

2025 ▶ 2027



# NSW SCREEN & DIGITAL GAMES STRATEGY





Cover:

Still from *100% Wolf*, image courtesy Flying Bark Productions Pty Ltd.

Anya Taylor-Joy in Warner Bros. Pictures' action adventure *Furiosa: A Mad Max Saga* a Warner Bros. Pictures release. Courtesy of Warner Bros. Pictures

Hayden Broadis (Jai Waetford), Dalia Tun (Zoë Boe) in *Critical Incident* ©Matchbox Pictures. Photo: Lisa Tomasetti

This page:

Chris Hemsworth, Dr George Miller and Anya Taylor-Joy at the Australian Premiere of *Furiosa: A Mad Max Saga* © 2024 Warner Bros. Entertainment Inc.

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The NSW Government acknowledges and respects the Traditional Owners and Custodians of the Lands on which we work and live.

## Minister's Foreword

Our people, our stories, and our skills – these are the reasons why more than half of Australian screen production happens here in NSW. This strategy sets out how the industry and the government could work together to build on that.

While there has been a recent slowdown in global screen production, the Federal Government's increased location offset will see Australia gain a greater share of that market. This strategy recognises the opportunity, but also the pressure that puts on production facilities in NSW, and is also alert to the emerging concerns about the impact of Artificial Intelligence on creative workers.

The strategy also identifies ways of cutting the red tape that has made NSW a 'No' state when it comes to attracting productions. Backed by the introduction of a NSW Screen and Digital Games Act, we aim to make NSW a 'Yes' state.

For the first time in NSW, this screen strategy puts digital gaming front and centre. The \$466 billion global gaming industry represents an enormous opportunity, but NSW is currently punching well below its weight. This strategy sets out a 'hothouse' approach that backs existing high performing producers to support the ambitious target for growth in the sector.

I thank the team at Screen NSW for their continued hard work backing the industry and thank every person working in the industry for their ongoing passion and creativity. The government recognises how important it is to have Australian stories on our screens, and the economic importance of sustainable careers in the screen industry.



**John Graham MLC**

NSW Minister for the Arts,  
NSW Minister for Music and the Night-Time Economy,  
NSW Minister for Jobs and Tourism

**October 2024**  
**Gadigal Country – Sydney**

## Head of Screen NSW Foreword

Storytelling is what connects us; it is where we can be seen, heard and understood. There is value in being able to walk in someone else's shoes, explore new perspectives and get lost in a virtual world. Stories have the power to unite, inspire, inform people's identity and broaden the fabric of our cultural lives.

The contribution of screen stories to our cultural landscape is firmly underpinned by the significant economic impact of our screen and digital games industries in NSW. Engaging audiences, locally and globally, wherever and however they consume content, we strive to be known as a place to create vibrant stories.

Recent disruptions and uncertainties domestically and abroad have galvanised our industry. Right now, there is a unique opportunity to work together at this pivotal time for the screen and digital games sectors. Legislation for an increased Australian Location Offset, a commitment of the Federal Government's *Revive* policy, reignites screen production attraction opportunities for NSW and delivery of our first creative industries policy, *Creative Communities*.

This strategy provides assurance of an ongoing plan for productions being made in NSW and for post, digital and visual effects and digital games work to be undertaken here. It focuses on programs that elevate and expand distinct and new voices, including First Nations storytellers. Screen NSW will support content that is loved locally, respected nationally and consumed globally.

Our ambition is for strong, high quality, sustainable screen businesses and practitioners at all levels, whose stories champion all communities. Engaging with industry stakeholders, we will build our influence for change, serve the sector and advocate for the NSW screen sector locally and internationally.



In unity

**Kyas Hepworth**

Head of Screen NSW  
Department of Creative Industries, Tourism,  
Hospitality and Sport

**October 2024**  
**Gadigal Country – Sydney**

## A renewed SCREEN NSW

The NSW Government is committed to greater independence and capacity for Screen NSW, enabling it to continue strengthening and growing the screen and digital games sectors.

A renewed Screen NSW will be the lead partner in implementing the government's ambitions for the industry, as outlined in this strategy. Screen NSW will:

- Shorten investment approval, contracting and payment timeframes (reducing to 14 days)
- Promote upskilling and training opportunities for existing and aspiring screen and games producers
- Support collaboration and sharing of industry knowledge through professional development opportunities such as networking events
- Give the Head of Screen NSW the authority to escalate critically urgent production issues for a government response within 48 hours
- Ensure Screen NSW has a strong and visible presence for the industry within Australia and internationally.

# NSW Screen and Digital Games Strategy 2025 –2027

## Our vision

New South Wales is home to a thriving global screen and digital games community, sustainably growing the industry and developing storytelling culture to connect with local and global audiences

Australian stories –told through screen and digital games –play a critical role in Australia both culturally and economically.

Over the next three years the NSW Government will work with screen and digital games production businesses to seize the opportunities that have arisen from the recent changes to federal incentive programs<sup>1</sup>, and growing consumer demand at an international level. Longer-term, the strategy sets the course for future generations living and creating in NSW to tell Australian stories and choose fulfilling and future-proofed careers. NSW will become the state of choice for local and international screen and digital games creators.

