Australian Children's Television at the Crossroads

Securing Social Cohesion and Youth Citizenship in the Streaming Era

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The Streaming Industries and Genres Network (SIGN) brings together scholars and key industry experts to contribute evidence-based strategy, policy recommendations and public understanding around how streaming entertainment— including streaming video (both subscription and user-generated), gaming, and social media platforms— constructs and frames genre. SIGN examines:

- The deep socio-cultural ramifications of shifting paradigms around content categorisation, discoverability and access with the rise of streaming video services and other streaming-based entertainment platforms;
- Shifting policy and industry strategies in relation to the organisation of content on streaming services and platforms; and
- Audience engagement with new and evolving content distribution and categorisation systems, such as streaming video platform interfaces, content recommendation systems, and catalogues.

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Abstract

Australian children's television is navigating a profound cultural and industrial crisis. Local screen content fosters social cohesion and is critical to the development of multicultural child citizenship, especially in the wake of the under-16s social media ban, a regulatory mechanism which seeks to redirect youth attention away from global social media platforms and back towards culturally enriching, civically valuable local screen content. However, the sector tasked with producing this content is experiencing systemic market failure and contraction.

The 2020 removal of commercial quotas triggered a 97% collapse in total commercial children's television investment (ACMA, 2024b). Consequently, Australia's public broadcasters, particularly the ABC—the nation's primary commissioner of children's content—and the Australian Children's Television Foundation (ACTF) have been left to bear the rising costs of live-action production. Screen Australia data indicates that the average per-hour cost of live-action children's production has tripled over the last five years (Screen Australia, 2015-2025b). [1]

These pressures have contributed to a deepening production deficit where reported Australian first-release children's hours on the ABC have fallen by 59% since 2018-19 (ABC, 2019-2025), with Screen Australia reporting a historic low of 21 hours of new children's drama entering production in 2024-25 (Screen Australia, 2025a). This represents a 38% decline from 2023-24 (Screen Australia, 2025a). Overall industry expenditure on children's TV and VOD drama is 44% below the 5-year average (Screen Australia, 2025b), a crisis exacerbated by a 74% contraction in Screen Australia's own commitments to children's TV drama from a 2020-21 peak of $10.72 million to $2.75 million in 2024-25 (Screen Australia, 2025c). [2]

Answering the National Cultural Policy's call for clear data benchmarks (Australian Government, 2023, pp. 71-72), this report delivers an evidence-based policy and industry analysis structured through a "wicked problems" framework. It synthesises longitudinal economic data and expert industry and academic insights to expose key structural vulnerabilities in the current children's screen sector. It highlights an industry retreat from the older tween demographic (10–14-year-olds), and exposes

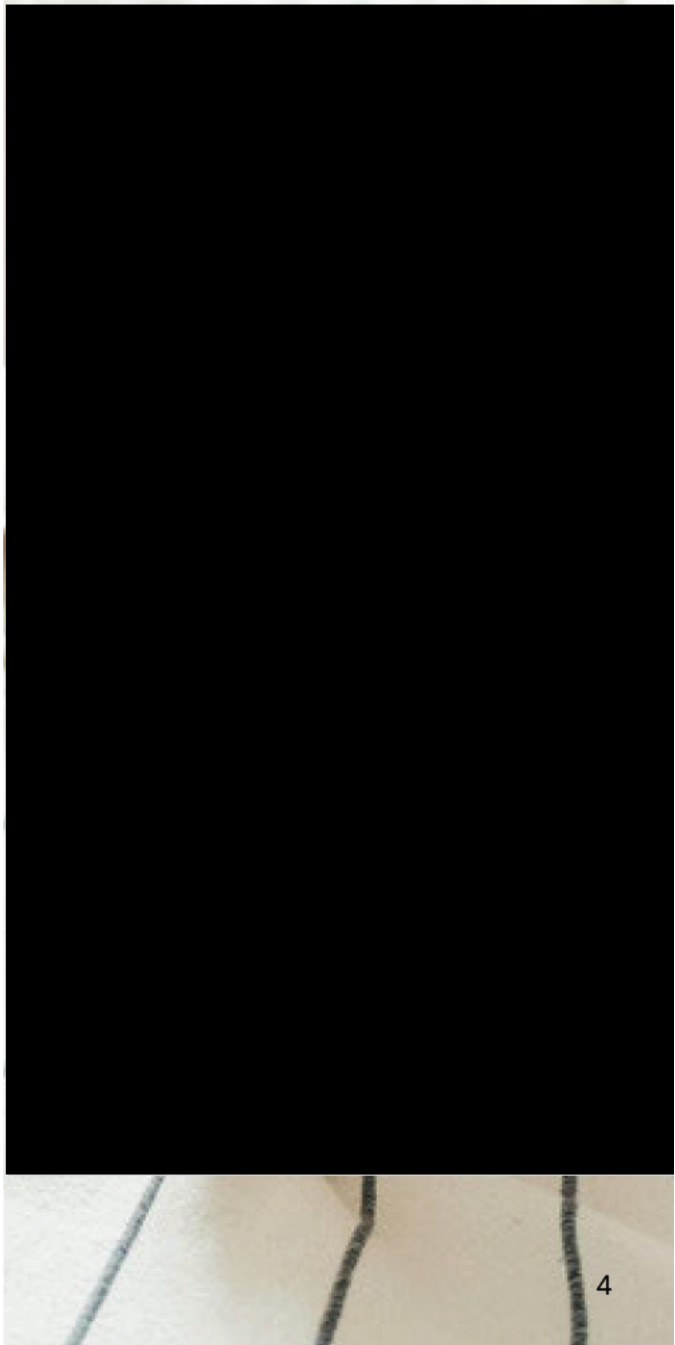
[1] According to Screen Australia reports, the average cost per hour of live-action children's drama rose from $0.928m in 2019–20 to $2.807m in 2024–25. It must be noted that the 2024–25 average is elevated due to a historically low production volume (just 21 hours generated across five titles). This small pool weights the average toward high-cost formats produced that year, such as the feature film *Whale Shark Jack* and the hybrid live-action/animated series *Knee High Spies*.

[2] As detailed in this report, it is challenging to quantify Screen Australia commitments to children's content due to complexities in reporting methodologies.

volatile commitments to local children's content by the subscription video on demand (SVOD) services. This issue is exacerbated by inconsistent and complex reporting strategies across the sector that make it difficult to track and monitor investment in local children's television, masking the severity of the sector's precarity. The volatility is compounded by an "SVOD Mirage"—where a lack of SVOD investment in original local children's programs (reporting no new children's commissions in 2024-25) has been masked by their aggregation of expenditure on new content with legacy acquisitions. The report also identifies a critical "cultural literacy gap" among young audiences, underscoring the need to rethink discoverability and algorithmic prominence in an on-demand digital environment where children consume much of their screen entertainment via video-sharing platform YouTube.

To safeguard the sector's vital civic function and bridge the gap between effective on-demand digital distribution and original production, this report outlines six consolidated, evidence-based recommendations for policymakers and industry:

1. introduce demographic-specific SVOD sub-quotas;
2. institutionalise sustainable, ring-fenced funding and update public broadcaster Charters to explicitly include children's content;
3. streamline and cohere reporting on children's content production and investment across the sector;
4. mandate local investment and prominence on YouTube following international precedents;
5. capitalise on "demographic blur" to incentivise intergenerational "co-viewing" content; and
6. invest in media literacy and engage young people by structurally embedding youth co-creation into the production process via the ACTF.



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Executive Summary

The Policy Problem and Context

> **Australian children's television is navigating a period of significant cultural and industrial transition.**

Historically, Australian policy settings have been designed to ensure the provision of high-quality children's television in service of the public good and national civic goals. As a mass broadcast format, television has been instrumental in constructing "national civic spaces" (Zanker, 2011, p. 32) that enable young people to build communities and develop both collective and individual identities around nationally shared screen stories. This public value function of children's television has long scaffolded the "multicultural child citizenship" (Brown and Rutherford, 2011) of Australian youth.

Presently, the sector faces a complex intersection of socio-cultural and policy pressures. On one hand, the Federal Government increasingly relies on local children's screen content to foster social inclusion and national identity. This objective is central to the *Towards a new National Cultural Policy Public Consultation Paper* (2026), which acknowledges that "younger people in particular are engaging with culture in new ways" and which explicitly seeks strategies to address changing "discovery pathways and modes of engagement" (p. 4; 7) to ensure children are able to find and discover locally made, culturally enriching content. This policy imperative directly intersects with the December 2025 enforcement of the minimum age for social media (the "social media ban" for users under 16). As the Federal Government acts to redirect youth attention away from global, algorithmically curated social media platforms, its stated goal is to shift focus onto "social interaction rather than social media" (Albanese, 2025). The National Cultural Policy provides a vital opportunity to achieve this by ensuring high-quality local screen content is available to anchor young audiences in a localised civic space—building community resilience and scaffolding social cohesion in a culturally specific way.

Yet the industry tasked with producing this culturally specific screen content is experiencing structural vulnerability and systemic market failure. The 2020 removal of commercial children's sub-quotas unravelled a 40-year policy settlement, resulting in commercial investment in children's drama flatlining at an unprecedented $0 in 2022–23 (ACMA, 2024b). The sector is now characterised by the withdrawal of commercial broadcasters, a retreat

from the older “tween” market (ages 10–14), and pronounced volatility in Subscription Video on Demand (SVOD) spending. This vulnerability is masked by highly complex and inconsistent reporting on children’s content investment, including an “SVOD Mirage"—where perceived commitments to local stories by SVODs are inflated through the aggregation of new commissions with legacy library acquisitions. In reality, SVOD investment has proven highly volatile, falling from a reported peak of over $40 million in 2019-20 to $3.34 million in 2023–24 (ACMA, 2020; 2024a). This mirage was laid bare in the 2024–25 financial year when SVODs reported no new local children's commissions, with their reported $3.67 million expenditure thus being largely directed toward acquiring pre-existing content rather than funding new Australian stories (ACMA, 2025).

As the report highlights, these pressures are compounded by escalating production costs for live-action drama. While it is very complex to gather a clear picture due to the inconsistent ways investment is reported across the sector, Screen Australia reports (2019-2025) indicate that live-action children’s drama costs have more than tripled over the past five years, from $0.928 million per hour in 2019–20 to $2.807 million per hour in 2024–25. While this 2024-25 average is tied to historically low production volume (just 21 hours across five titles) that is weighted toward high-cost formats, this upward trajectory has developed throughout the 2020s with a particularly sharp[3] 107% increase since the 2021–22 financial year. As well as general inflationary pressures across the economy (Office of Impact Analysis, 2025, p. 19), these accelerating cost increases are tied to SVOD-driven demand for premium productions and high-end budgets (Screen Australia, 2025a, p.3). Yet, this demand for high-cost production has not been balanced by commensurate investment from SVODs in children’s content. Consequently, the Australian children’s screen sector is under immense pressure at the exact moment its role in building socially cohesive, civic youth communities has become critical—an imperative central to the *Towards a new National Cultural Policy Public Consultation Paper* (2026), which seeks new strategies to sustain youth engagement with shared national stories.

Methodology

The National Cultural Policy, *Revive*, explicitly acknowledges that "without high quality data it is difficult to tell the stories of what is happening in the sector," and mandates the establishment of "clear benchmarks to measure success" to evaluate policy outcomes (Australian Government, 2023, pp. 71-72; 95-96). Directly answering this call, this report delivers an evidence-based policy and industry analysis developed through a "wicked problems" framework (Coyne, 2005; Head, 2019). It synthesises longitudinal economic data from the Australian Communications and Media Authority (ACMA), Screen Australia, the public and commercial broadcasters, and the Australian Children’s Television Foundation (ACTF) with qualitative insights gathered during a September 2024 workshop—and subsequent 2025/2026 longitudinal reflections—hosted by RMIT University’s Streaming Industries and Genres Network (SIGN). Participants included academic experts and industry leaders from the ABC, the ACTF, and independent screen production.

[3] As detailed in annual Screen Australia reports, average per hour children’s live-action production costs have risen from $0.928m (2019–20) to $1.562m (2020–21), temporarily dipping slightly ($1.357m, 2021-2022), before rising each year to $1.587m (2022–23), to $1.883m (2023–24), and to $2.807m (2024-25).

Key Findings

The Burden on Public Broadcasters and Cultural Infrastructure

With the retreat of commercial networks, the ABC, the SBS/NITV, and the ACTF function as the critical cultural infrastructure doing the "heavy lifting" for the sector. However, because the average cost of producing live-action drama has increased so sharply (rising from $0.928 million to $2.807 million per hour according to Screen Australia reporting), this infrastructure is buckling under structural pressure. Despite the ABC increasing its investment between 2022–23 ($17.605 million) and 2024-25 ($21.14 million), the actual volume of Australian first-release hours reported by the broadcaster has fallen by 59% since 2018-19 (ABC, 2019–25). Furthermore, SBS/NITV's hybrid-funding model leaves vital First Nations children's content highly vulnerable to market fluctuations. This is exacerbated by a growing global risk aversion wherein commissioners "want to take fewer risks and invest in known IP" (ACTF CEO Jenny Buckland, RMIT Workshop reflections 2026) rather than fostering new audiences for original programming.

The Complexity of Screen Australia Reporting and Institutional Inconsistencies

Screen Australia is a vital funder and pillar of Australian children's screen entertainment across film, television, and digital platforms. However, its reporting frameworks make it difficult to track its exact contribution to the sector. Unlike other institutions that report annual disbursed expenditure or broadcast hours, Screen Australia measures its investment through multi-year financial commitments awarded to approved projects (Screen Australia, 2024). Furthermore, there are inconsistencies around how Screen Australia and other organisations in the sector, including ACMA, categorise children's and youth content investment. Screen Australia tracks the specific genre of "Children's TV Drama Production" in ways that can obscure other youth-oriented investments. For instance, recent children's and youth digital initiatives for platforms like YouTube and TikTok are categorised under broader administrative umbrellas such as "Online", while children's movies are logged as "Feature Film" (Screen Australia, 2024). Screen Australia and ACMA utilise a broad definition of "drama" derived from the Broadcasting Services (Australian Content and Children's Television) Standards 2020. Under these standards, the classification of drama stretches to combine live-action series, scripted sketch comedy, and animation under a single banner (Australian Government, 2020; Baker et al. 2025, p. 2). This means that an animated preschool series like *Kangaroo Beach* (2021-) is officially catalogued as "Children's TV Drama" alongside live-action series (Screen Australia, n.d.). By bundling these different formats together, the reporting inflates drama statistics and obscures the different genres and formats made for the children's demographic. Consequently, this lack of cohesive, granular data makes it difficult to cross-compare institutional contributions and track the depth of the sector's financial precarity.

The "Genre" vs. "Demographic" Discrepancy and the SVOD Mirage

To ensure there is a place for every story (Australian Government, 2023, p. 37)—including every *youth* story—policy frameworks must shift from categorising children's television as a *genre* to protecting it as a complex *demographic*. The January 2026 SVOD local content legislation includes children's programming as a genre alongside adult documentary and drama, but lacks the specific sub-quotas necessary to

protect distinctively Australian children's content. This regulatory loophole leaves the sector exposed to extreme investment volatility, with self-reported SVOD expenditure on children's content falling from $40.47 million in 2019–20 to $3.34 million in 2023–24 (ACMA, 2020; ACMA, 2024a). In 2024–25 SVODs reported no new children's commissions (ACMA, 2025).

The Retreat from Tween Audiences

The industry faces major challenges in retaining the 7–14-year-old "tween" demographic. Engaging this audience requires support for intergenerational family viewing and boundary-pushing original content. However, escalating live-action costs and changing audience behaviours—particularly the popularity of YouTube and Netflix amongst this cohort (Balanzategui, Baker and Clift, 2024; Alannah & Madeline Foundation, 2025) —constrain the sector's ability to sustainably deliver such content. Longitudinal reflections indicate that even the ABC is effectively withdrawing from this upper end of the children's audience (ages 10–14): tween dramas such as *Crazy Fun Park* (2023) and *MaveriX* (2022) have not had their licences renewed after their first runs.[4] As a result, publicly funded shows previously freely available to audiences via the ABC are now only available behind the Netflix paywall, before being given time to build an audience. There is also a lack of new content for this age-group.

The Digital Public Sphere and the Social Media Paradox

The 2026 NCP Consultation explicitly seeks solutions for changing "discovery pathways". While the Federal Government has restricted under-16s from social media in an effort to preserve social cohesion, video-sharing platforms, particularly YouTube, remain one of the dominant ways young people find and watch screen entertainment (Alannah & Madeline Foundation, 2025; Swinburne/RMIT ACTC Report, 2025; Balanzategui, Baker and Clift, 2024), yet operate outside of the screen policy framework. Conversely, online content initiatives, such as the "cultural inclusion rider" pioneered on the Screen Australia-funded TikTok series #Matched (2021-22), indicate that video-sharing platforms can be effectively leveraged to build culturally safe civic spaces that contribute to multicultural youth citizenship.

This reveals a central paradox faced by the sector: despite regulation restricting young people's access to YouTube and TikTok, the sector recognises that these platforms continue to dominate young people's screen entertainment habits and operate as vital youth "public spaces" that demand equivalent creative and civic care to legacy screen media. Indeed, both television and social media platforms operate as important youth public spheres that are uniquely placed to complement each other: television as a cultural glue that provides young people with shared stories and collective cultural experiences, and digital platforms as an interactive public sphere where children and young people create their own narratives as well as consume them, and actively build communities. Best practice strategies involve harnessing this reciprocity to enfranchise young people as active cultural gatekeepers and co-creators of their own narratives on these platforms.

[4] Notably *MaveriX* is a co-commission between the ABC and Netflix, underpinned by major public production investment from the ACTF, Screen Australia, and state agencies. Under this model, Netflix held the global distribution rights while the ABC retained first-release Australian rights. However, the expiration and non-renewal of the ABC's domestic licence means that this heavily publicly subsidised program now sits exclusively behind the Netflix paywall for Australian audiences as well.

