National Cultural Policy Review Submission

The State of Play Indie Games Advisory Board is dedicated to elevating NSW's independent game development industry. Through **advocacy, strategic engagement, and data-driven initiatives**, we aim to secure funding, foster professional growth, and promote NSW Indie Game Developers locally and internationally.

Our board is drawn from a diverse spectrum of developers, advocates and industry professionals across NSW and we represent both **Professional Game Developers** working on large-scale commercial games as well as **Local Indie Game Studios** with fewer than 50 employees.

Our Vision

- Recognition of indie games as a valued cultural artform in Australia.
- Growing and retaining exceptional local talent.
- Achieving funding parity with similar creative industries.
- Aligning with state agencies, funding bodies, and industry stakeholders.

We exist to **raise the profile of NSW Indie Game Developers** by addressing critical funding gaps, unlocking international opportunities, and building pathways for career development. Currently, digital games receive just **1%** of available Screen resources in NSW. Our goal is to increase funding parity and ensure fair support for this thriving sector. We provide strategic guidance to government bodies that reflect the challenges, opportunities and trends impacting developers from NSW. This will be done through data and feedback collected from the NSW Games Industry.

A **vast inequity** currently exists in the way locally produced videogames are funded in Australia compared to film or television. As the world's most dominant creative force – both commercially and culturally, the local videogame industry is being neglected, receiving only 1% in NSW or 3% in nationwide screen funding compared to film or television production. Though we boast some of the most talented videogame practitioners in the world, we are at great risk of losing them to overseas companies and the collapse of the local industry without appropriate support. The following report outlines the scale of the issue in NSW alone, based on the most comprehensive study undertaken of the state of the local industry.

We submit our 2025 report to be considered when developing the National Cultural Policy Review. Though the report focuses on NSW, the issues identified are common through all states- this is a **national** problem. Our 2026 report is currently in development and will be made available by August 2026. We welcome further consultation and discussion on this extremely important topic.

NSW INDEPENDENT DEVELOPER REPORT 2025

The largest, most comprehensive study of independent game developers in NSW

Authors:
State of Play Advisory Board
www.stateofplaynsw.com.au
[redacted]
10/07/2025

Acknowledgement

State of Play acknowledges and respects the Traditional Owners and Custodians of the Lands on which we work and live.

Representing Australia's original storytellers, we recognise the importance of First Nations voices being heard, seen and respected.

Despite the medium of storytelling changing through time, humans will always seek stories that reflect their experience and understand how the past has influenced the present. We have a duty to ensure the next generation does not lose this history and cultural connection with our uniquely Australian identity.

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Introduction

Indie Game Developers in NSW have been building games and telling their stories since the early 2000's.

As part of a $466 billion global gaming industry, they are an important part of building a sustainable ecosystem, generating economic growth, jobs and skills.

The State of Play survey was launched to collect real data on the challenges, successes, and needs of the NSW Indie Developer Industry to push for better funding, support, and opportunities.

We received overwhelming support for our survey with responses from over 60 unique NSW-based Indie studios. To be eligible for this survey, our definition of Indie Studio is an established NSW Studio / solo developer working on commercial games with fewer than 50 employees and majority Australian ownership.

The Australian Bureau of Statistics (ABS) reported 32 registered Game Development Studios in NSW (2021-22)[1].

In addition, the annual IGEA Game Developers Survey captures approximately 20 NSW Game Studios. Based on existing ABS and IGEA data, we are confident the State of Play survey represents a statistically significant sample of NSW Game Development Studios.

This report is a summary of the survey's key findings and recommendations in response to the current state of the NSW Indie Games Industry. It is the first time NSW Indies have had their own independent voice in NSW.

[1] Australian Bureau of Statistics (2021-22-financial-year), Film, Television and Digital Games, Australia, ABS Website, accessed 20 May 2025.

History of Screen NSW and independent game developers

Screen NSW was first established in 2009. Its name was changed from the NSW Film Corporation / NSW Film and Television office (or FTO) to reflect the age of Digital Media.

Despite the name change in 2009 to expand their remit from Film / TV to encompass Digital Media, Digital Games did not receive any support until 2022 in the form of Tax rebates for medium to large scale Digital Game Studios.
In 2023 there was wide scale consultation with the screen industry to inform the Screen and Digital Games Strategy which launched in 2024 during SXSW Sydney.

"For the first time in NSW, this screen strategy puts digital gaming front and centre." - The Hon. John Graham MLC, Minister for the Arts

Screen NSW hired their first dedicated Digital Games staff member and launched a small seed and travel fund. Sixteen years after its establishment, Indie Game developers are now able to access support from Screen NSW.