The Australian screen sector is well placed after the Australian Government introduced several significant incentive programs which enhance Australia's screen and digital games sector and international competitiveness. The NSW Government will introduce a Screen and Digital Games Act to align with the National Cultural Policy, *Revive*, and maximise the opportunities for the sector.

This strategy is a key commitment of the government's *Creative Communities* policy to outline the initiatives for sustainable sector growth over the next three years and beyond. It draws on extensive consultation with the sector, conducted over the last several months. It has been drafted at a point in time when the sector is facing challenges in relation to recent global contraction and the rapid adoption of Artificial Intelligence (AI) and other technologies that impact creative practice.

Tying these opportunities together requires a collaborative approach involving industry, all levels of government, educational institutions and creatives.

## Our strategic priorities - summary

The four priorities of our Strategy for NSW screen and digital games are:

- **Creating stories:** we lead the way in making enriching, high calibre stories and cultural content for local and global audiences.
- **Building sustainable growth:** our businesses are globally recognised, connected and competitive. High quality, accessible spaces help them grow and create jobs that are future proofed and sustainable.
- **Improving capacity and capability:** we set best practice standards to ensure workers have career pathways, are respected, safe, appropriately remunerated and supported in their career ambitions.
- **Developing audiences to increase demand:** local content finds and delights diverse audiences locally and around the world.

<sup>1</sup> The Federal Government's increased support for the sector includes specific screen and games initiatives such as increasing the Location Offset from 16.5% to 30% (2023) introducing a 30% Digital Games Tax Offset (backdated to 1 July 2022), introducing an Emerging Gamemakers Fund (2023), a Games Production Fund (2023) and a Games Festivals and Events Fund (2023)

# Part 1: State of play in the NSW screen and digital games industries

## The NSW screen industry

NSW's share of Australian screen production businesses and workers is significant.

It is home to 51% of Australia's screen production businesses<sup>2</sup>. NSW production, post-production, exhibition and digital games businesses employed 13,589 people in 2021-22 (incl. 697 digital games employees)<sup>3</sup>. Almost half (49%) of Australia's post-production facilities are located in NSW, with 284 out of 572 businesses nationwide<sup>4</sup>.

The NSW screen industry added almost \$1.1 billion to the state economy in 2021-22<sup>5</sup>. In the same period, wages and salaries in the NSW screen industry were around \$1.24 billion, with businesses generating \$4.88 billion in income<sup>6</sup>.

The Screen Australia Drama Report 22-23 notes that NSW represents a 51% share of production spend by location.

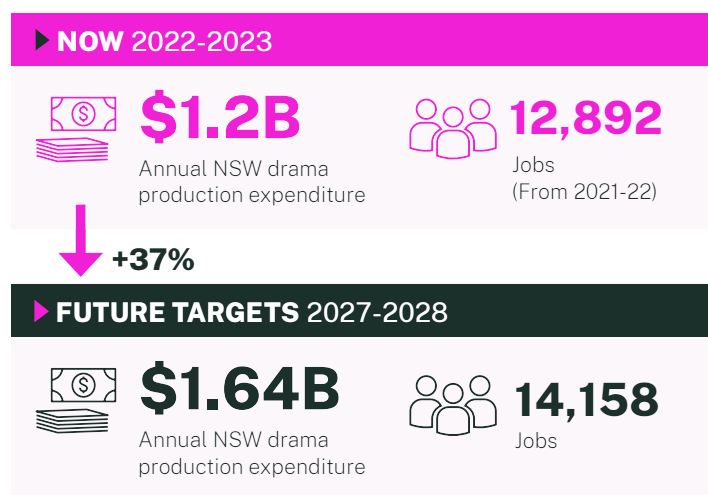


Figure 1 Future targets for NSW drama production expenditure and jobs

2 ABS Film, Television and Digital Games, 2021-22  
3 National Institute of Economic and Industry Research (NIEIR)  
4 ABS Film, Television and Digital Games, 2021-22  
5 National Institute of Economic and Industry Research (NIEIR)  
6 ABS Film, Television and Digital Games, 2021-22

## The NSW digital games industry

NSW is less mature in its share of digital games than in screen production; the state is home to 22% of Australia's game studios and 16% of full-time employees<sup>7</sup>.

Australia-wide, the digital games industry is growing its income and workforce, due to the increasing popularity of digital games, now played by 81% of Australians<sup>8</sup> and worth \$455 billion globally<sup>9</sup>. In 2022-23 Australian game development studios employed 2,458 full-time workers (an increase of 17% on the year before)<sup>10</sup>, including programmers, engineers, artists, designers and producers.

The NSW digital games ecosystem is growing off the back of highly skilled programmers, artists, creative hubs and leading games companies such as Riot Games, Plastic Wax, Ubisoft and Blowfish Studios.

There is significant opportunity for NSW to grow its digital games sector with the right strategy and policy settings.

The 2022-2023 Australian Game Development Survey, by peak industry body the Interactive Games & Entertainment Association (IGEA), found that 68% of games studios expected slight or significant income growth in the following year, 63% planned to hire more staff, and 87% of the industry's revenue comes from overseas markets<sup>11</sup>.

NSW Government is adopting a "hothouse" strategy, directly focusing on achieving sustainable growth for established NSW digital games companies.