Strategic Conclusions and Recommendations

> **The findings of this report evidence how children's television represents "the clearest case of market failure of any sector of the screen industry" yet simultaneously remains "the clearest example of public benefit" (ACTF, 2023a, p. 2).**

To secure the sector's longstanding role in scaffolding national civic publics and to directly answer the National Cultural Policy's call to address changing youth "discovery pathways", we offer the following strategic recommendations for policymakers and industry leaders:

1. Re-evaluate Regulatory Frameworks to Protect Demographic Nuance

Strategic Alignment: NCP Pillar 2 – A Place for Every Story, p. 37

Treating children's television as a broad "genre" alongside adult programming, rather than a "demographic", contradicts industrial realities, leaving the sector vulnerable. In particular, distinctively Australian, live-action children's drama operates at a financing disadvantage relative to other genres. This vulnerability is currently masked by an "SVOD Mirage", where the perceived commitment of SVOD platforms to local stories is inflated by the aggregation of new commissions with legacy acquisitions. The reality of this mirage was exposed in the 2024-25 financial year when SVODs reported no new children's commissions. This suggests that their $3.67 million expenditure was directed toward acquiring existing content rather than funding new Australian stories.

RECOMMENDATION

Policymakers should monitor and conduct a rigorous review of the SVOD local content legislation to evaluate the necessity of implementing protected, demographic-specific sub-quotas. Regulatory adjustments should ensure the genuine commissioning of high-quality, distinctively Australian content across both free-to-air and streaming platforms to counterbalance global market forces and ensure there remains a dedicated "place" for the increasingly alienated 7–14-year-old "tween" demographic.

2. Institutionalise Sustainable Funding Tied to Public Broadcaster Charters

Strategic Alignment: NCP Pillar 4 – Strong Cultural Infrastructure, p. 65; Pillar 1 – First Nations First, p. 21

The ABC and the ACTF currently function as central pillars of the Australian children's screen ecology, and more broadly, children's participation in a localised, civic public sphere. The SBS/NITV are also critical, specifically in relation to the delivery of First Nations content. As Lotz et al. (2024) assert, public service broadcasters are pivotal to screen cultural policy because they are the only institutions explicitly dedicated to serving the Australian community and prioritising accessibility of content vulnerable to the market. Crucially, Australia possesses an internationally unique asset in the ACTF, a non-profit public entity that is explicitly dedicated entirely to children's content and audiences. Yet, neither the ABC nor the SBS have an explicit commitment to children's content enshrined in their foundational Charters. By contrast, the BBC has explicit commitments to children's content including quantitative quotas, and the specific nature of these commitments is systematically reviewed every 10 years. The current review

process is underway, with children's and youth content a particular focus: due to conclude in late 2026, this review seeks to bring the Charter into line with current industry dynamics and pressures (Government UK, 2025; BBC, 2026).

In Australia, this omission leaves this vital cultural infrastructure vulnerable, particularly under the burden of the collapses in SVOD and commercial network investment outlined in this report. Amending this would provide the sector with vital security and sustainability, particularly if aligned with institutionalised, ring-fenced funding for children's content for the ABC, SBS/NITV, and the ACTF to offset the commercial and SVOD sector's retreat from youth audiences. Short-term funding allocations fail to provide the structural certainty required to produce high-value, culturally specific live-action drama—especially for older child audiences, who are the very demographic left most vulnerable post-social media ban. This type of content has a long and substantial generational shelf life but high upfront costs, which have risen sharply throughout the 2020s.

RECOMMENDATION

Updating the ABC and SBS Charters to include specific mandates around children's content would provide the sector with vital security and sustainability, particularly if aligned with institutionalised, ring-fenced funding for children's content to offset the commercial sector's retreat from youth audiences. Crucially, quarantined funding for SBS/NITV would protect the continued delivery of First Nations content from the precarity of its hybrid commercial funding model. NITV performs a uniquely powerful civic function that benefits all Australian children; programs like the Logie Award-winning *Little J & Big Cuz* (2017-) not only instil pride and preserve endangered languages for First Nations children, but also provide vital, relatable resources for teachers to broaden non-Indigenous students' understanding of First Nations histories and cultures (SBS, 2024a; Swinburne/RMIT ACTC Report, 2025). Ensuring NITV is sustainably funded guarantees the continued provision of this irreplaceable civic and educational asset. Short-term funding allocations fail to provide the structural certainty required to produce high-value, culturally specific live-action drama—especially for older child audiences, who are the demographic left most vulnerable post-social media ban. This type of content has become very expensive to produce. This funding must therefore be calibrated to contemporary production costs to sustain original civic storytelling and prevent the premature cancellation of new drama—which takes time to build an audience in a fiercely competitive multi-platform environment.

3. Streamline and Cohere Reporting on Children's Content Production and Investment

Strategic Alignment: NCP Pillar 4 – Strong Cultural Infrastructure, p. 65; Pillar 2 – A Place for Every Story, p. 37

The current fragmentation of data across institutions obstructs clear tracking and measuring of the sector's health and can produce "mirages" of investment. Institutions currently rely on mismatched methodologies to track their contributions: ACMA tracks annual expenditure incurred by broadcasters and streamers, the ACTF catalogues its own direct production investment per financial year, and Screen Australia reports its spend in terms of multi-year commitments awarded per year, rather than funds disbursed. Meanwhile, public broadcasters (ABC and SBS) primarily report their contributions in broadcast hours rather than granular financial spend. Up until January 2026, SVOD reporting relied on voluntary frameworks that conflated new commissions with legacy library acquisitions (ACMA, 2025).[5]

Furthermore, different definitions of children, youth and adults across organisations further cloud the data. For instance, Screen Australia catalogued successful PG-rated teen series *Surviving Summer* (2022-2023) as a *children's* production, while ACMA, who follow the Broadcasting Services Standards definition of a "child" as someone under 15, catalogued the show as an *adult* drama. Similarly, while Screen Australia's 2024–25 report logs the Stan-commissioned children's film *Whale Shark Jack* as entering production (Screen Australia, 2025a), ACMA's SVOD data for the same period records zero new children's commissions (ACMA, 2025). As Independent MP Allegra Spender argued during the 2025 streaming legislation debates, without mandating transparent, disaggregated sub-genre reporting, it is impossible for Parliament or the public to assess whether investment is genuinely flowing into vulnerable youth genres (Spender, 2025).

RECOMMENDATION

Policymakers and screen agencies (including the Department of Infrastructure, Transport, Regional Development, Communications and the Arts, ACMA, Screen Australia, the ACTF, and broadcasters) could collaborate to establish a unified, transparent, and platform-agnostic reporting framework. This framework would mandate granular sub-genre reporting that explicitly separates new children's commissions from acquisitions. It would also standardise metrics to allow for direct cross-comparison of disbursed expenditure and hours produced. Furthermore, legacy definitions of "children's" content could be updated across agencies to more accurately capture the 15–18-year-old youth demographic, ensuring that digital-first initiatives, feature films, and teen dramas are visibly recognised for their contribution to the youth screen ecology.

4. Mandate Investment and Prominence on Dominant Video-Sharing Platform: YouTube

Strategic Alignment: NCP Pillar 5 – Engaging the Audience, p. 79

While recent SVOD legislation and smart TV prominence frameworks address television streaming, they overlook the primary destination for older tween and teen audiences: video-sharing platforms, particularly YouTube. The 2026 National Cultural Policy consultation explicitly seeks strategies to respond to changing

5 While commercial broadcasters also report expenditure on a voluntary basis, unlike SVODs this reporting is firmly anchored to strict legislative definitions and mandatory content quotas.

"discovery pathways and modes of engagement" (Australian Government, p. 7). Addressing this is urgent: as the UK communications regulator Ofcom recently warned, children now spend more time watching YouTube than all public service broadcasters combined, placing the future of public service media at risk (Ofcom, 2025a).

To understand the severity of this discoverability crisis, one need only look at how algorithmic curation can override free public broadcaster content. In its 2024 submission to the Senate Prominence Inquiry, SBS highlighted that searching on connected TVs for the SBS/NITV children's program *Little J & Big Cuz* routinely directs audiences to view it via paid global platforms like Netflix or YouTube, rather than the free, publicly-funded SBS On Demand app (SBS, 2024b, p. 8). While the new smart TV Prominence legislation responds in part to this problem, strategic algorithmic personalisation and curation on platforms like Netflix and YouTube compounds the sector's structural precarity, meaning the few new local titles produced can be difficult for young viewers to find (Balanzategui, Baker and Clift, 2024; Balanzategui et al., 2024).

RECOMMENDATION

Policymakers should consider ways to extend local content investment obligations to dominant video-sharing platforms, such as YouTube, building on French, Belgian, and Canadian precedents (Oliver & Ohlbaum Associates, 2021, pp. 24–25; Ofcom, 2025c, pp. 4; 6–7). Regulations could compel these platforms to algorithmically privilege and provide prominence to local public service media and culturally safe children's content to ensure it is discoverable by young Australians, directly addressing the evidence that children currently struggle to locate local programming on these services (Balanzategui, Baker and Clift 2024). This research shows that relying on young audiences to actively 'search' for this content is a flawed strategy; it identified a critical "cultural literacy gap," revealing that while children have *high technical fluency* with streaming platform interfaces, they possess *low cultural literacy* regarding the national identity of shows and struggle to identify or locate Australian content without explicit algorithmic prominence.

This aligns with calls from cutting edge interdisciplinary computer science/humanities research to redesign recommender systems using a metric of "commonality"—a design paradigm where algorithms are actively coded to familiarise a population of users with culturally specific content, rather than solely optimising for market-driven, individualised user retention through algorithmic personalisation (Ferraro et al., 2024). Given that YouTube remains publicly accessible without an account despite the under-16s social media ban, treating it as a regulated youth public sphere would secure the digital "discovery pathways" prioritised by the National Cultural Policy.

5. Capitalise on Demographic Shifts to Recapture Tween Audiences

Strategic Alignment: NCP Pillar 2 – A Place for Every Story, p. 37

The breakdown of rigid age-siloing presents an evolving opportunity to engage the tween demographic, which tends to drift away from local content around age 11 or 12. Evidence indicates that tweens and teenagers increasingly desire to co-view complex content with their parents (Baker, Balanzategui and Sandars, 2023; Potter, Archer-Lean, Macrossan and Beazley, 2024). This type of viewing is also valuable to scaffolding social cohesion and robust national civic publics (Brown and Rutherford, 2011; Zanker, 2011).

RECOMMENDATION

Industry funding bodies and broadcasters should actively incentivise high-quality intergenerational content to ensure there remains a dedicated "place" for every youth story. The ABC has already recognised this demographic blur in its *distribution* strategy, executing a profound digital shift that collapsed age silos (such as ABC ME) into flexible, intergenerational platforms like *ABC Family* and the *Big Kids* stream on iview. This strategy triggered a surge in library content availability across platforms, with the proportion of all ABC iview content explicitly categorised as "children's" expanding from 47.1% in 2023-24 to 77.8% in 2024-25. Consequently, the *hours* of Australian children's content available across the ABC's platforms jumped from 7,071 to 23,228 hours.

However, this strategic distribution pivot masks a production deficit: the number of *first-release* children's hours reported across all ABC platforms has fallen to a seven-year low, dropping 59% from 274 hours in 2018-19 to 112 hours in 2024-25. This distribution pivot must now be matched by equivalent *production* incentives—funding the creation of bold, new Australian stories designed for these shared intergenerational spaces.

6. Invest in Media Literacy and Institutionalise Involvement of Young People in Civic Content Creation via the ACTF

Strategic Alignment: NCP Pillar 3 – Centrality of the Artist, p. 51; Pillar 1 – First Nations First, p. 21

As age restrictions curate youth attention away from global social media platforms, the local screen industry faces a unique transitional juncture and opportunity. The 2026 National Cultural Policy consultation notes that "digital tools and platforms are changing how creative work is produced, distributed and discovered" (p. 4). Authentically building a robust public sphere around screen entertainment in this disrupted environment requires enfranchising youth and marginalised communities as active cultural gatekeepers and creative decision-makers in the screen sector. Notably, such opportunities for youth creative inclusion and civic empowerment are constricted by the sector's deepening production deficit. With live-action costs rising and SVOD investment proving highly volatile, first-release children's hours on the ABC have fallen by 59% (since 2018-19), and the total volume of local children's broadcasts on NITV has similarly contracted by 59% (since 2022-23). Consequently, there are fewer original Australian productions being commissioned for youth to co-create.

However, in this environment a concerted effort and investment could be made in children and young people's media literacies and capabilities to get the most civic cultural value out of each production. Indeed, media literacy education around Australian children's shows has long been a key strength of the sector (Swinburne/RMIT ACTC Report, 2025). Previous research has highlighted significant gaps in children's cultural literacies connected to confusions and difficulties navigating streaming and video-sharing platforms (Balanzategui, Baker and Clift, 2024).

Culturally specific media literacy is pivotal to young people's developing citizenship and civic cultural values (Buckingham, 2000) and thus social cohesion.

RECOMMENDATION

This report supports adoption of a novel dual approach: involving young people in the content creation process in a way that builds their media literacies through real-world participation. This would involve balancing sustainable investment in television productions with experimentation with agile, platform-agnostic models to meet audiences where they are. Despite the social media ban, this strategy provides an avenue for video-sharing platforms like YouTube to be treated as vital youth "public spaces" scaffolded by civic care and media literacy support, leveraging the significant work Screen Australia is already doing around online content support—most recently in partnership with the ACTF through the Kids IP Initiative for digital platforms.

To achieve this, the ACTF—which already operates at the intersection of script and production development and educational outreach—is uniquely positioned to structurally embed young people directly into the creative process. The ACTF has already proven the cultural viability of this approach by financing and mentoring the acclaimed live-action drama *More Than This* (2022), which was "written by teens for teens" after being created and scripted by 17-year-olds Olivia Deeble and Luka Gracie (ACTF, 2021), who also starred in the show.

Combining this local precedent with successful international frameworks—such as the Danish public broadcaster (DR) formally integrating 10–13-year-olds as credited "junior editors" on the hit tween series *Klassen* (2016-) (Novrup Redvall, 2024)—provides a clear blueprint for the industry. The Australian sector could scale similar collaborative mechanisms into an industry standard, in line with the "cultural inclusion rider" successfully pioneered on the Screen Australia-funded TikTok series *#Matched* detailed in this report. Though the internationally unique asset that is the ACTF, the sector has potential to become a global leader in this space, structurally embedding youth co-design and civic principles into the pitching, production, and distribution processes. As well as meaningfully supporting media literacy development, this would also ensure the resulting content authentically reflects Australia's young people in civically valuable ways. The Danish precedent also points to strengthening tween engagement with screen content: *Klassen* resonated so strongly with its target tween demographic that it reached the 1,000-episode mark, becoming Denmark's longest-running series (Norup Redvall, 2024).

Crucially, formalising youth co-creation also provides opportunity for early talent development alongside formation of media literacy, in ways that could directly fulfil NCP Pillar 3 (Centrality of the Artist) and Pillar 1 (First Nations First), which mandate the creation of "sustainable career pathways for young First Nations peoples to enter the arts, entertainment and cultural sector" (p. 9). Empowering youth as creators and cultural gatekeepers thus also transforms screen media consumption into a structured, civically valuable vocational pathway.

1

Introduction and Context: A Sector at a Cultural and Policy Crossroads

This report intervenes into a cultural moment of significant transition for the Australian children's television and broader screen entertainment sector.

It offers rigorous industry and policy analysis collaboratively developed between screen industry leaders and academic experts in the field of children's digital and screen media. The findings are grounded in a mixed-methods approach that synthesises longitudinal economic data with qualitative insights from a September 2024 workshop hosted by RMIT University's Streaming Industries and Genres Network (SIGN), alongside longitudinal reflections gathered from key participants a year later (late 2025-early 2026).

Identifying key structural obstacles in the present through attentiveness to the lessons of the past, this analysis deliberately bridges the historical divide between "administrative" media research—which seeks to solve short-term institutional policy problems—and "critical" research, which scrutinises underlying societal power structures and inequalities (Just and Puppis, 2012; Melody and Mansell, 1983). It is guided by leading children's media policy researcher David Buckingham's assertion that while "policy-makers are often infatuated by fantasies about the future", it is vital to recognise that "fantasies have a history—and at times of change, it is important to look back as well as forward" (Buckingham, 2020, p. 231).

The stakes for the sector's sustainability are high. As director and producer Nicholas Verso warned during the RMIT workshop's longitudinal reflections (2026), "If we don't engage more with audiences under the age of 21 in Australia, then I give our industry ten years before it's all over." This disruption is exacerbated by a global trend in which commissioners increasingly "want to take fewer risks and invest in known IP" as ACTF CEO Jenny Buckland explained in her longitudinal reflection (2026), leaving producers, public broadcasters and streaming platforms grappling with how to attract and retain young audiences.

The report canvasses a dynamic 12-month period of stagnation and change, navigating three major regulatory shifts:

Streaming Investment Obligations

A protracted delay in the introduction of regulation around the provision of local content on SVOD platforms, initially promised in July 2023, announced in November 2025, and in effect from January 2026.

The "Social Media Ban"

The introduction in December 2025 of regulation restricting social media platforms from issuing accounts to users under 16 years old.

Smart TV Prominence Regulation

The development and introduction of new regulations mandating that local TV services and apps must be readily available and visible to consumers on the "primary user interface"—or homescreen—of smart TVs, in effect and applied to new devices from January 2026.

Before mapping the recent economic and industrial contraction of the sector, it is necessary to establish the civic and cultural framework underpinning Australian children's television. This analysis adopts a TV-centric but platform-agnostic approach, which accounts for the critical socio-cultural role that television has traditionally performed in constructing a public sphere for children in Australia.

