Australian Government | Screen Australia

Submission to the National Cultural Policy

Screen Australia

June 2026

Acknowledgement of Country

Screen Australia acknowledges that our Ultimo office is located on the lands of the Gadigal People of the Eora Nation, and our South Melbourne office is on the lands of the Wurundjeri People of the Kulin Nation.

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

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

About Screen Australia

Screen Australia is the Commonwealth Government agency responsible for the Australian screen industry, charged with supporting the development, production, promotion and distribution of culturally relevant Australian screen content, across all formats, platforms and genres.

Our Purpose

Screen Australia's purpose is to build a **vibrant, viable screen industry that reflects the depth and diversity of Australian stories.**

Broadly, the agency is responsible for:[1]

- **culture:** supporting and promoting the development of screen culture in Australia
- **content:** developing, producing, promoting and distributing Australian programs and providing access to Australian programs
- **industry:** supporting and promoting the development of a highly creative, innovative and commercially sustainable Australian screen production industry.

We also administer the Producer Offset on behalf of the Australian Government, and are the competent authority for administering the International Co-Production Program in Australia.

Our Strategic Framework

Since the launch of *Revive* in January 2023, Screen Australia has worked closely with government and industry partners to align with, and promote the National Cultural Policy. Within this context, Screen Australia's Corporate Plan 2025-29[2] outlines our Strategic Framework, grounded in clear organisational foundations, supporting five core pillars: **Empower, Enrich, Enable, Engage** and **Elevate**. These pillars inform 10 priorities and 12 key deliverables serving as guiding principles for the work of the agency (Figure 1).

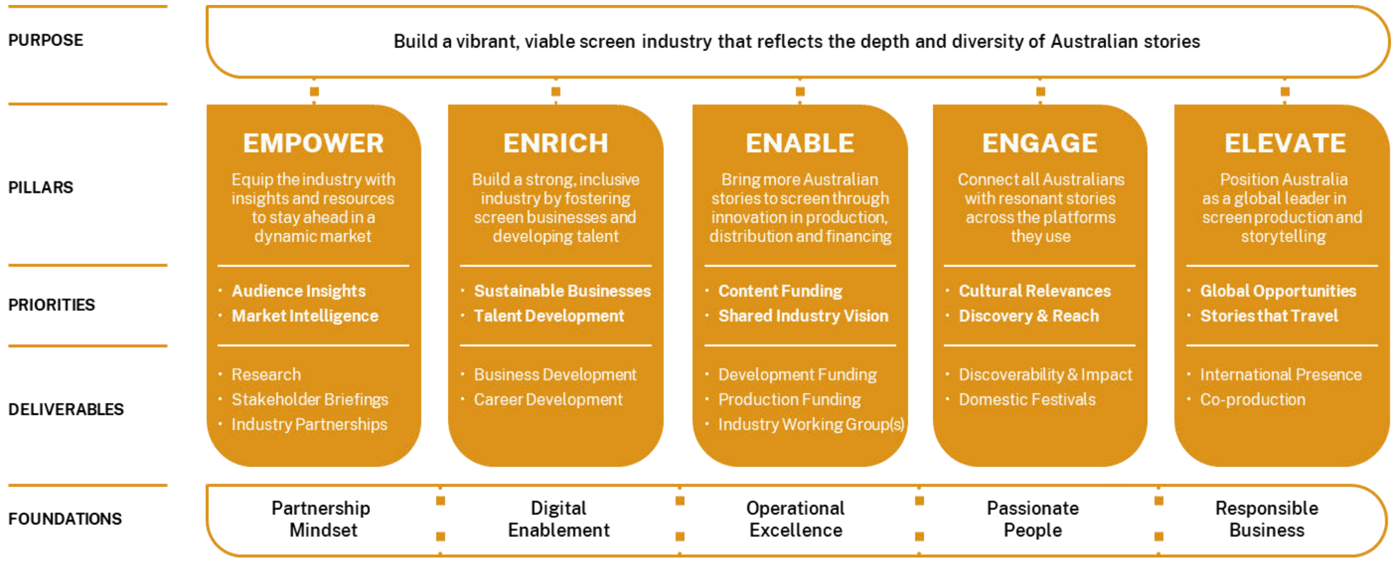

Figure 1: Screen Australia's Strategic Framework

[1] *Screen Australia Act 2008 (Cth)*, s6.

[2] Screen Australia (2025), *Screen Australia Corporate Plan 2025-2029*.

Since the launch of the Corporate Plan in 2025, Screen Australia has delivered substantial efforts to sharpen its impact and better position the sector for growth. Key actions have included:

- **Refocusing investment settings** by consolidating programs and initiatives to drive greater clarity, impact and strategic alignment.
- **Adopting a platform-agnostic approach** to direct content funding, enabling projects to be created for broad platforms and local audiences.
- **Expanding the evidence base for decision-making** through a new research program, providing insights to inform policy, investment and industry development. This includes the Production Infrastructure Capacity Analysis (PICA), and upcoming reports Screen Currency 2026 and an Australian Theatrical Review.
- **Embedding audience and market insight** through a refreshed Market & Audience approach to increase the impact of local content, including piloted support for assets, audience testing and channel management.
- **Investing in early-career talent and storytelling** through the launch of a new short film fund, supporting emerging creatives to develop skills, experiment creatively and build pathways into the industry.
- **Simplifying access** through streamlined application processes and clearer, consistent program guidelines.
- **Enhancing digital engagement and accessibility** with a new Screen Australia website, improving usability, transparency and access to information, funding opportunities and services.

Screen Australia and *Revive*

The Australian Government released the National Cultural Policy, *Revive*, in January 2023 to transform and safeguard a diverse, creatively distinct and sustainable arts and cultural sector. All initiatives undertaken by Screen Australia complement broader policy developments across the screen and games industry, which are delivering strong cultural and economic outcomes for Australia. These include:

- **Strengthened collaboration** between government, agencies and industry to respond to structural change and emerging opportunities for the screen and games industry – for example, Screen Australia's ongoing participation on the Creative Workplaces Reference Group.
- **Advancing inclusion and accessibility** through collaborating with Creative Australia and the Office for the Arts in implementing the Australian Government's *Equity: the Arts and Disability Associated Plan* (EDAP).
- **Local content requirements for subscription video on demand (SVOD) services** from 1 January 2026, requiring them to invest in new local drama, children's, documentary, arts and educational programs.
- **Targeted investment in the games sector** through the allocation of $12 million to Screen Australia over four years, to support Australian game developers and small and medium independent studios – complementing the Digital Games Tax Offset (DGTO).
- **Increased Location Offset rebate to 30%** for productions commencing after 1 July 2023, and new eligibility criteria requiring productions to meet minimum training obligations or contribute to the broader workforce and infrastructure capacity of the sector.

These actions have laid a strong foundation for a more coordinated, forward-looking screen and games sector – creating the conditions for the next phase of policy development.

Screen Australia's strategic framework aligns with the current National Cultural Policy ‑ each strategic pillar supports the Policy's ambitions through clearly defined priorities and deliverables (Figure 2).