This will enable transformational change with a focus on the value of the NSW digital games sector, targeting 20% compound annual growth (CAGR<sup>12</sup>) to 2027-2028.

7 Interactive Games & Entertainment Association (2023)  
8 Interactive Games & Entertainment Association (2023)  
9 2023 figures from the Global Entertainment and Media Outlook 2024-2028, PwC, converted to AUD.  
10 Interactive Games & Entertainment Association (2023)  
11 Interactive Games & Entertainment Association (2023)  
12 CAGR = Compound Annual Growth Rate

# Part 2: Our priorities, objectives and how we will get there

## NSW SCREEN & DIGITAL GAMES STRATEGY 2025-2027

### OUR VISION

New South Wales is home to a thriving global screen and digital games community, sustainably growing the industry and developing storytelling culture to connect with local and global audiences

### STRATEGIC PRIORITIES

Creating stories

Building sustainable growth

Improving capacity and capability

Developing audiences to increase demand

### HOW WE ARE GOING TO GET THERE – TOGETHER

#### A RENEWED SCREEN NSW

- 1 Nurture new ideas and talent
- 2 Generate outstanding NSW screen content from NSW First Nations screen and digital games practitioners
- 3 Broaden representation of all NSW communities in screen and digital games projects
- 4 Make government processes screen friendly and more responsive
- 5 Provide funding certainty via Screen NSW to position NSW as the Asia-Pacific hub for screen and digital games
- 6 Power the development of the digital games sector in NSW
- 7 Meet demand for production spaces through enhanced infrastructure
- 8 Grow our skilled workforce – above and below the line – to confirm NSW as a leader in screen careers
- 9 Champion safe, secure workplaces and nation-leading workforce conditions
- 10 Assert and promote awareness of creative workers' intellectual property rights in relation to Artificial Intelligence and evolving distribution platforms
- 11 Develop and support initiatives to connect audiences with our screen and games content
- 12 Develop and support initiatives to broaden and deepen audience engagement and growth, particularly the next generation of audiences across NSW
- 13 Increase global connections and export our stories to the world

### SUCCESS MEASURES



### Creating stories

## Total Control Season 3

Hailing from Blackfella Films, *Total Control* continues the company's exceptional record of bringing First Nations stories and characters to a wide audience, and further cements NSW's position as the centre of Indigenous drama production in Australia.

For Season 3, two emerging First Nations writers, Julia Moriarty and Meyne Wyatt, were brought onto the series and received expert mentoring to continue the line of hard-hitting home-grown storytelling. *Total Control* has been supported by Screen NSW for all three seasons, with the Regional Filming Fund supporting Seasons 2 and 3 shooting at various locations in regional NSW, including Narromine, Trangie and Broken Hill. Season 3 employed 288 people living in regional NSW.

Deborah Mailman (Alex Irving) Rachel Griffiths (Rachel Anderson) in Blackfella films' *Total Control Season 3*.  
Photo: Lisa Tomasetti

## PRIORITY 1 CREATING STORIES

We lead the way in making enriching, high calibre stories and cultural content for local and global audiences

### 1 Nurture new ideas and talent

- Recognise and nurture screen and digital games storytelling as a personal cultural right and public good, and acknowledge the intrinsic worth of Australian stories to community wellbeing
- Continue investment support for producers and writers to develop accessible, equitable and inclusive scripted, documentary, online and digital games content (including supporting connections between producers and authors with the introduction of a new \$200,000 fund for producers to option intellectual property, i.e. novels, non-fiction, podcasts)
- Support lower budget and agile screen production, reflecting the innovative nature of individual creative talent and the creative industries
- Promote business development strategies for screen and games content producers

### 2 Generate outstanding NSW screen content from NSW First Nations screen and digital games practitioners

- Prioritise opportunities for First Nations screen and digital games producers and creative practitioners
- Grow NSW-based First Nations screen and digital games businesses and intellectual property to amplify First Nations stories and culture
- Champion Indigenous Cultural Intellectual Property rights (ICIP) for NSW First Nations peoples



### 3 Broaden representation of all NSW communities in screen and digital games projects

- Prioritise industry development programs to encourage stories about and from under-represented communities, including Western Sydney and regional communities
- Grow the value of intellectual property generated by NSW-based creatives from under-represented communities, ensuring representation for diverse creators and storytellers
- Promote diverse screen and digital games content through Screen NSW's communication channels

Screen is one of the most effective ways of sharing our stories to broader audiences, driving NSW Government's audience ambitions around the *Creative Communities* policy.



#### Creating stories

### Colin from Accounts

When the first season of the series *Colin from Accounts* launched in Australia, it broke records becoming Foxtel's most watched original scripted series of all time. From there the series found global success, premiering in the UK on BBC and in the US on Paramount+.

*Colin from Accounts* is produced by NSW-based Easy Tiger and has been supported by Screen NSW for both Seasons 1 and 2. It is an example of how NSW-based intellectual property has the potential to reach large local and global audiences.