1.1 The Historic and Civic Role of Children's Television

> **As a widely accessible mass broadcast format, television constructs "national civic spaces" for children (Zanker, 2011, p. 32) and contributes to the development of "the child as citizen-in-the-making" (Messenger Davies, 2001, p. 2).**

However, as youth viewership shifts to on-demand global platforms that deliver content via algorithmic personalisation, it becomes more difficult for youth "audiences" as a collective to form around screen stories. Experts warn that this fragmented environment has damaging effects on the formation of "civic" publics—collective formations of young people which cultivate debate, discussion, and shared experiences around culturally specific stories (Ferraro et al, 2024). In turn, research has found that algorithmic personalisation may be impacting children's "cultural literacies": for instance, their ability to discern whether the content they are watching is Australian or North American (Balanzategui et al, 2024). For these reasons, researchers across computer science and the humanities are calling for a move beyond hyper-personalised algorithmic curation strategies driven by commercial aims and towards public service media principles around cultural specificity and diversity. Specifically, digital platforms bear a responsibility to enable youth "cultural citizenship" by ensuring young audiences share a common exposure to diverse, local cultural content that stimulates social integration and intercultural dialogue (Ferraro et al, 2024).

While the Australian public service television sector has historically been relied upon to provide high-quality and culturally diverse children's content in service of the public good, these commitments are not explicitly enshrined in the foundational charters of either the ABC or SBS. The ABC Charter (Australian Broadcasting Corporation [ABC], 2020, p. 208) and the SBS Charter (Special Broadcasting Service [SBS], 2020, p. 175) outline broad educational and cultural duties but omit any specific mention of the child audience. The Australian Children's Television Foundation (ACTF) highlights this omission as a significant policy anomaly, pointing out that because public broadcasters have "no formal requirements in respect of children's content" (2017, p. 21) their provision of youth programming remains variable and at the mercy of management rather than being protected as a core charter obligation. Section 2 of this report, Mapping the Deepening Economic Crisis for Children's Television, highlights the ramifications of this volatility.

Children's live-action drama possesses a high degree of cultural value crucial to the construction of a localised public sphere for young people. Flagship examples such as *My Place* (2009-2011) are explicitly leveraged to build a "multicultural child citizenship" (Brown and

Rutherford, 2011) through surrounding media literacy resources by organisations such as the ACTF, ABC Education, SBS Learn, and the Australian Media Literary Alliance (AMLA).[6] Thus, TV's civic value is significantly amplified through dedicated educational resources. Recent data reveals that 55% of Australian teachers use television content in classrooms at least weekly to aid emotional understanding and deliver cross-curriculum priorities, such as Aboriginal and Torres Strait Islander Histories and Cultures (Baker et al., 2024). By underpinning local shows with robust pedagogical frameworks—such as the ACTF's learning resources exploring the ethics of Artificial Intelligence alongside the drama *The PM's Daughter (*2022-2023) (ACTF, 2025), or SBS Learn's classroom-ready tools designed to spark conversations on inclusion during NAIDOC Week (SBS 2025)—the sector actively transforms passive viewing into applied civic education. This process directly empowers the "child as citizen-in-the-making" (Messenger Davies, 2001, p. 2) and demonstrates a depth of public value that imported global content cannot replicate.

As Professor Anna Potter (QUT) observed during the RMIT workshop, Australian children's drama possesses an "incredibly long generational shelf life because it was made with a lot of money and very high production values" (2024). Since the late 1970s—most notably through the 1979 introduction of the Children's Television Standards (CTS) and the subsequent implementation of mandatory children's content quotas—policy settings in Australia have been designed to ensure the provision of such content to serve national civic goals. Consequently, the the unravelling of this policy settlement has significantly exacerbated the precarity of children's television as a "market failure" genre (ACTF, 2023a, p. 2). 2026 reflections from ACTF CEO Jenny Buckland indicate this legacy is under immediate threat, noting that "children's shows aren't given the time to grow an audience anymore", limiting the cultural resonance of these properties.

[6] It must be noted, however, that this idealised construction of a singular national public sphere is not without its limitations. As Chu, Donald, and Witcomb (2003) problematise, the mainstream media sphere can inadvertently marginalise the complex, transnational identities of diasporic youth, forcing migrant children to act as "negotiators" who must translate between Australian civic culture and their parents' residual cultural memories. Furthermore, the traditional policy assumption that high-cost live-action drama is the only valid vehicle for achieving the goals of cultural nationalism is increasingly challenged by children's enthusiastic consumption of "ordinary" television genres, such as localised reality TV formats (Potter, 2013, pp. 75-84).

1.2 Theoretical and Policy Context: Scaffolding Social Cohesion and Civic Agency

1.2.1 The Policy Paradox and Social Cohesion

The sector currently occupies a position of structural vulnerability at a time when there is increased socio-cultural and policy pressure on children's television to fulfill its civic role. The Federal Government increasingly relies on local children's television to foster social cohesion, counteracting the fragmenting effects of social media. In a September 2025 UN speech, Prime Minister Anthony Albanese framed the under-16s social media ban (formally described as not a "ban" but a "delay" of access) as a mechanism for social cohesion, stating that it aimed to "protect young Australians at a critical stage of their development, giving them three more years to build real world connections."

Local television, by contrast, is positioned as a cultural glue. As former Communications Minister Michelle Rowland noted in a November 2024 speech—the same month the ban was introduced (see Timeline below)—free-to-air broadcasting remains "a critical delivery platform, with significant impacts for social inclusion and community cohesion." Furthermore, recent research confirms that Australian children's television is widely considered key to national social cohesion by cross-generational audiences, who use it to bond and share Australian culture (Burke et al., 2024; Swinburne/RMIT ACTC Report, 2025). During recent parliamentary debates, MPs similarly highlighted that Australian screen stories "contribute to our social cohesion as a nation" by allowing communities to see themselves reflected on screen (Khalil, 2025; Moncrieff, 2025).

However, the fragmentation of audience habits and structural market failure mean new pathways forward must be rigorously strategised. As ACTF CEO Jenny Buckland cautioned during the RMIT workshop (2024), while delivery platforms rapidly proliferate and change, ultimately "the shows, the content is the real heart of it." Furthermore, ABC Children's Commissioning Editor Mary-Ellen Mullane—ABC's Acting Head of Children's Content at the time of the RMIT workshop—reminded participants that while the fundamental developmental needs of children have not changed, "there's a lot of noise sitting around it" in the contemporary media environment.

This tension has resulted in a marked institutional shift. By 2026, the ABC did not relicense acclaimed live-action tween dramas such as *Crazy Fun Park* (2023), *MaveriX* (2022), and *The PM's Daughter* (2022-23) after their first runs, prompting the former two properties to migrate to Netflix, and thus behind an SVOD paywall. Buckland (2026) observes in her 2026 reflection for this report that this indicates that public broadcasters have effectively "dropped the upper end of the children's audience". This fundamentally weakens the sector's ability to scaffold social cohesion for tweens and teenagers, the group who are most vulnerable in the wake of the social media ban. The simultaneous restriction of youth access to digital public spheres and collapse of local television for older children has become a problematic policy paradox.

1.2.2 The Social Media Ban and Children's Civic Agency

The assertion that social media inherently damages social cohesion poses challenges for children's civic agency. As researchers emphasise, evidence-based support for children's wellbeing on social media platforms demands attentiveness to the specific texture of content consumption across platforms, and media literacy support so that children are empowered to navigate participatory, cross-platform media experiences in a socially cohesive way (Institute of Medicine and National Research Council, 2006; González-Bailón and Lelkes, 2023; Harris et al., 2022; Ogun et al., 2025). Rather than holistically resolving the crisis of social cohesion, a blanket restriction on social media risks excluding young people from the contemporary public sphere, particularly with a weakened and chronically underfunded local children's television sector. During the RMIT workshop, experts articulated several conceptual provocations regarding this tension, aligning with calls for education and policy frameworks that centre children's rights and participation in culture (Livingstone and Third, 2017).

While the social media minimum age legislation seeks to perform a protective role, its long-term implementation requires careful consideration of children's participation in and access to the surrounding media environment. Indeed, while the legislation has been welcomed by some clinical experts as a necessary intervention to protect youth mental health and development (Scimex, 2024), participants in the RMIT workshop raised concerns around how its implementation may impede children's agentic participation in Australia's public sphere. This discussion was consistent with Amanda Third's (2025) warning that a blunt protectionist approach risks enacting a form of "regulatory theatre" that subsumes the private lives of children into a threatened "public child" narrative (pp. 26, 35). Legislation that positions the state as *parens patriae* (the ultimate parent) threatens to marginalise children's agency by subordinating their voices and lived experiences to adult political agendas (Third, 2025, pp. 35-36).

To ensure the policy does not inadvertently disempower young Australians, scholars urge a shift away from blanket restrictions and towards a rights-based framework that actively balances protection with children's fundamental rights to digital provision, community connection, and civic participation (Third, 2025, pp. 45-46). Television and screen entertainment play an important role here. Panellists at the RMIT workshop offered the following provocations:

International Rights and the Value of Play and Leisure

> Dr Kyle Moore (Swinburne University of Technology) questioned whether a blanket social media ban conflicts with the UN's Constitutional Rights of Children to have access to play, leisure, and cultural activities. By failing to recognise that digital platforms are primary sites where contemporary youth exercise their cultural agency, policy-makers risk repeating historical moral panics. Panellists discussed how a weakened local television sector exacerbates these issues, further reducing child and youth access to localised leisure cultures.

Exclusion from the Public Sphere

> Dr Madeleine Hunter (RMIT Univesity) observed that digital platforms have successfully positioned themselves as the

"new public sphere" for decades. If social media functions as a modern civic space, a blanket ban removes youth from this public sphere rather than undertaking the necessary regulatory work to make these spaces "inclusive by design" (Hunter, 2024).

The Marginalisation of Cultural Safety and Proximate Communities

The assumption that social media disintegrates social cohesion overlooks how platforms can facilitate community building for marginalised youth with appropriate frameworks. As filmmaker Kauthar Abdulalim demonstrated through her Screen Australia-funded TikTok series *#Matched*, social media can be leveraged by young creators to pioneer structurally safe civic spaces, notably through the implementation of Australia's first "cultural inclusion rider" (Abdulalim, 2024).

To operationalise this rights-based framework, the Australian screen sector is in a unique position to actively enfranchise young people as co-creators in the production process. As well as the ACTF's own work in this space with teen creator and lead writer Olivia Deeble on *More Than This* (2022), a compelling blueprint for this approach can be found in the Danish television industry. As detailed in Eva Novrup Redvall's research on the award-winning Danish tween series *Klassen*, the production structurally embeds youth civic agency by employing 10–13-year-olds as credited "junior editors" who "provide feedback on episode ideas and screenplays" (2024, p 111). By adapting similar co-creation models grounded in civic participation and literacies, the Australian screen sector can proactively build screen cultures that foster genuine youth participation, engage youth audiences in new ways, and empower young people to safely contribute to their own digital public spheres.

Thus, the sector is navigating contradictory forces: social media platforms are legally restricted for children under 16 to preserve social cohesion, yet these platforms are simultaneously spaces where youth actively seek out representation and community. Furthermore, well-funded local children's television has become even more important to sustain and build civic publics in light of the social media restrictions—particularly for tweens and younger teens—however the sector as a whole is in a precarious position, and a key industry response has been to retreat from the tween market. At this transitional juncture, it is vital to critically consider how television and social media complement and create friction with one another in scaffolding children's civic participation in local cultures.

1.3 Timeline of Sector Disruption (2024–2026)

The following timeline provides an overview of the 12-month period of expansion and contraction across policy, industry, and creator ecologies, tracking the precise movements that have brought the sector to its current crossroads.

May 2024: Regulatory Testing & Industry Contraction

- **Testing Social Media Policy:** The Federal Government announces an Age Assurance Trial to test social media age verification.
- **Decline of Children's TV:** ACMA releases its Commercial TV program expenditure report revealing a $0 expenditure on children's drama by commercial broadcasters in 2022-23.
- **ABC Children's Content Transformations:** The ABC, Australia's primary commissioner of children's content, announces the departure of Head of Children and Family, Libby Doherty (RMIT Workshop participant, Mary-Ellen Mullane, subsequently served as Acting Head until January 2026). Concurrently, the ABC announces an overhaul of Kids and Family channels to boost discoverability: ABC Family replaces ABC TVPlus, and ABC Entertains replaces ABC ME, the digital channel for older children, operational since 2009 (as ABC3, rebranded to ABC ME with dedicated app in 2016).
- **Online Content Support:** Screen Australia and the ACTF announce the Kids IP Incubator Initiative, supporting content creators with strategies to develop local IP for YouTube, Roblox, and FAST channels.

June – August 2024: Legislative Momentum

- **Social Media Ban Advocacy:** Public discussion intensifies around the social media ban, driven by the "36 Months" campaign with bipartisan support.
- **Delayed SVOD Regulation:** The July 1 deadline passes without action for proposed SVOD local content obligations. However, Parliament passes the *Communications Legislation Amendment (Prominence and Anti-siphoning) Act 2024* on July 4 to ensure local broadcast platforms are more visible and accessible on smart TV interfaces.
- **Online Content Support:** Screen Australia and YouTube Australia announce new Skip Ahead projects, including children's creators "Rainbow Bop".
- **ACTF Funding:** In the Federal Budget, the ACTF receives $14.5 million over four years.

September 2024: Formalising Legislative Intent

- **Social Media Policy Announcement:** Prime Minister Anthony Albanese officially announces Government intent to introduce a minimum age for social media.
- **Videogame Policy Implementation:** Mandatory classifications are introduced for gambling-like content in video games.

- **Industry Reflection:** RMIT SIGN Workshop is held to analyse sector strategy in a transforming policy and industry environment.

November – December 2024: New Regulatory Frameworks

- **The Social Media "Ban":** The Government introduces the *Online Safety Amendment (Social Media Minimum Age) Bill 2024* (age 16 limit). The Bill passes with bipartisan support on November 29th.
- **SVOD Regulation Stagnation:** The Government shelves previously announced plans for local content requirements on streaming platforms.
- **Smart TV Prominence:** Introduction of the *Broadcasting Services (Minimum Prominence Requirements) Regulations 2024* mandating that local television apps must be readily available and prominently displayed on the primary home screen of smart TVs.

November 2025: SVOD Regulation and Children's Content Funding

- **SVOD Regulation Introduced:** Almost three years after being announced by the Government (January 2023), and 16 months after the passing of the Government's deadline for the legislation (July 2024), legislation is introduced mandating that SVODs with more than one million Australian subscribers invest at least 10% of their total Australian expenditure (or 7.5% of revenue) on new local drama, children's content, documentary, arts, and education programs.
- **ABC Funding:** Announcement of a $50 million funding injection for the ABC to produce new children's and drama content, spread out over a three-year period (2026-2028).

December 2025 – January 2026: Policy Implementation

- **Social Media Ban Enforced:** The social media ban for under-16s becomes legally enforceable on December 10, 2025.
- **SVOD and Prominence Obligations in Effect:** Local content obligations for streaming services and Prominence obligations for smart TVs officially come into effect in January 2026.
- **Industry Contraction:** The ABC does not relicense first-run live-action dramas for older children *Crazy Fun Park*, *MaveriX*, and *The PM's Daughter*. *Crazy Fun Park* and *MaveriX* migrate to Netflix. This signals the broadcasters' strategic retreat from the older children's demographic.

1.4 Methodology: A "Wicked Problems" Framework

To ensure robust strategic insights grounded in scholarly rigour and real-world industry experience, the findings detailed in this report are built upon a longitudinal, qualitative methodology.

1.4.1 The "Wicked Problems" Analytical Approach

The report emerges from a workshop hosted by RMIT University's Streaming Industries and Genres Network (SIGN) in September 2024, with reflections gathered from key participants a year later (late 2025 into early 2026). This methodology captures participants' diverse perspectives during a period of transition, evaluating how intervening regulatory shifts may alleviate or exacerbate the sector's structural challenges.

The workshop and subsequent analysis were structurally driven by a "wicked problems" theoretical framework. As defined by Coyne, wicked problems are thorny, multi-faceted, tangled, and complex: "loosely formulated", they "persist, and are subject to redefinition and resolution in different ways over time" (Coyne, 2005, p. 6). This approach focuses "on how actors in various situations articulate their diverse perspectives about public issues" (Head, 2019, p. 181). As Head (2019) argues, understanding these intractable issues requires moving beyond the illusion of simple, "evidence-based" technical fixes to rigorously examine how policy problems are framed, contested, and shaped by divergent stakeholder positions and values. In scholarly literature, wicked problems are intractable and contentious; they are not so much "tackled" or "solved" but understood, coped with, and incrementally adjusted to (Daviter, 2017; Head, 2019; Wallace, 2008).

By adopting this framework, the report deliberately bridges the historical divide in media policy studies between "administrative" research —which seeks practical solutions to immediate institutional problems—and "critical" research, which scrutinises underlying power structures and inequalities (Lazarsfeld, 1941; Melody and Mansell, 1983). As contemporary scholars note, effective media policy research must move beyond this dichotomy to offer both rigorous, evidence-based policy interventions and a normative commitment to democratic communication (Just and Puppis, 2012; Napoli and Friedland, 2016). To counteract the conceptual "freeze" response often caused by wicked problems, the discussion panels in the workshop were followed by structured brainstorming and futures-thinking sessions. The audio-recorded discussions were then thematically analysed using an iterative, inductive-deductive coding process (Van den Bulck and Puppis, 2019; see also Herzog, Handke and Hitters, 2019).

1.4.2 Participating Academic Experts and Industry Leaders

The workshop bridged the gap between academic theory and industry practice.