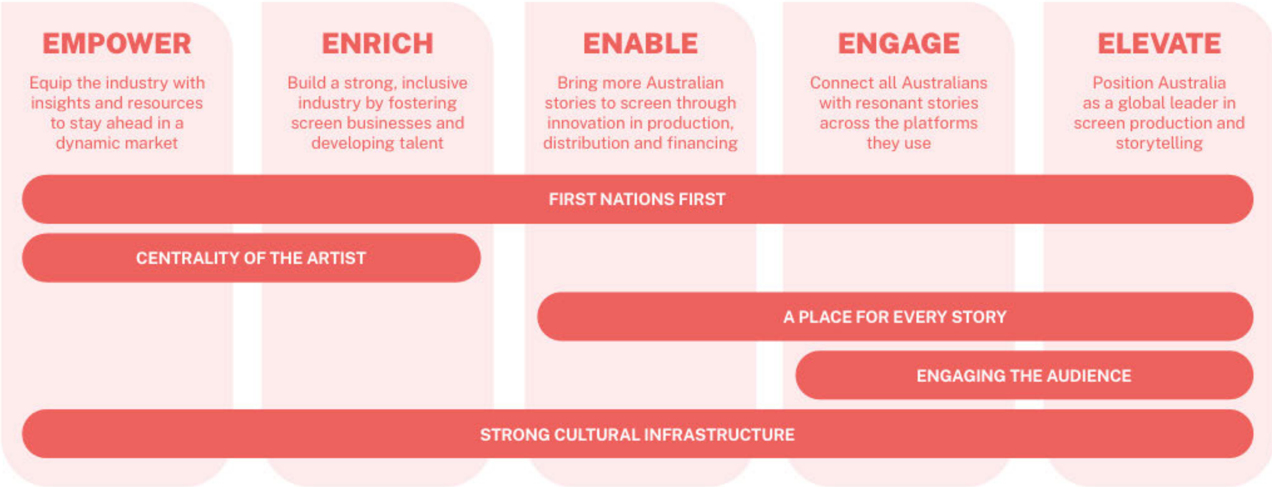

Figure 2: Alignment of Screen Australia's Strategic Framework to the National Cultural Policy, *Revive*

Building on this momentum, Screen Australia's submission for the next National Cultural Policy sets out both agency priorities and broader opportunities to sustain this progress, positioning the creative sector for a vibrant and viable future.

Submission: Executive Summary

Screen content remains central to the lives of Australians, providing shared reference points that help us navigate culturally relevant subjects and build empathy and connectedness across multiple, interconnected identities. Australian audiences place real value on local stories specifically – 84% recognise the importance of access to local stories. While viewing habits are increasingly personalised, the social impact of content is collective – and relatable representation of locally grounded experiences is something only Australian content can provide.

Yet this stated support does not always translate into consumption. **Only around 35% of Australians spend more than about a third of their viewing time on local content**, and nearly two-thirds spend less than 30% – a gap that is structural rather than a matter of preference. Both awareness and discoverability are barriers to engagement with local content. In a platform-led globalised marketplace, with proliferating aggregators, Ad-supported Video On Demand (AVOD), Free Ad-Supported TV (FAST) channels and growing streaming adoption, audiences have more choice than ever. They are also increasingly guided by algorithms, so content that requires more active searching is less likely to be visible.

This sits within a period of unprecedented transformation in how screen and games stories are created, financed, and experienced. **Technological change, competition for attention from expanding content sources and global market shifts have reshaped production, distribution and revenue models,** while sustained pressure on production budgets is constraining output and driving further consolidation. These pressures are compounded by shifting approaches to rights and data access, including performance and audience demographics. As local creators face growing challenges in retaining and exploiting intellectual property (IP) – along with reduced access to audience insights – their ability to generate long-term value under traditional models is diminished. To remain viable in this environment, the local production sector needs to evolve towards new models and diversify its connection with audiences.

Despite these challenges, there is robust demand from the sector. This reflects both stronger activity, but also a greater reliance on public incentives and equity support. In FY25/26, Screen Australia was only able to fund 24% of the total number of applications, which has dropped from 46% of applications in FY21/22.

Ongoing disruption on this scale is also a significant opportunity. Australia has renowned creative talent, a globally attractive production base, and audiences who value local stories. With the right support, cross-sector coordination and policy settings, Australia can build a screen and games industry that is creatively ambitious, complex and commercially competitive – one that connects with audiences at home, and carries Australian culture and commercial value to global markets.

Through a continued National Cultural Policy, the creative sector will be recognised for the uniqueness of our stories and the collegiate, holistic way that we work. Screen Australia is ready to lead, partnering with industry and government to make the decade ahead the most ambitious yet for Australian screen and games.

Our Vision

The goal is to shape an Australian screen and games industry that is sustainable, creatively distinct, commercially competitive and culturally vital. It will be an industry that tells stories worth making and builds businesses worth sustaining - delivering enduring cultural, social and economic value.

At its core, the screen and games industry reflects and connects Australia, producing content that speaks to every corner of national life, capturing its diversity, complexity and richness. It will empower creatives to take risks, support the development and retention of original Australian Intellectual Property (IP), whilst supporting screen and games businesses to scale and compete globally.

Innovation will underpin both cultural expression and commercial success. Over the next 10 years, the industry will be defined by its capacity to evolve, and its ability to adapt to new technologies, formats and business models that respond to changing audience behaviour and platform ecosystems.

This focus will ensure that Australian stories are not only created, but reach and meaningfully connect with both local and global audiences. Strengthening representation will remain central - supporting First Nations storytelling, elevating underrepresented voices and enabling stories that reflect the full breadth of the Australian experience. Recognising screen and games creators as workers will require ongoing support for long-term career pathways and adaptable funding approaches.

When it comes to the re-energised area of global co-production and creative partnerships, Australia brings enormous value to the table that goes beyond world-class production incentives. Talent, ideas and a point of view that has evolved from our landscape, our First Nations storytellers and the experiences of the people who make Australia their home.

These are all our stories. Watch. Play. Challenge. Dream. Grow.

Key Priorities and Themes

Screen Australia's submission draws on the findings from the Screen Currency 2026 research.

Screen Currency 2026 is the most comprehensive examination of the social, cultural and economic value of Australian screen and games content undertaken in a decade.[3] Commissioned by Screen Australia and drawing on collaboration between leading researchers, economists and senior academics across four universities, it combines national surveys, audience forums, industry interviews, global surveys and case studies into a genuinely landmark evidence base.

The research arrives at a pivotal moment - one defined by audience fragmentation, algorithmic discovery, platform concentration, economic pressure on producers, and intensifying global competition for audience attention. Screen

[3] Screen Currency was first published 2016. See: Screen Australia (2016), *Screen Currency: Valuing our screen industry.*

Currency 2026 addresses that environment directly, offering an integrated, evidence-grounded framework that moves from how content is produced, to how it is valued by audiences, to what it contributes economically and culturally at home and abroad.

This submission draws directly on that evidence base with the findings cited throughout, reflecting original research rather than industry assertion, and presenting an authoritative resource to inform policy deliberation on the future of Australian screen and games.

Key findings include:

- **Australian audiences think local content is vital for preserving culture, reflecting diversity and portraying real-life issues[4] –** with 84% saying access to local content is important. Audiences expect screen content to reflect the full breadth of contemporary Australian life, and where it does, it generates significantly stronger engagement, social discussion and long-term resonance. Where it doesn't **–** defaulting to stereotyped or traditional portrayals **–** younger audiences in particular are actively disengaging.
- **Australian screen content drives action -** 71% of Australian audiences say they are inspired to take some form of action after engaging with local content. The response spans both social interaction and personal decision-making, from sharing and seeking further information to shifts in behaviour
- **Australian stories hold significant value for audiences, but fragmentation and discoverability limit engagement ‑ creating a gap that is structural rather than a matter of preference.[5]** While 75% of Australians say they want to watch more local content, nearly two-thirds spend less than 30% of their screen time with it. Platform ownership of audience data is severely limiting the feedback loops Australian producers need to understand and grow their audiences.
- **Awareness can influence engagement with local content[6]** ‑ viewing choices are often shaped by convenience, which may mean content requiring more active searching is less likely to be visible. Word-of-mouth remains the most important way audiences discover content, and can contribute to greater visibility for titles that have already built some audience momentum.
- **Public investment remains essential.[7] Policy frameworks need to keep pace with changing industry dynamics –** existing incentive settings continue to support traditional commissioning and distribution pathways, but need to evolve to keep pace with the platform-driven models that have fundamentally shifted how audiences consume content. Supporting the screen and games sector to evolve would help strengthen the long-term sustainability of Australian creative businesses.
- **The economic sustainability of the domestic screen sector is facing increasing pressure[8] –** with the democratisation of content creation, omni-platform distribution and sources of financing beyond government support harder to secure, Australian production companies need to fully exploit their IP and drive long-tail revenues in order to reinvest in new content and businesses over time.
- **Streaming-led commissioning is redefining the economics of Australian TV drama, reshaping genre production[9] –** with SVOD platforms surpassing free-to-air (FTA) as the largest commissioners of local drama. Total FTA TV drama hours drama hours fell 31% year-on-year in FY24-25[10], and children's drama has effectively

[4] Screen Australia, Screen Currency 2026, *Audience Insights*. (Nb. Not yet published at time of writing).
[5] Ibid.
[6] Ibid.
[7] Screen Australia, Screen Currency 2026, *Industry Insights.*
[8] Screen Australia, Screen Currency 2026, *Economic Insights* and *Industry Insights.* 'Public funding' includes Producer Offset, Location Offset, PDV Offset, federal and statement government investment, and other government sources.
[9] Screen Australia, Screen Currency 2026, *Industry Insights.*
[10] Screen Australia, Drama Report 2024/25.

disappeared from commercial TV since the removal of genre sub-quotas in 2021 and in the face of transformative shifts in the behaviour of young audiences.