Creators, writers and stars Harriet Dyer and Patrick Brammall with Zak in *Colin From Accounts Season 2* a CBS Studios and Easy Tiger Production. A Binge Original / Foxtel Original. Photo by Joel Pratley for BINGE

## CASE STUDY



### Building growth and employment in digital games

#### Phantom Galaxies and Blowfish Studios

Blowfish Studios are an award-winning developer and publisher of interactive entertainment based in Sydney which has gained a reputation as a blockchain game pioneer. Their latest game *Phantom Galaxies* was supported by Screen NSW through the Digital Games Rebate and integrates Web3 technology in an open-world space action Role Play Game (RPG). The project employed 62 NSW residents and provided advanced skill development opportunities for NSW game practitioners.

Art from digital game *Phantom Galaxies*.  
Photo courtesy of Blowfish Studios



### Building growth and employment in screen friendly NSW

#### The Fall Guy

*The Fall Guy's* choice to shoot in Sydney was a testament to the power of the Made in NSW fund, backed in by a whole of government coordination. Sydney's unique architectural landscape and natural features were incorporated into the story.

Complex jurisdictional challenges, for example shooting on the Sydney Harbour Bridge, on the harbour and in front of the Sydney Opera House, were met with effective collaboration and communication between Screen NSW's Production Location team, Screen NSW's Destination Attraction team and NSW government agencies including Transport for NSW, Sydney Trains and local councils.

Behind the scenes on *The Fall Guy* with Ryan Gosling.  
Photo courtesy of Universal Pictures

## PRIORITY 2

### BUILDING SUSTAINABLE GROWTH

Our businesses are globally recognised, connected and competitive. High quality, accessible spaces help them to grow and create jobs that are future proofed and sustainable

#### 4 Make government processes screen friendly and more responsive

- Introduce a Screen and Digital Games Act to strengthen elements of the *Making NSW Film Friendly Premier's Memorandum* and *Local Government Filming Protocol*
  - Updating the *Local Government Filming Protocol* to streamline filming logistics
  - Broadening screen representation and adding digital games for the first time
  - Improving parking, traffic management, and easier road closure processes
  - Introducing a fee appeal process
  - Improving response times to industry for filming permit applications
  - Introducing accreditation for screen friendly local councils
- Enabling NSW Government agencies collaboration with local councils for faster and smoother cross government response achieved through consultation and working directly with councils
- Move to a faster and simpler grants-based production investment model, eliminating Screen NSW involvement in equity-based Production Investment Agreements (PIAs), reducing red-tape, shortening payment timelines and giving producers an increased share in their intellectual property
- Reissuing, refreshing and strengthening the approval process pathway, entering into a consultation process to explore ways to extend from 30 days to 90 days the period filming may take place before a development application is required

## 5 Provide funding certainty via Screen NSW to position NSW as the Asia-Pacific hub for screen and digital games

- Grow and sustain the NSW share of national and international footloose production through the revitalised Made in NSW fund (\$35m announced for 2024-25)
- Grow the state's share of the digital games, post-production and VFX industries through the Post, Digital and Visual Effects (PDV) and Digital Games Rebates
- Improve funding for local productions via development and production finance programs

## 6 Power the development of the digital games sector in NSW

- Leverage the Federal Government's increased support for the sector including the introduction of a 30% Digital Games Tax Offset (backdated to 1 July 2022), and Screen Australia programs: Emerging Gamemakers Fund (2023), Games Production Fund (2023) and a Games Festivals and Events Fund (2023)
- Reduce the Digital Games Rebate minimum spend threshold from \$500,000 to \$350,000 to enable more games producers access to the Rebate
- Grow the NSW digital games sector and its international connections through digital games development and market travel funds, supported through an increased investment of \$1.5 million over three years for the Digital Games Seed Development and Market Travel Programs
- Update legislation and rename the Film and Television Industry Advisory Committee to include digital games and expand the role of the board to improve games representation
- Develop a stand-alone Digital Games Strategy within three years

## 7 Meet demand for production spaces through enhanced infrastructure

- Building on the recent completion of a business case for a second major film studio in Sydney, NSW Government commits to secure temporary spaces immediately while partnering with industry to solve the problem of additional studio spaces and sound stages, including a future global film studio, ensuring Sydney remains the leading location for Australian and international productions
- Progress plans to establish a NSW centre for screen culture, digital innovation and a gathering place for practitioners and creative workers, working with partners, including the sector and the City of Sydney, to make it a reality
- Provide greater and more regular access to Callan Park for film production offices, shooting locations, studio and ancillary space on an ongoing basis



### Creating spaces for export-quality content

## Callan Park – Kirkbride and surrounds

To maximise the effective use of Callan Park and Kirkbride, NSW Government will collaborate across agencies to provide greater and more regular access to space for filming and production.

Callan Park offers a blend of open spaces and historical architecture. Buildings at the site provide spaces for filming and backlot locations for major productions to create a vibrant film production site serving as versatile and accessible spaces.

Locations at Callan Park can accommodate multiple productions simultaneously, including workshop areas and offices, post-production and editing suites. The nearby One Canal Road screen precinct enhances Callan Park providing essential services, storage and parking for trucks in proximity.

Callan Park is a sensitive heritage site that requires collaboration and future investment as a cross-government project, with Create NSW and Screen NSW working closely with the asset owners Greater Sydney Parklands and Health NSW.