Panel One: Children's Television and other Legacy Formats

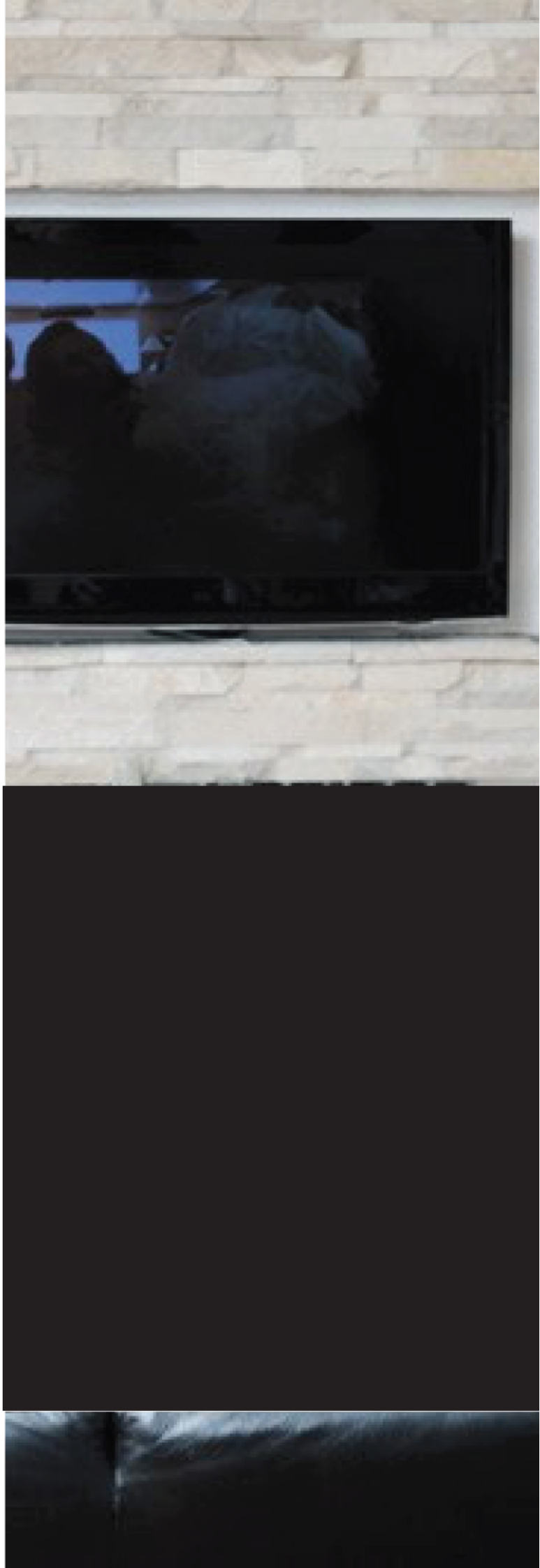
Facilitated by A/Prof Jessica Balanzategui and Dr Djoymi Baker (RMIT). Featuring Mary-Ellen Mullane (Acting Head of Children's, ABC), Jenny Buckland (CEO, ACTF), Prof Anna Potter (Queensland University of Technology), and Nicholas Verso (Award-winning Director/Producer, *Crazy Fun Park* [ABC], *Invisible Boys* [2025] [Stan]).

Panel Two: Social Media Entertainment and Digital Platforms

Facilitated by Prof Ingrid Richardson (RMIT). Featuring Kauthar Abdulalim (CEO of Blacksand Pictures and Filmmaker/Producer, *#Matched*), an anonymous policy expert from ACMA, Dr Madeleine Hunter (RMIT), and Dr Kyle Moore (Swinburne).

Additional Experts

Dr Alexa Scarlata (RMIT), Prof Sean Redmond (RMIT), Dr Merinda Staubli (RMIT), Dr Andrew Lynch (Swinburne), and additional researchers and academics from universities across Melbourne.



2

Mapping the Deepening Economic Crisis for Children’s Television

> **To fully grasp the "wicked problem" facing Australian children's television, the cultural and civic stakes established in Part 1 must be tethered to the stark economic realities of the production ecology. As previously noted, the sector represents "the clearest case of market failure of any sector of the screen industry" (ACTF, 2023a, p. 2).**

Before mapping this contraction, it is necessary to acknowledge the profound methodological challenges inherent in quantifying the children’s television sector. Attempting a holistic, cross-comparative accounting of the industry requires synthesising data across fundamentally disparate regulatory and financial reporting frameworks. The key agencies track the sector using largely incompatible metrics: ACMA monitors commercial free-to-air compliance through a mandatory points-based system governed by strict legislative definitions, and, during the period analysed in this report, relied on voluntary, self-categorised expenditure reporting for SVODs; the public broadcasters (ABC and SBS) track first-release broadcast hours; the ACTF reports direct annual production expenditure; and Screen Australia measures multi-year financial commitments awarded to approved projects. This lack of cohesive, standardised data obscures the depths of the sector's precarity, making it difficult to construct a clear economic map and trace levels of investment.

However, by synethesising data from the Australian Communications and Media Authority (ACMA), Screen Australia, the ABC and SBS, and the Australian Children’s Television Foundation (ACTF), the following section maps the systemic contraction of the children’s screen sector between 2018 and 2025, revealing a clear narrative of deepening market failure. The sector is currently defined by the exodus of commercial free-to-air broadcasters, severe volatility in streaming investment, and escalating costs of production, which together place an unsustainable burden on the public broadcasters, in particular the ABC.

2.1 Data Spotlight 1: Commercial Broadcaster Retreat (see Table A1)

The 2020 abolition of the Australian Content and Children's Television Standards (ACCTS) sub-quotas—which previously required commercial broadcasters to produce a minimum number of hours of children's drama—triggered an immediate and profound collapse in commercial investment.

The Free-to-Air Collapse

In the 2018-19 financial year—the last full year before the April 2020 suspension of the quotas—commercial broadcasters spent $24.87 million on children's content, with $11.66 million dedicated to children's drama (ACMA, 2024b). By the 2022-23 financial year, total commercial spending fell 97% to just $743,820, with investment in children's drama flatlining at an unprecedented $0 (ACMA, 2024b).

The 2023–24 "Rebound" Anomaly

While the 2023-24 financial year saw a modest rebound to $3.09 million, this still represents an 88% reduction from pre-quota levels (ACMA, 2024b). Commercial broadcasters now operate under a points-based regulatory system, where broadcasters earn credits toward an overall target rather than being required to fulfill dedicated hours (Knox, 2025a). The $1.75 million spent on drama in 2023-24 is almost entirely attributable to a single title—Network 10's comedy drama *Rock Island Mysteries* (Season 3), which provided 10 hours of content to claim 60 points toward their quota (ACMA, 2024; Knox, 2025a). The remaining $1.34 million in the "Children's Other" category was driven by the Nine Network focusing on high-volume, lower-cost non-drama formats (such as the quiz show *The Actually Really Very Difficult Show* and the improvisational series *TheatreDome*, which produced 100 episodes) to meet its points obligations (ACMA, 2024; Knox, 2025a; Knox, 2025b). Notably, ACMA reporting confirms the Seven Network claimed zero points for children's television and recorded $0 in children's drama expenditure during this period (ACMA, 2024; Knox, 2025a).

2.2 Data Spotlight 2: The SVOD "Mirage" and Investment Volatility (see Tables A2 & A3)

The picture is further complicated by the entry of Subscription Video on Demand (SVOD) services into Australia's local screen production ecologies. Initially, global streaming platforms—alongside domestic competitor Stan—appeared poised to fill the funding gap left by local commercial broadcasters. However, analysis reveals a highly unstable investment environment.

Voluntary Reporting and Unpredictable Investment

In 2019, ACMA began collecting data on spending by SVOD providers. This system relied on SVODs to voluntarily self-categorise and report their expenditure until the end of 2025 (ACMA, 2024a). While commercial broadcasters also report expenditure on a voluntary basis, unlike SVODs, this reporting is firmly anchored to strict legislative definitions and mandatory content obligations. Amazon Prime Video, Disney+, Netflix, and the domestic platform Stan began self-reporting in the 2019-2020 financial year, while Paramount+ began reporting in 2021-2022. Based on this voluntary data, SVOD providers reported a significant $40.47 million spend on children's content in 2019-20: almost four times as much as local commercial broadcasters and outspending them in children's drama by over 6:1 (ACMA, 2025). This initial surge suggested that streaming platforms might fill the funding gap left by the retreat of commercial broadcasters post the 2020 quota abolition.

Yet this SVOD investment has proved highly unreliable. By 2021-2022, SVOD spending had declined by 81.87%—a steeper collapse than the commercial broadcasters' decline over the same period. This spending continued to fall to $3.34 million by 2023-24, flatlining at $3.67 million in 2024-25 (ACMA, 2024a; ACMA, 2025). Notably, the new SVOD expenditure legislation in place from January 2026 brings an end to the voluntary reporting era, as alongside investing 10% of their Australian program expenditure (or 7.5% of their revenue) major SVODs must also report to ACMA. However, because this new mandate bundles children's programming with adult drama and documentaries rather than placing it under its own protected sub-quotas, SVOD investment in children's television is likely to remain unpredictable.

The Licensing Mirage and Evolving ACMA Data

Based on ACMA reporting of overall SVOD expenditure across all genres between 2019 and 2025, new commissions constitute an average of 72.7% of SVOD spending (ACMA, 2025). However, ACMA *does not* provide this granular financial split specifically for the children's genre. For children's programming, ACMA provides top-line financial figures that cluster together the

financing of new commissions with the licensing of *pre-existing* library content. This creates a financial "mirage" that inflates the perceived commitment of SVODs to funding original Australian children's stories. In 2024-25, the reality behind this mirage was exposed, with SVODs reporting zero new children's commissions, meaning the majority of their $3.67 million spend was dedicated to library acquisitions.

The *Mako Mermaids* Loophole

Fortunately, ACMA's reporting has evolved significantly since it began. In 2020-2021, ACMA began detailing the total *number* of SVOD commissions, and crucially, from 2021-2022 onwards, it began releasing the *specific titles* and genre headings (ACMA, 2024a). It is the publication of these title lists that exposes a loophole in the reporting framework. When ACMA collects data on "commissioned and co-commissioned Australian programs," providers are simply asked to report where "expenditure was incurred" during that specific financial year. As an example of the loophole, because Netflix participated in the original co-commissioning of *Mako Mermaids: An H2O Adventure* (a co-production with Network 10 and ZDF that aired between 2013 and 2016), they appear to have been able to claim ongoing expenses incurred in relation to that legacy property as part of their "commissioning" expenditure in the 2023-2024 financial year, despite the series being a decade old (ACMA, 2024a).

A Collapse in Original Commissions

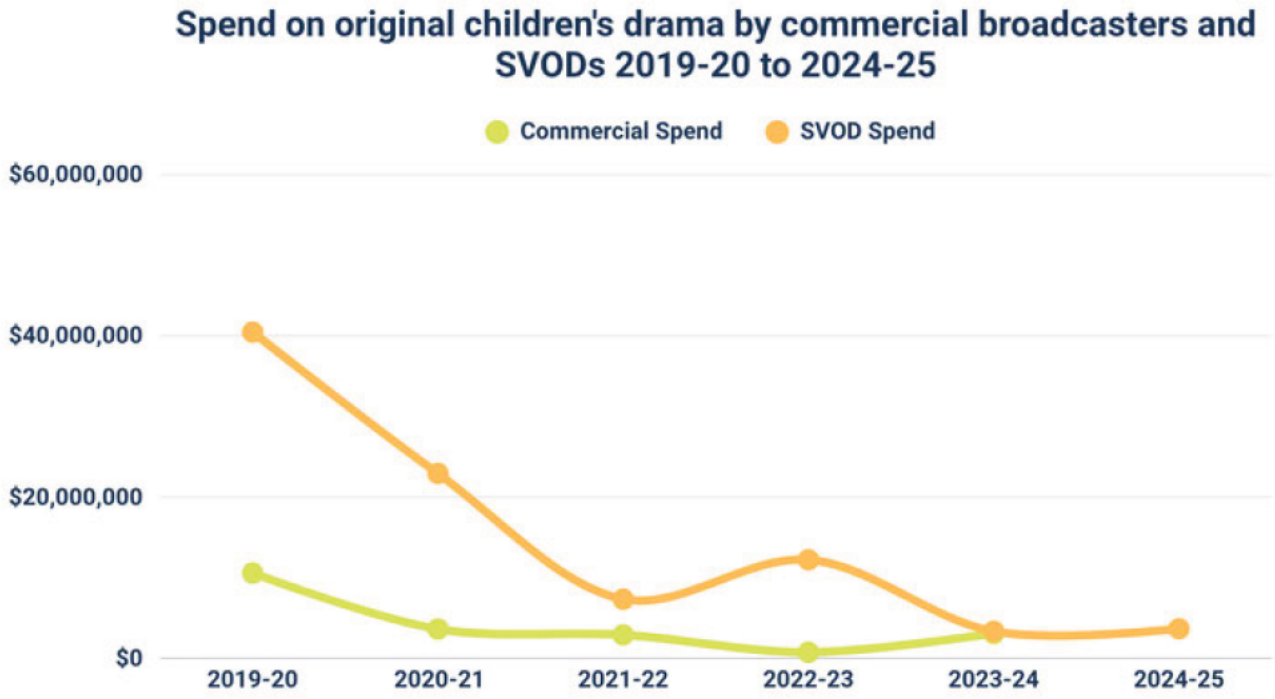
When historical anomalies like *Mako Mermaids* are removed from ACMA's title data, it reveals that SVODs contributed to the commissioning of just 5 genuinely new Australian children's titles four episodic series and one feature film) between 2021-2022 and 2024-2025. Furthermore, this output is built from partnerships with legacy children's TV providers rather than independently sustaining new production. *The Bureau of Magical Things S2* (2021, Netflix) and *Rock Island Mysteries* (2022-2024, Paramount+) were both primarily commissioned for Network 10, *Eddie's Lil' Homies* (2024, Netflix) is a co-commission with NITV with major production investment from the ACTF, and the sole feature film *Windcatcher* (2024) was made possible through a landmark partnership between the domestic SVOD Stan, the ACTF, and Screen Australia (Screen Australia, 2023; ACTF, 2021). While the total number of Australian children's titles available across SVODs rose from 74 titles (370 hours) in 2019-2020 to 113 titles (511 hours) in 2024-2025, analysis of ACMA data reveals that this growth relies almost entirely on legacy acquisitions (ACMA, 2025). This trend culminated in 2024-2025, when SVODs commissioned no new children's programming—meaning the vast majority of their reported $3.67 million spend was directed toward acquiring existing content (ACMA, 2025).

Continued Vulnerability Post 2025 Streaming Bill

The vulnerability of the children's sector is poised to continue despite the recent passage of the *Communications Legislation Amendment (Australian Content Requirement for Subscription Video On Demand Services) Bill 2025.* While the legislation introduces a 10% expenditure requirement for SVODs, the Government did not include genre-specific sub-quotas for children's television. These vulnerabilities were heavily debated in the House of Representatives during the Bill's Consideration in Detail stage, where independent MPs moved amendments attempting to close funding loopholes and mandate sub-

genre reporting. For instance, Independent MP Zali Steggall moved an amendment for “balanced genre investments,” warning that without protected sub-quotas, “children's content could fall off the map completely over the next four years" (2025, p. 3942). As Minister for the Arts Tony Burke conceded during parliamentary debate, the government "pulled right back from sub-quotas" due to trade law complications (2025, p. 3941). While Burke defended the Government’s approach by arguing that SVOD platform specialisation is a valid business model, he acknowledged it is no longer "essential for each individual streaming business to be providing that full range" of genres, and that many platforms will pursue a path "deliberately aimed at not having children among their audience" (2025, p. 3942).

Furthermore, the legislation's broad definition of qualifying expenditure leaves the system vulnerable to exploitation. Independent MP Allegra Spender warned that streaming expenditure risks being artificially inflated by federal or state taxpayer subsidies (such as the producer offset), arguing strongly that "Australian taxpayers don't expect our taxpayer money to be used to support content quotas for overseas filmmakers" (2025, p. 3941). Without mandated sub-quotas or tight expenditure definitions, there is no legislative mechanism to compel streamers to reverse the collapse of original children's commissions.



Source: Screen Australia Australian Children’s TV and VOD drama titles produced 1995-96 to 2024-25

2.3 Data Spotlight 3: The Escalating Cost of Civic Storytelling (See Table A4)

As established in Part 1, live-action children's drama possesses a "long generational shelf life" (Potter, in RMIT SIGN Workshop, 2024) and serves as a vital tool for scaffolding national identity. However, the cost of producing this culturally specific content has escalated dramatically, fundamentally altering the commissioning landscape.

Rising Live-Action Costs

According to Screen Australia data, the average cost of producing live-action children's drama more than tripled over a five-year period (Screen Australia, 2015-2025). In 2019-20, live-action cost $0.928 million per hour. By 2024-25, this figure rose to $2.807 million per hour.

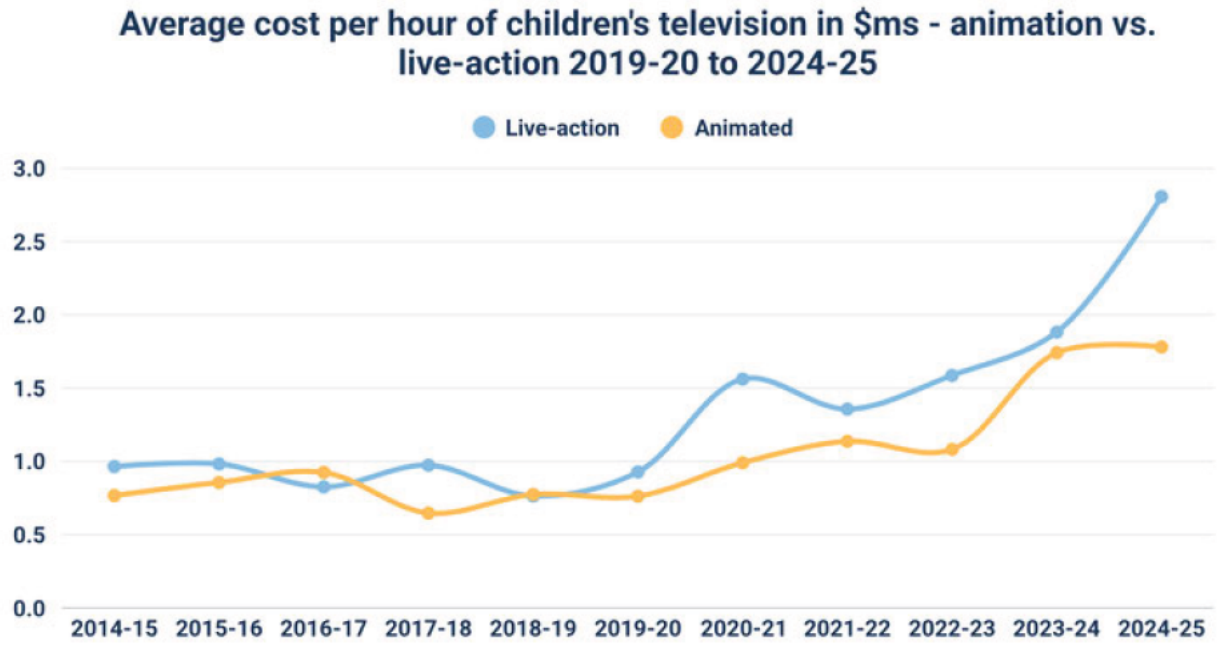
It must be noted that the 2024–25 average is elevated due to a historically low production volume: just 21 hours generated across five titles, which represents a 38% decline in hours from the previous year (Screen Australia, 2025). This small pool weights the average toward high-cost formats produced that year, such as the feature film *Whale Shark Jack* and the hybrid live-action/puppet-animated series *Knee High Spies* (2026).