- **Gaming is mainstream, across all demographics.**[11] Australian game players don't focus on game origins, but express strong support for the local industry **–** with 82% of Australians now playing, including a fast-growing 55–64 years cohort, and an average player age of 35. While players don't actively seek out games by national origin, awareness of Australian-made titles translates into strong expressed support for the local industry.
- **The Australian screen and games workforce is highly skilled, but the path to a sustainable career is precarious**[12] **–** 36% of screen workers have considered leaving the industry often or all the time, 62% face pressure not to claim basic entitlements, and 48% experienced bullying in the past year.
- **Australian screen content is a powerful cultural ambassador, building cultural affinity, positive perception and intention to visit as tourists**[13] **–** with over 60% of respondents in China and India saying it gives them a positive impression of Australia, and 51% of Indian respondents reporting increased intention to visit after viewing local content.
- **Australia's screen and games industries generated $1.6 billion in exports in 2023/24**[14] — $1.3 billion in screen exports (driven primarily by production and post-production) and $323 million in games. Screen exports have more than doubled since the introduction of the producer and location offsets (4.7% average annual growth since 2008/09), while games exports are expanding even faster at 15.4% per year since 2016/17, making both industries significant contributors to Australia's export diversification agenda.

The Screen Currency research identifies four key themes for the screen and games industry:

Converting value to engagement: Australians value local screen and games content, recognising its cultural, social and economic value ‑ yet watch less of it than they would like. Closing that gap is a major opportunity to turn goodwill into sustained engagement and lasting impact.

Strengthening social cohesion and community: Australian cultural output is a powerful catalyst for social connection and cohesion, reflecting shared experiences and diverse perspectives. It inspires conversation, empathy and action. We need to position local stories as vital infrastructure for a more connected and resilient society.

Building an adaptive, resilient industry: Shifts in audience behaviour, distribution channels and commissioning pathways are opening new ways to create and capture value. With business models and policy settings that reward innovation and enable reinvestment, Australia can build an industry that is creatively ambitious, culturally relevant and commercially sustainable.

Amplifying global reach and soft power: Australia's screen and games industries are powerful, proven cultural exports that enhance Australia's global profile, influence perceptions and strengthen international relationships. There is a real opportunity to expand reach, build export value and strengthen our influence on the world stage.

[11] Screen Australia, Screen Currency 2026, *Audience Insights.*
[12] Ibid.
[13] Screen Australia, Screen Currency 2026, *Global Insights.*
[14] Screen Australia, Screen Currency 2026, *Economic Insights.*

The following table utilises Screen Australia's Strategic Framework to align the agency's areas of focus with the Screen Currency 2026 research findings and National Cultural Policy submission recommendations:

Framework	Screen Currency 2026	Screen Australia Recommendations
EMPOWER: *Equip the industry with insights and resources to stay ahead in a dynamic market.*	• Reduced visibility of audience and performance data for traditional content businesses. • Deeper industry understanding of new platforms and audience analytics is critical.	• **Prioritise the sharing of audience data**, with conditional requirements for all Screen Australia direct funding. • **Build First Nations screen and games data** reporting, insights and analysis.
ENRICH: *Build a strong, inclusive industry by fostering screen businesses and developing talent.*	• The screen/games sector is a significant source of economic value, contributing \$11.1bn to the economy in gross value added (23/24). • Notable pressures across the sector mean that while entry is easier than ever, sustaining success is harder. • Developing and managing original IP/rights are vital. • Need to expand support beyond projects, to invest in creative businesses and long-term talent pathways.	• Create a new 3-5-year program that **helps creative 'scale-ups' become self-sustaining** by building commercial capability with a focus on IP development, business skills, revenue diversification, technology, R&D and clear ROI. • Establish a **First Nations Screen Alliance** to align approaches and identify opportunities, working towards a **new First Nations Screen Strategy.** • Support talent development long-term through **Screen Australia Fellowships.**
ENABLE: *Bring more Australian stories to screen through innovation in production, distribution and financing.*	• Australian content is culturally essential. • Engagement is fragmented and personalised. • SVOD platforms have reshaped TV drama commissioning models. • Opportunity for new creative voices to innovate and build reach.	• Lead an **industry-wide action plan** to increase Australian engagement with local screen and games content. • Increase output with **Production funding boost** for Narrative, First Nations and Games. • **Expand commitment to new creative voices** through direct-to-audience, multi-disciplinary opportunities across the cultural sector. • Work with cross-sector partners on **regional creative clusters.**
ENGAGE: *Connect all Australians with resonant stories across the platforms they use.*	• Local content carries significant value and importance for Australians. • Representation and authenticity are core value propositions. • Discoverability and global competition limit engagement. • Gaming is now mainstream, across all demographics.	• Strengthen Screen Australia support to **amplify marketing and audience programs**, including asset creation, distribution growth strategies, media planning, testing and content labelling.
ELEVATE: *Position Australia as a global leader in screen production and storytelling.*	• Australian content delivers strong international soft power and economic spillover benefits. • Screen and games generated \$1.6bn in exports (23/24). • Content builds cultural affinity and positively influences travel intentions - (China, India, NZ and UK).	• **Expand and modernise co-production frameworks** by reviewing existing treaties and pursuing new agreements with high-growth, strategically important markets. • **Implement a three-year Cultural Export Plan,** ensuring Australian stories, games and creative talent are showcased to global audiences and businesses.

Australian Government | Screen Australia

1. First Nations First

The Importance of First Nations Screen Stories and Talent

A strong commitment of *First Nations First* within the National Cultural Policy is essential to recognise First Nations storytelling as a foundational pillar of Australia's cultural identity and creative ecology. These stories strengthen national cohesion through truth-telling and shared understanding, sustain cultural resilience by maintaining living knowledge, languages and traditions, and enable equitable access and participation across the sector for First Nations creators and audiences.[15] They also underpin economic sustainability by driving a distinctive, globally competitive screen industry that creates job opportunities, builds cultural value and supports long-term sector growth. **Embedding First Nations screen and games storytelling at the heart of the National Cultural Policy is therefore critical to realising its full ambition of a cohesive, resilient, inclusive and sustainable national cultural landscape.**

Screen Australia acknowledges the continuous strength of First Nations storytelling and is proud of the work of Screen Australia's First Nations Department, which has provided leadership and support to Aboriginal and Torres Strait Islander creators around the country for more than three decades.[16] The First Nations Department facilitates the creation and sharing of powerful, authentic First Nations stories across all screens and formats. It drives change in the industry by identifying and championing emerging talent, supporting First Nations businesses, advocating for representation, encouraging cultural safety and providing significant funding for imaginative, resonant and authentic First Nations screen stories. It delivers responsive and targeted initiatives, recently including the *Proper Loved Up* romantic comedy short films, created in partnership with ABC and NITV. Ground-breaking titles supported

[15] Screen Australia, Screen Currency 2026, *Audience Insights*.
[16] The First Nations Department was established in 1993 under the Australian Film Commission.

by the First Nations Department include: *Wolfram, Mystery Road*, *Total Control*, *Little J & Big Cuz, The Moogai, Dreaming Big, The New Boy, Our Medicine, Sweet Country, Samson & Delilah* and *First Australians.*

Screen Australia's upcoming Screen Currency 2026 report emphasises the cultural and social value of First Nations content in reinforcing identity, community connection and cultural continuity.[17] Within communities, First Nations storytelling creates shared cultural space, affirming connections to kinship, Country and ancestry, while enabling self-determination through control over how stories are told and represented.