Dodger (Thomas Brodie-Sangster) and Fagin (David Thewlis) in *The Artful Dodger*, filmed at Callan Park–Kirkbride. Photo by Mark Rogers, courtesy of Disney



**Improving capacity and capability**

**Bump**

When Season 1 of *Bump* premiered on Stan in 2021 it was the platform’s biggest ever premiere, breaking all-time viewing records for any local or international series. Generating an estimated 565 jobs in NSW, Season 4 launched in December 2023. *Bump*, from NSW-based production company Roadshow Rough Diamond, continues to grow emerging talent. Multiple first-time directors have been given opportunities on the series and have gone on to direct other projects.

On set of *Bump* Season 4. Photo courtesy of Stan and Roadshow Rough Diamond. Photo: John Platt.

**PRIORITY 3**  
**IMPROVING CAPACITY AND CAPABILITY**

We set best practice standards to ensure workers have career pathways, are respected, safe, appropriately remunerated and supported in their career ambitions

**8 Grow our skilled workforce – above and below the line<sup>13</sup> – to confirm NSW as a leader in screen careers**

- Develop and roll out a \$1 million pilot program with TAFE, Australian Film TV and Radio School (AFTRS) and the National Institute of Dramatic Art (NIDA) to fast track entry level and mid-career below the line practitioners with a focus on under-represented communities in order to address skills shortages in the below the line workforce
- Strengthen Screen NSW partnerships with the state’s universities, TAFE, and key training institutions, including NIDA and AFTRS to promote training and skills development opportunities
- Increase screen and digital games training and production attachments for people in Western Sydney, regional NSW and for First Nations, culturally and linguistically diverse, LGBTQIA+ communities and people with disability (above and below the line)

**9 Champion safe, secure workplaces and setting nation-leading best practice conditions**

- Collaborate with the Media Entertainment & Arts Alliance (MEAA) and Screen Producers Australia (SPA) in implementing Screen Safe Australia, the National Guidelines for Screen Safety
- Continue to ensure professional development opportunities for emerging practitioners, including through workplace attachments
- Provide NSW Government investment of \$250,000 annually to support Creative Australia’s Creative Workplaces, which has been established to promote and enable fair, safe and respectful workplaces in the arts and culture sector

<sup>13</sup> ‘Below the line’ includes production crew members e.g. location scout, set builder, costume maker, and lighting technician. ‘Above the Line’ is e.g. creatives, writers, directors, designers and performers.

## 10 Assert and promote awareness of creative workers' intellectual property rights in relation to Artificial Intelligence and evolving distribution platforms

- Advocate for protection of the intellectual property rights of creative workers with regard to challenges and opportunities from AI by leveraging Federal Government policy as it is developed and adopted
- Convene an industry working group to help develop an Australian industry response to AI and review Screen NSW funding guidelines, examining key issues related to the impact of AI on the industry (both benefits and challenges) including the potential displacement of jobs due to automation, the ethical use of AI in content creation, the implications of AI for creative expression, the role of AI in enhancing productivity (without undermining human creativity), and how to ensure fair and transparent AI use
- Promote awareness in emerging screen and digital games practitioners and businesses of intellectual property value in contracting for the supply of creative services