The Shift to Animation

While animation costs have also risen (reaching $1.781 million per hour in 2024-25) (Screen Australia, 2025), it remains a more economically viable format. The industry has seen a structural skew toward animation that predates the current crisis: between 1997 and 2016, the average annual hours of Australian children's animated drama more than doubled, while live-action hours halved (ACTF, 2017). The animation sector makes a vital contribution to the broader children's media ecology. The phenomenal success of *Bluey* (2018-24)—the most-streamed title of any kind in the United States in 2025, with 45.2 billion minutes watched (Walker, 2026)—proves that animated formats can retain unambiguously Australian cultural specificity while achieving substantial global resonance. Furthermore, at the 2026 Screen Producer's Australia Awards, acclaimed author-illustrator Shaun Tan's *Tales from Outer Suburbia* won Animated Production of the Year and was selected for competition at the prestigious International Animation Festival (Poland, 2026): met with rave reviews, the show has been described as "haunting, mesmerising, with touches of surrealism, behold a slice of Australian life through the eyes of a child" (Knox, 2025c). Thus, animation has evolved from a children's format heavily influenced by the interests of international partnerships and thus often with little discernible cultural specificity (ACTF, 2017) to a globally and critically acclaimed

artistic force that delivers sophisticated culturally specificity. For instance, in the case of *Bluey*, after securing major international partners like the BBC and Disney, the creators fought "hard to retain the Australian accents" despite requests to dub them for overseas markets (Pearson cited in McCutcheon, 2019).

Animated shows like *Bluey* and *Tales from Outer Suburbia* thus function as vital civic content that, in the words of Communications Minister Anika Wells, "connects us to who we are and shares it with the world" (2025). It will be imperative that the sector is supported and empowered to continually build on these internationally esteemed strengths in the age of SVOD local content legislation, especially if the sector is to avoid a return to the pre-2020s era and its emphasis on internationally accented animations that "rarely contribute to the audience's developing Australian identity" (ACTF, 2017, p. 16). For instance, take the case of Netflix's 2026 Australia and New Zealand content slate; while the streamer is investing in local crews by commissioning Sydney-based Flying Bark Productions (also behind *Tales from Outer Suburbia*) to animate *Stranger Things: Tales From '85*, Netflix explicitly categorises the project as an "international production" rather than an original Australian story (Hatherly, 2026; Laidlaw, 2026).



Source: Screen Australia Australian Children's TV and VOD drama activity summary 1995-96 to 2024-25

2.4 Data Spotlight 4: The Public Broadcaster Burden (ABC and SBS) (See Tables A5, A6 & A7)

With the commercial sector retreating and SVOD spending proving volatile, Australia's public service broadcasters have been forced to do the "heavy lifting" to keep the local children's production ecology alive.

The ABC's Purchasing Power Paradox

The ABC is the primary commissioner of new Australian children's content, directing $21.14 million towards commissions in 2024-25 (ABC, 2025), with investment steadily increasing since 2022-23 ($17.605 million, ABC, 2023). Notably however, this rise follows a 33% drop in commissioning investment from 2021-22 (from $26.388m to $17.605m). While the ABC is maintaining strong investment in children's content as Australia's primary commissioner, the rising costs of production mean their funding does not stretch as far. As a result, the ABC is producing fewer titles overall, with the total volume of first-release hours falling by 59%, from 274 hours across all platforms in 2018-19 to 112 hours in 2024-25 (ABC, 2019-2025).

Speaking of the $50 million the ABC received in late 2025, to be spent over the next three years (2026-28) on children's and drama content, ABC Managing Director Hugh Marks explained the broadcaster's strategy to invest in premium productions—to "deliver really excellent content" that can compete with "the quality of production that is being delivered by some of those international streamers" (p. 81). He noted that this entailed investment in a couple of high-quality children's shows likely to be commercially successful, following in the footsteps of *Bluey*, to enable reinvestment in more children's programming and to "supplement the income base of the ABC" (p. 82). These comments—and the subsequent announcement of children's reboots *Bananas in Pyjamas* and *Little Lunch*—suggest that Australia's primary children's TV commissioner will continue a strategy of a smaller number premium productions.

The Rise and Re-categorisation of Children's Content on iview

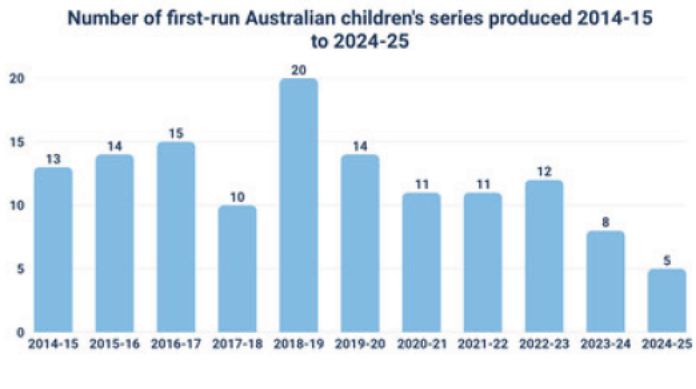
To adapt to the decline in purchasing power for new commissions, the ABC has executed a profound digital platform shift. Between 2023-24 and 2024-25, the total hours of children's content on ABC iview rose significantly from 13,120 to 41,595 hours (ABC, 2025). While not representing an influx of newly funded productions, this upsurge reflects a strategic utilisation of library content and a structural re-categorisation of existing media, helping to maintain a robust offering despite the decline in first-release broadcast hours. Crucially, the proportion of all ABC iview content explicitly categorised as "children's" rose from 47.1% in 2023-24 to 77.8% in 2024-25. Across the ABC's

combined broadcast and streaming platforms, the percentage of that content dedicated to local programming rose from 29.97% to 45.48% without equivalent new production spend (ABC, 2025). This increase was structurally facilitated by the June 2024 discontinuation of the dedicated older children's channel ABC ME (replaced by ABC Entertains), with the broadcaster instead shifting legacy content into broader, flexible digital "buckets" (such as *Family* or *Big Kids*). This maximises the discoverability and lifespan of existing children's provision, even as the actual number of first-run hours continued to fall.

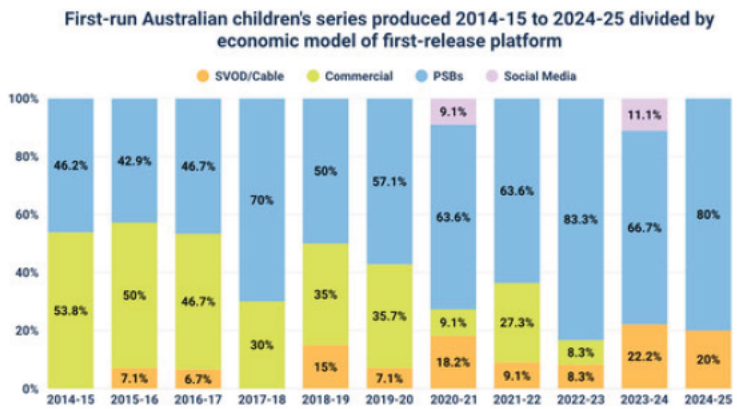
The Vulnerability of SBS and NITV

While the ABC carries the primary structural burden, the Special Broadcasting Service (SBS) plays a vital, albeit smaller, role in the sector. The primary SBS channel does not commission first-run children's content, leaving the network's commissioning to National Indigenous Television (NITV). NITV contributes to the commissioning of first-run, culturally specific First Nations children's content, such as *Little J & Big Cuz* and *Red Dirt Riders* (SBS, 2020-2025). However, unlike the ABC, SBS operates on a hybrid-funding model, generating roughly 30% of its operating revenue from commercial advertising (SBS, 2020-2025). Because it relies on commercial returns to reinvest in Charter-driven content, SBS's capacity to commission youth programming is exposed to the same advertising market fluctuations impacting the commercial networks.

Consequently, the network's children's television offerings remain highly precarious. First-run commissioned hours on NITV dropped from 7.8 hours in 2019-20 down to 2.6 hours in 2023-24, and total volume of local children's content broadcast on NITV suffered a contraction of 59% between 2022-23 and 2023-24. This contraction extends to digital platforms, with the availability of Australian children's content on SBS On Demand almost halving since 2022-23 (SBS, 2020-2025).



Source: Screen Australia Australian Children's TV and VOD drama titles produced 1995-96 to 2024-25



Source: ACMA TV in Australia: Spending on Commercial TV Programs Aggregated Report 2023-24 FY; ACMA SVOD Content in Australia: Spending on Australian Programs by SVOD Providers Aggregated Report 2024-25

2.5 Data Spotlight 5: The ACTF and the Economics of the "Long Tail" (see Tables A8 & A9)

In a volatile market in which public broadcasters are stretched and commercial platforms are risk-averse, the Australian Children's Television Foundation (ACTF) plays a uniquely critical role in bridging the financing gap and ensuring the global sustainability of local IP (Baker et al., 2025).

Direct Investment and Scaling Support

The structural burden placed on the ACTF and ABC is exacerbated by a contraction in federal agency support. While Screen Australia committed a peak of $10.71 million to children's TV drama in 2020-21, this fell 74% to $2.75 million by 2024-25 (Screen Australia, 2025). Consequently, the ACTF has exponentially scaled its own direct production funding to bridge this widening financing gap and trigger production. Enabled by targeted federal funding boosts—including an initial $20 million injection over two years from July 2021, followed by ongoing funding secured in the May 2024 Budget—the ACTF's capacity to invest has grown exponentially. For context, in the 2018-2019 financial year, the ACTF's production investment was $381,509. By the 2024-2025 financial year, this figure had surged to reach $6.15 million (ACTF, 2019–2025).

Sustaining the Production Pipeline

Beyond immediate production spend, the ACTF anchors the sector's future by backing projects conceptual stages and the critical financing thresholds. In 2024-2025, it spent $1,081,536 on script development across 25 different projects, ensuring that a robust slate of local stories continues to be nurtured (ACTF, 2025). Concurrently, the ACTF committed a further $4,983,462 to projects at the financing stage, building on a sustained pattern of multi-million-dollar forward commitments (including $4 million in 2023-24 and $6.1 million in 2022-23) that provide independent producers the certainty needed to trigger production (ACTF, 2025).

International Viability

Beyond direct funding, the ACTF drives the economic sustainability of the sector through its international distribution arm. By achieving significant international sales to major global players—peaking at a record $4,963,516 in the 2021-22 financial year and generating $2,380,196 across more than 60 territories in 2023-24——this dual role proves that culturally specific Australian content can achieve commercial viability. This success was underscored when the ACTF was voted one of the top 10 global children's media distributors by *Kidscreen* readers in 2021-22 (ACTF, 2022). By actively cultivating the "long tail" of international sales, the ACTF not only generates substantial returns to reinvest in the local sector, such as the $2,959,125 recouped from previous investments during the 2024-25 financial year, but ensures that Australian storytelling achieves sustained global visibility (ACTF, 2025). The enduring economic and cultural value of this long tail is demonstrated by the ACTF's continued international licensing of 30-year-old legacy titles, such as *The Girl From Tomorrow* (1990) and *Spellbinder* (1995), alongside its contemporary productions.

2.6: Data Spotlight 6: The Screen Australia Complexity

While Screen Australia remains a vital funder of children's screen entertainment across film, television, and video games, quantifying its exact contribution to the sector presents a unique methodological challenge.

Unlike the ACTF, which reports annual expenditure, Screen Australia measures investment in terms of multi-year financial commitments awarded to approved projects (Screen Australia, 2019-2025). Furthermore, its reporting frameworks remain structured by the legacy definitions of the Broadcasting Services Standards. This means it explicitly tracks the specific genre of "Children's TV Drama Production", and tends to categorise other investments in youth-oriented content—such as its recent digital initiatives for YouTube and TikTok (Screen Australia, 2022; 2024)—under broader administrative umbrellas like "Feature Film" or "Online". However, even accounting for the inherent volatility of this reporting style—which saw commitments fluctuate from a peak of $10.71 million in 2020-21, dip to $4.32 million in 2022-23, and briefly rebound to $7.97 million in 2023-24—the longitudinal trend reveals a contraction. Screen Australia's commitments to children's TV drama fell to $2.75 million by 2024-25, representing a 74% drop from its 2020-21 peak that further compounds the structural financing pressures placed on the sector.

Attempting a full cross-comparative accounting of Screen Australia's investment highlights a vexed issue that sits at the heart of the sector's current crisis: the friction between defining children's content as a *genre* versus understanding it as a *demographic*. As the thematic analysis in Part 3 will explore, addressing this friction could help to secure the industry's future. *(For a longitudinal breakdown of Screen Australia's commitments to Children's TV Drama, see Table A10 in the Appendix)*.

For comprehensive longitudinal data supporting these Data Spotlights, including the collapse of commercial free-to-air investment and the escalating costs of live-action production, please refer to Appendix A: Longitudinal Economic and Market Data (2019–2025).

Thematic Analysis of Industry and Academic Perspectives

> **While the economic mapping in Part 2 outlines the structural parameters of the market failure facing Australian children's television, addressing this "wicked problem" (Head, 2019) requires a nuanced understanding of how creative and institutional practices are adapting on the ground.**

To capture these dynamics, the audio-recorded discussions from the RMIT SIGN Workshop were thematically analysed. The value of this methodological approach lies in its synthesis of diverse perspectives, bringing together key institutional decision-makers—such as Jenny Buckland (CEO, ACTF) and Mary-Ellen Mullane (Acting Head of Children's, ABC)—with academic experts and frontline creators including award-winning filmmakers Nicholas Verso (*Crazy Fun Park* and *Invisible Boys* [2025]) and Kauthar Abdulalim (*#Matched* and *Selma's Season* [2022]). Furthermore, by collecting longitudinal reflections from these panellists from late 2025 into early 2026, the analysis tests how speculative industry strategies have held up against the reality of intervening policy shifts.

Four central themes emerged from this analysis, highlighting the tension between legacy television formats, digital experimentation, and the urgent need to rethink how we engage the youth demographic.

3.1 Traditional Television Formats, Discoverability and the ABC's Digital Transformation

A dominant theme throughout the workshop was the profound tension between sustaining high-value, traditional television formats and the industry's pivot toward digital platforms. This tension is best exemplified by the ABC's recent digital distribution overhaul.

Historically, public broadcasting has proven capable of scaffolding resilient civic spaces for youth when adequately funded (Zanker, 2011). ACTF CEO Jenny Buckland noted that the UK's dedicated children's channel CBBC (launched in 2002) succeeded precisely because it "treated their children's audience just the way they treated their adult audience," offering a rich, multi-genre slate that included news, documentaries, and live-action drama (Buckland, in RMIT SIGN Workshop, 2024). As Buckland explained, this model inspired the 2009 launch of Australia's ABC3 (later ABC ME), which ushered in a "new Golden Age of children's content" underpinned by a specific carve-out for children's funding, as a result securing sustainable funding for expensive, culturally specific live-action series, including *My Place, Dance Academy* (2010-2013), *Nowhere Boys* (2013-2018), and *Little Lunch* (2015-2016). These shows and their surrounding media literacy resources successfully scaffolded Australia's youth civic public during this period (Brown and Rutherford, 2011). As Professor Anna Potter noted in the RMIT SIGN Workshop:

> *"[the 2010s were characterised by] really innovative, bold, wonderful children's drama, hugely successful with audiences. [It] has an incredibly long generational shelf life because it was made with a lot of money and very high production values."*
>
> **Professor Anna Potter (QUT)**

In June 2024, the ABC discontinued ABC ME, replacing it with "ABC Entertains" and shifting content into broader, flexible "buckets" (such as *Family* or *Big Kids*) to increase digital discoverability on ABC iview. Mary-Ellen Mullane (Acting Head of Children's, ABC) positioned this transformation as a necessary response to a highly fragmented streaming market characterised by endless competition (RMIT SIGN Workshop, 2024):

> *"In the old days, you could just pop content onto a platform and people would find it because there wasn't too much other competition. Well, now it's a very crowded space."*
>
> **ABC Acting Head of Children's Mary-Ellen Mullane**

Mullane also noted a distinct branding challenge with retaining the tween market (7-14), noting that the ABC ME platform had difficulty retaining this age group.

Despite the discontinuation of ABC ME, Buckland reinforced the cultural longevity of the content of this era, noting that:

> *"The content has in many ways outlasted the channel.* Dance Academy, My Place *is still being used in every school in Australia, and shows like* Little Lunch *are still being used by the ABC to headline ABC Entertains."*
>
> **ACTF CEO Jenny Buckland**

The ABC's drive for new approaches to on-demand platform discoverability can thus support longevity of legacy programs. However, it also comes with a risk that newer programs are not afforded weight and space to build cultural resonance over time. Jenny Buckland strongly cautioned that high-quality, distinctive Australian shows need patience. Drawing a parallel to the classic tween fantasy-drama *Round the Twist* (1990-2001), Buckland recalled that "for three years, not very many people knew about it" due in part to a 7:30am Sunday timeslot on its original broadcaster, Channel Seven. The ACTF in response took the show to the international market themselves, where it gathered steam with audiences and found significant and enduring popularity internationally via the BBC, and locally via the ABC (1993-2001) in an after-school timeslot (Buckland, in RMIT SIGN Workshop, 2024).