It also plays an important educational role. By combining historical truth with strong emotional engagement, First Nations screen stories provide accessible entry points for broader audiences, fostering understanding of cultures and experiences.[18] Works such as *First Australians*,[19] demonstrate how these stories can challenge dominant narratives, reshape public understanding and contribute to cultural and social cohesion. Its significant educational impact is reflected in strong institutional uptake and record Screenrights revenue exceeding $1 million within its first year.

First Nations screen content is also central to truth-telling and public dialogue.[20] By confronting difficult histories and lived truths - including ongoing racial vilification and abuse of First Nations peoples[21] - First Nations storytelling promotes reflection, empathy and accountability, and supports a more informed and inclusive national conversation.

Additionally, First Nations screen stories play a vital role in promoting and preserving First Nations languages.[22] Productions such as *Little J & Big Cuz,* translated into 17 First Nations Australian languages,[23] support language revitalisation while strengthening identity and cultural pride among younger generations.

Gaps and Emerging Priorities

Barriers to growth for First Nations screen practitioners, gamemakers and businesses include:**[24]**

Access to funding in an environment of rising costs

Unclear and unsustainable talent pathways

Retention of Intellectual Property (IP) and business scalability

Structural and **systemic barriers**

Fragmented strategies and approaches across the whole industry

Addressing these challenges requires sustained investment, First Nations-led decision-making, genuine partnerships and structural change across the entire screen ecosystem. The First Nations Department at Screen Australia plays a central role in advancing this work, strengthened by new leadership and a clear focus on self-determination, cultural authority and long-term sustainability.

Screen Australia believes a refreshed national First Nations screen strategy will serve as a unifying framework for the sector – aligning investment, policy and programs across governments, agencies and industry partners, to

[17] Screen Australia, Screen Currency 2026, *Audience Insights*.
[18] Ibid.
[19] For more info: Screen Currency 2026, *First Australians* case study.
[20] Screen Australia, Screen Currency 2026, *Audience Insights*.
[21] As highlighted in the Joint Standing Committee on Aboriginal and Torres Strait Islander Affairs' *Inquiry into Racism, Hate and Violence toward First Nations People*.
[22] Screen Australia, Screen Currency 2026, *Audience Insights*.
[23] Screen Australia, Screen Currency 2026, *Little J & Big Cuz* case study.
[24] For more information, see: First Nations Department strategy (2019), *The Next 25 Years*.

reduce duplication and improve consistency in how First Nations screen stories, creators and businesses are supported.

This could be complemented by deeper collaboration and advocacy to support an Australian screen industry that genuinely reflects First Nations self-determination and creative sovereignty. This could include the establishment of a **First Nations Screen Alliance -** a cross-agency collective to drive coordination and shared priorities.

There is also opportunity to expand international engagement, supporting co-production, cultural exchange and global market access for First Nations practitioners and businesses. Screen Australia's First Nations Department is a globally recognised leader in this space, actively enabling international engagement and collaboration with other First Nations screen industries.[25] There is significant opportunity for increased international collaboration and to maximise the potential of existing co-production arrangements.

Structural barriers to sustainable business growth remain. [26] While First Nations screen content delivers strong cultural impact, this is not necessarily consistently matched by economic returns, IP ownership or business viability. Addressing this requires a greater focus on strengthening enterprise capability, ownership and market participation over time.

Improved data and evidence will be critical to this effort, alongside targeted workforce development initiatives that create clearer, more sustainable career pathways. This includes expanding training, mentoring and industry attachment opportunities, as well as embedding First Nations participation more consistently across publicly funded production. Expanding the National Cultural Policy's focus beyond direct content funding through Screen Australia and state screen agencies in this way could help build long-term industry capacity alongside continued investment in content creation. In this context, Screen Australia and First Nations counterparts at state and territory screen organisations, propose a **National Training and Professional Development Strategy, to establish clear, sustainable training and talent pathways for First Nations practitioners across education, industry and funding bodies**. Crucially, this would be informed by industry-wide research, and insights provided by the First Nations Screen Alliance.

Ensuring First Nations stories are visible and accessible is equally important. Discoverability, distribution and culturally appropriate curation will be key to maximising reach, cultural impact and economic outcomes.[27] Emerging technologies - including games and digital content - presents new opportunities for First Nations content to connect with distinct audiences and support storytelling, language preservation and cultural continuity.

A strong and sustainable sector also depends on culturally safe working environments, underpinned by clear standards and protocols. Creative Workplaces have developed resources on culturally safe workplaces and First Nations relations within the cultural and creative industries.[28] Specific to the screen production sector, **the First Nations Department will undertake a review and refresh of its Pathways & Protocols guide,[29] which is the Australian screen industry standard for working with First Nations people, culture and concepts.**

While AI may be a valuable tool for First Nations content creation and culture, there may be unfavourable impacts of AI on representation and ICIP rights. Further industry consultation and research may enhance understandings of potential risks.

Ultimately, sustained government investment is critical to enable long-term planning, scale and continuity. Screen Australia has demonstrated a strong commitment by dedicating as much funding as possible to the First Nations Department, with current funding for all First Nations programs and services representing around 10% of overall content funding. Increased support would expand opportunities for creators and businesses, strengthen career

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[25] See, for example: The First Nations Factual Co-production Development fund, in partnership with state and territory screen agencies.

[26] Screen Currency 2026, *Little J & Big Cuz* case study.

[27] Screen Currency 2026, *Audience insights.*

[28] See: Creative Workplaces resources.

[29] *Pathways & Protocols: a filmmaker's guide to working with Indigenous people, culture and concepts*.

pathways and ensure that a broad diversity of First Nations screen and games stories – culturally significant as well as commercially driven – can be told, sustained and shared with audiences in Australia and globally.

Opportunities

Increased resourcing for Screen Australia would enable the First Nations Department to be strengthened and expanded. **Opportunities for the First Nations Department include:**

Formalise a First Nations Screen Alliance – a cross-agency First Nations collective to align approaches, work more efficiently and identify opportunities to innovate in the face of rapid change in the sector.

Expand the volume and ambition of First Nations projects, across both development and production, to support greater cultural and industry impact.

Develop a new national First Nations screen strategy to serve as a unifying framework to address the systemic and fragmented nature of current approaches.

Initiate First Nations research and insights project to identify gaps and guide action.

Enhance enterprise support for First Nations screen and games companies to help scale businesses.

Support greater investment for emerging talent, including increased opportunities for skills development and more consistent pathways to build long-term careers.

Increase international collaboration and maximise the potential of existing co-production arrangements.

In addition, to address gaps and emerging priorities for First Nations creators and businesses, Screen Australia recommends that the next National Cultural Policy include consideration of the following:

Develop a **coordinated professional development strategy** to establish clear, sustainable training and talent pathways for First Nations practitioners, complemented with mentoring opportunities.

Continue to support and identify approaches that **strengthen IP ownership and the protection of ICIP rights**, helping First Nations businesses maintain long-term revenue streams and creative control.

Build on existing efforts to help **foster cultural safety in the screen and games industries,** contributing to equitable participation, authentic storytelling and industry sustainability.

Australian Government | Screen Australia

2. A Place for Every Story

The Importance of Authentic, Diverse and Contemporary Representation

A Place for Every Story in the screen and games industry is essential to make the sectors more relevant to Australians and globally competitive. **Screen Currency 2026 underscores the importance of authentic, diverse representation in Australian screen stories, recognising storytelling as a critical mechanism for building understanding and connection.**[30] Authentic storytelling deepens engagement and enables audiences to not only see themselves reflected on screen, but to see each other - to encounter perspectives and experiences beyond their own. Screen Currency case studies such as *Heartbreak High, Unpacking* and *Mystery Road,* resonate strongly as they embed lived experience and cultural specificity, creating emotional connection while opening windows into different worlds.

At a time when strengthening social cohesion is a national priority, the role of screen storytelling is particularly significant. Social cohesion must be nurtured through empathy, which arises from understanding. Screen stories are uniquely powerful and scalable in delivering this, bringing diverse Australian voices into homes and communities and enabling audiences to connect with experiences different from their own. In this context, sustained investment in Australian screen storytelling represents a direct investment in social cohesion, ensuring that a wide range of Australian stories and perspectives are both told and seen.