### Improving capacity and capability:

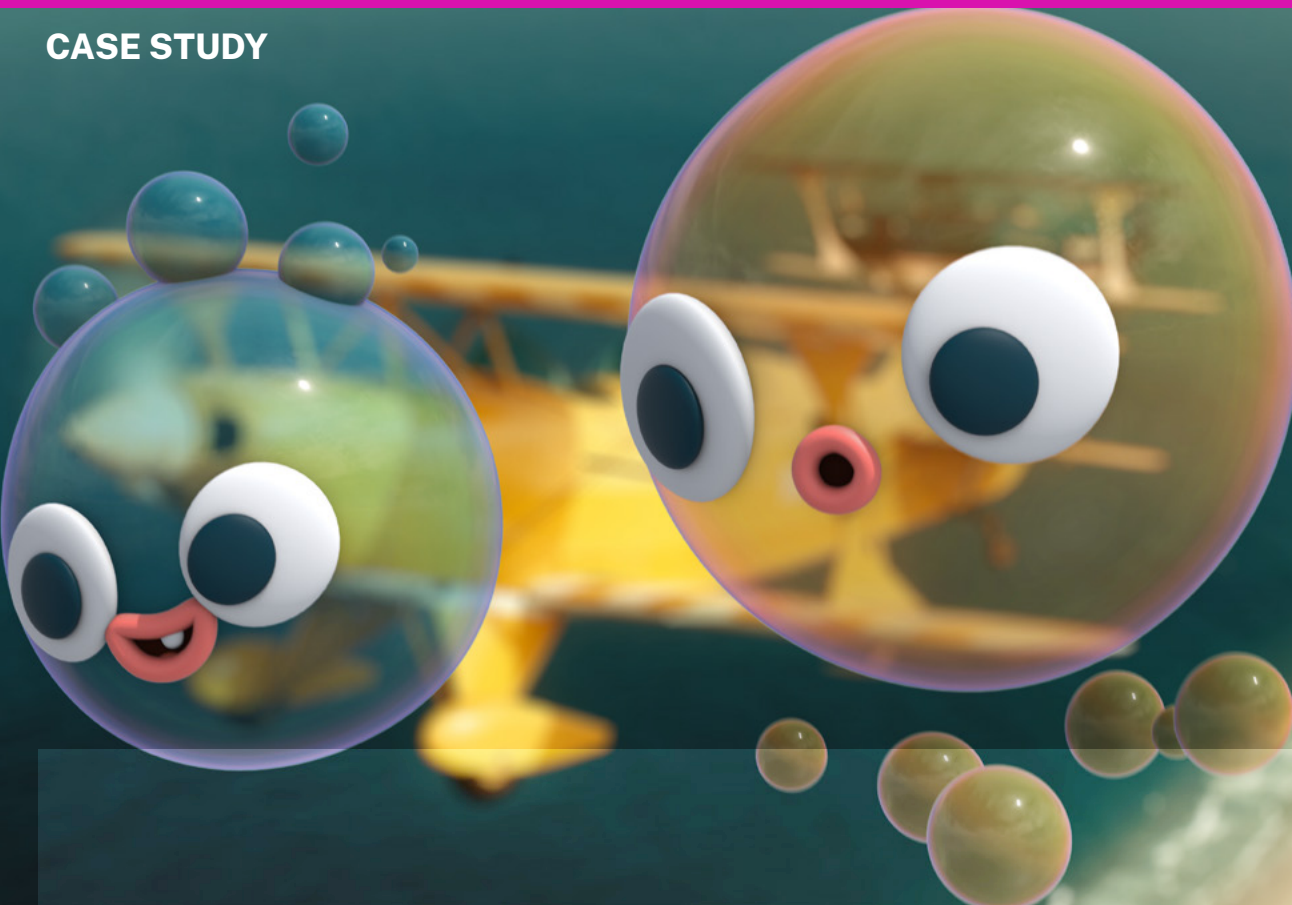
#### One Canal Road

The One Canal Road storage, workshop and office spaces offer a dynamic solution for the diverse needs of screen production companies. From a compact setup during pre-production, the spaces can expand to accommodate additional staff and crew as projects progress. A small studio on site provides space for convenient rehearsals and small shoots which are essential for publicity and other content creation.

Storage facilities for film gear and trucks meet the needs of various departments such as grips, gaffers, and caterers, and ensure equipment is ready on-site. A hard stand area for unit bases enhances functionality and spaces for artists and special effects crews within the complex enable a collaborative environment for the technical and creative facets of film production.

One Canal Road office, storage and workshops spaces. Photo: Create NSW

## CASE STUDY



### Regional production excellence Fizzy & Suds

Screen NSW supported ABC's first factual, preschool series *Fizzy & Suds* via Production Finance and the Post, Digital and Visual Effects Rebate. The series, which hails from the Northern Rivers-based Tilt Media, is ABC's first production to be certified as Inclusively Made, produced inclusively with people living with disability.

Still from *Fizzy & Suds*. Courtesy of the ABC and Tilt Media

## PRIORITY 4

### DEVELOPING AUDIENCES TO INCREASE DEMAND

Local content finds and delights diverse audiences locally and around the world

#### 11 Develop and support initiatives to connect local audiences with our screen and games content

- Support collaboration and share audience development strategies through industry networking events hosted by Screen NSW
- Establish a new \$200,000 Community Film Festival Opening Night fund to support community film festivals to bring communities together for opening night celebrations at film festivals across NSW
- Support and grow world-class screen events such as Sydney Film Festival and South by South-West (SXSW) Sydney

#### 12 Develop and support initiatives to broaden and deepen audience engagement and growth, particularly the next generation of audiences across NSW

- Partner with Screen Australia and state agencies to collate data on audience and business trends to ensure NSW and Australian creatives have access to current data sets and insights
- Grow the next generation of screen and digital games audiences through targeted programs and partnerships
- Leverage the Federal Government's support for local content to focus public engagement on NSW-generated stories and games to build an appreciation among emerging and future audiences of the value of Australian content

### 13 Increase global connections and export our stories to the world

- Advocate for local industry and attract international business to NSW through a Screen NSW presence at international conferences, festivals and markets
- Market NSW produced content and IP internationally through collaboration with Australian government entities and diplomatic representatives across the world
- Collect NSW screen and digital games industry data to measure the strategy's success including exporting Australian stories to the world and the sector's contribution to the economy, employment, culture and tourism
- Provide access to globally recognised local and international filmmakers and creators for the benefit of emerging and mid-career creatives

#### Enabling engagement and breaking box-office records

##### John Farnham: Finding the Voice

Theatrically released documentary *John Farnham: Finding the Voice* was the biggest Australian release of 2023, with total box office takings of \$4.5 million. *John Farnham: Finding the Voice* now stands as the highest Australian grossing feature length documentary of all-time and the fourth biggest grossing feature length documentary in Australia ever. The film was produced by NSW-based Beyond Oz, a division of Beyond International, in association with Blink TV, and supported by Screen Australia, Screen NSW and VicScreen.

John Farnham singing at the Chain Reaction Concert 1990, from *John Farnham: Finding the Voice*. Photo: Serge Thomann



#### Advancing tech capabilities

##### Not Doppler

Not Doppler is a Sydney-based game development studio and publisher. Screen NSW, through the Digital Games Rebate, has supported Not Doppler projects, *Food Stylist* and *Earn to Die Rogue*.

