australia became known as a relative "safe haven" for production. In July 2024, the 30% Location Offset rebate was legislated. The filming of high-budget features and TV drama in Australia can have a big impact on industry revenues and infrastructure, sustain local production roles and build workforce capabilities (e.g. through training attachment programs). However, the ability to attract such productions is vulnerable to fluctuations in the Australian dollar, the capacity of our local studios and workforce, and competition from global incentives.

Direct-to-audience online content

Digital and online screen content are the fastest-growing but least-measured part of the sector. Largely invisible in the national datasets underpinning much of this analysis — such as production volume and employment trends — their contribution can't be quantified in the same way. What can be described, if not measured, is how these creators work: digital-first and creator-led projects are typically self-financed or supported through platform ad-share, sponsorships, crowdfunding, or brand partnerships, with additional revenue streams in merchandise and live events.

Engagement with online content in all forms – including user-generated content on TiKTok or Instagram, or video on YouTube – is now a part of everyday life and screen culture, and represents substantial creative and commercial activity. These creators operate within a distinct ecosystem, running on different financing, distribution and employment models to the sections of the industry that are the focus of these reports.

Online content creators have very low barriers to entry and far more immediate relationship to audiences, who have formed around an – often niche – interest or identity. When they reach a certain level of followers, the platform (along with aligned agents such as multichannel networks) assist them to monetise engagement through sponsorship, brand placement and advertising.

Creators have creative control of their content and maintain a direct relationship with their audiences. They typically use a combination of platform analytics, audience feedback and iterative development to refine content and build communities over time. While audience reach, engagement and commercial outcomes are influenced by platform algorithms and terms of service, creators often develop sophisticated approaches to audience growth across multiple platforms and channels.

Online creators typically build their businesses independently of the funded ecosystem, financing their work through platform revenue, sponsorship, brand partnerships and audience-driven income such as merchandise and live events. The skills, craft and audiences developed this way are increasingly transferable, some creators are crossing into funded production bringing established audiences and production fluency with them. Accessing broader screen funding and incentive frameworks can nonetheless present challenges, as these systems were developed around different production, employment and compliance models.

In recognition of its growing impact, Screen Australia has incorporated direct-to-audience projects into its narrative and documentary production programs, in addition to specific initiatives such as Skip Ahead and Digital Originals.

Since 2013, YouTube and Screen Australia have partnered on the Skip Ahead program that supports YouTube content creators to develop longer-form narrative content. Screen Australia project funding has supported projects such as *The Formal* with funds to develop content for TikTok. Two of Screen Currency's case studies include creators that have expanded to larger budget TV or features: *Talk to Me*, written and directed by the Philippou brothers, who have been online sensations for over a decade with YouTube channel *RackaRacka*; and TV drama *Deadloch*, a noir comedy set in Tasmania, created by Kate McCartney and Kate McLennan, creators of online lifestyle parody *The Katering Show*. A third case study, *Bad River*, shows a different pathway: Beau Miles used Skip Ahead funding to make ambitious long-form documentary for the audience he had already built on YouTube, rather than crossing into traditional formats.

See *Bad River* and *Talk to Me* case studies:

Case Studies

Meta Runner

Games

Tracking output in games is harder than in screen. Games development has no separate ABS industry or product classification, so it can't be observed directly in economic statistics, and the game project cycle — long, iterative development, beta, release, then ongoing updates — together with globally oriented publishing pathways means there is no equivalent to screen's "first release" records for counting supply over time. Estimates of gross value added (GVA) and exports are therefore the best available proxy for the sector's expansion.

Our economic study shows that games development continues to experience substantial growth in production, but from a much lower base than screen. Games generated $317 million in GVA in 20234/24, more than doubling since 2015/16, and growing at an average annual rate of 11.7% since 2021/22. Games development and distribution have always been globally oriented, building communities of players via global platforms and digital shopfronts.

As the industry matures and grows in scale, Screen Australia is seeing strong and increasing demand for project funding, with a 59% average annual increase in project applications since 2021/22. While public funding represents a small share of project finance, it can play a targeted role in early-stage games development.

376

project applications to Screen Australia games funds in 2024/25

+59%

average annual increase from 2021/22

Who's making local content

Pathways to market

Screen

Screen Currency's industry study shows how high-value screen content relies on a range of diverse, skilled and resourced businesses of different scales creating and contributing to stories that are both high-quality and culturally resonant. In a sector where costs are incurred upfront, creative projects must navigate through the value chain to build finance required for production and pathways to audiences (Figure 9).

Figure 9: Screen value chain

Upstream → *Downstream*

Creation

- Create, adapt and/or develop IP
- Package and pitch
- Finance
- Secure commission/ greenlight

Key industry participants:

- Creators and writers
- Producers/production companies
- Commissioners/buyers
- Rights-holders/publishers/ literary agents
- Financiers and insurers
- Legal and business affairs teams/advisors

Production

- Plan and crew up (pre-production)
- Produce (principal photography/animation)
- Post-produce and finish
- Deliver masters and deliverables

Key industry participants:

- Producers/production companies
- Commissioners/buyers
- Production service companies
- Animation and PDV houses
- Talent agencies
- Actors and crew

Distribution | **Broadcast, streaming and exhibition**

- Sell and license
- Market, publicise and release
- Broadcast, stream or exhibit
- Measure and monetise

Key industry participants:

- Sales agents
- Distributors (independent and studio)
- Marketing and publicity agencies
- Cinema exhibitors
- Broadcasters (public/commercial/pay TV)
- Platforms (SVOD/AVOD/FAST/online)
- Festivals and event exhibitors

Audiences

Enablement and support

Education and training | Infrastructure and technology | Investment, support and development | Advertising and marketing | Rights management, regulation and legal

Source: McAtamney & Advisors for Screen Currency industry study.

Talk to Me

Over the past decade, the Australian screen and games industry have seen a diffusion of activity at either end of the value chain. At creation stage, the line between amateur and professional continues to blur as barriers to entry are reduced in the world of digital content creators and informal pathways to practice. But content made for direct-to-audience platforms often does not meet the requirements to access offsets and operates on different economics, such as ad revenue share, merchandising and brand partnerships. As a result, direct-to-audience content creators and others in the early creation stage, who largely sit outside the current funding frameworks, face a threshold challenge to move into the funded ecosystem of public incentives, agency investment and commissioning and licence fees.

See *Talk to Me* case study:

Case Studies

The audience research highlights fragmented viewing behaviours, particularly for younger audiences. The range of points of access to content – and ways to engage with it – have extended from a finite set of channels to multichannels and a profusion of social and subscription platforms.

At the same time, the industry study describes a concentration of distribution power, where a few digital platforms – with networked models that increase their market influence with each new consumer or subscriber – have found enough scale and functionality to derive consumer value from vast libraries of content.

The economic study shows that traditional pathways to audiences – including commercial free-to-air TV and the release of feature films – still generate significant revenue. But while the exhibition sector (cinemas and film festivals) has rebounded strongly since severe declines during the COVID-19 pandemic, broadcasting is in decline as free-to-air and pay TV providers lose revenue and audiences to online platforms and streamers.

Growth in active businesses

Creation and production:

+7%

10-year average annual growth to 2023/24

Distribution, broadcast, streaming and exhibition:

-1%

10-year average annual growth to 2023/24

Dog Park

The industry study indicates a value chain in which **downstream segments (distribution, broadcasting, streaming and exhibition) generate significant revenue but face weaker growth.** In contrast, **the upstream businesses in creation and production continue to grow** in the number of businesses and participants without a commensurate increase in average profitability or financial strength.

Vertically-integrated SVOD services (combining commissioning, rights ownership, release, marketing and audience measurement within a single platform) **are more agile than infrastructure-heavy broadcasters and hold greater control.** The platforms hold audience data, performance analytics and renewal decisions tightly, which the industry study shows is limiting critical audience feedback loops to producers. Economic data shows that **SVOD services such as Netflix, Stan and Amazon Prime Video are now significant investors in Australian content – particularly drama.**

The industry study explores how an increasingly concentrated market, which favours capital and scale, has made it harder for smaller producers to secure and exploit the value in the IP they generate. Some industry stakeholders described how deals with global SVOD platforms provide access to finance but require "cost-plus" deals that provide an upfront fee but sign rights to all territories over to the platform.

Streaming platforms are investing heavily in premium drama to compete in an international marketplace, and cost-plus contracts consolidate global rights with the platform.

A further way creatives are giving up profits to intermediaries is in up-front funding for productions. Traditional commissioning models used to cash-flow productions. The terms of trade for some platforms are pay-on-delivery, meaning production companies must find external financing (often at high rates of interest).

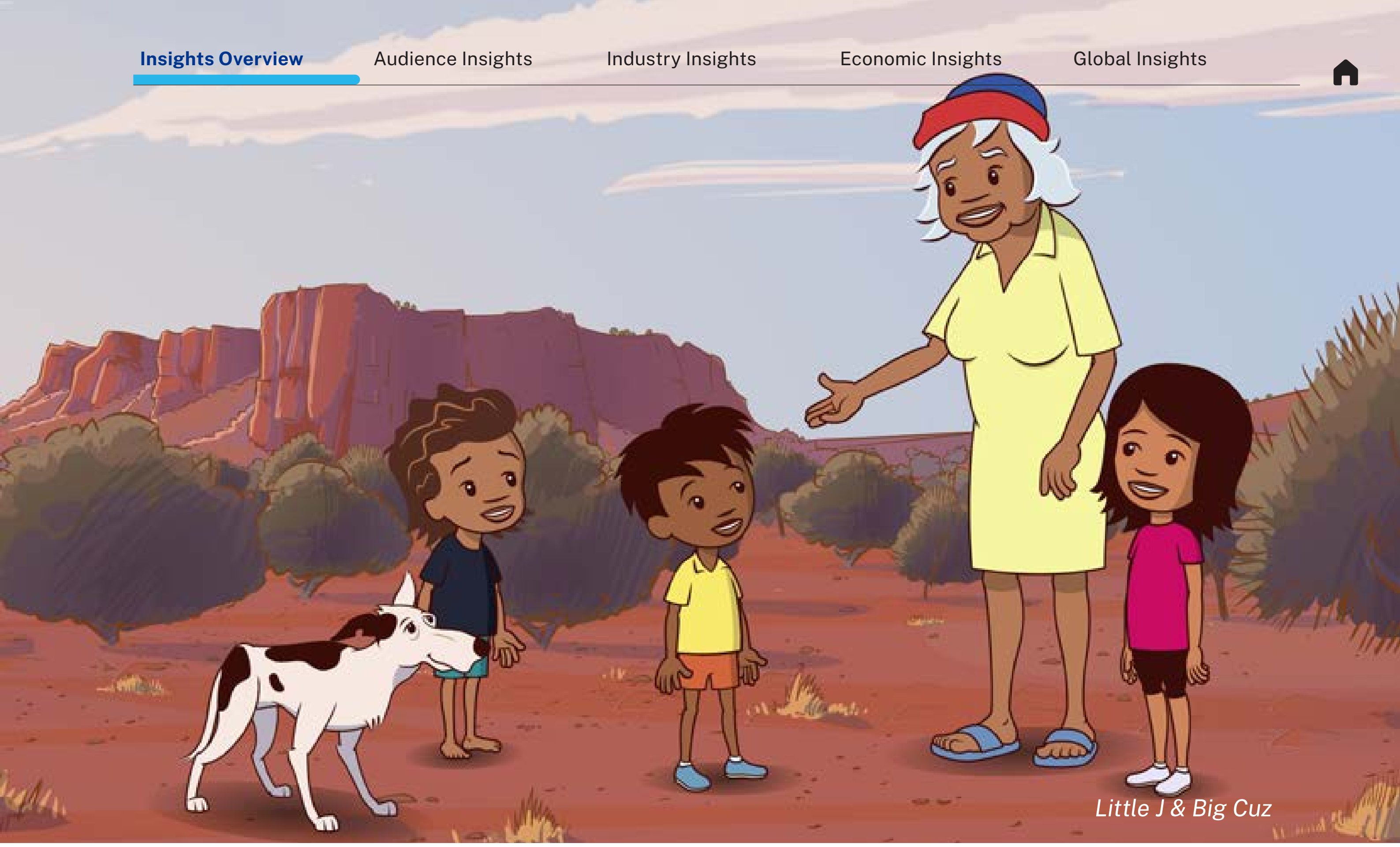
IP/equity ownership at first release (typical project):

39% of screen businesses own all
16% of screen businesses own some
45% of screen businesses own none

Findings are directional due to sample size (n=49, n= 45).