Referring to contemporary examples like panellist Nick Verso's live-action tween drama *Crazy Fun Park*—which, as detailed later in this report, was met with national and international acclaim but struggled to connect with audiences via ABC—Buckland emphasised that

> *"the problem is not the show, it's about whether the audience found it."*
>
> **ACTF CEO Jenny Buckland**

Buckland noted that through *Crazy Fun Park*'s international release via Hulu in the US in late 2023—which was written about in *The New York Times*—it is likely to echo *Round the Twist*: "its audience will grow, and it will be discovered as it goes to air again and again and again" (2024).

Notably, *Round the Twist* became a cultural phenomenon through a sustained afterschool timeslot and frequent repeats on the ABC throughout the 1990s and early 2000s. This continuous distribution over a decade built and continually supported its status as one of the most nostalgically treasured Australian shows, with audience research evidencing that adults continue to revisit the show and share it with their own children, sustaining a long inter-generational shelf-life (McIntyre et al 2023).

3.1.1 Looking Ahead: Time to Grow Audiences

By 2026, the structural industry capacity—framed throughout workshop discussions as "patience"—required to build these audiences for new programs has become constricted.

In a stark 2026 longitudinal reflection, Buckland observed that the ABC had allowed the original licences for acclaimed live-action dramas *Crazy Fun Park*, *MaveriX*, and *The PM's Daughter* to expire after their first runs, prompting the former two shows to migrate to paywalled platform Netflix. As Buckland warned:

> *"I think we can safely say that children's shows aren't given the time to grow an audience anymore, and that the ABC has dropped the upper end of the children's audience. Or, more accurately, the ABC is acknowledging that this audience has dropped them."*
>
> **ACTF CEO Jenny Buckland**

3.2: The Tween Exodus, Co-Viewing, and Creative Experimentation

This brings us to the second major theme: the industry's struggle to retain the "tween" demographic (audiences aged 7–14, but particularly older children 10–14) and what this exodus means for Australia's social cohesion.

The thematic analysis identified a phenomenon of "Demographic Blur," wherein the traditional age-based silos of broadcast television have been entirely disrupted by streaming habits.

Mary-Ellen Mullane noted that the tween age bracket is “a very contested space”, because children in this age group experiment with a wide range of different platforms:

> *“They’re very independent, curious, experimental, adventurous.”*
>
> **ABC Acting Head of Children’s Mary-Ellen Mullane**

To combat the exodus of tweens from local broadcasters, industry strategy has shifted toward promoting intergenerational "co-viewing"—a move reflected in the ABC's decision to collapse ABC ME into broader "family" programming. This move follows global trends identified by Baker, Balanzategui and Sandars (2023) in relation to Netflix and family audiences: as they outline through a combination of audience, industry and platform research, Netflix has heavily invested in family programming that challenges traditional expectations of “child-appropriateness” through tentpole productions like *Stranger Things* (2016-2025), micro-genre categories like “Family Watch Together TV”, and interface design and algorithmic surfacing strategies that privilege such content.

In the RMIT workshop, Anna Potter discussed her own research with tweens and teens during the panel discussion (Potter et al 2024), noting that:

> *“We have this image of tweens and teens: they’re on their phones sexting each other, or watching something terrible on YouTube. In fact, all of the [teen participants in our research] spoke about how much they enjoyed watching television to spend with their families. […] Many of them talked about shows like* Boy Swallows Universe *[2024] because their parents were watching it, and they watched it with Mum or Dad, and thought it was fantastic."*
>
> **Professor Anna Potter (QUT)**

All panellists pointed out that the exodus of tweens from local broadcasters is also directly tied to the dominance of global video-sharing platforms. Recent data from the UK regulator Ofcom reveals that YouTube is leading the "streaming takeover of TV sets," with children now spending significantly more time watching YouTube than all public service broadcasters combined (Ofcom, 2025a). This has led Ofcom to

warn that "the future of public service media is at risk" if interventions are not made (Ofcom, 2025a). In Australia, similar viewing habits prevail, with 87% of children aged 8–17 watching videos on platforms like YouTube at least once a week (eSafety Commissioner, cited in Alannah & Madeline Foundation, 2025). Crucially, algorithms on these platforms heavily skew towards international content; Ofcom found that only about 20% of YouTube material viewed in the UK is locally made (Ofcom, 2025b).

This algorithmic dominance creates a profound discoverability crisis for Australian youth. Recent research into Australian children's streaming platform fluencies reveals that while children possess high technical competency in navigating platforms like YouTube and Netflix, they find it very difficult to find and identify Australian content on these platforms (Balanzategui, Baker and Clift, 2024; Balanzategui et al., 2024). Because YouTube currently operates outside traditional broadcast and SVOD quota systems, the Australian sector faces a critical discoverability and funding vacuum for the tween demographic.

While some workshop participants saw the local move towards co-viewing as an opportunity to foster shared family experiences, the blending of adult and children's spheres sparked significant critical debate. Director and producer Nicholas Verso cautioned against the normative effects of intergenerational blurring, arguing that collapsing these demographics risks sterilising content to appease conservative parental sensibilities:

> *"It sounds really good, but the concern I've got [is] the dumbing down of adult content... I feel like so much has been reduced to try to make it all 'family'."*
>
> **Director, writer, and producer Nicholas Verso**

Verso also expressed the civic danger of this migration, noting that by failing to provide compelling local content specifically for tweens and younger teens,

> *"inadvertently what we've done is trained Australian kids not to watch our own content."*
>
> **Director, writer, and producer Nicholas Verso**

Verso framed this as a direct threat to the sector's ability to maintain a localised public sphere.

Rather than retreating into safe "family" content, creators argued that retaining the tween demographic requires bold and creative experimentation in an effort to speak directly to this audience. Verso's acclaimed live-action horror-drama series *Crazy Fun Park* (2023, ABC) exemplifies such pushing of genre boundaries. As Verso noted, contrary to institutional assumptions from funding bodies like Screen Australia that the horror genre is not viable for Australian children, Verso leveraged horror tropes to authentically engage 11–12-year-old boys.

Because the series could not exceed a PG rating, the creative team was forced to experiment forensically with the format. As Verso outlined, "We would have really forensic and granular conversations about what we could show. ... Rather than actually showing the violence, you'd see the aftermath" (2024). Furthermore, to adhere to public broadcaster standards, they had to strictly avoid depicting "imitable behaviour," ensuring that when characters broke into the abandoned theme park of the show's title, it did not encourage real-world trespassing.

Thus, the creative challenge of skirting the edge of the PG rating without "sanding off the edges" too much required a layered collaborative process between Verso and the writing team, the ACTF,

and the ABC. This robust writing process was necessary to craft the show to enable children to explore mature themes in an age-appropriate way. As critics noted, the series acts as a "training ground for children to practice their response to fear in a supervised environment when we give them the dignity of risk" (Gilmour, *The Sydney Morning Herald*, 2023), and while being "a lot darker than it suggests," it has "a sense of wonder, that should entertain kids looking for something both offbeat and Aussie" (Knox, *TV Tonight*, 2022)

However, despite successfully engineering the horror genre for tweens, the fate of *Crazy Fun Park* highlights a profound crisis in how to pitch, frame, and deliver local tween content. The show was unequivocally recognised as a high-quality production, beating the global juggernaut *Bluey* (2018-) to win the 2023 Logie Award for Most Outstanding Children's Program. Furthermore, it secured First Prize from the International Youth Jury at the 2024 Prix Jeunesse in Germany—proving it was highly acclaimed by the youth demographic itself. Yet, despite this prestigious validation, the show struggled to gain traction with its intended audience on the ABC, across its scheduled broadcast and on iView.

This disconnect between quality and discoverability precisely illustrates Jenny Buckland's concerns regarding the time required to build an audience in a fragmented, on-demand market. Buckland noted that rather than being given the time to be "discovered as it goes to air again and again," *Crazy Fun Park* saw its original ABC licence expire without renewal, prompting it to migrate to Netflix before it could establish its local cultural footprint.

3.2.1 The Digital Pivot and Its Civic Limits: Screen Australia and ACTF Kids IP Incubator

To capture this migrating tween audience, funding bodies have recently launched digital-first initiatives like the Screen Australia and ACTF "Kids IP Incubator" designed to support creators to develop IP for platforms like YouTube.

Yet ACTF CEO Jenny Buckland strongly cautioned against viewing short-form digital content as a permanent replacement for long-form and live-action television. Drawing on her decades of experience with the ACTF, Buckland recalled how 20 years ago

> *"everyone was talking about user-generated content and saying that television was dead."*
>
> **ACTF CEO Jenny Buckland**

While acknowledging the need to experiment to meet kids where they are across platforms, Buckland revealed:

> *"There was a robust conversation with Screen Australia about the press release, because I didn't think the partnership should be framed as the future of children's screen content... I don't think anything that will be funded through an IP Incubator and go on YouTube or Roblox games will last anywhere near as long as a* Little Lunch *or a* Dance Academy *or a* Crazy Fun Park.*"*
>
> **ACTF CEO Jenny Buckland**

Across the discussion, participants highlighted that in different ways, both television and video-sharing platforms like YouTube and TikTok cultivate youth public spheres. While there was debate about how best to achieve this, participants agreed that best practice involves harnessing the interactive, community-building potentials of social media platforms *around* shared screen stories, whether they be televisual or native to social media, like the groundbreaking Screen Australia supported TikTok series #Matched detailed in below in section 3.4.

3.2.2 Looking Ahead: A "Hard Reset" for Tween Production and Consumption?

Reflecting on the sector's volatility in March 2026, experts suggest that new Government interventions, specifically local content obligations for SVODs and the ban on social media for under-16s, could serve as a radical circuit-breaker for the tween exodus.

Describing the legislation as a "bold move" that puts Australia "at the forefront for online child safety", Mullane predicts:

> *"[reducing tweens' exposure to the] "digital noise ... could usher in a profound change in Australian children's media consumption habits."*
>
> **ABC Acting Head of Children's Mary-Ellen Mullane**

This enforced disconnection from social media platforms presents an opportunity for the sector to redirect the elusive tween demographic to the shared, intergenerational television spaces the local industry excels at crafting.

However, Buckland cautions that the industry continues to contract. She pointed to recent Senate Estimates in which ABC leadership made explicit the broadcaster's strategy to use the new $50 million funding (2027-2029) – some of which they must dedicate to children's content – to focus on 2-3 commercially successful children's shows, such as the rebooted *Bananas in Pyjamas* and *Little Lunch*. Notably, in February 2026 Senate Estimates, ABC Managing Director Hugh Marks noted that the ABC is going to leverage the funding to produce premium productions that "[generate] income as well for the ABC and that will enable us to reinvest even more in children's programming (p. 82), explaining the broadcaster has "a couple of really good kids shows ready to go."

The comments are a promising indication of the ABC's commitment to local children's television. However focus on select "premium", commercially successful IP, Buckland detailed, may have ramifications. Given ABC is the main commissioner of children's content, it could restrict the sector's capacity for the types of creative experimentation around the tween audience that underpinned *Crazy Fun Park*.

> *"All over the world, we're seeing the same thing: commissioners want to take fewer risks and invest in known IP. Public broadcasters and streaming platforms alike are grappling with how to attract audiences to their services."*
>
> **ACTF CEO Jenny Buckland**

As Verso starkly warned in his 2026 reflection regarding the urgent need to authentically engage the tween demographic:

> *"If we don't engage more with audiences under the age of 21 in Australia, then I give our industry ten years before it's all over."*
>
> **Director, writer and producer Nicholas Verso**

3.3 The "Genre Versus Demographic" Challenge

One of the core structural challenges identified by industry leaders is the persistent policy pressure to categorise children's television as a single "genre," rather than a broad "demographic" that requires a rich diversity of genres within it.

As Mary-Ellen Mullane succinctly explained:

> *"Kids' content is a little bit more complicated, because it's not a genre, it's a demographic."*
>
> **ABC Acting Head of Children's Mary-Ellen Mullane**

Jenny Buckland echoed this, noting that treating children's television as an audience demographic rather than a genre allows for a comprehensive slate of programming that includes documentary, news, live entertainment, and live-action drama—noting that treating the child audience just like the adult audience is necessary to build and sustain youth civic publics through a rich variety of collective shared screen stories that can then be debated, discussed, and shared both online and offline.

Conversely, forcing all youth content into a narrow "children's genre" box restricts creative risk-taking. Director Nicholas Verso, for example, noted the ongoing difficulty of convincing funding bodies like Screen Australia that genres like horror can be viably and safely adapted to engage tween audiences.

This conceptual clash between genre and demographic has profound implications for the new SVOD legislation introduced in November 2025. The legislation mandates that streaming services with over one million Australian subscribers must invest at least 10% of their total expenditure for Australia (or 7.5% of revenue) on new local drama, children's, documentary, arts, and educational programs. Announcing the laws, Minister for Communications Anika Wells highlighted the cultural value of children's content in particular, stating: "Real Australian content like *Bluey* matters, it connects us to who we are and shares it with the world which is why these laws are so important" (Wells, 2025).

However, the legislation treats "children's programming" as one of several eligible genre categories that streamers can choose to invest in to meet their targets. Crucially, the legislation lacks a specific "carve-out" or dedicated subquota exclusively for local children's television.

3.3.1: Looking Ahead: Legislative Classifications

In the new local content expenditure legislation for SVODs, children's content is treated as an optional "genre" rather than a mandatory requirement associated with specific sub-quotas.

Thus, critics fear streamers will bypass it in favour of adult content. Warning of the sector's "chronic underinvestment," Independent MP Allegra Spender argued that the Bill fails to "protect genres uniquely vulnerable in the market" (2025). During the bill's Consideration in Detail, Spender warned that "key sectors, particularly children's programming and documentaries, are under significant pressure" (2025, p. 3940). Similarly, Independent MP Zali Steggall warned that the children's sector "has been amongst the hardest hit by declining investment," moving an amendment to mandate "balanced genre investments" so that local children's stories do not "fall off the map completely" (2025, pp. 3941-3942). Ultimately, industry experts warn that without a specific sub-quota, the legislative classification of children's television as an optional "genre" leaves its future production highly vulnerable.

This legislative classification issue is compounded by a significant data aporia regarding teen content. Under the *Broadcasting Services (Australian Content and Children's Television) Standards 2020*, "children" are explicitly defined as people younger than 15 years of age. This rigid parameter has caused some inconsistency between how federal regulators and federal funding agencies catalogue local teen shows. The hit Netflix teen series *Surviving Summer* (2022-2023, rated PG) highlights this structural confusion: the federal funding agency, Screen Australia, catalogues it as "Children's TV and VOD Drama" (Screen Australia 2025), yet under the federal regulator's under-15 legislative definitions, it is catalogued as an "adult drama" in ACMA expenditure reporting, as is the Netflix Original teen series *Heartbreak High* (2022-2026, rated MA15+). This inter-agency inconsistency highlights how these "child versus adult" regulatory distinctions do not reflect cultural and audience understandings of youth programming. By legally categorising 15–18-year-olds as adults, the policy framework creates a blind spot, making it difficult to effectively track whether the specific cultural needs of teenagers are being met through screen content.

Furthermore, this regulatory aporia exposes a double-edged sword for youth audiences. On one hand, high-profile teen shows like *Heartbreak High* are undeniably valuable to young people, successfully engaging the Gen-Z market with culturally resonant and diverse Australian stories. Arguably, this investment should be legally recognised as youth programming, but because the current *Broadcasting Services (Australian Content and Children's Television)* framework defines "children" as under 15 (Australian Government, 2020), regulators catalogue these MA15+ series as "adult drama" (ACMA, 2024a). However, while the regulatory definitions do not reflect the reality of teen viewing, the cultural capital generated by these shows contributes to the "SVOD Mirage" charted previously in Section 2. Netflix for instance has been celebrated in journalistic discussion for championing Australian youth stories through *Heartbreak High* (Bastow, 2022; Sun, 2022; Watson, 2024). Ultimately, such widespread praise supports a public narrative of robust youth investment, while quietly papering over the lack of commissions from SVODs for the under-15 demographic.

3.4 Reclaiming the Digital Public Sphere Through Cultural Safety

The final theme in the RMIT SIGN workshop addressed the vital role of social media platforms and content creation in the everyday lives of young people, including in the context of how they find, discover, and relate to Australian screen content.

The discussion revealed a stark contrast between the Federal Government's approach to youth digital media and the lived reality of diverse young creators. The state's under-16s "social media ban" was heavily driven by online campaigns (such as the "36 Months" and "Let Them Be Kids" campaigns) and relies on a protectionist framework that restricts youth civic agency (Third, 2025; LTBKCa, 2024). Critics like Livingstone and Third argue that the ban asserts sovereign power to appease adult anxieties while side-stepping the digital rights and media literacy frameworks that have long been advocated for by experts (Livingstone and Third, 2017). Furthermore, policies developed without young people's input risk being ineffective and often push them into less regulated, less safe corners of the internet (Gordon in Scimex, 2024). As research from Western Sydney University and the Centre for Resilient and Inclusive Societies demonstrates, diverse young people have under-recognised competencies in building social cohesion and new modes of digital civic participation (Harris et al., 2022; Ogun et al., 2025). Rather than relying solely on exclusionary "regulatory theatre", a more effective strategy would be the "co-design" of digital spaces with youth (Ogun et al., 2025): to involve young people in the creation of screen stories through social media, in a way that empowers them to be active contributors to Australia's screen sector.

Panellists in the RMIT SIGN workshop challenged the fundamental assumptions driving the ban. Dr Kyle Moore (Swinburne) questioned the rights-based implications of excluding youth from digital platforms, asking:

> *"Does the social media ban violate the UN's Constitutional Rights of Children to have access to play, which includes participation in leisure and cultural activities?"*
>
> **Dr Kyle Moore (Swinburne)**

Comparing the current debate to past moral panics over games like Pokémon Go, Moore noted that society harbours "all kinds of strange ideas around how play leads to these problematic pathways for children."