*Food Stylist*, in the 'cozy game' genre, has had over 300,000 players each month since its launch. The team at Not Doppler used advanced technologies such as photogrammetry to 3D-scan and model over 5,000 food items and props in its development. The project employed 15 people in NSW across programming and development including 3D Artists, designers, project managers and creative directors.

Art from digital game *Food Stylist* by Not Doppler. Image courtesy of Not Doppler



## Part 3: Context and sizing the prize

### The local and global markets for screen content and digital games<sup>14</sup>

It is useful to quantify the size of the screen and digital games markets to plan for growth and measure the success of government intervention.

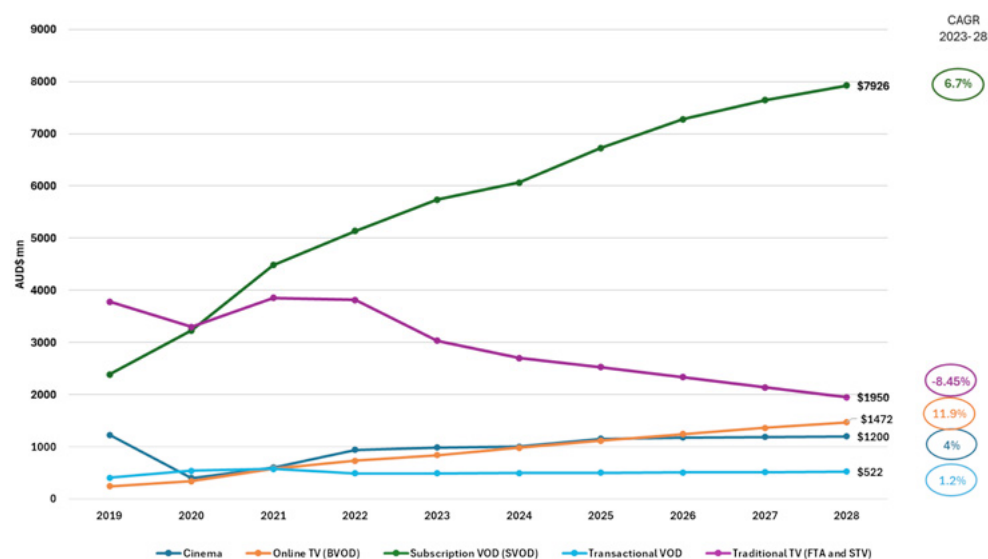


Figure 3 The Australian Screen Market 2019 to 2028

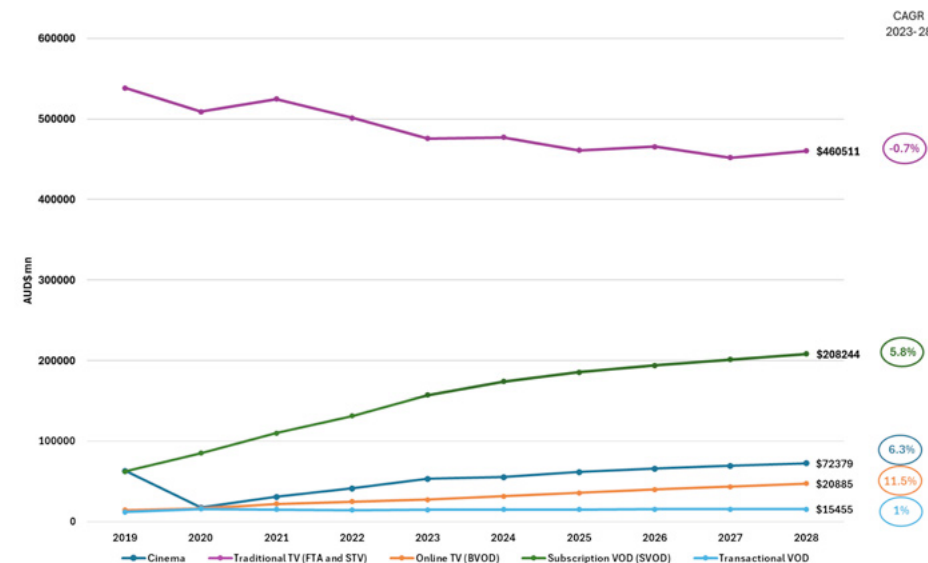


Figure 4 The Global Screen Market 2019 to 2028

### Screen sector's historical and forecast data analysis:

- A decline in traditional television viewing<sup>15</sup> leading to a reduction in advertising income available to commercial broadcasters
- A flatlining of transactional video on demand (TVOD) as viewers move away from owning screen content
- Healthy growth in advertising-supported 'Online TV', which comprises broadcasters' free video on demand (BVOD) services e.g. 7Plus, 9Now, 10 Play, SBS On Demand, as well as streamers' advertising revenues from their new ad tiers, e.g. Netflix, Bing and Kayo
- Healthy growth in paid subscription-supported video on demand (SVOD) services (e.g. Stan, Amazon Prime and Bing)
- Moderate growth in cinema box office revenue as recovery from the Covid-19 pandemic continues