Average earnings from IP for screen in 2024/25:

45% from new IP
26% from existing IP
29% from others' IP



Little J & Big Cuz

Together, these shifts carry a significant cost – particularly for smaller production companies. The industry study highlights the impact of foregoing long-tail revenues, because these ongoing income streams have traditionally been relied on to build sustainable businesses.

Simultaneously, the economic report charts the disruptions to the "bread and butter" of commercial TV: drama and children's content (previously secured by sub-quota requirements in commercial free-to-air local content regulations), which have meant that Australian producers have lost previously consistent pathways to market.

Despite lower barriers to entry and a profusion of access points for audiences, our industry study provides evidence that **it is harder than ever – particularly for newer or smaller players – to sustain a screen business.** This is not because screen businesses are showing a lack of willingness to adapt, but because they face unprecedented pressures. The study highlights strategies that Australian screen business are undertaking to manage risk through diversification of financing sources, partnerships and market reach, rather than relying on a single commissioning or funding pathway.

See *Little J and Big Cuz* case study:

Case Studies >

Our screen industry survey revealed a fragmented distribution model, with income from a wide mix of platforms and channels including self-distribution, direct platform deals and client delivery. It found that traditional distributor, sales agent or commissioner-led intermediaries are still important but are no longer the only route to market.

Typical screen project distribution arrangements:

39% use Australian distributor/sales agent
25% use direct deal with platform (e.g. SVOD)
23% use self-distribution/publishing
14% use client-delivered

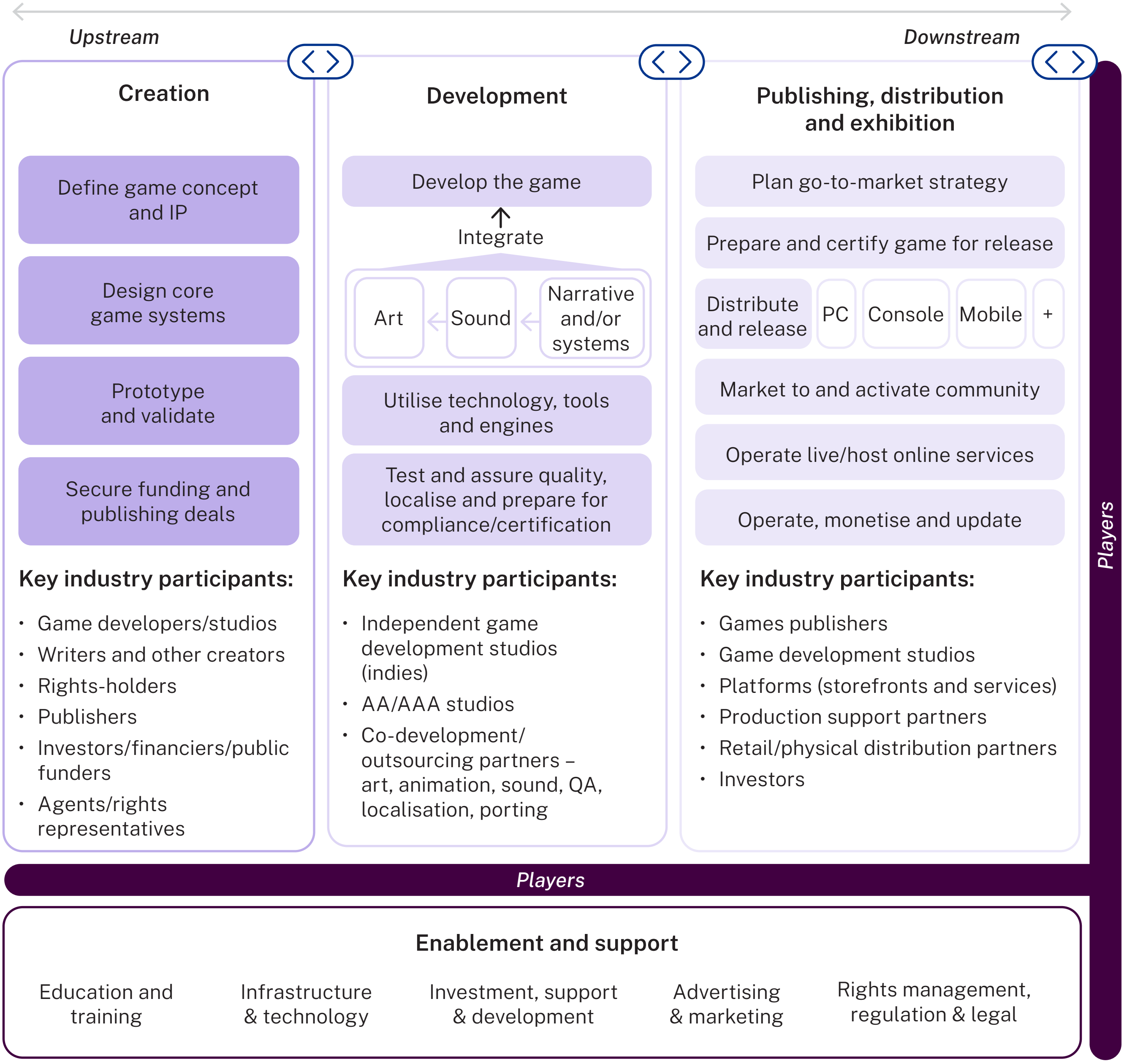
Multiple options allowed. Findings are directional due to sample size (n=44).

Games

The Australian games sector is inherently global. Less traditionally reliant on government incentives and regulation, Australian games businesses have long focused on global distribution platforms and marketing to achieve commercial sustainability and success.

The games insights in our industry survey show that games business income relies on a concentrated market of global platforms (i.e. Steam, Epic Store, PlayStation Store, Xbox Store) that act as pathways and gatekeepers to global audiences. Revenues are shaped by publisher terms, platform algorithms, storefront placement and marketing spend, which sit largely outside the control of Australian studios. As in screen, discoverability is key to success on these platforms. Unlike most screen projects however, the industry study highlights that development of games extends past initial release, with continual iteration in the form of community management, post-launch updates and live operations.

Figure 10: Digital games industry value chain



Source: McAtamney & Advisors for Screen Currency industry study.

For games studios in the industry study, IP retention is achievable but uneven and closely shaped by project finance structures, deal terms and a developer's ability to secure publishing relationships. Among games businesses, self-publishing and client service work are the 2 most common primary pathways to market, reflecting different outcomes: independent distribution and self-publishing enable companies to retain and commercialise their own IP, whereas client delivered work tends to be fee-for-service in which the developers relinquish IP.

Industry stakeholders cautioned against only highlighting breakout hits among Australian games. A range of stakeholders described how big global success stories tend to attract significant attention among Australian games and can build confidence, recognition and the reputation of Australia's games sector. However, many noted that they do not necessarily offer repeatable models to emulate. Stakeholders interviewed for our industry study – including developers, publishers, investors and screen agency representatives (federal and state) – emphasised that the conditions for breakout success are highly project-specific and not easily replicated in policy or program design.

> "*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 study stakeholder interview

See *Hollow Knight: Silksong* case study:

Case Studies

188

digital games businesses in 2021/22

15.3%

average annual growth from 2015/16

Typical games project distribution arrangements:

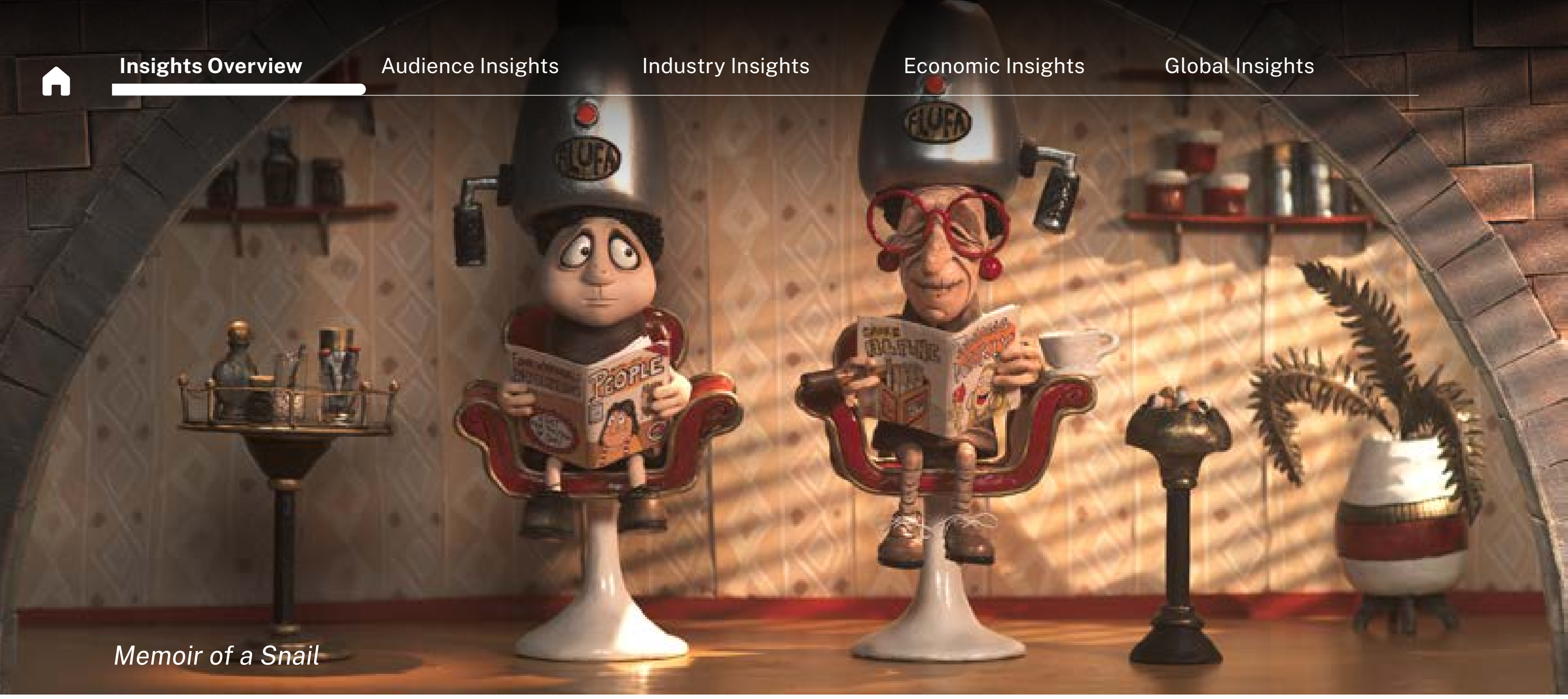
17% Australian distributor/sales agent
33% international distributor/sales agent
25% direct deal with publisher
67% self-distributed
58% client delivered

Multiple options allowed.

Equity/IP ownership at first release (typical project):

45% of games businesses own all
15% of games businesses own some
40% of games businesses own none

Findings are directional due to small sample sizes (n=12, n=20).



Memoir of a Snail

Industry profile and dynamics

Screen

The screen and games industry is built on human capital – the ideas, skills and collaborations of their workforces and businesses – enabled by technology, infrastructure, incentives and access to funding and finance.