Similarly, Dr Madeleine Hunter (RMIT) argued that rather than banning children, we should rethink how platforms are governed. She offered the provocation:

> *"Since we've allowed these platforms to spend decades selling themselves as the new public sphere, what if we actually treat them as public spaces? What if we accept that children are part of a mass audience... If social media platforms get to sell themselves as public spaces they have to start building themselves and be regulated like public spaces."*
>
> **Dr Madeleine Hunter (RMIT)**

3.4.1 The Case of #Matched on TikTok

Workshop panellists demonstrated how digital platforms can actively be leveraged to *build* structurally safe, cohesive public spheres rather than simply banning them.

Blacksand Pictures CEO and filmmaker Kauthar Abdulalim described the creative process behind her Screen Australia-funded TikTok series *#Matched* (2021-2022), which exemplifies the dynamism of contemporary creator ecologies. Rather than viewing social media as inherently toxic, Abdulalim utilised the TikTok platform to pioneer structurally embedded safety mechanisms, launching Australia's first "inclusion rider" for a screen production:

> *"It was cultural safety policy, and that was essentially in order for us to be able to create a sense of safety for us as Muslim creatives, because, yes, we are creating entertainment, but for a community that's been demonized consistently in the media. We felt that we needed some kind of reassurance that anyone who we partnered with will align with our values and help us create positive kinds of representations of our experiences in our community."*
>
> **Blacksand Pictures CEO, Filmmaker, Kauthar Abdulalim**

Crucially, Abdulalim outlined that this policy was a rigorously applied production framework designed to protect Muslim creator values. The cultural inclusion rider mandated:

Pathways and Representation

A requirement that 50% of the cast and crew come from Muslim backgrounds, explicitly creating industry pathways for marginalised creatives.

Structural Religious Accommodation:

The mandating of prayer timings within the production schedule and the provision of dedicated prayer spaces on set.

Ethical Financial Expenditure

A requirement that production funds be expended in line with Muslim cultural values, specifically prohibiting the earning of interest on production funds and banning the expenditure of funds on alcohol.

Mediated Safe Spaces and Education

An introductory Muslim cultural safety session for all staff, and the presence of a dedicated cultural safety consultant on set to act as a mediator.

End-to-End Cultural Care

A mandate of cultural safety extending beyond physical production, specifically governing the editing process, including the "cut of trailers and other marketing materials" to prevent sensationalised misrepresentation.

This rigorous framework proved highly successful. Funded by Screen Australia with support from Film Victoria and TikTok, *#Matched* became a "TikTok sensation" (Screen Australia, 2022; FilmInk, 2026). Its success directly fostered further culturally safe public spaces online, leading to a second season, *#MATCHED2*, which attracted established Australian screen actors and community leaders for guest roles, including Nazeem Hussain, Manal Shehab, and Claudia Greenstone. By embedding this "respect for culture" into the very architecture of the production, creators are successfully carving out localised, inclusive public spheres within a social media platform that is regularly accused of youth

harm and framed as being destructive to youth civic publics (e.g., Feiam, 2024; Jackson, 2024). This underscores a critical policy insight: authentically representing multicultural Australia requires enfranchising communities as active gatekeepers over their own narratives.

Achieving this requires some conceiving of policy that extends and builds beyond the Government's current "social media ban" framework. While YouTube is captured under the minimum age legislation, it remains publicly accessible without an account, meaning it will continue to function as a primary civic and entertainment space for young people (Swinburne/RMIT ACTC Report, 2025; Alannah & Madeline Foundation, 2025). Therefore, it should be treated as a regulated public sphere. Just as Ofcom has urged the UK government to consider laws forcing YouTube to boost the visibility of public service media (Ofcom, 2025a), Australian policymakers could compel these dominant platforms to directly invest in local children's production. By mandating video-sharing platforms to fund local content and embed cultural safety standards into their algorithmic curation, the sector could transform a digital threat into a sustainable pipeline for youth enfranchisement and civic storytelling, ensuring local stories are not algorithmically buried (Balanzategui et al., 2024).

3.4.2 Longitudinal Reflection: Meeting Audiences Where They Are

Reflections gathered from panellists in 2026 underscored that if the sector retreats from producing complex, age-specific narratives, including for platforms like YouTube and TikTok, it risks entirely alienating the next generation of citizens and creators.

However, Nicholas Verso offered a path forward in his 2026 reflection, urging the local industry to embrace digital platforms rather than fear them:

> *"I think there are some really interesting opportunities that exist right now but we have to be willing to let certain things go and meet audiences where they are. For example, BBC are now commissioning content for YouTube as they know that's the smartest way to engage with the younger demographic. They're still creating BBC content—it's just not through their traditional player. I would love to see if ABC are willing to make a similar pivot or will they continue to only drive things to iview even if young people aren't engaging with that platform?"*
>
> **Director, writer, and producer Nicholas Verso**

Furthermore, Dr Kyle Moore highlighted his own collaborative research on young people's engagement with content creators (streamers) on platforms like YouTube, Twitch and TikTok:

> *"A lot of tweens and teens were really interested in Australian streaming and content. I've been thinking—is this one of the gaps where young people, in particular in their teens and ten and up—early high school—are looking for proximate content? They are looking for part of their life to be reflected back on them. They're not really like, 'I want to watch the biggest and best streamers.' They sometimes might like to engage with them, but they're really like, 'I just want to see people who are in my own sort of social landscape'.*
>
> **Dr Kyle Moore, Swinburne**

Social cohesion, then, was tied to the potential cultural value of some of the platforms covered by the social media ban rather than seen as discrete from it.

4

Future-Visioning the Australian Children's Screen Sector

> **Throughout this report, the crisis in Australian children's television has been framed as a "wicked problem". As policy scholars Brian Head and John Alford (2015) outline, wicked problems are characterised by deep complexity, stakeholder divergence, and a high resistance to simple technical or "evidence-based" fixes.**

When faced with such intractable industry and policy conditions—such as the collapse of commercial quotas colliding with digital disruption—stakeholders frequently experience a conceptual and logistical "freeze" response. To counteract this paralysis, the final phase of the RMIT SIGN Workshop deliberately moved beyond outlining the problem to actively brainstorming solutions. It did so by employing a participatory "Futures Thinking" methodology, which involved breaking the participants into three small groups, using butcher's paper and Post-it notes to rapid-fire brainstorm and map their vision for the children's screen sector in light of the workshop discussion. While these maps were finalised at the end of the discussion, participants were encouraged to add their Post-it notes to the butcher's paper continuously throughout the workshop. This allowed them to capture their real-time reactions to the panellists' insights and collaboratively synthesise their ideas at the workshop's conclusion.

Ultimately, the individual responses (or "signals") collected on the butcher's paper were aggregated and quantified to form the core data of the Futures Triangle analysis. The workshop had twenty-one participants, who produced 141 signals via Post-it notes in the workshop.

4.1 The "Futures Triangle" Methodology

In the realm of media policy research, attempting to predict the future by simply extrapolating past trends is deeply insufficient. As media scholar Amanda Lotz observes, "predictions can be effective in run-of-the-mill evolution, but accurately foreseeing disruption is another matter entirely" (2021, p. 5).

Furthermore, policy literature warns that administrative approaches fail to resolve wicked problems because they ignore the need for "adaptive, participatory and transdisciplinary" interventions (Xiang, 2013; Head, 2019). To generate genuinely innovative policy insights, the workshop utilised a modified version of Sohail Inayatullah's "Futures Triangle" (2008). As an action-research method, workshops provide a vital platform for researchers and practitioners to negotiate meaning and collaboratively design solutions to complex technological disruptions (Ørngreen and Levinsen, 2017). The Futures Triangle exercise compels participants to evaluate three competing dimensions: the legacy issues holding them back (The Weight of the Past), the urgent actions required now (The Push of the Present), and the aspirational goals pulling them forward (The Pull of the Future).

4.2 The "Futures Triangle" Mapping: Sector Disruption

The following model synthesises the collective workshop responses, categorising the specific policy, economic, and creative forces currently acting upon the Australian children's screen sector.

Across the workshopping, the highest number of signals related to Industry Barriers (23): these ranged from the subquota collapse, lack of pathways for emerging talent, and volatile SVOD investment. In terms of possible strategies, a clear hierarchy emerged: pushing creative boundaries generated the most intense consensus (21 signals), followed closely by the need to productively navigate demographic blur (15 signals) and structurally embed equity and inclusion (11 signals).

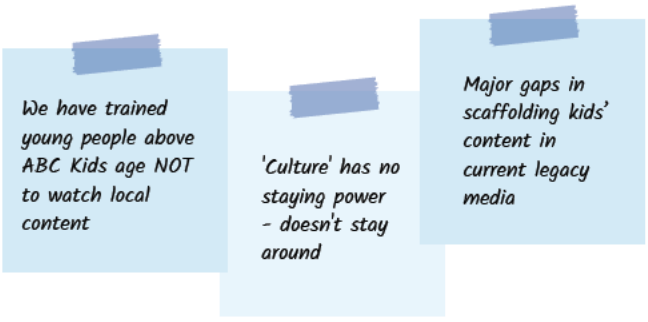
These key themes from the workshop are mapped in the table below.

THE WEIGHT OF THE PAST Existing Challenges & Legacy Issues	THE PUSH OF THE PRESENT Possible Strategies	THE PULL OF THE FUTURE Speculative Futures
Industry Barriers including Sub-quota Removal and SVOD volatility The 2020 removal of commercial broadcasting sub-quotas dismantled a 40-year policy settlement.	***Equity & Inclusion*** Implementing structural solutions like "inclusion riders" to empower marginalised voices in digital and physical production spaces.	***Youth Capacity*** Enfranchising young people beyond being an "audience" to act as funded creators, cultural gatekeepers, and critical decision-makers.
The Collapse of Safe Harbours and Policy Lag Historic broadcasting protected youth by creating clearly separated "child" and "adult" time slots. In the digital age, these boundaries have collapsed, yet policy still hasn't caught up.	***Parental Support & Digital Literacy*** Developing robust literacy and education initiatives to support parents, who act as highly influential but deeply unsupported "cultural gatekeepers" struggling to navigate these collapsed digital boundaries.	***Integrated Cultural Spheres*** Embracing a more integrated model of child and adult cultural spaces. Rather than using blunt regulatory strategies to artificially recreate historical boundaries, digital platforms must be treated as public spaces that should be "inclusive by design".
Narrow Pathways With the ABC as the primary commissioner doing the heavy lifting, there are few pathways for creators and a lack of opportunities to nurture and grow talent and capacity.	***Pushing Boundaries*** Embracing bold, risky narratives and tackling tricky genres (like horror) that offer complex emotional engagement and respect tween intelligence.	***Demographic Blur*** Capitalising on the disruption of age-silos to design complex, intergenerational content that drives authentic family co-viewing.
The Discoverability Crisis The fragmentation of audiences across digital platforms.	***Format Experimentation (Volume vs. Quality)*** Actively experimenting with new production and content formats to recapture fragmented audiences, debating whether the best strategy is to prioritise a few high-quality productions or if higher volume is the key to building an audience.	***Digital Civic Spaces*** Harnessing social media platforms to actively build inclusive, safe, and culturally resonant digital public spheres that complement television.

4.3 Analysis of the Futures Data: The "Precarity Gap"

When analysing the volume of responses generated by industry and academic participants across the three domains of the Futures Triangle, a stark "Precarity Gap" emerged.

The overwhelming majority of responses focused on The Weight of the Past/Existing Challenges (46%) and The Push of the Present/Possible Strategies (39%). In contrast, the path to the future was highly uncertain, with The Pull of the Future/Speculative Futures generating just 15% of responses. This outcome illustrates the ongoing precarity being experienced by the sector. The industry is so bogged down by the immediate "flux" of regulatory shifts, rising costs, and the scramble to survive that it struggles to dedicate strategic oxygen to long-term future-visioning. However, diving into the specific thematic clusters reveals clear, actionable pathways for policy and industry renewal.



RMIT Workshop Responses

4.3.1. Equity, Inclusion, and Pushing Boundaries (The Present)

The most encouraging data emerged around immediate strategies for inclusion. Responses centred on Equity and Inclusion tied with responses centred on Pushing Boundaries—on pursuing content that challenges existing preconceptions around genre and age appropriateness—as the dominant focus of responses across the Possible Strategies domain.

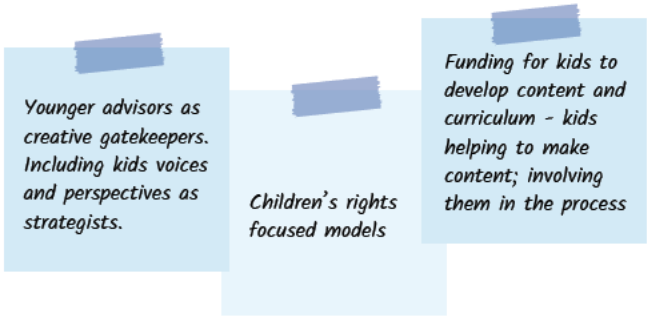
Notably, 82% of the responses focused on Equity and Inclusion identified strategies that can be actioned right now—such as youth involvement in the creative process, cultural safety policies, on-set cultural consultants, and inclusivity riders. This reinforces the findings from Part 3: the industry has the tools to include young people as co-creators and in the process ensure production is culturally safe and civically meaningful; these mechanisms simply need to be scaled and structurally supported across the pitching, marketing, and distribution apparatus.

RMIT Workshop Responses

4.3.2 Youth Capacity and Enfranchisement (The Future)

When participants did look to the future, their primary concern was Youth Capacity (accounting for 29% of all responses within the Futures domain).

Participants repeatedly expressed the urgent need to enfranchise youth as active participants in not just the production process, but also in processes of commissioning, promoting, adjudicating and critiquing children's and youth entertainment. Historically, children appear in media, but they are very rarely in positions of creative control or evaluation (Third et al., 2019). This directly challenges the Federal Government's approach to the under-16s social media ban. While the state enacts "regulatory theatre" that positions the child as a vulnerable subject requiring exclusion (Third, 2025), the screen industry and experts are calling for the opposite: giving young people the agency, digital literacy, and structural platforms to safely shape their own narratives.

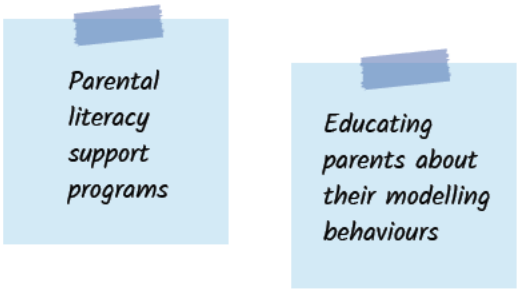


RMIT Workshop Responses

4.3.3 The Burden on Parents

Finally, the mapping identified "Parents" as a highly influential but deeply unsupported category of cultural gatekeepers.

Parents heavily shape children's media consumption (Burke et al 2025), yet they are poorly supported in developing the digital literacy skills necessary to navigate the contemporary algorithmic environment or lead productive conversations with their children around screen content and digital platforms. This highlights that policy interventions cannot solely target platforms or broadcasters; they must include robust media literacy education for families.



RMIT Workshop Responses

Conclusion

> **This report demonstrates that Australian children's television—and the civic public sphere it sustains—cannot be left to the whims of a volatile global market.**

This report demonstrates that Australian children's television—and the civic public sphere it sustains—cannot be left to the whims of a volatile global market. As we have charted, the sector is caught in a profound policy paradox. The Federal Government is intervening in youth digital lives via the social media minimum age framework, citing the urgent need to protect social cohesion and redirect youth attention toward safer, local activities and environments. Yet, simultaneously, we are also experiencing the economic contraction and constriction of the local children's television sector, which historically builds and sustains spaces for the scaffolding of "multicultural child citizenship" (Brown and Rutherford, 2011). Post the removal of quotas for commercial broadcasters, and in the wake of volatile SVOD commitments to children's content, the national broadcaster and the ACTF are shouldering the burden of rising live-action production costs in an increasingly fragmented landscape. Yet, this content remains deeply valued by end-users as an irreplaceable educational and cultural resource. Recent studies demonstrate that 76% of Australian teachers strongly prefer using local screen content in lessons to teach cultural values and First Nations histories, and up to 84% of parents consider it important that children's television is distinctively Australian, even as they increasingly struggle to locate it on streaming platforms (Swinburne/RMIT ACTC Report, 2025).

The industry's response to this wicked problem has been highly adaptive. From Kauthar Abdulalim's implementation of Australia's first cultural inclusion rider on TikTok, to Nicholas Verso's forensic experimentation with the horror genre in *Crazy Fun Park*, local creators are proving they can meet the sophisticated demands of the contemporary youth audience. While there are major challenges with content discoverability and longevity in a fragmented multi-platform environment dominated by international content, even the elusive "tween" demographic is not necessarily beyond the industry's reach. However, as the RMIT SIGN workshop mapping revealed, the sector's vision is constrained by extreme precarity. Acclaimed shows are no longer given the time to build generational audiences, and the perceived investment from global streaming platforms is often a "mirage"—rather than funding new, distinctively Australian narratives, streamers frequently purchase the licensing rights for pre-existing library content to expand their

catalogues. While the ABC is driving major innovations around how to catalogue and organise content for young people across their channels and digital platforms, questions remain around the role of new Australian children's content in this strategy, and the accessibility and discoverability of the rich library of content available across streaming platforms.

Ultimately, if policymakers are committed to safeguarding the "public child" (Third, 2025; Gilligan, 2009) and building civic youth publics on a national scale, they must now move beyond restricting child access to public spheres and towards building more opportunities for child access to and participation in locally created civic spaces through television and screen content. Digital platforms that curate screen entertainment now act as the central civic spaces where young audiences encounter a diversity of cultural perspectives (Ferraro et al., 2024). Therefore, enacting policies that force recommender systems to deliver a diversity of shared, localised cultural experiences is just as vital for scaffolding the next generation's cultural citizenship as protecting them from online harms (Ferraro et al., 2024). This is especially the case for the tween demographic that has proven the most vulnerable and increasingly excluded in the current period of flux. To achieve stability, the sector requires structural, demographic-specific protections across SVOD and broadcast platforms, sustainable funding and thus structural certainty, and active support for the creation of culturally enriching digital spaces where young Australians are not just protected, but given a creative voice and heard.