Screen Currency 2026 also confirms that there is strong appetite for a range of Australian screen stories, and that the sector is responding effectively to this demand.[31] Younger audiences in particular expect to see a broad

[30] Screen Australia, Screen Currency 2026, *Audience Insights*.
[31] Ibid.

spectrum of experiences and identities reflected on screen.[32] Continued investment in diverse perspectives, new creative voices and evolving content formats will ensure Australian storytelling remains relevant and connected to audiences over time. A well-supported screen sector is essential to realising the National Cultural Policy's ambition to foster a diverse, inclusive and sustainable cultural landscape.

Digital games are a popular form of cultural participation, offering interactive ways to experience stories and explore perspectives through play. Games create immersive opportunities for building empathy. By embedding themes into gameplay and design, games are a powerful medium for supporting social cohesion and amplifying under-represented voices. Screen Currency 2026 reveals that games players increasingly want inclusion embedded into how local games are made.[33] Beyond personal representation, Australian players also show broad support for diversity in video games, with 62% of respondents agreeing that games should reflect a wide range of cultures and backgrounds. The next National Cultural Policy could recognise games not purely as a creative and commercial activity, but as a vital component of Australia's cultural ecosystem that contributes meaningfully to cultural expression and social outcomes.

Gaps and Emerging Priorities

The National Cultural Policy commits to representing the breadth of Australia's multiple national identities in ways that reflect distinct perspectives and the way they intersect. For the screen and games industry, this presents an opportunity for sustained investment in creators with lived experience, ensuring they have the resources to shape and tell stories authentically.

The next National Cultural Policy presents a critical opportunity to embed this at a systemic level, by aligning funding, commissioning and industry development with creator-led representation. Targeted investment, inclusive commissioning and workforce development can support sustainable careers across a diverse talent base. Cross-platform storytelling – spanning film, television, interactive formats and games – can also expand reach, particularly for younger and global audiences, strengthening both cultural impact and commercial potential.

Revive recognises the need to reflect the diversity of communities nationwide. In screen production, industry infrastructure remains heavily concentrated in urban areas, limiting access for regional and remote practitioners to participate on equal terms and to build sustainable careers locally. Screen production delivers significant regional economic and social benefits, including local employment, skills development, accommodation and increased tourism visibility. **There is opportunity to enhance support for regional and remote screen and games creators, to ensure that stories from all parts of Australia can be made and shared on a more equitable basis.**

Disability representation remains a key priority, with important progress underway – for example, through the Australian Government's *Equity: The Arts and Disability Associated Plan* (EDAP).[34] Screen Australia's *Seeing Ourselves 2* report indicated that a persistent and substantial gap exists between the presence of people with a disability in Australian society and their representation on screen.[35] As part of the EDAP's implementation, Screen Australia is working closely with the Office for the Arts and Creative Australia to advance actions for meaningful improvements in equity for d/Deaf and disabled screen workers. Feedback from advocates and creatives with lived experience, shared with the Arts Disability Implementation Advisory Group, highlighted several opportunities, which include supporting creative leadership and authorship by d/Deaf and disabled practitioners, embedding access as standard practice, building long-term career pathways and sector capability, and improving data to understand participation and impact over time.

[32] Ibid.
[33] Ibid. Newzoo (2025), Global Gamer Study.
[34] Australian Government, *Equity: the Arts and Disability Associated Plan*.
[35] Screen Australia (2023), *Seeing Ourselves 2: Diversity, equity and inclusion in Australian TV drama*.

While progress has been made over the last decade,[36] gender equality remains an area of focus in the screen and games industry. Screen Australia data[37] shows that women occupied 46% of all key creative roles on projects that entered production in Australia in 2023/24. Under-representation remains pronounced in the feature drama genre, where women accounted for 43% of producers, 32% of directors and 33% of writers in 2023/24. Representation is stronger within Screen Australia-funded content, with women and gender diverse creatives comprising 56% of key creative roles across approved applications in 2024/25. Participation is lower in Screen Australia-funded games, although progress is evident year on year, with women and gender diverse gamemakers holding 45% of approved key roles in 2024/25. Continued effort is needed to achieve industry-wide balance.

The next National Cultural Policy presents further opportunity to drive coordinated, sector-wide inclusion by aligning strategies across agencies and industry bodies. **Establishing a framework for collaborative diversity and inclusion** would align diversity strategies, targets, data and accountability. This approach would support measurable progress, helping build a more inclusive, sustainable and representative screen and games sector.

Opportunities

To address these gaps and emerging priorities, Screen Australia recommends that the next National Cultural Policy include consideration of the following actions:

Build on existing coordinated, approaches to inclusion across government, alongside sustained investment at state and federal levels, to help provide greater certainty for d/Deaf and disabled creatives.

Increase integration of diversity efforts by national and peak bodies – including through better alignment of strategies, coordinated initiatives and improved data collection and sharing – to reduce duplication, improve representation and maximise collective impact.

Enhance support for regional and remote screen creators, to help address the structural barriers that limit participation. With additional resources, Screen Australia could play a role in delivering targeted support and fostering partnerships that build local capacity and enable more sustainable pathways into the screen industry.

[36] The Screen Australia (2025), *Gender Matters: Women in the Australian Screen Industry* report revealed significant, persistent under-representation of women in key creative roles within the Australian screen sector. Following the release of this report, from 2015 Screen Australia's Gender Matters initiatives (including a KPI, Taskforce and targeted programs) have tracked the issue and have empowered women and gender diverse practitioners in the local sector.

[37] Screen Australia, Gender data (2025 update). Industry-wide data is based on information provided by industry agencies, broadcasters, and producers, as well as some publicly sourced information, and is recorded based on the financial year a title enters production in Australia. Screen Australia-funded content data is based on information in Screen Australia funding applications.

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3. Centrality of the Artist

The Importance of Artists as Workers and Creators

Recognising the *Centrality of the Artist* is essential in the screen and games industry to value creative output, as well as labour, and highlight the impactful contribution to the broader Australian economy.

The screen and games industry have significant economic impact, driving employment, skills development and sustainable growth in the broader creative economy. As demonstrated in Screen Currency 2026, the screen and digital games industries directly employed 59,337 people in 2024/25. Of this, 56,573 jobs were associated with the screen industry and 2,764 jobs were in digital games development.[38] Continued investment is critical to strengthening this creative labour market and sustaining long-term economic impact.

The games sector in particular is a high-growth area. Screen Currency 2026 reveals that its economic contribution in Australia has more than doubled since 2016/17, with the introduction of the Digital Games Tax Offset (DGTO) in 2022 driving increased activity from 2021/22.[39] Employment grew at an average annual rate of 14.6% between 2016/17 and 2024/25 – from a relatively low starting point – compared with 2.9% growth across the broader workforce. Building on the foundations established under *Revive* – including the introduction of the DGTO and direct funding support of $12 million over four years administered through Screen Australia – the next National Cultural Policy presents an opportunity to embed more sustained and systemic support for the local games industry.