The huge range of roles represented by Australia's screen industry can be difficult to capture. It includes everything from small teams of animators collaborating in co-working spaces all the way through to high-budget productions employing hundreds of creatives and crew. It includes the work of a writer coming up with an idea and the ways that idea can be transformed – after years of development, collaboration, deals, funding, incentives and the building of teams – into productions that, for live action film and TV, can sometimes resemble small cities.

See *Furiosa: A Mad Max Saga* case study:

Case Studies

New analysis for Screen Currency's economic study shows that almost half (45%) of the screen workforce is in production and post-production, with the next group at 21% in free-to-air TV broadcasting and 14% in cinema exhibition.

In Screen Currency's industry study, stakeholders consistently highlighted **the strong quality and international reputation of Australia's above- and below-the-line production workforce**, particularly its problem-solving capability and cross-functional skill sets.

Over the course of 2022/23, **34% of the production workforce held multiple jobs**. Our industry survey indicated that 84% of screen practitioners' earnings are from the screen sector (on average), but they are moving project to project in portfolio – often precarious – careers, particularly vulnerable to changes in Australia's competitiveness as a production location for foreign projects.

Screen businesses 2024/25:

Median **4** employees
Median **5** contractors
63% operating ≥10 years
25% operating ≤ 5 years

Of screen industry employees:

73% hold a bachelor's degree or higher
16% of income is earned outside screen
46% in current role for ≤ 2 yrs

New developments in AI, virtual production, and virtual/augmented reality are changing screen industry practices.

Increasingly, AI is being used in global screen and games sectors – primarily in early development (e.g. idea generation) and post-production (e.g. subtitling and metadata generation). Because AI is embedded as a standard feature in software applications, many screen and games sector workers may be using it without realising. It has the capacity to merge some stages of the traditional value chain – for example, by enabling edits to be done in real time.[28]

Screen Currency's industry study found uneven usage and ambivalence around AI applications, with some examples of use in prototyping but a resistance to its use in final creative products.

This parallels a recent global study by Olsberg SPI on the use of AI in the screen industry which found: "Ethical, legal and reputational concerns, especially around final creative outputs, make individuals and organisations cautious both in adopting the technology and in disclosing how they employ it."[29]

The study reveals AI developers are starting to adapt models for the sector's creative workflows, but currently available AI tools have limited creative flexibility, meaning they often fall short for production needs. Proprietary tools are being developed by some large organisations, meaning that expertise is becoming increasingly concentrated. Some have called for locally developed sovereign AI models to address these issues.

In Australia, the use of globally-produced Large Language Models (LLMs) without adaptation for the local environment, can lead to poor representation of and cultural specificity related to the unique dynamics of Australian life and cultural diversity – particularly Aboriginal and Torres Strait Islander cultures.[30]

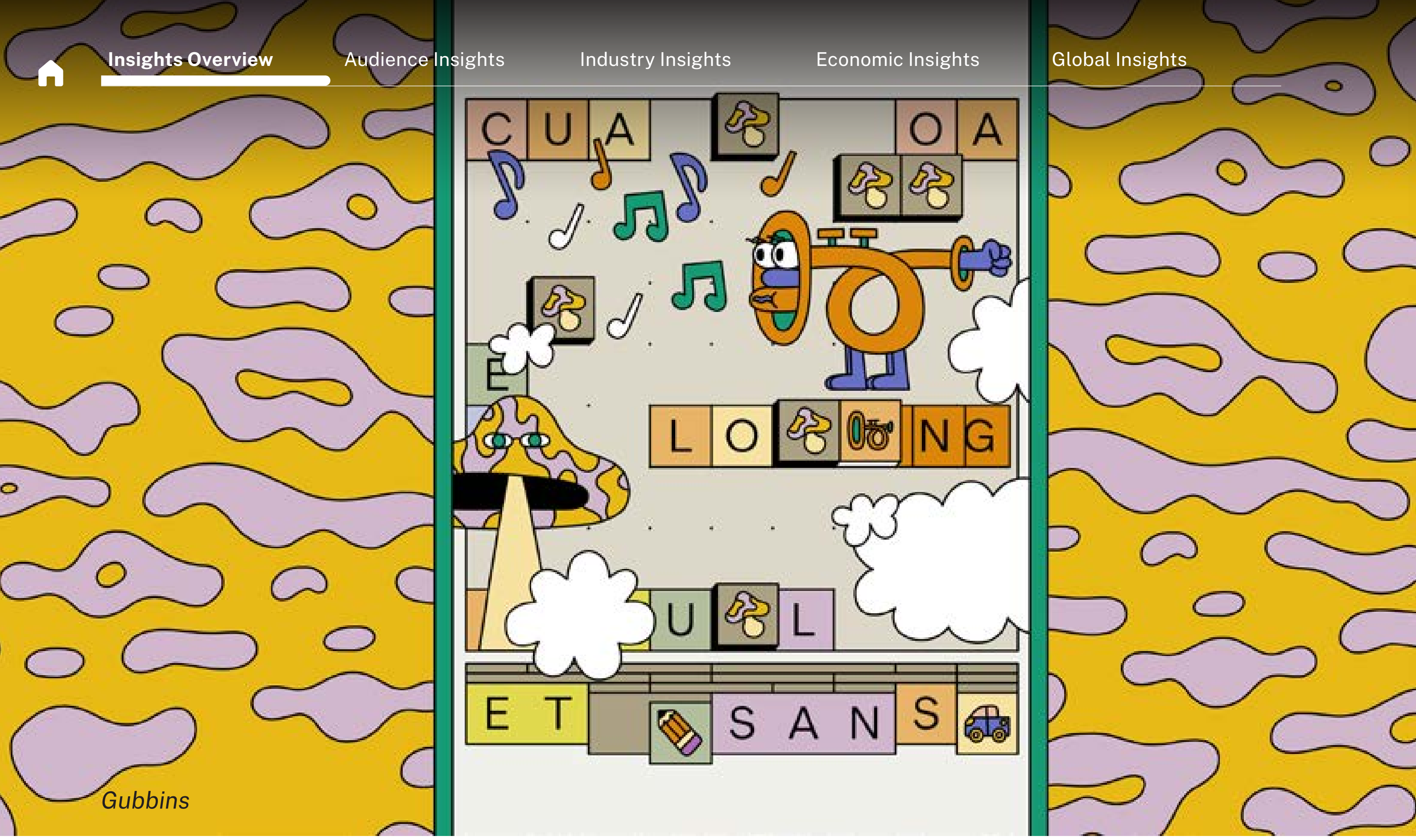
The recently updated Department of Industry Science and Resources voluntary **AI Ethic Principles** seek to ensure that AI models are safe, fair, pluralistic, and human centred in their approach.[31]

IP and copyright protections in the training and deployment of LLMs remain major concerns for the creative sector. As part of the Australian Government's copyright framework review, the Attorney General recently ruled out a text and data mining exemption, setting limits on the use of creative works to train LLMs "so that Australian creators are protected and supported while unlocking new uses of copyright material".[32] The review includes a Copyright and AI Reference Group that will explore licensing frameworks and seek to clarify or update how copyright law applies to material generated through the use of AI.[33]

Some AI proponents have expressed concern the current policymaking focus on IP protection and traditional modes of production has held back productive engagement with new technologies that would enable the sector to realise the potential of new, software-driven forms of production.

New technologies are disrupting workflows and occupations, including artists working across visual effects, animation, foley sound and voiceovers. However, new tools and production techniques also offer new opportunities. Rapid change is particularly transforming animation and visual effects.[34]

28 Foresight Lab report prepared by Olsberg SPI 2026, *AI Policy and its Impacts on the Screen Sector Across the Globe*.
29 Ibid p.9.
30 Ibid.
31 Department of Industry, Science and Resources, *Australia's AI Ethics Principles*, last updated December 2025.
32 The Hon Michelle Rowland MP 2025, *Media release: Albanese Government to ensure Australia is prepared for future copyright challenges emerging from AI*.
33 Olsberg 2026, op cit.
34 Creative Australia and SaCSA 2025, *Creative Workforce Scoping Study Report: Addressing the challenges with critical skills and sustainable careers*.



Gubbins

Games

Our industry study indicates most games businesses in Australia are small, young and founder-led, operating with very small core teams (median of 2 full-time staff, or 4 including part-time and casual) and scaling activity through contractors (median of 4.5). This structure supports flexibility and creative control but concentrates risk within businesses to a small number of individuals.

Industry stakeholders highlighted that games development cultivates advanced, future-facing skills in real-time engines, interactive systems, simulation and visualisation. These capabilities are increasingly in demand across a wide range of industries, including defence, architecture, manufacturing and more – positioning games as a source of "weightless exports" and a broader digital skills engine. Among games industry survey respondents, 53% earn income from other industries, ranging from computer system design to mining and advertising services.

Stakeholders noted that the transferability of games skills can create competitive pressures for studios, particularly where adjacent industries offer higher wages. Stakeholders interviewed described developers with specific skills and experience as highly attractive to other sectors, reinforcing the idea that games studios often act as training grounds for talent that is later absorbed elsewhere in the economy.

> **"When I registered for Unreal Fest, they asked what industry I worked in, and games was just one of so many options. If you've got skills with the right engines and in visualisation, you're attractive to a lot of other industries."**
>
> – Developer, industry study stakeholder interview

Digital games businesses 2024/25:

Median **4** employees
Median **4.5** contractors
37% operating ≥ 10 years
51% operating ≤ 5 years

Of games industry employees:

83% hold a bachelor's degree or higher
27% of income earned outside games
48% in current role for ≤ 2 yrs

Our industry study highlights that the Australian screen and games workforce tends to be highly skilled and globally respected. It is, however, a workforce experiencing significant pressures. In part because of the increasingly precarious nature of work in this sector, many key roles have experienced critical workforce shortages, from writers and game artists to technical crew. As technical barriers to entry continue to reduce, and as more creative workers find informal pathways into the industry, entry into the sector is easier than ever. It is getting harder than ever, though, to "stay in the game".

The Australian screen and games workforce is supported by a range of education and training. This includes informal pathways as well as private providers, and a range of government-supported institutions such as the Australian Film Television and Radio School (AFTRS) and the National Institute for Dramatic Arts (NIDA). It also includes a range of attachments, pathways and professional development opportunities supported by funding agencies, guilds and other sector bodies.

Formal education pathways are complemented by extensive work-integrated learning, employer-led training and informal learning through networks. Sector-level research suggests these pathways can be fragmented and difficult to navigate, particularly outside major cities and for those without existing connections.

Since the disruptions of COVID-19, critical sector skills shortages are being experienced, particularly in technical and critical support roles, limiting production capacity and contributing to increasing production costs.

This has been the focus of considerable industry attention in recent years, including Ausfilm's 2023 Screen Workforce Development Framework,[35] SaCSA and Creative Australia's 2025 Creative Workforce Scoping Study[36] and Screen Australia's 2026 Production Infrastructure and Capacity Analysis.[37]

As part of the Location Offset, the Minimum Training Expenditure Requirement and Training Program link incentive access to investment in workforce development. Effective from 1 July 2024, eligible productions are required to contribute to training and skills development through on-the-job opportunities, structured training activities or longer-term training programs, with minimum expenditure thresholds based on production spend. These programs are designed to support skills transfer, mentoring, industry partnerships and work placements, and to help address workforce capacity constraints across the Australian screen industry.[38]

35 Ausfilm 2023, *Australian Screen Workforce Development Framework*.

36 Creative Australia and SaCSA 2025, *Creative Workforce Scoping Study Report: Addressing the challenges with critical skills and sustainable careers*.

37 Screen Australia 2026, *Production Infrastructure and Capacity Analysis (PICA)*.

38 Office for the Arts 2024, *Location Offset – Minimum Training Expenditure Requirement and Training Program, July 2024*.

What supports content creation

Screen

Our economic study explores trends in broadcaster and government support for Australian screen content. Historically, the most important sources of funding for Australian screen content were free-to-air broadcasters and government incentives.