By comparison, other states in Australia have provided support for Indie Game developers over many years. This is demonstrated by the IGEA Game Developer Survey which showed growth in full time employment roles in states like Queensland and Tasmania due to competitive rebates and direct funding opportunities[2].
This has resulted in talent and studios moving to states across Australia, in particular Victoria and Queensland. Our survey discovered that most Indie Studios have considered moving to another state over the last 5 years to access grants, rebates, community and networking opportunities.

By comparison, Screen NSW provides a significant amount of support for the Film and TV Industry. Funding for Screen significantly dwarfs that allocated to Games.

Games make so much more money than Film and Music combined, yet we get the least amount of support – SURVEY RESPONDENT

[2] IGEA, Australian Game Development Survey F23, IGEA Website, accessed 20 May 2025.

Funding opportunities available to NSW-based studios

The following table provides a range of published funding and professional support provided by Screen NSW to the Screen industry. Table 1 outlines a series of grants, career development, travel funding and audience development that screen industry creatives have had access to from 2023-2025. It illustrates the disparity between Digital Games vs TV/Film. All values are represented in AUD. The duration, recurrence and total fund value for several of these grants are unknown and are represented below as they are advertised on Screen NSW website. The table reflects funding and grants available on the 20 May 2025.

Table 1: Current available funding available to screen industry from Screen NSW

Digital Games	Screen (TV/Film
Games seed fund: up to $30k per application	**Screen development fund:** $650,000 confirmed across 31 projects
Games production fund: $0	**Screen production fund**: up to $850k per application
Made in NSW: $0	**Made in NSW - TV drama:** up to $1mil per project. For projects with spend from $5mill - $18mill
Travel grant - domestic: $0 *(NOTE: $500 travel grant fund to attend GCAP has been replaced by PAX Market Support Program as of 30 May 2025.)* **PAX Market Support Program:** *$2,289 for up to 10 developers*	**Travel grant - domestic:** $1-$2k - The Australian International Documentary Conference, Melbourne, Screen Forever, Gold Coast, The Australian Children's Content Conference, Coffs Harbour, MIFF 37 South, Melbourne (specific programs)
Travel grant - international: Up to $5k per application for one creative per studio - GDC & Gamescom	**Travel grant - international:** Up to $6k for two or more key creatives per project. Available each financial year. Open year round.

Regional games fund: $0	**Regional filming fund:** up to $175k per project.
Community games opening night: $0	**Community film opening night**: up to $5k per application with total funding of $200k available
Games emerging talent: $0	**Screen emerging talent:** 6 month paid placement
Scouts and inbound projects / studios: $0	**Location scouts and inbound programs:** Up to $3k per project. Open year round.
Games attachment register: Nil	**Screen attachment register:** Rolling register to help pace talent / build skills and job growth
Creatability hosts: Nil	**Creatability hosts:** Support for 11 paid internships for people with disability
International working space: Nil	**Charlies working space LA:** 1 working space (multiple people)
Strategic opportunities (events): From $2k	**Strategic opportunities (events):** From $2k
Industry development program: From $5 -$150 *NOTE: Games were included in this fund as of 18 June 2025*	**Industry development program**: From $5k - $150k
Audience development program: $0	**Audience development program**: From $5k - $50k
Infrastructure - NIL	**Infrastructure – new studio facilities: $7-$8Mil**

Pathways development program: $0	**Pathways development program:** $30k per person. Supports continuation of a career in screen for creatives with disability.
IP in motion fund – up to $5k	**IP in motion fund – up to $5k**
Digital Games Rebate – 10% on expenditure $350k+	**Post digital & visual effects (PDV) rebate – 10% on expenditure $500k+**

Source: Screen NSW (2025) Funding & Support, Screen NSW Website, accessed 20 May 2025

Table 2: Funding available for the games industry across states.

The duration, recurrence and total fund value for several of these grants are unknown and are represented below as they are advertised on screen agency websites. The table reflects funding and grants available on the 20 May 2025.