[38] Screen Australia, Screen Currency 2026, *Economic insights.* Estimates are by University of Canberra based on the ABS Labour Account, ABS Labour Force Survey and ABS Jobs in Australia (TableBuilder), ABS Film, Television and Digital Games Survey, IGEA Australian Game Development Survey.
[39] Screen Australia, Screen Currency 2026, *Economic insights.*

Gaps and Emerging Priorities

A vibrant, highly-skilled and resilient screen and games workforce is essential to producing distinct Australian content. This requires not only technical excellence, but also a genuine appetite for innovation and risk-taking – both increasingly under pressure from rising production costs and growing industry risk aversion. As Screen Currency 2026 highlights, project-based work remains a persistent source of career instability, with many workers moving between roles and sectors in search of consistent employment.[40] Skills shortages persist[41] despite investment in recent years - including targeted Screen Australia initiatives,[42] state and territory agency programs,[43] and other government actions including the introduction of new training requirements under the Location Offset.[44] Building on this progress, **sustained support for talent development and innovation will be critical to strengthening long-term industry capability and global competitiveness.**

Gaps in business capabilities – such as financial management, rights negotiation and commercial strategy – hamper sustainability. Strengthening these skills would support practitioners to better navigate financing, ownership and market opportunities. **Screen Australia, in partnership with industry bodies and education providers, is well placed to develop targeted, long-term business enterprise programs that are vital to ensure the sustainability of the sector.**

In the screen and games industries, AI is reshaping production and creative workflows, with implications for IP, jobs and rights. Screen Australia maintains that **the next National Cultural Policy must continue to prioritise creators as the foundation of the screen and games ecosystem.** Screen Australia also acknowledges the ongoing discussions among creative guilds and organisations regarding AI usage principles and content licensing frameworks, and encourages the government to continue engaging with these stakeholders as these conversations and outcomes evolve.[45] Alongside this, strategic and ethical adoption of AI can enhance capability and competitiveness,[46] supported by clear industry safeguards and transparency measures.[47]

Ensuring the physical and psychosocial safety of screen and games workers is fundamental to sustaining a healthy cultural ecosystem. Sector-specific research highlights the ongoing prevalence of bullying, harassment and discrimination in the local screen industry.[48] Ongoing collaboration between Screen Australia, screen agencies and guilds, together with emerging initiatives such as trials of alternative working models,[49] provides a foundation for strengthening workplace culture. **The next National Cultural Policy presents an opportunity to build on these existing efforts and ensure consistent, updated industry-wide standards for safety and wellbeing.**

[40] Screen Australia, Screen Currency 2026, *Economic insights.* At any given time, 11% of the Australian screen production workforce hold more than one job.

[41] Creative Australia for Service and Creative Skills Australia (SaCSA) (2024) *Creative Workforce Scoping Study*.

[42] For example, see: Screen Australia (2025), *Media release: Industry Development initiatives.*

[43] See: Olsberg SPI for Screen Australia (2026), *Production Infrastructure and Capacity Analysis for Australia's Screen Production Sector*.

[44] Australian Government, *Location Offset guidelines.*

[45] For example: SPA, MEAA, Screenrights.

[46] Screen Australia, Screen Currency 2026, *Industry insights.*

[47] For example, see: Screen Australia, *AI Guiding Principles*. Developed in consultation with industry organisations such as the Australian Writers' Guild (AWG).

[48] See: Australian Cinematographers Society (2022), *A Wider Lens: Australian camera workforce development and diversity report*; and findings from the Australian Screen Industry Mental Health and Wellbeing Survey (2025), summarised in Screen Well (2025), *Pressure Point Report.*

[49] See: Gender Matters Taskforce (April 2026), Scene Change: Modelling Innovative Practices for Screen Workforce Sustainability and Screen Well's job sharing pilot initiative.

Opportunities

To address these gaps and emerging priorities, Screen Australia recommends that the next National Cultural Policy include consideration of the following actions:

Prioritise sustained, long-term investment in industry-specific talent and business development for the screen and games sector, supporting continuous skills development and clear career pathways to help grow and retain a globally competitive workforce**.**

Support creators to adapt to evolving technologies, including AI, by building capability, promoting fair use frameworks and ensuring remuneration models remain fit-for-purpose.

Build on existing workplace safety and culture frameworks, by supporting their ongoing evolution to reflect emerging risks, industry best practice and changing workforce needs.

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4. Strong Cultural Infrastructure

The Importance of Strong Cultural Infrastructure

Strong Cultural Infrastructure enables the screen and games industry to support Australian creators, serve broad local audiences, drive economic growth and sustain a culturally vibrant and competitive sector. **Australia's screen and games industries are a significant source of economic value, contributing $11.1 billion to the Australian economy in gross value added (GVA) in 2023/24.**[50] The sector also generates significant indirect economic benefits beyond their direct spending, with substantial flow-on effects across the broader economy through supply chains, exports, tourism and technological developments.[51] These significant impacts underscore the importance of the screen and games sector in delivering the economic objectives of the next National Cultural Policy, particularly in driving growth, productivity and cross-sectoral benefits.

Government policy plays a crucial role in supporting the screen and games industry. The sector is strengthened by an interconnected system of regulation, direct funding and tax offsets, including federal government support via the Australian Screen Production Incentive (ASPI) – comprising the Producer Offset, Location Offset and Post, Digital and Visual Effects (PDV) Offset – and the Digital Games Tax Offset (DGTO). The Producer Offset currently serves as the financial engine for Australian screen production. In 2024/25, 44% of Australian theatrical feature finance and 34% of Australian TV drama finance was from federal government sources.[52] Screen Australia's 2025 Industry Participant Survey found that producers regard the Producer Offset as the most valuable form of support,

[50] Screen Australia, Screen Currency 2026, *Economic insights*. Estimates are by University of Canberra based on ABS National Accounts Input-Output tables; ABS 2023 *Film Television and Digital Games, Australia.*
[51] Screen Australia, Screen Currency 2026, *Economic insights*
[52] Screen Australia (2025), *Drama Report 2024/25.* 'Federal Government sources' includes Producer Offset, Location Offset, PDV Offset, and other Australian Government funding.

particularly amid increasing costs.[53] Across the past three financial years, the average annual value of the Producer Offset has been $474 million, with an average of 211 final certificates issued.[54] These levels indicate sustained production activity in Australia, highlighting the ongoing importance of government support in maintaining content volume, employment and broader economic and cultural benefits.

Screen production infrastructure - such as soundstages, studios and production facilities - drives economic, cultural and social outcomes by attracting investment, supporting large-scale productions, creating jobs, and strengthening industry resilience.[55] Reliable access enables Australian projects and IP to be developed locally, sustaining a pipeline of creative work.

Broader screen and games infrastructure builds social capital. For example, cinemas connect Australian content to audiences and serve as valued community and cultural spaces, fostering shared experiences, dialogue and identity. Investment helps keep venues accessible, supports local programming and inclusion. In the games sector, shared workspaces, co-working hubs and online platforms enable collaboration, skills development and networks that support creativity, business growth and job creation.[56]

Gaps and Emerging Priorities

The screen and games sector faces a range of interrelated challenges that are affecting business sustainability. Technological change and shifting audience behaviours are reshaping how content is produced and distributed, while intensifying competition from global streaming and social platforms. At the same time, increasing costs are placing pressure on production investment, impacting volume and constraining output. These dynamics are ultimately reshaping the operating environment and creating ongoing uncertainty for screen and games businesses, and underscoring the importance of policy frameworks to keep pace with industry change.

For creative businesses, owning and controlling high-value IP remains a core strategic imperative, yet evolving platform-driven market dynamics are making this increasingly difficult. As highlighted in Screen Currency 2026, the rise of cost-plus commissioning, platform-controlled distribution and consolidated media ownership has reduced the ability of Australian producers to retain rights, access downstream value and utilise audience data[57] – factors now central to long-term business sustainability.

Screen Currency 2026 highlights that Australia produces world-class screen and games content, but is increasingly losing control over its value. IP rights, audience data and revenue are gravitating towards global platforms, which increasingly influence what is distributed, discovered and monetised – limiting the ability of Australian businesses to reinvest in new IP or remain commercially sustainable. The Screen Currency 2026 report makes the consequences of this visible in the data – prevailing deal structures see 39% of businesses operating on service-fee-only arrangements with no backend participation, and only 12% receiving meaningful partner or platform support. Existing IP owned by Australian businesses accounts for just 28% of IP earnings on average, and long-tail royalty flows tracked through Screenrights and Screen Australia's own recoupment data are steadily declining.

These are not the outcomes of underperforming businesses - they reflect structural pressures facing independent production companies that have historically been the keystone of Australia's screen ecology. Without the commercial capability, systems and strategic relationships needed to negotiate from a position of strength, capable Australian businesses will continue to deliver for the industry without building the economic foundations needed to sustain themselves independently.

The next National Cultural Policy presents an opportunity to respond to these interrelated challenges through targeted support that strengthens enterprise capability and resilience. Targeted support for Australia's screen and

[53] Screen Australia (2025), *Screen Australia Industry Survey 2025.*
[54] Screen Australia, Annual Reports.
[55] Olsberg SPI for Screen Australia (2026), *Production Infrastructure and Capacity Analysis for Australia's Screen Production Sector*.
[56] Ibid.
[57] Screen Australia, Screen Currency 2026, *Industry insights.*

games scale-ups – businesses with strong delivery credentials and proven capacity to develop IP – represents a direct opportunity to close this gap and increase the value retained by Australian-owned businesses.