The rationale for Australian Government support for the local screen industry – including the last 50 years of policy and regulatory settings – is that Australians benefit, via cultural and economic outcomes. The development of local content relies on government interventions via federal and state investments in programs, tax offsets, workforce training, industry development, infrastructure or regulatory protections (such as Australian content quotas). Most of these interventions have the explicit purpose of supporting the production and distribution of local content as an irreplaceable public good.

Direct total support of screen sectors by federal and state governments has increased significantly in recent years, with average annual growth of 7.9% between 2015/16 and 2023/24 from $213.5 million to $387.6 million in real terms. Much of this increase was in state government support, which increased by 136% over this period while federal expenditure increased by 34%.

Federal government direct and indirect support of features, drama and documentaries together were approximately $1.2 billion in 2024/25. Around 72% of this funding was directed to local productions through the a combination of direct funding, the Producer Offset and offsets for qualifying PDV expenditure, and 28% to international activity (Location Offset and PDV). Support through the Producer Offset has grown from $295.16 million in 2019/20 to $713 million in 2024/25. This growth reflects an increase in Australian titles accessing the Producer Offset. As a percentage of qualifying expenditure, the Offset can fluctuate significantly year-to-year depending on the scale and number of individual productions.

The economic study finds that total state and federal government support for screen production has grown substantially, making government one of the largest sources of finance for screen production in Australia. For the content types it most directly supports – narrative drama, documentary and children's programming – government is now the dominant source of funding.

As commercial television program expenditure declines, the commercial contribution to vulnerable content types is increasingly flowing through streaming platforms – domestic and global – rather than traditional broadcast channels. For Australian content not consistently served by this shift, government support is playing a larger role in sustaining production volume and employment. This represents a significant evolution for a sector that has long exemplified a "mixed economy" model of commercial and public funding sources.

Direct federal & state government support:

$387.6

million in 2023/24

+7.9%

average annual growth since 2015/16

Indirect federal government support:

$1.1

billion in 2024/25

+7.6%

average annual growth since 2015/16

Games

Screen Currency's industry study explores how dedicated federal funding for games development has evolved over time. Federal direct support currently includes a $12 million, 4-year allocation from 2023 through *Revive,* invested in Screen Australia's Games Production Fund, the Emerging Gamemaker's Fund and Future Leaders Delegation, and indirect support includes the Digital Games Tax Offset from 2022.

Federal support has contributed to the development of Australian digital games over time, including by supporting pathways from early project support to subsequent critical success. For example, Screen Australia supported Witch Beam's first title *Assault Android Cactus* (2015), which received strong critical attention. The studio later released *Unpacking* (2021), which went on to achieve major international recognition including at the BAFTA Games Awards.[39]

See *Unpacking* case study:

Case Studies

Strong and increasing demand for funding highlights growing scale and maturity of the games industry. However, industry study stakeholders highlighted a timing mismatch between the federal Digital Games Tax Offset – realised on a game's completion – and the working capital requirements of games' longer development cycles. Combined with the $500,000 minimum qualifying expenditure, this can make the offset harder to access for smaller independent studios.

> "The incentive [Digital Games Tax Offset] is built on this concept of publishing and delivering to market like a theatrical release. [Developers] will always highlight it's difficult to get the 30% federal because they don't deliver a project in the same way, release can take up to four years..."
>
> – Games executive, industry study stakeholder interview

Unpacking

39 BAFTA 2022, *Unpacking wins the EE Game of the Year Award at the 2022 BAFTA Games Awards*.

Australian screen content and games are supported by a range of organisations, institutions and enabling structures and settings.

Government support for Australian screen and games take multiple forms including:

- **Direct funding:** at local, state and federal levels. This funding supports both a volume of local production, particularly targeting vulnerable forms of content; and a range of industry support programs and services.
- **Tax offsets and incentives:** a system of indirect supports, known as the Australia Screen Production Incentive (ASPI) provides the foundation for many forms of screen production. The supports include the Producer Offset, the Location Offset and a Post, Digital and Visual Effects (PDV) Offset. The Digital Games Tax Offset was introduced from 2022. These are tax rebates calculated as a proportion of qualifying production expenditure paid directly to production companies (and tend to be much larger than direct funding). They are paid following completion of the work providing it meets the offset guidelines.
  - **The Producer Offset** requires projects to meet a **Significant Australian Content (SAC) Test**, intended to ensure cultural as well as economic outcomes. It assists producers to secure upfront finance, providing them with project equity they are able to maintain or trade.
  - **The location and PDV offsets** are primarily economic measures: the location offset targets international productions, while the PDV offset supports post-production, digital and visual effects work in Australia regardless of where filming takes place.
  - **The Digital Games Tax Offset** is also an economic measure, aiming to support growth in the marketplace and new opportunities for skilled workers.
- **A range of state-based grants, investments and rules-based incentives:** these can add key supports to production in parts of Australia.
- **Funding for the public broadcasters:** ABC, SBS and NITV to support their delivery against their public charters.
- **Trade and export support:** through Ausfilm and AusTrade.
- **Training and skills development:** supported by a range of university courses and vocational training bodies, as well as dedicated government-funded institutions in the higher education sector including the Australian Film, Television and Radio School (AFTRS) and the National Institute of Dramatic Arts (NIDA). These courses offer higher education and training in key creative, technical and support roles alongside a range of commercial providers, including the Academy of Interactive Entertainment (AIE) for games developers.
- **Regulatory frameworks:** these include local content regulation imposed in the form of content obligations and expenditure requirements on broadcasting and streaming services. These frameworks support volumes of production and incentivise the production of less commercial genres and formats, although they have been struggling to keep pace with rapid change amid the radical disruptions of the global digital media landscape.

In 2020 the federal government updated the Australian content standards, combining the *Broadcasting Services (Australian Content) Standard 2016* and *Children's Television Standard 2009* into the single *Broadcasting Services (Australian Content and Children's Television) Standards 2020* (ACCTS). The ACCTS replaced separate sub-quotas for first-release adult drama, children's drama and documentary programming with a combined first release Australian program quota. The requirement for subscription TV licensees is limited to drama and obliges them to direct 10% of their total drama expenditure to new eligible drama.

Qualifying streaming services must invest at least 10% of their total Australian program expenditure, or 7.5% of their Australian revenue, in new Australian drama, children's, documentary, arts and educational content.

Public service broadcasters do not have local content requirement but are governed by legislated charters that include range of commitments to local audiences' cultural needs.

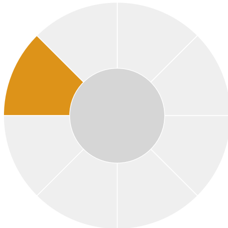
Alongside government investment and regulation, the local industry is supported by a range of industry bodies and professional organisations dedicated to advocacy, industry and skills development and market access. They include Ausfilm (established to attract international productions to film in Australia), IGEA (the Interactive Games and Entertainment Association), the Australian Children's Television Foundation (ACTF), Screen Producers Australia (SPA), the Media, Entertainment & Arts Alliance (MEAA), Motion Picture Distributors Association of Australia (MPDAA) and creative guilds such as the Australian Writers' Guild (AWG) and Australian Directors' Guild (ADG), as well as a range of regional, state-based and specialist organisations.

These organisations – along with the public broadcasters (ABC, SBS and NITV), commercial broadcasters, distributors, exhibitors, festivals and industry networks – all play different roles in building industry capability and exert varying degrees of influence over how much content is made and where it is produced.

Taken together, the range and mix of supports – while vital parts of the ecology – can be complex and administratively challenging to navigate. Substantial energy is dedicated by content creators in managing relationships, requirements and (sometimes competing) interests between players in this ecosystem.

Enabling structures and settings are increasingly under pressure to adapt to the new industry and audience landscape in which they operate. Industry support and intervention have evolved considerably over recent decades, responding to screen and games industry needs. However, Screen Currency's economic and industry studies highlight that these settings, built around earlier production and release models, face growing pressure in a rapidly evolving landscape.

Economic impacts and spillovers



Economic

Gross value added (GVA)

Screen and games

Screen Currency estimates that activity across the screen value chain contributed $11.1 billion to the Australian economy in gross value added (GVA) in 2023/24. For comparison, this was 17.4% of the value of all cultural and creative activity in the same year, similar to GVA generated by the air and space transport industries and more than that generated by the sport and recreation, and the electricity generation industries.

Of the total figures for screen and games, **$10.8 billion in GVA and 66,080 jobs are associated with the screen industry, and $317 million of GVA and 2,764 jobs are in digital games development.** The digital games sector is seeing strong average annual growth in GVA (11.7% since 2021/22) and employment (14.6% since 2016/17). 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.[40]

Our economic study highlights that the sectors that generate the most direct economic value are not those that create the IP. Roughly two thirds (65%) of the total screen and games GVA came from distribution mechanisms: free-to-air and subscription TV and internet broadcasting (see Figure 11). In contrast, the sectors that are upstream in the industry's creative engine room – production, post-production and digital games development – generate 22% of GVA.

These upstream sectors are highly labour-intensive compared to the broadcasting sectors, with most income going to wages rather than profit margins. For all screen and games sectors, skills shortages since the COVID-19 pandemic have contributed to labour increasing as a share of GVA, with production and post-production companies most affected. Small businesses facing skills and labour shortages transfer their returns to their workers rather than to shareholders.

40 Office for the Arts, 2023 *Level up: tax break set to reshape digital games industry*.

Screen:

$10.8b
GVA generated by screen activity in 2023/24

+5.8%
average annual growth since 2020/21

66,080
employed in screen industry 2024/25

+3.1%
average annual growth from 2016/17

Games:

$317m
generated by games in 2023/24

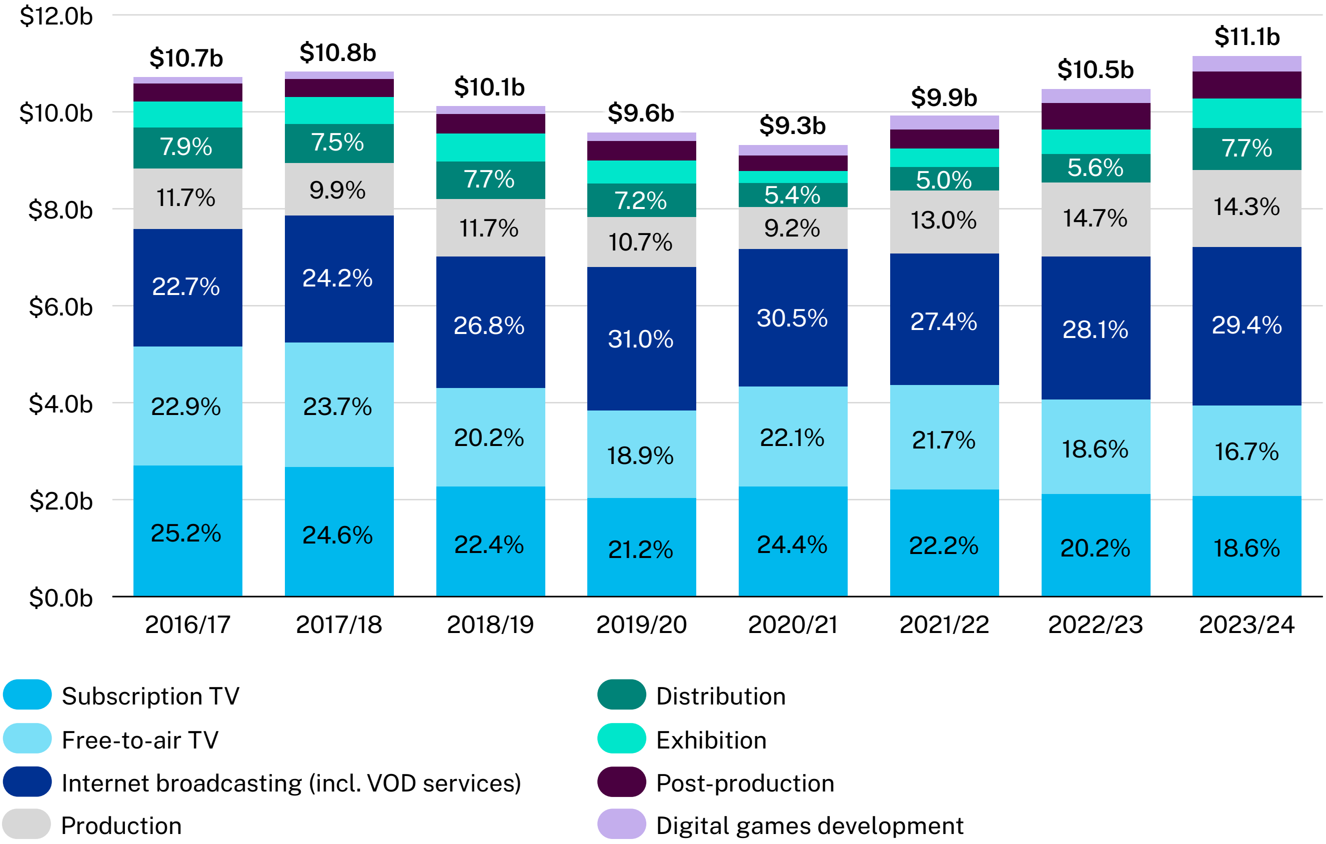
+11.7%
average annual growth since 2021/22

2,764
employed in games industry 2024/25

+14.6%
average annual growth from 2016/17

Figure 11: GVA generated by screen and games activity, 2016/17 to 2023/24

Percentages below 5.0% are not displayed for clarity.