	NSW	VIC	QLD	SA	WA	TAS
Seed funding	Up to $30k	Originate Games - up to $50k	Prototype up to $20k Vertical Slice up to $100k	Nil	Pre-production up to $25k	Up to $20k
Production funding	Nil	Up to $500k ($30k per stage)	Release up to $200k	Nil	Production up to $100k Post-production up to $25k	Up to $50K Production support program equity investment for projects seeking $50k+
Travel grant - domestic	Nil	Nil	Up to $1.5k	Nil	Up to $1.5k	Up to $2k
Travel grant - international	GDC up to $5k	Up to $4k	Up to $7.5k	Up to $3.5	Up to $5k	Up to $5k

Marketing	PAX booth cost *(NOTE: Launched 30 May 2025)*	PAX booth cost & VIC Game promotion Screen Culture Program up to $50k	PAX booth cost & QLD Game Promotion (they did this last year, assume again this year)	PAX booth cost & SA Game Promotion SAGE: SA Games Exhibition	PAX booth cost & WA Game Promotion	Conference Support i.e. 50% cost of accommodation, airfare, registration fees, per diems & transfers) - NOTE: in additional to travel grant
Business Development & Skills	Nil	Industry Development Program, Internships & Placement	Professional Development Program up to $5k, Internships & 12-month games residency	Nil	Digital Games Business Accelerator Fund up to $50k Professional Development up to $15k	Attachments, Placements & Traineeships Up to $2k for short courses Professional Events up to $5k

Source: Screen NSW (2025) Funding & Support, Screen NSW Website, accessed: 23/4/25.
VicScreen (2025) Funding & Support | Digital Games, VicScreen Website, accessed: 23/4/25.
Screen Queensland (2024) Games, Screen Queensland Website, accessed: 23/4/25.
SA Film (2025) Funding & Support | Games, SA Film Website, accessed: 23/4/25.
Screenwest, Digital Games Funding, Screenwest Website, accessed: 23/4/25.
Tasmanian Government (2025) Screen Tasmania, Games Development, Tasmanian Government Website, accessed: 23/4/25.

In addition to the overwhelming disparity between games and screen funding opportunities from Screen NSW, NSW-based developers face another discrepancy when compared to their interstate counterparts.

NSW-based digital studios are significantly underfunded in comparison with all other Australian states. As Table 2 demonstrates, NSW developers can access up to $30,000 per project in comparison to a Victorian project which can access up to $500,000. This disparity has led developers to consider leaving NSW for Victoria. The survey shows that 73.7% of developers have considered moving to another state. Only 16 of 61 studios surveyed said that they had not considered moving.

In the survey, developers were asked to report the most common reasons why they would consider moving out of NSW for another Australian state. The top motivations for developers moving state were as follows: State funding opportunities (61%), moving for a better games industry ecosystem (networking and connections) (49%), live closer to talent (20%) and <5% considered moving due to the cost of living.

Awareness and Eligibility

Another way in which developers are disadvantaged is the lack of awareness for grants and funds available to them. The State of Play survey reported a low level of awareness of funding available. The survey found that 39% of respondents did not know about the Screen NSW Seed Fund and only 42% were aware of the Screen Australia Fund.

Additionally, of the nearly 60% of developers who were aware of the Screen NSW Seed fund, more than half of them were not eligible for the grant. This brings to attention that there is a significant need for grants to be made available to developers at all stages of their game production timeline.

Furthermore, after examining the grant application process and speaking to studios who submitted, there is a significant amount of work and time required to submit a grant application with a government agency. The several week commitment can be arduous and impact the willingness of developers to attempt the grant application.

The NSW Digital Games Rebate awareness was slightly lower with over 50% responding that they were unaware of the rebate. Nearly 50% of the responders noted they were not eligible for the tax rebate with only one studio responding that they had applied. With a nearly 100% rate of unaware and ineligible indie studios for tax rebates, it is clear the program does not serve NSW indie studios.

The NSW Screen and Digital Games Strategy was announced in October 2024. The survey shows that of the respondents 16% found the report useful and 63% were unaware of its existence. However, after taking the survey, half of those who were unaware of the strategy indicated they would seek it out after completing the survey.

More work needs to be done to increase the accessibility of information from both state and federal institutes so indie studios in NSW have the best opportunity to engage and access support.

Further data from the Emerging Gamemakers Fund (EGF) February 2025 Report prepared by Screen Australia shows that of 368 eligible applications, 113 originated from NSW over the last three rounds of funding. This demonstrates an over-representation of NSW-based studios in the application process, with NSW consistently having the highest number of applications across all states. Ultimately, only 10% of all submitted projects were selected for EGF, leaving a significant gap in funding for NSW-developers. Our survey showed that of the 62 responding studios 57% of studios were unaware of government initiatives and **only 3% successfully attained funding** in either EGF or Screen NSW Seed Funding.

We encourage Screen NSW to provide transparent reporting of grant applications and selection rate.

Employment and labour

According to the State of Play NSW survey, studios require an average of $150,000 to complete a game. Most of this pay would go to salaries, contractors and marketing (including travel to conferences).