Beyond direct funding and content incentives, government can play an important role in supporting the broader conditions in which Australian screen and games businesses operate. There may be value in continuing to review key approaches and settings to ensure they remain fit-for-purpose. For example, frameworks and content definitions – such as the Significant Australian Content (SAC) test and the 'Australian program' definition under the Australian Content and Children's Television Standards (ACCTS) – could be modernised to better reflect where IP is ultimately held and how value is retained over time. This could ultimately support sustainable enterprise growth while rewarding innovation and strengthening Australia's global competitiveness.

The Australian screen industry is increasingly reliant on government funding and tax offsets as revenues decline and costs rise. In the commercial environment, fragmented audiences and changes in commissioning have reduced support for high-cost drama, children's content and one-off documentaries, with broadcasters favouring lower-risk formats. Australian films are also losing ground at the domestic box office. Together, this is narrowing opportunities for independent producers and deepening dependence on public funding to fill the gap.

Five years ago, Screen Australia was able to support almost half of the applications it received. By 2024/25, this figure had declined to just 27%, even as demand remained strong and the calibre of submitted projects consistently high. Engagement is also steadily increasing with each funding round for Screen Australia's games programs, supported by the additional $12 million over four years announced in *Revive*. Stakeholder engagement suggests that this demand reflects growing scale, capability and maturity of the Australian games industry, rather than a shortage of high-quality or market-ready projects.[58]

The increased demands on Screen Australia direct funding and services are symptomatic of these broader systemic challenges facing the sector. Growing pressure on limited public funding within an increasingly competitive production landscape has shifted Screen Australia's focus toward carefully balancing its resources against a rising pipeline of compelling, impactful Australian screen stories.

Australia's public broadcasters also play an essential role in addressing market failure and sustaining 'at risk' genres, despite operating within limited funding environments. 'At risk' genres (including drama, documentary and children's content) require continued and targeted support to address persistent market gaps. In particular, the removal of sub-quotas for children's programming from 2021 has led to a noticeable decline in FTA commissioning in this genre.[59] Investment in local content by subscription television broadcasters has also been impacted by similar market pressures[60] and media consolidation.

There is growing recognition of the need to complement public funding by unlocking alternative sources of capital, including private investment and philanthropic contributions.[61] In 2024/25, government sources contributed an estimated $430 million of investment across Australian drama production, compared to $$24 million[62] from Australian private investment. Building genuine investment readiness across the sector - through programs that develop producers' understanding of investor expectations, strengthen financial reporting capability and support the structuring of investment-grade propositions - will be essential to unlocking sustained private capital participation.

Strengthening producer capability in these areas – alongside improving investor understanding of screen sector business models – will reduce information imbalances and support more efficient and sustainable private capital participation. Screen Australia is actively progressing services and tools, including a **Private Investment Toolkit**

[58] Screen Australia, Screen Currency 2026, *Industry insights.*

[59] Australian Communications and Media Authority (ACMA) (15 October 2025), *Broadcaster compliance with TV content standards.*

[60] ACMA (3 December 2025), *Spending on subscription TV drama.*

[61] See: House of Representatives Standing Committee on Communications, the Arts and Sport, *Inquiry into Arts and Cultural Philanthropy.*

[62] Screen Australia (2025), *Drama Report 2024/25.*

(launching in June 2026) to provide guidance to producers and investors in navigating screen finance structures, clarifying risk settings and improving access to alternative financing.

Impact investing - where capital is deployed to generate measurable social or cultural outcomes alongside financial returns - represents an emerging opportunity for the sector. Australian screen and games content is well positioned to attract this capital given its demonstrable contributions to social cohesion, First Nations self-determination and community wellbeing. Developing a shared impact measurement framework, in collaboration with the impact investing community, could help articulate this value proposition and unlock new, values-aligned funding streams.

Small to medium enterprises are the backbone of Australia's screen and games sector, yet face disproportionate pressure from rising costs, shifting commissioning and complex financing. Targeted capacity-building support – including business development expertise, strategic planning resources and funding tied to business model adaptation – would help SMEs respond to structural change and build more sustainable operating models, complementing existing content investment with support for the enterprise infrastructure that underpins it.

Strengthening co-production and international partnerships is also critical to supporting a resilient and globally competitive Australian screen and games industry. These arrangements enable producers to access additional financing, share risk, and unlock larger support mechanisms and budgets, supporting ambitious and innovative productions. They also provide a pathway to international markets, expanding audience reach and enhancing the export potential of Australian content.

Partnerships can support industry capability building, while creating opportunities for Australian creatives and businesses to participate globally. Screen Australia is focused on amplifying international engagement and fostering deeper collaboration with international partners to help ensure that Australian creators and businesses remain competitive in an increasingly globalised environment. **Screen Australia strives to provide consistent support for Australians at major global markets[63] and connects local creatives with international decision-makers, networks and mentors.[64]**

Creative clusters – geographically concentrated ecosystems of screen and games businesses, service providers and education institutions – further drive innovation, skills and investment. Emerging sites such as the Miami Arts Depot in the Gold Coast demonstrate the potential of targeted infrastructure to help anchor creative activity and build local capability.[65] The next National Cultural Policy could explore investment in creative cluster development, particularly in regions with existing screen and games activity, to build more resilient local ecosystems.

The screen and games industry also require **robust data and evaluative capability** to enable government and industry to measure impact consistently over time. This includes longitudinal tracking that captures careers, IP value creation and global market performance. Screen Australia is collaborating with industry stakeholders through its contributions to the Australian Bureau of Statistics' ongoing maintenance of the Occupation Standard Classification for Australia (OSCA),[66] ensuring that screen and games roles are accurately captured in labour data that informs skills, migration and workforce planning. Equally important is building analytic capacity within agencies to interpret data, embedding evaluation from program design to delivery and supporting research partnerships.

A holistic ecosystem approach to the screen and games industry, and the broader arts and cultural sectors, requires coordinated, 'whole-of-government' approaches that recognise the cross-cutting economic, cultural and creative impacts. The screen and games industry intersects with portfolios including arts, culture, education, health, tourism, technology and foreign affairs and trade. A more integrated approach that fosters collaboration across portfolios and the private sector could better align infrastructure, systems, investment, skills development and export strategies, so that the benefits of the sectors can support whole-of-government outcomes and long-term

[63] For example: Cannes Film Festival, Berlinale, MIPCOM, Toronto International Film Festival (TIFF), SXSW, BitSummit in Japan, and Content London.

[64] For example, see initiatives: Talent Gateway and the Global Producers Exchange in partnership with Australians in Film (AiF); and Partner with Australia (UK) in collaboration with Ausfilm.

[65] See: Invest Gold Coast, 'Miami Arts Depot'.

[66] Australian Bureau of Statistics, Occupation Standard Classification for Australia.

sustainability. Continued collaboration across federal, state, territory and local governments is also required to recognise the essential role that all levels of government play to support shared cultural outcomes.

Opportunities

Screen Australia recommends that the next National Cultural Policy include the following actions:

Establish a new support mechanism to equip screen and games scale-ups with the commercial capability, systems and strategic relationships needed to transition from project-by-project operations to long-term, self-sustaining businesses.

Review the regulatory definitions of Australian content to further incentivise the development and exploitation of local IP, alongside meaningful Australian participation in creative and commercial decision-making.

Expand the role of private funding to more effectively diversify funding streams and strengthen the sustainability and resilience of the local sector.

Enhance data infrastructure and evaluative capabilities to enable government and industry to measure impact consistently over time and clearly demonstrate the public value of screen, games and broader arts and creative industries.