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

Economic and social spillovers

Screen and games

Economic value does not only accrue in financial terms, but also as social and cultural impacts on viewers and broader society. Collectively, the Screen Currency studies provide evidence for a range of forms of value and ways they accrue.

Our economic study captures the value generated by screen and games sector goods and services in terms of GVA, jobs and outputs, and our global study reveals how screen and games also generate financial returns as they are sold into multiple markets and reach diverse global audiences.

Our case studies highlight how the benefits of production can be self-sustaining within the industry, such as skills transfers, as well as generating a range of economic, social and cultural spillovers. These include externalities associated with production, such as regional development benefits from demand for accommodation, catering, transport and construction around filming; and with audience consumption, such as tourism and support for Australian trade.

Production activity can have a profound impact on the economies and identities of the locations in which it occurs. Local government organisations such as the Goldfields-Esperance Development Commission recognise these benefits, marketing themselves as a film-friendly destination.[41] Benefits are also recognised in towns like Hay, which experienced a significant economic boost from the production of *Furiosa: A Mad Max Saga*, such that some now call it "Haywood".[42]

See *Mystery Road* and *Furiosa: A Mad Max Saga* case study:

Case Studies

Our case studies spotlight how the process of creation and production can also build new capabilities and opportunities – from individual career progression to a range of attachments and skills development programs. Our industry study highlights how technology – and the skills to develop, apply and navigate it – are central to the screen and games industry. The screen and games industry exemplifies important drivers of productivity through both technological acceleration and human empowerment.

The industry study highlights that post-production can also be a great source of innovation, employing a highly skilled workforce in a sector that drives and exemplifies growing economic complexity (creating a wider range, and greater sophistication, of goods for export and to build resilience and potential for growth). The study shows that screen and games sectors involve multiple specialist technical skills in high demand across the economy.

Our audience study shows that the unique outcomes of screen and games engagement support a range of public goods, including education, skills development and greater intercultural understanding; alongside the soft power evidenced in our global study (see Global impacts for more on this).

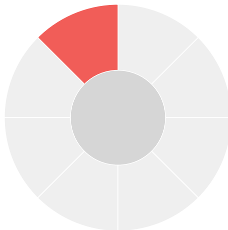
Screen content also generates unique social value, including (as evidenced in our audience study) the benefits of enhanced social cohesion through building mutual understanding, belonging and a more confident, contemporary national identity. Our research found that these benefits do not require direct engagement: they can accrue to both individuals and the broader community whether they watch the content or not.

Audiences place value in having access to local content (for themselves and for others) and the importance of cultural products to pass on to future generations. Our analysis of online reviews and video responses highlights how cultural IP, and the kinds of engagement it enables, provide opportunity for self-expression, identification, exchange, education and connection.

These multiple, concurrent benefits evidence the unique qualities of cultural production and the catalysing role it plays across a range of domains: benefiting individuals, communities, industry, the economy and the nation. **Screen and games are not just products; they are vital cultural resources.**

41 Goldfields Esperance Development Commission 2026, *Film Friendly*.
42 Stephens R 2022, "Mad Max: Furiosa filming drives economic recovery in Hay after COVID 19 and drought", *ABC News*.

Global impacts



Global

Screen

Screen Currency's industry study reveals that, increasingly, content is made to travel: sales to, and success in, international territories are vital in global, digitally distributed markets.

Stakeholders interviewed for our industry study described how **international sales are central to building audiences and finance for Australian productions.** Sometimes, as in the case of co-productions, they are central to the whole model.

Screen exports in 2023/24 totalled over $1.3 billion. This will increase again in 2024/25 figures, due to an increase in foreign drama expenditure (see Foreign production). This is also an underestimate, as it does not include locally made program sales to global platforms like Netflix.[43] The sectors generating the largest proportions of exports are production and post-production (83% of total screen exports in 2023/24).

Screen exports have more than doubled since the introduction of the producer and location offsets, increasing by an annual average of 4.7% since 2008/09. The Australian screen and games industry is a significant and growing export industry, aligned with the Australian Government's agenda to diversify Australia's exports.[44]

Our global study shows that screen stories carry unique soft power. They help form the way global audiences think and feel about a place and its people, and shape how much cultural affinity and connection viewers feel towards another country.

See *MasterChef* case study:

Case Studies

Our international audiences survey confirmed screen content influences perceptions of Australia. Half of respondents in 8 priority markets (US, China, Germany, UK, Canada, India, Singapore and New Zealand) agree Australian film and TV gives a positive impression of Australia and its people (50%), including a substantial majority of survey respondents in China and India (60%), with strong agreement also seen in the UK (55%). These forms of affinity and connection can help build greater understanding between global communities, and can translate into real world action – including the choice of Australia as a holiday destination, or an influence to "buy" Australian cultural and other goods.

43 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 shows up in ABS export data (or in Screen Australia's recoupment data).

44 Senator the Hon Don Farrell 2026, *Media release: Trade Diversification Network activated*.

$1.3b
total screen exports in 2023/24

$415m
screen royalty exports in 2024/25

21%
of financing for current screen projects came from overseas

Australian screen content also influences tourism and travel. Half of global audiences surveyed agree watching Australian film and TV has increased their interest in visiting Australia (50%). Beyond interest, watching Australian film and TV is influential on travel intentions, including for 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 viewing Australian screen content.

Sometimes the influence of Australian content is overt, visible in for example, the attraction of tourists to the *Bluey* World immersive experience in Brisbane.

Often it is more subtle – accumulating over time, built through identification with characters, familiarity with locations and exposure to the norms, humour and forms of expression of another culture.

Some global releases of Australian content directly coordinate with tourism bodies to engage with this influence through targeted tourism campaigns. Stakeholder interviews for our industry study highlighted the *Kangaroo* campaign delivered in partnership between Tourism and Events NT, STUDIOCANAL and Screen Territory as a recent stand-out example of how **joined-up public sector approaches can amplify impact**.

> “I think tourism agencies have really realised and come to appreciate the salience factor of screen production.”
>
> – Screen agency representative, industry study stakeholder interview

Our screen stories help show the world who we are – they represent a range of faces of contemporary Australia, and they showcase our skills, our creativity and our humanity. Three in 4 (74%) of our international audience survey respondents in China agree that Australian film and TV help them understand Australian culture and way of life, with similarly high responses in India (70%). These findings highlight the role of Australian screen content in communicating authentic Australian stories, values and settings to large international audiences.

50%
of audiences in priority markets agree Australian screen content gives them a positive impression of Australia and its people

35%
agree it makes them interested in working, doing business or buying products from Australia

50%
agree it has increased their interest in visiting

Games

From its earliest years, Australia's games sector has been globally oriented. Local studios have always created games designed for international audiences, a pattern reflected today in the industry's export-heavy revenue profile. IGEA's most recent developer survey shows that 95% of Australian game development revenue comes from outside Australia.[45] Australian games studios have always designed for international markets, working in global genres, marketplaces and technology.

See *Hollow Knight: Silksong* case study:

Case Studies

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 Australian studios selling their development skills and services into international production pipelines.

Our economic report reveals that, in 2023/24, Australia's digital games sector generated $323 million in exports. The digital games sector outperforms the screen sector in export growth, expanding at an average annual rate of 15.4% between 2016/17 and 2023/24. This rapid rise is occurring from a comparatively small base, but it highlights the sector's accelerating momentum and increasing competitiveness in global markets. Globally, games sector revenue is forecast to grow 4.9% by 2028.

The communities that Australian studios seek to reach are global because the markets themselves are global – and huge. Australia generated approximately 1.1% of worldwide consumer games revenue in 2025, within a global industry valued at A$273 billion. While modest in absolute terms, this performance represents a significant over-index relative to Australia's share of the global population. In revenue terms, Australia generates just over 3 times its population weighted share of global games spending. This per capita strength underscores both consistent domestic engagement and the structural importance of international markets for Australian developers.[46]

45 IGEA 2025, *Australian game development survey: 2025 report*.
46 Newzoo 2026, *Global Games Market Report 2025*, accessed via subscription.

$323m
total games exports in 2023/24

29%
of financing for current games projects came from overseas

95%
of games revenue received by Australian games studios comes from overseas

Ningaloo Nyinggulu

Conclusion: The health of Australia's screen and games ecology

Screen Currency 2026 reveals that Australians value local screen content deeply, and in many different ways. Building from that strong foundation, the sector's future success will depend on how effectively Australian creators and businesses compete for audience attention, build intellectual property for the long term, and navigate local and global opportunities – and in doing so generate significant cultural and economic value at home and overseas.

The kinds of value attributed to Australian content in the research can transcend how we spend our time as audiences and can be far longer lasting. Local content continues to play a crucial role in helping people navigate their place in the world, connect with communities and understand themselves and one another.

Screen and games content provides shared reference points to help us navigate culturally relevant subjects. Our shared engagement is no longer with a singular national identity or story, but multiple, cross-cutting and interconnected identities and stories.

Our viewing and playing habits may be personalised and individual, but **the social impacts of local content are collective**, experienced as a community.

The global screen landscape offers unprecedented choice – vast libraries of content that open windows into different worlds, perspectives and ways of life. Within that abundance, Australian stories offer something distinct: our own voices, places and experience. The opportunity is to ensure they take their place among the stories and experiences audiences are drawn to.

Current trends can alternately be seen as an expansion or a contraction: either a sign of growth and opportunity through an explosion of access, creativity and choice, or as an increasingly concentrated market in which production serves the interests of global technological platforms, rather than local public interest.

Australia's creatives and independent production companies – the engine room of our high-value IP – are producing work of exceptional cultural and commercial worth. The opportunity now is to build on that strength: to keep backing content creation while closing the gap between what Australian audiences value and what they engage with.

A radically evolved media and cultural landscape has empowered audiences, raised expectations and opened new pathways to reach them. This is a moment to ensure Australians – as consumers, citizens and communities – can benefit in a range of ways from that transformation, by supporting, protecting and promoting the precious public goods that hold a place of unique value in Australians' lives.

The Screen Currency evidence base reveals how investment, energy and value flow between components of the ecosystem, and where those flows can be strengthened. It provides an opportunity to reflect on the tremendous value of this ecology to Australians – as individuals and as communities, as economic actors and as global citizens – and to think about the elements that can make it healthy, diverse, connected and resilient.