With nearly all studios responding that many of their titles are self-funded this involves a significant amount of unpaid labour to complete games. Studios report that on average they require $150,000 to complete their current title if they were to pay their staff and themselves.

When asked how many hours of unpaid labour they have done in their career 11% reported working over 10,000 hours unpaid and 26% reported working between 1000-5000 unpaid hours. These unpaid hours, in addition to developers reporting relying on sweat equity and quid pro quo, demonstrate the unrealised potential for paid hours through grants and funds.

When asked "If you had appropriate funding and every developer on the team was paid their full rates, what would be the average cost of shipping a game from your studio?" the median response for a studio with employees was $300,000 with an average of $645,000, whereas solo developers reported requiring a median of $200,000 for a project.

Concerningly, even with an estimated $50,000-$200,000 in funding, studios reported that they would spend this on covering their own personal salaries and employees. This leaves very little room for expanding studios and investing in future projects.

Development related degrees. Currently, there are 34 bachelor's degrees offered in Australia relating to these fields[3]. With roughly 2500 full-time games industry employees across Australia according to the 2024 IGEA AGDS Report[4].

Finally, it is significant to note that universities and tertiary education institutions across Australia are increasingly choosing to offer Game Design and Game IGEA reported a growth of 0.3% over the previous year in full-time employment, therefore is a concern of an oversupply of skilled graduates being unable to find work in their field.

[3] Study Portal (2025), Game Design Bachelor's in Australia. Study Portal Website, accessed 28 May 2025

[4] IGEA, Australian Game Development Survey F24, IGEA Website, accessed 20 May 2025.

Games industry ecosystem and the NSW exodus

"Games still seem undervalued for the cultural and economic role they play in modern society." - *SURVEY RESPONDENT*

The State of Play NSW survey reveals that Indie Studios overwhelmingly require funding to keep producing games in NSW.

When asked 'What does you or your studio need to thrive in the next 5 years?' 95% of studios selected 'Funding'. Most studios also selected 'Marketing Support' and 'NSW Games Events' as their next priorities with 54% and 47% selecting each option respectively.

This significant response shows that developers need funding, support and an ecosystem to thrive in the coming years.

73.7% of developers have considered moving to another state for funding and a better games industry ecosystem.

Effort needs to be taken to increase the number of community, statewide and online events to develop a thriving ecosystem and pipeline for studios to flourish. This would involve state supported games event with options for interstate travel funds for developers who live a certain distance away.

Our survey shows that nearly 30% of the studios in NSW exist outside the Sydney Metro area, therefore interstate travel funds are particularly important for supporting the needs of developers in regional NSW.

Market response to games investment

"More funding means more games. More games mean a richer economy in a modern tech-based world." - *SURVEY RESPONDENT*

The market appetite for game development in NSW is clearly high as evidenced by the latest ABS data from 2021-22.

According to the ABS, NSW had 13 registered game development businesses from 2015-2016[5]. This jumped to 32 in 2021-2022 when the tax rebates were introduced.

Not only did the number of businesses increase, but the number of employees jumped significantly from 146 to 697 (4.7 times higher) and in terms of employment, NSW outperformed Victoria (which only grew by 2.4[6]). It's important to note that Victorian Game developers have been supported for over 25 years and have been maintaining or growing studio numbers and size over this time.

A direct correlation can be drawn between the introduction of the tax rebate & Screen Australia Grants in 2022 across both state and federal government. This saw a significant increase in the number of studios and jobs in NSW.

It provides clear data showing the positive economic impact a small amount of investment has when applied to the Games industry.

As the most populated state in Australia with a focus on Technology jobs, NSW is a large market for Digital Game development and skills. It is worth noting many skills needed for game development are transferable to TV and Film with increased convergence between the two industries over the last 5 years.

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[5] ABS (2023) Film, Television and Digital Games, Australia: Financial and employment statistics for film, video and digital game businesses. Production activity for film, television, video and digital games, ABS Website, accessed 20 May 2025

[6] ibid

Key recommendations

Funding parity

NSW should offer competitive Seed and Production Grant funding that aligns with the support provided in other Australian states.

Meaningful support

Support for "Made in NSW" games should be strengthened through dedicated marketing and promotional opportunities that enable local developers to grow audiences at both domestic and international levels.

Increased visibility

Efforts must be made to increase the visibility and accessibility of state and federal funding programs, ensuring a more diverse range of recipients and game types.

Rolling travel support

Travel grants should operate on a rolling basis throughout the year, referencing a list of pre-approved international and national events to ensure timely and equitable access.

Research and reporting

Data capture and reporting methods should be enhanced to accurately reflect the full spectrum of game development activity across NSW, including micro-scale and multiplayer projects.