Explore the creation of regional creative clusters to strengthen local capacity, deepen industry networks and ensure screen and games opportunities are not concentrated in capital cities

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5. Engaging the Audience

The Importance of Converting Value to Engagement

Engaging the Audience is essential to ensure that Australian stories are meaningfully experienced, shape identity and inspire, while also projecting Australia's culture, values and perspectives globally. **Screen Currency 2026 shows strong public support for local content, driven largely by entertainment and wellbeing.**[67] In addition to holding 'use value' (a source of enjoyment), Australian content also holds 'non-use value', reflecting its broader cultural significance. It supports social connection and cohesion by fostering feelings of belonging and connectedness, prompting audiences to reflect on their place and identity as Australians, and encouraging dialogue around important social issues that connect people to culture, history and each other.

Australian screen content provides educational benefits helping audiences stay informed, particularly through documentary, children's and First Nations content (see *First Nations First*). Notably, Screen Currency 2026 reveals that many Australians report being inspired to take action after engaging with local screen content – whether by seeking further information, changing behaviours or deepening their engagement with issues highlighted – demonstrating its broader social and cultural impact as levers of change.

Screen Currency 2026 shows strong value placed on local games, with three in four Australians having played in the last six months – and their appeal extending across all ages and platforms.[68] Engagement is driven by enjoyment and wellbeing, with discovery largely social. Games also provide social, creative and learning benefits beyond entertainment.

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67 Screen Australia, Screen Currency 2026, *Audience insights.*
68 Ibid.

Screen Currency 2026 indicates that Australian content has global appeal. **Screen and games exports totalled $1.6 billion in 2023/24, of which $1.3 billion was in screen exports and $323 million in games.[69]** Beyond their economic impact, Australian content is a powerful tool for public diplomacy and soft power, engaging audiences at scale and shaping perceptions of Australia's identity, values and lifestyle. This cultural influence extends beyond viewership, contributing to tourism interest and enhancing Australia's broader international profile. Screen Currency 2026 suggests that **awareness and appeal of Australian film and television vary by market, but is strongest particularly in China, India, New Zealand and the United Kingdom.[70]** Popular programs such as *Bluey*[71] exemplify the global reach and cultural impact of Australian screen content its success underscores how Australian screen productions deliver value beyond economic returns, contributing meaningfully to social connection and driving cultural exchange on a global scale.

The games sector is increasingly recognised as an export powerhouse and is growing rapidly, at an average annual rate of 15% between 2016/17 and 2023/24.[72] Driven by a skilled workforce and global reach, Australian studios are producing successful and acclaimed titles such as *Hollow Knight: Silksong* and *Untitled Goose Game*.[73] Increasing government recognition of the sector's economic, social and cultural value is further positioning the Australian games industry as a competitive player in the global market.

Gaps and Emerging Priorities

Screen Currency 2026 reveals that while local screen content carries significant perceived value, this support does not necessarily translate to engagement. The research found that **84% of Australians believe it is important to have access to locally produced film and television – however, translating that support into active viewing is an increasingly complex challenge.[74]** The macro-forces of globalisation and digitalisation have brought genuine benefits - richer cultural exchange, broader access and more choice than any previous generation has enjoyed. But they have also fragmented how people experience culture, making it more personalised, more transactional, and less shared. Collective cultural moments are becoming harder to create and sustain.

Global content abundance and algorithm-driven recommendations are reshaping audience behaviour, making Australian content harder to find. Findings from Screen Currency 2026 reflect these dynamics, with many Australians indicating that local content is not always easy to find within their viewing experience.[75] Rather, word-of-mouth continues to play a significant role in how audiences engage with content, and can help extend reach for titles that have already built some momentum.

However, the problem is not discoverability alone. Even when audiences encounter Australian content, it must compete on appeal against productions backed by globally recognised IP or fanbases, significant scale and marketing investment – factors that materially shape audience expectations. Access alone is therefore insufficient to drive meaningful engagement. What is needed is a more sustained and strategic approach across industry and audience engagement efforts, to help ensure Australian content is not only available, but more actively sought out.

Australian film faces similar challenges. Cinema continues to be highly valued by Australians,[76] however, attendance is in decline, reflecting shifting audience behaviours and increased choice from at-home viewing options. Screen Australia's Theatrical Review report[77] reveals that a core issue for Australian films is weaker demand at release, with audiences having low awareness and little pre-release momentum. While films continue to access cinema

[69] Screen Australia, Screen Currency 2026, *Global insights.*
[70] Ibid.
[71] Nielsen (January 2026), 'Bluey wins second consecutive top streaming title of the year with 45 billion viewing minutes on Disney+.'
[72] Screen Australia, Screen Currency 2026, *Global insights* and *Economic insights*. Noting this figure is off a small base.
[73] Screen Australia, Screen Currency 2026, *Hollow Knight: Silksong* and *Untitled Goose Game* case studies.
[74] Screen Australia, Screen Currency 2026, *Audience insights* and *Economic insights.*
[75] Screen Australia, Screen Currency 2026, *Audience insights.*
[76] Australian Bureau of Statistics (2023), *Cultural and Creative Activities 2021/22.*
[77] Screen Australia (2026), Theatrical Review 2026. (Nb: not yet published at time of writing).

screens in Australia, this does not consistently translate into engagement, and factors like geographic availability further affect conversion. Strengthening outcomes requires a focus on the full lifecycle – building early demand, improving distribution and broadening success measures beyond box office. Screen Australia initiatives such as the Market & Audience programs demonstrate the value of programs that seek to increase discoverability and impact of Australian films.

Engagement in the games sector is shaped by highly personalised and social, platform-driven environments. Screen Currency 2026 highlights that the discoverability of Australian games is a significant gap, with 60% of game players surveyed unable to identify whether the games they play are Australian.[78] This points to a fundamental visibility gap that limits cultural recognition. Targeted interventions, such as clear labelling, could improve visibility.

Supporting Australian stories to reach global audiences through sustained engagement at international festivals, markets and industry events remains critical to building visibility, awareness and demand. These events – including Cannes, Berlinale, TIFF and major games markets – provide essential opportunities for Australian creators to showcase their work, secure distribution and develop strategic partnerships. Consistent participation helps to reinforce Australia's reputation and ensure local stories remain seen in an increasingly competitive global marketplace. Screen Australia's continued focus on maintaining strong national presence in these forums highlights the important role of government support in enabling this engagement.

Additionally, strengthening participation in international co-productions presents a further opportunity to expand the scale and sustainability of Australian projects.[79] Co-production enables access to larger pools of financing, shared resources and established distribution networks, enhancing the commercial viability and global reach of Australian content. **There is a clear opportunity to further enhance co-production support** to streamline collaboration pathways and connect more Australian creators with global partners, platforms and financiers.

Opportunities

To better convert value into engagement, Screen Australia recommends that the next National Cultural Policy include consideration of the following:

Encourage platform partnerships to amplify visibility, ensuring projects are effectively surfaced to audiences and supported through tailored, lifecycle-based distribution strategies to extend the longevity and reach of Australian content.

Prioritise the sharing of performance data and audience insights, enabling more evidence-based decision-making across screen and games that drive distribution and engagement strategies.

Recognise Australian screen and games as strategic and defined cultural exports, that advance Australia's cultural, social and economic objectives.

Expand and modernise co-production frameworks by reviewing existing treaties and pursuing new agreements with high-growth and strategically important markets.

Facilitate a stronger Australian presence at international marketplaces, to increase opportunities for Australian creators to connect with global networks and partners.

[78] Screen Australia, Screen Currency 2026, *Audience insights.*

[79] Australia currently has co-production agreements with 14 countries (12 treaties and 2 MOUs). For more information, see: 'Co-Production Program' on the Screen Australia website.

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Conclusion

Screen Australia welcomes the opportunity to contribute to the development of the next National Cultural Policy and supports its focus on maximising the cultural, social and economic value of Australia's screen and games industry. The policy presents a timely opportunity to convert creative and economic value into deeper engagement, strengthen industry sustainability, and reinforce the sector's role in fostering social cohesion and community connection. A clear strategic focus on global export and soft power will ensure Australian stories continue to reach international audiences, enhancing Australia's cultural influence and competitiveness. Screen Australia looks forward to continuing to work with government and industry partners to realise these outcomes through the next National Cultural Policy.

We welcome the opportunity to provide further information, either in writing or in person. To facilitate this, please contact Director of Strategy & Insights, Adrian Coates by email: [redacted]