Glossary

ACMA

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

Audience access

The ability for content to reach, be found and be used by audiences, shaped by platforms and distributors, marketing and algorithms, and availability across services, devices and screens. It also reflects practical barriers to access, including affordability (subscriptions, tickets and other costs), required technology or connectivity, and accessibility for people with disability (e.g. captions, audio description and interface design).

Australian children's TV drama

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

Australian documentary

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

Australian feature film

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

Australian TV drama

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

Cost-plus model

Cost-plus is a production financing model where the commissioner covers the costs of the production plus a fixed fee. The model offers guaranteed upfront returns for producers regardless of the commercial outcome of a work, usually in return for relinquishment of backend rights and long-term profit participation. It differs from more traditional deficit financing models.

CALD communities

Culturally and linguistically diverse communities. There are no widely accepted and used standard definitions of cultural diversity and cultural identity, which are multifaceted.[47] "Culturally and linguistically diverse (CALD)" is an umbrella term that has been used in Australia for some time and while contested, it continues to be used in data collection and reporting on Australia's cultural makeup. People from CALD communities were included as an audience group of focus in this research based on self-identification. Within the screen audience qualitative research there was emphasis on inclusion of people with experiences of cultural and racial marginalisation.

47 Mousaferiadis P, Moieni R and McCredie C 2025, *Culture, Cultural diversity and cultural identity: towards precise, functional, universal definitions to enhance intercultural understanding*, UNESCO World Conference on Cultural Policies and Sustainable Development Technical Paper; D'Almada-Remedios, R., Groutsis, D., Kaabel, A. and O'Leary, J. (2021) Counting culture: towards a standardised approach to measuring and reporting on workforce cultural diversity in Australia. Diversity Council Australia and University of Sydney Business School.

Discoverability

The extent to which content can be found by audiences, particularly on digital platforms or storefronts. Discoverability is often influenced by algorithms, promotion, timing and competition for attention.

Diversity

Diversity, by definition, is about multiplicity. It can mean different things in different contexts and to different people. This research focuses on several aspects of diversity among participants including First Nations identity, cultural background, gender, sexual orientation, disability, age and location, and intersections between these aspects. In measuring these aspects of diversity, the ultimate aim is that all the many and varied voices in Australia have the opportunity to have their views heard and be represented in local screen and games content.

First Nations

First Nations refers to Aboriginal and Torres Strait Islander peoples, who are the original custodians of the land of Australia and have maintained continuous cultures, knowledge systems and connections to Country for tens of thousands of years.

Foreign production

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

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.

Gen Alpha

Refers to video game players born 2010–2024. Note: In this study, the Gen Alpha sample includes children aged from 10 years old.

Gen Z

Refers to video game players born 1995–2009.

GVA

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

IGEA

Interactive Games and Entertainment Association (IGEA).

Millennials

Refers to video game players born 1981–1994.

Gen X

Refers to video game players born 1965–1980.

Baby Boomers

Refers to video game players born 1946–1964.

LGBTIQ+

LGBTIQ+ is an umbrella term used to describe people who identify as lesbian, gay, bisexual, transgender, intersex, queer or questioning, as well as other diverse sexual orientations, gender identities and sex characteristics. The "+" recognises identities not explicitly listed.

Non-use value

Non-use value is the value people place on a good or service even if they never personally use it, such as valuing its existence, its protection for future generations, or the benefit it provides to others.

Parents

Refers to parents of children under 15.

PDV

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

Platform

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

People with disability

Refers to people who self-identified as living with disability. To reflect and respect stakeholder input to the Australian Government's *Equity: The Arts and Disability Associated Plan*, people-first terminology has been used when talking about disability among audiences and the wider community. We recognise that many in the cultural sector prefer to use identity-first language (such as d/Deaf and disabled) to describe themselves.

Regional Australians

Refers to people who live outside major cities, in regional, rural or remote parts of Australia.

Screen content

Feature films, TV drama and comedy, documentary and factual, children's programming, animation, light entertainment and short-form online videos, viewed across all platforms. It does not include news, sport, or user-generated content.

SVOD

Subscription video on demand (SVOD) is a form of video on demand (VOD) where users pay a recurring subscription fee for access to a library of content. SVOD providers in Australia include Netflix, Disney+, Prime Video, Paramount+ and Stan. Some SVOD providers offer advertising-based tiers for lower recurring fees.

Use value

Use value is the value people obtain from a good or service through direct or indirect use, such as using it for recreation, production, or other everyday activities.

Value chain

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

Video game players

Video game players (or just "players") refers to people who play video games on PC, console and mobile devices, from simple puzzle and word games to immersive storyworlds and large-scale online environments that support social interaction and ongoing engagement. Respondents to the Australian video game players survey were required to be active players. Focus group participants were required to have played a video game on a console or computer at least once in the past month.

For further terms and definitions, see the individual Screen Currency reports.

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Appendix 1: Indicators, measures and sources

The following tables present the trackable indicators aligned to the Screen Currency Value Framework, including details of how we have measured them in Screen Currency 2026 and data sources.

Audience indicators

	Indicators	Screen measures	Games measures
What Australians value in local content	1. Importance of access to local content	84% of Australians agree it's important for Australians to have access to local screen content	N/A. Focus groups expressed strong support for the continued development of Australian games
	Source	**Australian screen audiences survey.** Nationally representative sample of 2,404 Australians aged 16 years and over (weighted for age, gender and location in line with ABS population data). **Question:** "Overall, how important is it that Australians have access to Australian-made movies and TV programs?" Respondents were asked to respond using a 5-point scale from "Not important at all" to "Very important." The measure combines the top 2 response options.	**Australian video game player focus groups.** Four focus groups were conducted with a total of 28 Australian video game players. Participants were recruited via a panel provider to ensure diversity across age, gender, ethnicity, disability status, and metropolitan and regional location. To participate, individuals were required to have played a video game on a console or computer at least once in the past month.

Buried

	Indicators	Screen measures	Games measures
What Australians value in local content	2. National pride & confident national identity	77% of Australians agree well-made screen content makes them feel proud to be Australian 78% agree Australian content contributes to our distinctive identity in the world 76% agree it represents who we are as a nation – our people, our humour & lifestyle	N/A. Focus groups expressed pride in local creative success
	Source	**Australian screen audiences survey (n=2,404 weighted).** **Question:** "Thinking about the Australian-made TV shows and films you have seen, how much do you agree or disagree that Australian content provides value to Australians in the following ways?" Respondents were asked to rate their level of agreement with the following statements on a 7-point scale from strongly agree to strongly disagree: "Well-made Australian movies/TV make me feel proud of being Australian." "Australian productions contribute to our distinctive identity in the world." "Australian screen stories represent who we are as a nation, our people, our sense of humour and lifestyle." The measures combine the 3 agreement response options.	Australian video game player focus groups (n=28).
	3. Cultural resonance	78% of Australians agree local screen stories help preserve & share our unique culture 71% agree screen stories connect them with Australia's past & cultural heritage 75% agree screen content ensures our stories are remembered for future generations	N/A. Country of origin is not usually a key component of game content
	Source	**Australian screen audiences survey (n=2,404 weighted).** **Question**: As above, agreement with the following statements on a 7-point scale from strongly agree to strongly disagree: "Australian movies/TV help preserve and share our unique history and culture." "They connect me with Australia's past and cultural heritage." "Australian productions ensure our stories are remembered for future generations." The measures combine the 3 agreement response options.	N/A.

	Indicators	Screen measures	Games measures
What Australians value in local content	4. Quality	73% of Australians agree local content is well-made & as good as international 76% agree Australian stories are visually & creatively distinctive	N/A.
	Source	**Australian screen audiences survey (n=2,404 weighted).** **Question:** As above, agreement with the following statements on a 7-point scale from strongly agree to strongly disagree: “Australian movies/TV programs are well-made and as good as international ones.” “Australian stories are visually and creatively distinctive.” The measures combine the 3 agreement response options.	
	5. Representation & authenticity	75% of Australians agree local screen stories reflect the diversity of Australian people & voices 72% agree they portray real issues & perspectives of Australians 70% agree they are an authentic portrayal of traditions & culture	61% of Australian video game players agree the games they play reflect people like them 62% agree games should reflect a wide range of cultures & backgrounds
	Source	**Australian screen audiences survey (n=2,404 weighted).** **Question:** As above, agreement with the following statements on a 7-point scale from strongly agree to strongly disagree: “Australian stories reflect the diversity of Australian people and voices.” “Australian productions portray real issues and perspectives of Australians.” “Australian screen stories are an authentic portrayal of traditions and culture.” The measures combine the 3 agreement response options.	**Newzoo 2025 Global Gamer Study survey data (n=1,620 Australian video game players).** **Question:** Agreement on a 7-point scale with the statements: “The games I play reflect people like me” and “Games should reflect a wide range of cultures & backgrounds”. The measure combines the 3 agreement response options.

	Indicators	Screen measures	Games measures
What Australians value in local content	6. Identity, belonging & social cohesion	67% of Australians agree local screen stories support feelings of belonging & connectedness 65% agree they make them think about their identity as an Australian 69% agree local screen stories help new Australians learn about Australian culture	37% of Australian video game players say socialising with others is one of the reasons they play video games
	Source	**Australian screen audiences survey (n=2,404 weighted).** **Question:** As above, agreement with the following statements on a 7-point scale from strongly agree to strongly disagree: "Australian-made TV and movies help people from non-English speaking backgrounds and new migrants learn about Australian culture and everyday life" "Watching Australian movies and TV support my feelings of belonging and feeling connected." "Australian screen stories make me think about my place and identity as an Australian" The measures combine the 3 agreement response options.	**Australian video game players survey (n=2,208).** An online survey of active Australian video game players. The final sample comprised 2,208 respondents and was structured using quotas to broadly align with known demographic characteristics of the Australian population by age and gender. **Question:** Agreement with the following statement on a 5-point scale from strongly disagree to strongly agree: "I play video games to socialise with others." The measure combines the 2 agreement response options.
What audiences are doing	7. Engagement with local content	35% of Australians watch more than 30% local content 66% watch more than 10% local content *(excluding sport and news)* 75% are interested in viewing more Australian screen content	60% of Australian video game players are unsure if they play Australian games Country of origin is not a feature of games engagement according to focus groups
	Source	**Australian screen audiences survey (n=2,404 weighted).** **Question:** "Thinking about everything you watch in a typical week, including movies, TV shows and series (excluding sport and news), approximately how much of it do you think is Australian-made?" Response options were on a 7-point scale from "None of it" to "Almost all of it (90–100%)" or "Not sure" (5% selected this). **Question:** "Are you interested in watching more Australian-made movies and TV programs in the future?" Respondents were asked to answer using a 5-point scale from "Not at all interested" to "Very interested". The measure combines the 2 positive response options.	**Australian video game players survey (n=2,208).** **Question:** "Do you play Australian developed video games?" **Video game player focus groups.** 4 focus groups with 28 Australian video game players.

	Indicators	Screen measures	Games measures
What audiences are doing	8. Social impact & action	71% of Australians take action after viewing local content (e.g. seeking information, changing behaviour, or deepening engagement with issues raised) 60% agree Australian content inspires them to learn more about themselves, their country, and places, stories or experiences shown 59% relate to Australian stories and often share or discuss them socially	19% of Australian video game players are actively involved in games communities 16% often post about video games
	Source	**Australian screen audiences survey (n=2,404 weighted).** **Question:** "After watching your favourite Australian movies or TV programs, do you ever feel inspired to take any of the following actions?" (Multi-select). Respondents selected at least one of 12 options such as talking, posting, learning more, visiting places, taking part in activities. **Question:** As above, agreement with the following statements on a 7-point scale from strongly agree to strongly disagree: "Australian-made movies and TV often inspire me to learn more about myself, my country, and the places, stories, and experiences shown" "I relate to Australian stories and often share or discuss them socially." The measures combine the 3 agreement response options.	**Australian video game players survey (n=2,208).** **Question:** "Which of these activities, focusing on video games, do you engage in?" (Multi-select).
What's driving audiences	9. Drivers of engagement	72% of Australians watch to relax or unwind 69% watch for entertainment 36% watch to learn new things or stay informed	87% of Australian video game players play to have fun 76% play to pass the time 72% play to de-stress 51% play to improve skills
	Source	**Australian screen audiences survey (n=2,404 weighted).** "People watch screen content for many reasons (movies, videos or TV shows, excluding sports and news). What are the main reasons for you? Select all that apply."	**Australian video game players survey (n=2,208).** **Question:** Agreement with the following statements on a 5-point scale from strongly disagree to strongly agree: "I play to have fun" "I play to pass the time" "I play to de-stress" The measures combine the 2 agreement response options.