Appendix: Longitudinal Economic and Market Data (2018–2025)

Table A1. The Collapse of Commercial Free-to-Air Investment in Children's Content

This table tracks the immediate contraction of commercial network investment following the April 2020 suspension of the Australian Content and Children's Television Standards (ACCTS) sub-quotas. Data sourced from ACMA (2018-2024).

Financial Year	Total Commercial Spend on Children's Content	Spend specifically on Children's Drama	Year-on-Year Trend (Total Spend)
2018–2019	$24.87 million	$11.66 million	True pre-suspension baseline
2019–2020	$10.58 million	$5.29 million	- 57% (Lead-up to quota suspension April 2020)
2020–2021	$3.63 million	$1.99 million	- 66% (First full year without quotas)
2021–2022	$2.91 million	$2.03 million	- 20%
2022–2023	$743,820	**$0**	- 74%
2023–2024	$3.09 million	$1.75 million	+ 316% (Still 88% below 2018-19 levels)

Analytical Note: The data demonstrates a 97% collapse in total commercial children's investment between 2018–2019 and 2022–2023, and a 100% collapse in children's drama spending in 2022-23 (ACMA, 2020; 2024).

Furthermore, while the year-on-year trend for 2023-24 suggests a 316% "rebound" in total commercial spend, this figure is a statistical anomaly caused by bouncing off a historic low of $743,820 the previous year. Following the 2020 removal of fixed hours quotas, commercial networks now use a points-based system where programs provide credits toward an overall Australian content target. Crucially, the 2023-24 drama spend ($1.75m) was driven entirely by a single Network 10 production (*Rock Island Mysteries* Season 3), while the 'Other' spend ($1.34m) was driven by high-volume, low-cost non-drama formats on the Nine Network (such as *The Actually Really Very Difficult Show* and *TheatreDome*) (ACMA, 2024b; Knox, 2025a; Knox, 2025b). The commercial sector's increasing reliance on unscripted reality and light entertainment formats—such as *Junior MasterChef* (2010-2020), *Escape from Scorpion Island* (2007-2011), or *Prank Patrol* (2009-2013)— inflates the appearance of investment recovery (Potter, 2013). Seven Network reported $0 spend on children's drama during this period. Ultimately, the $1.75 million spent on drama in 2023-24 remains a fraction of historical norms, leaving the production of premium, culturally specific civic storytelling structurally unsupported by the commercial networks.

Table A2. The SVOD Investment "Mirage" (Voluntary Reporting)

This table tracks the self-reported expenditure of major Subscription Video on Demand (SVOD) platforms (e.g., Netflix, Disney+, Amazon Prime, Stan) on Australian children's content. Data sourced from ACMA (2020-2025).

Financial Year	Self-Reported SVOD Spend (Children's Drama & Other)	Key Data Limitation
2019–2020	$40.47 million	Combines new commissions with library licensing
2020–2021	$22.94 million	Combines new commissions with library licensing
2021–2022	$7.34 million	Combines new commissions with library licensing
2022–2023	$12.23 million	Combines new commissions with library licensing
2023–2024	$3.34 million	Combines new commissions with library licensing
2024–2025	**$3.67 million**	**Combines new commissions with library licensing (Zero new commissions)**

Analytical Note: SVOD investment has proven highly volatile, falling from over $40 million to $3.67 million over five years (ACMA, 2025). Furthermore, because ACMA's reporting methodology bundles the acquisition of pre-existing library IP with the funding of new commissions, the actual investment in original Australian civic storytelling is significantly lower than these figures suggest. In 2024-25, this resulted in the SVOD sector reporting zero new commissions. This suggests the majority of the reported $3.67 million spend is dedicated to library acquisitions rather than new children's programming.

Table A3. Australian Children's Titles Commissioned by SVODs (2021–2025)

This table tracks the Australian children's series commissioned by SVOD platforms. Data sourced from ACMA (2025).

Financial Year	SVOD	Title	Genre
2021–2022	Netflix	Gymnastics Academy: A Second Chance (season 1)	Children's Drama
2022–2023	Netflix	Eddie's Lil' Homies	Children's Drama
2022–2023	Netflix	The Bureau of Magical Things S2	Children's Drama
2023–2024	Netflix	Mako Mermaids: An H2O Adventure (season 1)	Children's Drama
2023–2024	Netflix	Mako Mermaids: An H2O Adventure (season 2)	Children's Drama
2023–2024	Netflix	Mako Mermaids: An H2O Adventure (season 3)	Children's Drama
2023–2024	Paramount+	Rock Island Mysteries	Children's Drama
2023–2024	Stan	Windcatcher (Film)	Children's Drama
2024–2025	--	--	--

Analytical Note: ACMA identifies just 6 Australian children's programs that SVODs contributed to commissioning between 2021/2022 and 2024/2025. Crucially, Netflix was able to claim expenditure for the *Mako Mermaids* franchise in 2023-2024, despite the series originally airing on free-to-air television over a decade prior (2013-2016). Furthermore, while ACMA lists *Windcatcher* as "Children's Drama", its regulatory definitions define any scripted narrative as drama, meaning *Windcatcher* (a standalone feature film) is bundled together with episodic series. When *Mako Mermaids* is removed from the data, it reveals that SVODs commissioned just 4 genuinely new Australian children's series and 1 standalone film over four years. Finally, even within this minimal output, SVODs are relying largely on legacy children's TV providers and public funding for these new commissions. *The Bureau of Magical Things* S2 and *Rock Island Mysteries* were both primarily commissioned for Network 10, *Eddie's Lil' Homies* is an NITV co-commission with major production investment from the ACTF, and *Windcatcher* was funded through a partnership with the ACTF and Screen Australia (ACMA, 2025; Screen Australia, 2023; ACTF, 2021).

Table A4. Escalating Production Costs

This table tracks the escalating production costs of children's animation and live-action drama over an eleven-year period. Data sourced from the Australian Children's TV and VOD drama activity summary (Screen Australia, 2015-2025).

Financial Year	Average cost per hour – Animation	Average cost per hour – Live-Action	Average cost per hour overall
2014–2015	$0.767 million	$0.965 million	$0.815 million
2015–2016	$0.856 million	$0.983 million	$0.879 million
2016–2017	$0.925 million	$0.826 million	$0.893 million
2017–2018	$0.647 million	$0.974 million	$0.755 million
2018–2019	$0.775 million	$0.764 million	$0.770 million
2019–2020	$0.763 million	$0.928 million	$0.819 million
2020–2021	$0.991 million	$1.562 million	$1.331 million
2021–2022	$1.137 million	$1.357 million	$1.276 million
2022–2023	$1.082 million	$1.587 million	$1.412 million
2023–2024	$1.742 million	$1.883 million	$1.812 million
2024–2025	$1.781 million	$2.807 million	$2.102 million

Analytical Note: The COVID-19 pandemic marked a critical inflection point in the cost of producing children's content in Australia. Across the full eleven-year period (2014-25), the average cost per hour for live-action content nearly tripled. However, this inflation was concentrated in recent years, with costs more than tripling in just the five-year window between 2019-20 and 2024-25.

Table A5. Hours of Children's Content Broadcast and Streamed by the ABC

This table tracks the volume of first-release, Australian, and total children's content hours across the ABC's primary channels and its on-demand platform (iview). Data sourced from ABC Annual Reports (2019-2025).

Metric	2018–19	2019–20	2020–21	2021–22	2022–23	2023–24	2024–25
Total Hours of First Release Children's Content - iview	47	119	21	8	9	10	10
Total Hours of Australian Children's Content - ABC iview	2,476	--	2,385	1,967	1,667	4,541	21,000
Total Hours of Children's Content Total - ABC iview	9,591	9,804	10,775	8,978	9,315	13,120	41,595
Total Hours of First Release Children's Content (All Platforms)	**274**	**214**	**145**	**123**	**147**	**118**	**112**
Total Hours of Australian Children's Content (All Platforms)	5,595	--	5,279	4,841	4,395	7,071	23,228
Total Hours of Children's Content (All Platforms)	20,543	20,430	21,682	19,357	19,884	23,592	51,069

(Note: Data for individual linear channels—Main Channel, ABC Kids/Family, and ABC ME/Entertains—has been aggregated into platform totals for readability).

Analytical Note: As part of its mandated 2023–2028 strategic shift to emphasise a "digital-first" delivery (ABC, 2023), the ABC has executed a profound platform shift. This strategy more than doubled total children's content hours across all services by making a substantial library of legacy content available on iview, where total hours jumped to 41,595 in 2024/2025 (ABC, 2025). As a result, 77.8% of all content hours available on the ABC iview platform are now categorised as children's content (ABC, 2025, p. 234).

Crucially, while this digital distribution pivot increased the availability of older local IP, the total hours of Australian children's content still account for less than half (45.48%) of the ABC's overall children's offering across all platforms (ABC, 2025). Furthermore, the recirculation of legacy Australian library content masks a continuing production deficit: despite rising commissioning spend, the volume of new, first-release Australian hours declined to a seven-year low of 112 hours in 2024-25 (ABC, 2019–2025).

Methodological Note: ABC Reporting Practices: The ABC's method of reporting its commitments to children's programming differs from those applied by ACMA to commercial broadcasters and SVODs. As a public broadcaster charged with the provision of local content, the ABC measures its commitment to children's content in terms of hours broadcast, with annual reports detailing the number of hours of children's content broadcast on each of its linear channels, as well as the hours available via the ABC iview streaming platform. The exception is the 2019-2020 annual report, which dispensed with its usual detailed content analysis (total hours for this period were later retroactively supplied in the 2020-2021 report). From 2020-2021 onwards, the ABC also began providing data on its direct financial contribution to the commissioning of local screen productions (ABC, 2020-2025).

Table A6. The Public Broadcaster Burden (ABC Commissioning)

This table tracks the ABC's financial commitment to the independent children's production sector against the backdrop of rising production costs, revealing how increased spending yields diminishing hours of new content. Data sourced from ABC Annual Reports (2021-2025).

Financial Year	ABC Contribution to Commissioning	Total Australian First-Release Hours	The Purchasing Power Paradox
2020–2021	$14,900,000*	145	Baseline
2021–2022	$26,387,922	123	Funding surge, but purchasing power undermined by rising costs
2022–2023	$17,605,044	147	Funding contracts by 33%
2023–2024	$20,338,296	118	Funding rebounds, but live-action costs continue to rise faster
2024–2025	**$21,141,983**	**112**	**Volume of Australian first-release hours declines to a seven-year low despite high spend**

Analytical Note: The intersection of Tables A5 and A6 reveals the structural pressure placed on the national broadcaster. While total spending by commercial networks and SVODs has trended downwards over the last five years, the ABC has directed a strong $21.14 million towards new children's commissions in 2024-25 (ABC, 2025), with investment steadily increasing since 2022-23 ($17.605 million, ABC, 2023). Notably, however, this post-2022 rise follows a 33% decrease in commissioning investment from 2021-22 (from $26.388m to $17.605m). Furthermore, due to rising production costs, the ABC's high spend has not prevented a decline in Australian first-release hours (which fell 59% from 274 hours in 2018-19 to a seven-year low of 112 hours in 2024-25).

**Reported figure rounded to $14.9 million.*

Table A7. SBS and NITV Children's Content Provision (Hours)

This table tracks the highly variable provision and commissioning of first-run and total children's content across SBS, NITV, and SBS On Demand over a seven-year period. Data Sourced from SBS Annual Reports (2019-2025).

Metric	2018–19	2019–20	2020–21	2021–22	2022–23	2023–24	2024–25
Hours of First Run Children's Content Commissioned - SBS	0	0	0	0	0	0	0
Hours of First Run Children's Content Commissioned - NITV	0.3	7.8	7	5.8	5	2.6	4
Hours of Local Children's Content - NITV	986.6	930.8	815.5	851.1	899.7	368.3	399.2
Hours of Australian Children's Content - SBS on Demand	N/A	N/A	15.1	100.7	147	137.1	75.3
Hours of Children's Content - SBS on Demand	N/A	N/A	15.1	123.4	286	246.2	178.6

Analytical Note: This table illustrates the volatility and structural vulnerability of children's content provision within the SBS network. The data reveals that the primary SBS channel does not commission first-run children's content, leaving the network's commissioning to National Indigenous Television (NITV). NITV thus plays a vital cultural role in commissioning First Nations content, but its output is highly precarious. First-run commissions have fluctuated significantly, dropping from a peak of 7.8 hours in 2019-20 to just 2.6 hours in 2023–24. The total volume of local children's content broadcast on NITV suffered a contraction of 59% between 2022-23 and 2023-24, while the availability of Australian children's content on SBS On Demand has almost halved since 2022-23. Because SBS relies on a hybrid-funding model—generating roughly 30% of its revenue from commercial advertising—its capacity to commission and acquire youth programming is exposed to the same market downturns impacting commercial networks, rendering its children's provision highly unstable.

Table A8. The ACTF and Direct Sector Investment

This table maps the exponential growth in direct financial injections by the Australian Children's Television Foundation (ACTF) to bridge the financing gap caused by commercial market failure. Data sourced from ACTF Annual Reports (2019-2025).

Financial Year	Children's Content Expenditure (Script Development)	Children's Content Expenditure (Production Investment)	Total Annual Direct Spend
2018–2019	$244,055	$381,509	$625,564
2019–2020	$347,680	$2,230,000	$2,577,680
2020–2021	$533,912	$2,321,817	$2,855,729
2021–2022	$1,023,938	$6,632,169	$7,656,107
2022–2023	$596,205	$3,792,096	$4,388,301
2023–2024	$381,985	$5,411,198	$5,793,183
2024–2025	**$1,081,536**	**$6,156,725**	**$7,238,261**

Analytical Note: Empowered by targeted federal funding boosts, the ACTF's production investment has grown exponentially. In addition to its direct spend, the ACTF had a further $4,983,462 formally committed to projects at the financing stage by the end of 2024-2025, anchoring the sector's production pipeline and providing independent producers the certainty needed to trigger production (ACTF, 2025).

Table A9. The Economics of the "Long Tail" (ACTF International Sales)

Beyond direct production funding, the ACTF drives the economic sustainability of the sector through its international distribution arm. This table tracks the global commercial viability of Australian children's storytelling. Data sourced from ACTF Annual Reports (2019-2025).

Financial Year	International Sales Revenue Generated	Reach Highlights
2019–2020	$643,535	Broadcast sales extending into South Africa, Europe, and the UK.
2020–2021	$1,863,816	Strong sales driven by Hardball (2019-2021) and First Day (2020-2022) to broadcasters including BBC (UK), ARD (Germany), and Netflix.
2021-2022	**$4,963,516**	Record sales year driven by MaveriX (2022), Hardball (2019-2021, Series 1 & 2), and First Day (2020-2022, Series 1 & 2); ACTF voted a top 10 global children's media distributor by Kidscreen readers.
2022–2023	$2,088,337	66 contracts across 28 territories, including BBC (UK) and FNX (USA).
2023–2024	$2,380,196	Sales stretching across more than 60 territories and 35 international broadcasters.

Analytical Note: By actively cultivating the "long tail" of international sales, the ACTF not only generates substantial returns to reinvest in the local sector (e.g., $2,959,125 recouped from previous investments in 2024-2025) but proves that culturally specific Australian content can achieve sustained commercial viability on the global stage (ACTF, 2025).

Table A10. Screen Australia Children's TV Drama Commitments

This table tracks Screen Australia's financial commitments to projects approved during a given financial year. Note that this measures commitments awarded, rather than funds disbursed, making direct cross-comparison with other agencies complex. Data sourced from Screen Australia Annual Reports (2019-2025).

Financial Year	Organisation	Children's TV Drama Commitment
2018–2019	Screen Australia	$6,860,998
2019–2020	Screen Australia	$8,377,460
2020–2021	Screen Australia	$10,715,985
2021–2022	Screen Australia	$6,153,528
2022–2023	Screen Australia	$4,322,670
2023–2024	Screen Australia	$7,971,409
2024–2025	Screen Australia	**$2,750,000**

Analytical Note: Because Screen Australia reports its spend in terms of grants awarded rather than funds dispersed, its annual investment appears highly variable. However, the longitudinal trend reveals a severe contraction at the end of the observed period. While Screen Australia committed a peak of over $10.7 million to children's TV drama in 2020-21, this commitment fell to just $2.75 million by 2024-25, further compounding the structural financing pressures placed on the ABC and the ACTF to sustain the sector (Screen Australia, 2025).

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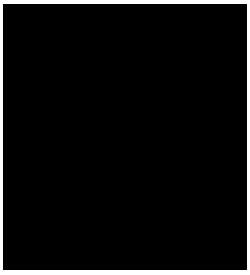

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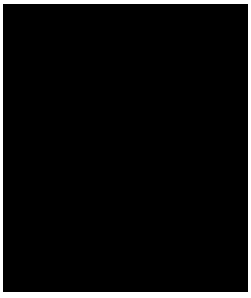
Jessica Balanzategui is an Associate Professor in Media and the founding lead of the Streaming Industries and Genres Network (SIGN). She is an Australian Research Council Industry Fellow researching how children discover Australian content in the streaming era. The industry partners for the broader project are the Australian Children's Television Foundation and Australian Centre for the Moving Image. The study for this report was conducted independently of partners. She is also the Lead Chief Investigator on an ARC Discovery Project examining how children engage with 'gamble-play' media across digital platforms and material play. Jessica's research has been published in the leading international journals in her field and has contributed to Parliamentary Inquiries and other policy consultations, and to the strategies of national arts and media organisations such as the ACTF, ACMI and Australian Centre of Contemporary Art. Jessica is the author or co-editor of 6 books, most recently *Imagining Innocence: Celebrity, Stardom and the Child* (2026) and *Netflix, Dark Fantastic Genres and Intergenerational Viewing: Family Watch Together TV* (2023, both with Baker and Sandars, Routledge).



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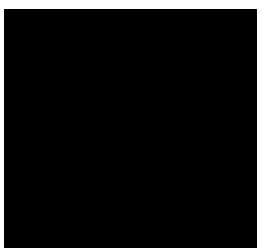

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