Greater transparency

Greater transparency is required in the allocation and distribution of funding across the broader screen industry.

Better representation

A holistic, community-informed strategy should be implemented to prioritise and support First Nations led game development initiatives.

Next steps

This report has been shared with survey respondents and published on our website. We hope this will help provide a partial picture of our industry in 2025. It has also been shared with Screen NSW executives for their consideration in addition to IGEA & IGDA.

The State of Play board will continue to conduct research, build case studies and engage with NSW Indie Developers both online and in person to improve the visibility and voice of game developers in NSW.

For the latest information on upcoming events, funding and opportunities to engage with us, please go to our website or contact us directly.

"Fingers crossed for the future and more ways our states can contribute to making great games."
SURVEY RESPONDENT

Thank you

To the Indie Game Developers who responded to this survey, thank you. Because of your generosity to share information and insights, we finally have enough evidence to build a case for change.

Your response and support have been overwhelming, and we are so grateful. The State of Play board also would like to thank Screen NSW for their willingness to engage directly with NSW Indie Game Developers and listen to our feedback.

We would also like to thank the following organisations for their support getting the survey out to Indie Game Developers:

- IGEA
- Beer & Pixels
- Noble Steed WIP Night
- Screen Australia
- Central Coast Game Devs

Authors

The State of Play NSW board set up the survey to provide data-led recommendations to State and Federal Government. The board's mission is to raise the profile of NSW Indie Game Developers by addressing critical funding gaps, unlocking international opportunities, and building pathways for career development.

Currently, digital games receive just 1% of available Screen funding and support in NSW. The board's goal is to increase funding parity and ensure fair support for our thriving sector.

The board was founded and self-funded by Hojo Studio and Luella Moore from SXSW. They are supported by board members from across NSW representing the spectrum of micro to mid-sized studios.

About State of Play NSW Board Members

Founding members & Chair / co-Chair

- **Stephanie Salter** is the Executive Producer & Chief Operations Officer at Hojo Studio, a micro–Indie Studio building family friendly games since 2013.

- **Luella Moore** is the Games Festival Manager at SXSW Sydney. Each year she produces a showcase of over 120 international indie games, networking events and an investment summit for game developers.

Board Members

- **Nico King** is the Co-Founder and Director at Chaos Theory Games, a prominent and multi-award-winning Australian mid-sized game development studio.
- **Josh Hallaran** is the founder of Critical Games and has been working as an independent developer in regional NSW. He has been a solo developer since 2011 and launched 10 commercial games across PC, Mobile, and Console.
- **Emre Deniz** is a multi-award-winning games, interactive media and technology developer based in New Zealand. He holds a master's in

business analytics, with several research publications in Artificial Intelligence.

- **Ben Armstrong (Wiradjuri)** has worked in the technology and creative industries for over 24 years. During his career, Ben has had several roles including engineering, solution architecture, management, bizdev, CEO and Head of Gaming. Passionate about authentic partnerships and the participation of Indigenous people in STEAM careers, Ben works to break down systemic barriers so that Indigenous people can thrive and have a future powered by choice.

- **Tegan Jones** is a multi-award-winning journalist reporting on games, technology and telecommunications for over 10 years. She is a regular tech commentator for mainstream media channels. She is also the co-host for one of Australia's top technology podcasts, Weird Tech.

Classification advisor

Margaret Anderson

Previous Director of Australia's Classification Board, Margaret has extensive knowledge of classification rules as applied to Film, TV and Games. She has a passion for creative arts-media content being fairly and consistently classified so that viewers, players, listeners, and readers can interact with content in an informed manner.

Survey Methodology

Questions were designed to ensure data integrity and best practice including and validated with industry data experts.

The survey was run using Fillout, a free online survey product designed to make it easy to both setup and answer surveys.
https://www.fillout.com/

The State of Play NSW Indie Devs Survey ran from the 11th March - 1st May 2025.

Data was collected in line with the State of Play privacy policy published on the website.
https://www.stateofplaynsw.com.au/contact-2

All responses were de-identified and aggregated to protect the privacy of all respondents.

Insights were developed and validated by industry data experts before being published in this report.

FAQ

- **How were the results between individuals and studios managed?**
  Studio leads and directors were asked to self-report and studio data was collected from these respondents.

- **How did you validate the responses?**
  Studios were manually validated by cross-referencing with ABN and public domain data. Respondents self-report all other information.

- **How can I get involved?**
  Contact us. We are all volunteers.

- **How is data from the survey managed?**
  All data is managed in accordance with the Privacy Policy.