	Indicators	Screen measures	Games measures
What's driving audiences	10. Discoverability	36% say it is easy to find local screen content	N/A. Country of origin rarely travels with games at the point of discovery
	Source	**Australian screen audiences survey (n=2,404 weighted).** **Question:** "How easy or difficult is it to find or discover new Australian-made screen content (such as TV programs, movies, and series)?" Respondents were asked to answer using a 5-point scale from "very difficult" to "Very easy". The measure combines the 2 positive response options.	

Industry indicators

	Indicators	Screen measures	Games measures
What content is getting made	11. Production trends	$3.0b total production expenditure in 2024/25 +11.1% increase from 2023/24 403 hours of adult TV drama broadcast on average per year 2020–24 -12.4% decrease from 2000–19 65 hours of children's TV broadcast on average per year 2020–24 -42% decrease from 2000–20 386 hours of documentary programming broadcast on average per year 2021–24 -3.7% decrease from 2009–20 40 drama feature film titles produced on average per year 2021–24 +43% increase from 2000–20 24 theatrical documentary features produced on average per year 2016–2024 +243% increase from 2009–2015	376 project applications to Screen Australia games funds in 2024/25 +59% average annual increase since 2021/22
	Source	Production expenditure includes expenditure on domestic and foreign drama and documentary production. Screen Australia drama and documentary reports data analysed by University of Canberra for Screen Currency. See economic report.	Applications to Screen Australia's Games Production Fund and Emerging Gamemakers Fund. Noted by games sector expert advisors as a relevant proxy for games business numbers. See Figure 5 in the industry report.

	Indicators	Screen measures	Games measures
What content is getting made	12. Sources of finance	**Current screen projects average % of financing:** 23% government funding 16% client fees/commissions 12% broadcaster or platform license fees 11% own investment *Note findings are directional due to sample size.*	**Current games projects average % of financing:** 4% government funding 35% client fees/commissions 29% own investment *Note findings are directional due to sample size.*
	Source	**Industry and workforce survey** based on responses from 75 screen businesses/ organisations. **Question:** "What is the approximate breakdown of financing and resourcing for your current projects from each of the following sources?" See Table 10 in the industry report for all responses.	**Industry and workforce survey** based on responses from 28 games businesses/ organisations. **Question:** "What is the approximate breakdown of financing and resourcing for your current projects from each of the following sources?" See Table 30 in the industry report for all responses. Note that the sample size and likely skew towards studios below Digital Games Tax Offset thresholds may mean these results understate the role of public funding in games development finance.
Who's making local content	13. Pathways to market	**Typical screen project distribution arrangements:** 45% of businesses use international distributor/sales agent 39% use Australian distributor/sales agent 25% use direct deal with platform (e.g. SVOD) 23% use self-distribution/publishing 14% use client-delivered *(multiple options allowed)* *Note findings are directional due to sample size.*	**Typical games project distribution arrangements:** 33% of businesses use an international distributor/sales agent 17% use an Australian distributor/sales agent 25% use direct deal with distribution/ publishing (e.g. app store) 67% use self-distribution 58% use client-delivered *(multiple options allowed)* *Note findings are directional due to sample size.*
	Source	**Industry and workforce survey based on responses from 44 screen businesses/ organisations.** **Question:** "Thinking of a typical project for your business, what are the primary distribution arrangements?" **Response options:** "International distributor/sales agent", "Australian distributor/sales agent", "Direct deal with platform/publisher (SVOD/app store)", "Self-distributed/self-published", "Client-delivered (no public distribution)", "Other". Percentages sum over 100% as multiple selections were allowed. See Table 17 in industry report.	**Industry and workforce survey based on responses from 12 games businesses/ organisations.** **Question:** "Thinking of a typical project for your business, what are the primary distribution arrangements?" **Response options:** "International distributor/sales agent", "Australian distributor/sales agent", "Direct deal with platform/publisher (SVOD/app store)", "Self-distributed/self-published", "Client-delivered (no public distribution)", "Other". Percentages sum over 100% as multiple selections were allowed. See Table 36 in industry report.

	Indicators	Screen measures	Games measures
Who's making local content	14. IP ownership	**Equity/IP ownership at first release (typical project):** 39% of screen businesses own all 16% of screen businesses own some 45% of screen businesses own none **Average earnings from IP for screen businesses in 2024/25:** 45% from own new IP 26% from own existing IP 29% from others' IP *Note findings are directional due to sample size.*	**Equity/IP ownership at first release (typical project):** 45% of games businesses own all 15% of games businesses own some 40% of games businesses own none *Note findings are directional due to sample size.*
	Source	**Industry and workforce survey.** **Equity/IP ownership at first release** based on responses from 49 screen businesses/organisations. **Question:** "Thinking of a typical project, who held the primary IP (copyright) at first commercial release?" **Response options:** "Me/my organisation held all equity/rights", "Me/my organisation held some of the equity/rights", "Me/my organisation did not hold any equity/rights". Responses presented based on whether respondents identified only their own organisation, multiple parties, or only another party as primary rights-holder at first commercial release. See Table 7 in industry report. **Average earnings from IP for screen businesses** based on responses from 45 screen businesses/organisations. **Question:** "Thinking about your earnings from IP in 2024/25 (fees, sales, royalties) what percentage share best describes where it came from (to the nearest 5%)?" **Response options:** "New IP first monetised in 2024/25 (created by my organisation)", "Existing IP owned by my organisation", "IP owned by others that my organisation produced, published, distributed, or licensed-in (incl. foreign IP exploited in Australia)". See Table 8 in industry report.	**Industry and workforce survey.** **Equity/IP ownership at first release** based on responses from 20 games business respondents. **Question:** "Thinking of a typical project, who held the primary IP (copyright) at first commercial release?" **Response options:** "Me/my organisation held all equity/rights", "Me/my organisation held some of the equity/rights", "Me/my organisation did not hold any equity/rights". Responses presented based on whether respondents identified only their own organisation, multiple parties, or only another party as primary rights-holder at first commercial release. See Table 29 in industry report.

	Indicators	Screen measures	Games measures
Who's making local content	15. Workforce profile	**Of screen industry employees:** 73% hold a bachelor's degree or higher 16% earn income outside screen 46% in current role for ≤ 2 yrs	**Of games industry employees:** 83% hold a bachelor's degree or higher 53% earn income outside games 48% in current role for ≤ 2 yrs
	Source	**Industry and workforce survey.** **Questions:** "What is your highest level of qualification?" (n=340), "Did you earn all your income from working in the screen and/or games industry?" And "How long have you been employed in your current main role?" See industry report.	**Industry and workforce survey.** **Questions:** "What is your highest level of qualification?" (n=109), "Did you earn all your income from working in the screen and/or games industry?" And "How long have you been employed in your current main role?" (n=76) See industry report.
	16. Growth in "active" businesses	**Creation and production:**[48] +7% 10-year average annual growth to 2023/24 **Distribution, broadcast, streaming & exhibition:** -1% 10-year average annual growth to 2023/24	**Digital games:** 188 businesses in 2021/22 +15.3% average annual growth from 2015/16
	Source	University of Canberra analysis of ABS BLADE data for industry report. "Creation and production" includes post-production. Trend calculated using compound annual growth rate. Note that creation and production includes special-purpose vehicles (SPVs) and many non-employing businesses (median headcount is zero for creation and production sector). An SPV is a separate legal entity created for a specific project. In the screen industry, SPVs and other project-specific entities are commonly used to deliver individual films or series, manage financing and risk and may be wound up once the project is completed. See Table 1 in industry report.	Based on analysis of ABS Film, Television and Digital Games data for Screen Currency. Trend calculated using compound annual growth rate. See Table 21 of the industry report.

48 Includes post-production.

	Indicators	Screen measures	Games measures
Who's making local content	17. Scale & longevity of businesses	**Screen businesses 2024/25:** Average 28/median 4 employees Average 35/median 5 contractors 63% operating ≥10 years 25% operating ≤ 5 years	**Digital games businesses 2024/25:** Average 17/median 4 employees Average 21/median 4.5 contractors 37% operating ≥10 years 51% operating ≤ 5 years
	Source	**Industry and workforce survey** based on responses from 223 screen businesses/ organisations. **Questions:** "How many people in Australia did you employ as at 30 June 2025?" "How many contractors did you engage between 1 July 2024 and 30 June 2025?" and "How long has your business been operating in its current form?" (Note: headcount = FT + PT + Casual) See Table 2 in the industry report.	**Industry and workforce survey** based on responses from 63 games businesses/ organisations. **Questions:** "How many people in Australia did you employ as at 30 June 2025?", "How many contractors did you engage between 1 July 2024 and 30 June 2025?" and "How long has your business been operating in its current form?" (Note: headcount = FT + PT + Casual) See Table 24 and Table 25 in the industry report.
What supports local content	18. Government	**Direct federal & state government support:** $387.6 million in 2023/24 +7.9% average annual growth since 2015/16 **Indirect federal government support:** $1.1 billion in 2024/25 +7.6% average annual growth since 2015/16	N/A. Federal direct support includes a $12 million, 4-year allocation from 2023 through *Revive,* invested in the Games Production Fund, the Emerging Gamemaker's Fund and Future Leaders Delegation Indirect support includes the Digital Games Tax Offset
	Source	**Direct federal and state government support** based on DITRDCSA Cultural and Creative Statistics Working Group, Cultural Funding by Government, Australia, 2023/24. Includes support for screen production and distribution. Trend calculated using compound annual growth rate. In 2024/25 dollars. Analysis by University of Canberra for Screen Currency. Indirect federal government support (tax offsets) based on ATO Annual Reports 2015/16 to 2024/25 Part 5 Performance and Accountability. Includes the Digital Games Tax Offset from 2022/23. Trend calculated using compound annual growth rate. In 2024/25 dollars. Analysis by University of Canberra for Screen Currency. See Figure 29 of the economic report.	N/A

Economic indicators

	Indicators	Screen measures	Games measures
Economic impacts	19. Employment	66,080 employed in screen industry 2024/25 +3.1% average annual growth from 2016/17	2,764 employed in games industry 2024/25 +14.6% average annual growth from 2016/17
	Source	University of Canberra estimates for Screen Currency based on the ABS Labour Account, ABS Labour Force Survey and ABS Jobs in Australia (TableBuilder). Trend calculated using compound annual growth rate. See Figure 9 and Table 3 in the economic report.	University of Canberra analysis for Screen Currency based on the ABS Film, Television and Digital Games Survey and IGEA Australian Game Development Survey. Trend calculated using compound annual growth rate. See Figure 9 and Table 3 in the economic report.
	20. GVA contribution	$10.82b GVA generated by screen activity in 2023/24 +5.8% average annual growth since 2020/21	$317m generated by games in 2023/24 +11.7% average annual growth since 2021/22
	Source	University of Canberra estimates for Screen Currency based on ABS National Accounts Input-Output tables. Trend calculated using compound annual growth rate. See Figures 2 and 3 and Table 1 in the economic report.	University of Canberra analysis for Screen Currency based on BCARR estimates. Trend calculated using compound annual growth rate. See Figure 39 and Table 21 in the economic report.


Ginger and the Vegesaurs

Global indicators

	Indicators	Screen measures	Games measures
Global impacts	21. Global sales	$1.3b total screen exports in 2023/24 +4.7% average annual growth since 2008/09 $415m screen royalty exports in 2024/25 21% of financing for current screen projects came from overseas	$323m total games exports in 2023/24 + 15.4% average annual growth since 2016/17 29% of financing for current games projects came from overseas
	Source	**Screen exports** are based on analysis by University of Canberra of ABS BLADE, ABS Balance of Payments and Screen Australia's international expenditure data. Trend calculated using compound annual growth rate. In 2024/25 dollars. See Table 4 in the economic report. **Screen royalties** are based on analysis of ABS Balance of Payments data. See Figure 19 in the economic report. **Overseas financing** is from the Industry and workforce survey based on responses from 66 screen businesses/ organisations. **Question:** "What is the approximate breakdown of financing and resourcing for your current projects from each of the following sources?" See industry report.	The games exports are based on The IGEA Australian Games Development Survey which is a self-report of revenue by local games studios who choose to participate. Trend calculated using compound annual growth rate. In 2024/25 dollars. See Table 4 in the economic report. **Overseas financing** is from the Industry and workforce survey based on responses from 23 games businesses/organisations. **Question:** "What is the approximate breakdown of financing and resourcing for your current projects from each of the following sources?" See industry report.

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	Indicators	Screen measures	Games measures
Global impacts	22. Global impact	50% of audiences in priority markets agree Australian screen content gives them a positive impression of Australia and its people 35% agree it makes them interested in working, doing business or buying products from Australia 50% agree it has increased their interest in visiting	95% of games revenue received by Australian games studios comes from overseas
	Source	**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 (total n=6,500). **Questions:** "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." "Gives me a positive impression of Australia and its people." "Makes me interested in working, doing business or buying products from Australia." "Makes me interested in visiting Australia one day." The measures combine the 3 agreement response options. See global report.	**Sourced from the IGEA Developers Survey 2025**. Based on a self-report survey of n=141 Australian games development studios.

Appendix 2: The Screen Currency 2026 approach

Brief

A decade after the publication of Screen Currency 2016, the Screen Currency 2026 project commenced with a wide brief, intended to provide an updated understanding of the public value of screen and games production in Australia.

In addition to identifying and quantifying the economic, cultural and social value of screen and games production, **this research was intended to**:

- enable government to better understand and track the public value gained from investing in and supporting the screen and games industry
- support industry practitioners to use this research to understand the impact of their work
- provide state and federal screen funding agencies and industry more widely with an advocacy tool to continue and increase investment in screen and games.

Consultation

Given the range of stakeholders identified in this research, the process began with extensive consultations including representatives of:

Government	Australian screen and games industry	Wider scope
• Office for the Arts • VicScreen • Screen Queensland • Screen NSW • Screen Tasmania • South Australian Film Commission • ScreenWest • Screen Territory • Screen Canberra • Department of Foreign Affairs and Trade • Austrade • Bureau of Communications, Arts and Regional Research	• Ausfilm • Screen Producers Australia (SPA) • Media Entertainment Arts Alliance (MEAA) • Documentary Australia • Interactive Games and Entertainment Association (IGEA) • Australian Centre for the Moving Image (ACMI) • Motion Pictures Distributors Association (MPDAA) • Australian Broadcasting Corporation (ABC) • Special Broadcasting Service (SBS) • FreeTV Australia • Netflix • Australians In Film (LA) • Australian and New Zealand Screen Association (ANZSA) • National Institute for the Dramatic Arts (NIDA) • Australian Film Television and Radio School (AFTRS) • National Film and Sound Archive (NFSA)	• Creative Australia • Tourism Australia • APRA-AMCOS • Sydney Opera House • Arts Council England • Figurative (UK) • Metcalf Canada • Canada Media Fund • New Zealand On Air • New Zealand Film Commission • Academics (Media & Cultural studies, Games, Creative Industries)

These consultations involved testing of the framing and core questions, including:

What are we hoping to value?

Participation	Consumption	Process	Cultural assets
engagement, attention & connection (social & cultural value measures)	transactional/ choice value/media "diet" (economic & cultural measures)	activity/skills/ innovation/models/ media "chain" (creative economy lens & economic measures)	impact/legacy/ shared reference points (cultural & social value measures)

The question of *value to whom?* was explored in a beneficiaries framework developed for the project to explore a range of ways of understanding value (see Figure 2).

The concept of value raises the question of who benefits, and how. In the context of cultural value, this doesn't just mean who owns the rights or equity in a project or platform, but includes more subtle points at reception, including who gets access, who gets to feel seen, who feels included in humour enough to laugh, who benefits from greater insight, or who is able to enjoy living in a more cohesive community. Benefits accrue in different ways across different interconnected beneficiaries categories.

Like all ecologies, ecosystems of cultural value are highly interconnected. A healthy screen and games industry both supports and depends on the engagement of the communities they serve.

This led to some core questions about how the project might explore questions of value, including:

- What we make (volume)
- The level of activity (and sustainability of activity)
- What it's worth to the economy
- What it's worth to the community
- What it's worth to individuals
- How much people engage
- Which groups of people engage
- What it does for people – as individuals or as a society
- What people do with it

These were mapped against existing data sources, data gaps and core sector needs to develop a set of **needs and priorities for the research**:

Academics/ commentators	• New approaches to methodologies • New examples of interdisciplinary approaches • A broader framework for engaging with value • Connection to policy context	New findings, methods and approaches
Sector	• Audience data • Domestic & inbound spend • Track IP and equity control • Careers/skills insights • Business sustainability • Narrative around value	Shared data & insights on agreed measures
State agencies	• State-based spend • State-based employment • Tourism impact • Regional data • Value for investment • Comparability by state/region	Comparable data
Screen Australia	• Impact of "public good" investments • Role of Australian content • Industry measures over time • Audience insights & trends • Strategic insights • Narrative around value	Trackable data & coherent narrative
Government	• Policy outcomes • Cultural impact • Justification for incentives & investment • Public engagement/ benefit • Flow on benefits	Data/insights related to policy context
Treasury	• Size of industries • Employment • Inputs (govt investment) • Outputs (production activity) • Tourism impact • GVA	Data/insights related to policy context

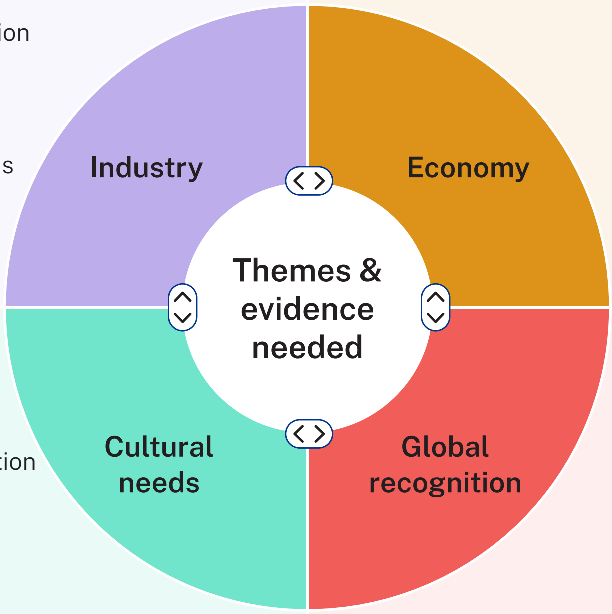
Methods development

Research and methods experts from a range of disciplines were invited to form a Research Advisory Group and participate in workshops to help develop the approach to research methods (with careful management of any potential future conflicts of interest).

These consultations and frameworks informed the brief for the Request for Proposals **which identified a range of research themes and evidence needs**:

- Number (& size & longevity) of businesses
- Employment "high value" jobs
- Sources of finance/private investment
- Control of IP and equity
- Growth & Innovation
- Training and higher education options
- Graduate outcomes/ career paths
- Retention & loss to overseas
- Skills transferability

- Total government investment
- Employment
- Volume of activity
- Export value
- Tourism impact
- Innovation & complexity economy
- GVA



- Cultural needs
- Quality & enjoyment
- Culturally relevant options
- Authenticity & representation
- Awareness of Australian content
- Perceptions of Australian content
- Access and discoverability
- Engagement and "stickiness" of content
- Talkability; exchange/ knowledge/awareness

- Global recognition
- Soft power
- Audience awareness
- Talent & location recognition
- Perceptions of Australia
- Intention to visit
- Experiences of and relationship to Australia

In parallel, **a literature review** of various models and perspectives (drawn from industry, academic and grey literature reports) was developed into a Discussion Paper (setting out range of ways of understanding value).

Research teams

An open Request for Proposals led to a competitive process, involving input from external experts, to select the Screen Currency research teams:

Audiences and cultural value team

- 89 Degrees East – local and global screen audiences studies
- University of Sunshine Coast – local and global video games players studies
- Swinburne University & QUT – platform analysis of online reviews and comments on screen and games selected case studies

Industry and economy team

- McAtamney & Advisors – industry study and value chain
- University of Canberra – economic and production trends analysis and case studies

The 5 successful teams, each addressing different elements of the Screen Currency brief, were brought together for several collaborative workshops throughout the development of Screen Currency to develop a shared approach, ensure cross-pollination of insights and to develop and test frameworks. Insights, identified gaps and obstacles were shared in weekly work in progress meetings (for the audiences teams and industry teams) with insights shared between the project teams.

Additional insights were sourced from sector and industry partners to address identified gaps.

See individual reports for detailed discussions of methods.

Case studies

Case studies were selected through a collaborative process involving the full team of research collaborators on the Screen Currency project. Projects were selected to ensure the sample included feature films, TV dramas, documentaries, online titles and games from a diverse range of producer types, commissioning broadcasters and streamers, and game styles. A threshold for inclusion was that sufficient public information was available about each title to construct a case study without relying solely on potentially commercial-in-confidence information. This meant that the selected titles are, on the whole, successful, with a public profile resulting from successful marketing strategies and high audience engagement.

Developing each case study involved a two-step process:

First, evidence was collected of the benefits generated by each production right through its value chain, from the initial idea through to its ultimate impact on society as a whole,[49] and structured according to 5 stages:

1. **Creation** – background on the companies involved, the origin of the idea and the creative process behind its development
2. **Production** – the personnel, funding, training and skills and economic impacts of the production process
3. **Dissemination** – distribution and sales to other territories
4. **Exhibition, transmission and critical reception** – release data, availability, awards and renewal deals
5. **Engagement** – online metrics, audience reception, social and cultural impacts, indirect impacts including induced tourism, education spillovers

Second, the evidence collated in these 5 stages was then analysed to observe the impacts of each production on:

- individuals
- the Australian community
- the screen and games industry
- the Australian economy
- the nation as a whole.[50]

The data was drawn from a variety of sources, including trade press and newspaper coverage, review websites, Screen Australia's own data repositories and audience research undertaken for the Screen Currency project. The creators of each production were given the opportunity to provide feedback, and this has been incorporated in each case study. Sources are cited for each case study.

Final reports

Final reports were overseen by The Gist as project director, with extensive input from Screen Australia's Strategy and Insights team and editing support from Impact Words Consulting.

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.

49 This approach was adapted from Turnbull S and McCutcheon M 2024, *Transnational TV Crime: From Scandinavia to the Outback*, Edinburgh University Press, Edinburgh.

50 This approach was developed by Georgie McClean of The Gist for Screen Currency – see Figure 2: Screen Currency beneficiaries framework.

Appendix 3: Acknowledgements

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Australian Centre for the Moving Image (ACMI)
Australian Children's Television Foundation (ACTF)
Australian Directors Guild (ADG)
Australian Film Television and Radio School (AFTRS)
A New Approach (ANA)
Australia New Zealand Screen Association ANZSA
APRA-AMCOS
Arts Council England
Ausfilm
Austrade
Australians in Film (AiF)
Australian Writers Guild (AWG)
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Canada Media Fund (CMF)
Creative Australia
Documentary Australia
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Interactive Games and Entertainment Association (IGEA)
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