14 The graphs show the global and Australian sizes of each market segment from 2019 to 2023 (five years historical) and how each segment is expected to grow (or shrink) from 2024 to 2028. 'CAGR' (compound annual growth rate) is the annualised average growth rate for each market segment expected in the next five years. Source: PwC Entertainment and Media Outlook 2024-2028

15 The Australian Communications and Media Authority (ACMA) 2023 viewership survey (one week's viewing) showed: The use of online subscription streaming services increased to 66% in June 2023, up from 59% the previous year; Viewership of free-to-air TV (excluding catch-up) decreased from 56% in June 2022 to 52% in June 2023; Viewership of free-to-air catch-up and TV streaming services increased from 38% in June 2022 to 43% in June 2023; 20% watched pay TV; 7% watched a pay-per-view service. Source: Communications and media in Australia: Trends and developments in viewing and listening 2022-23



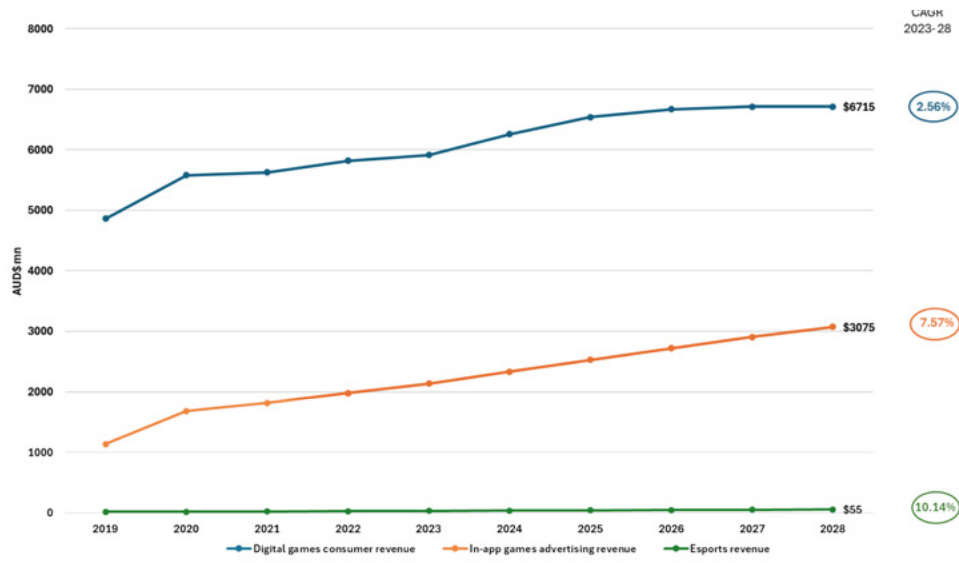


Figure 5 The Australian Digital Games Market 2019 to 2028

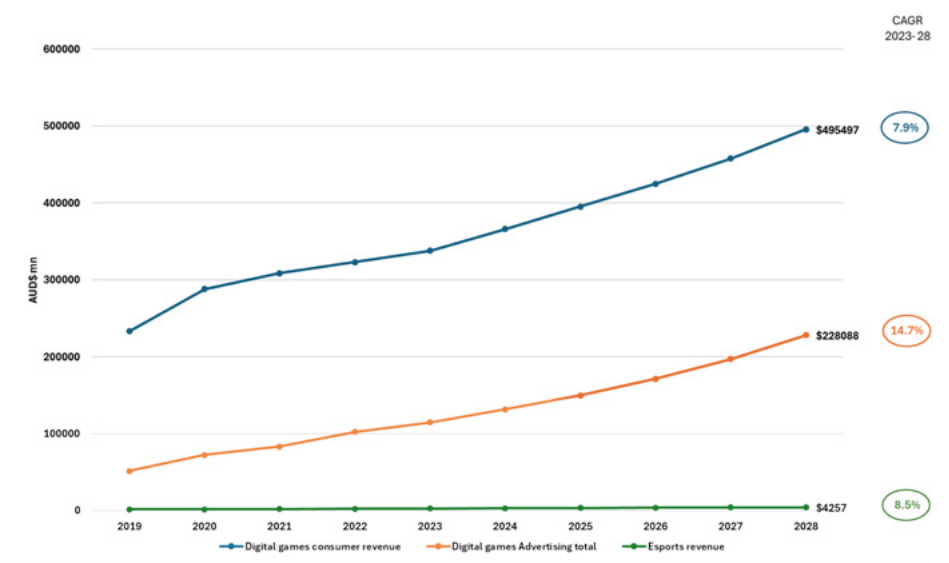


Figure 6 The Global Digital Games Market 2019 to 2028

### Digital games sector's historical and forecast analysis:

- Continued stellar growth in consumer spending on digital games as casual and mobile games boost the number of Australians who play digital games regularly, on their own or with friends<sup>16</sup>
- Increasing numbers of digital games players and time spent playing will continue to grow the 'in-app' advertising revenue
- 'E-sports', i.e. organised digital games competitions held online and offline (at live events), generate comparatively small revenues currently but this will increase dramatically in the next five years

16 81% of Australians play digital games, according to the *IGEA 2023 Australia Plays Report*

# Part 4: Your Partners – the NSW screen and digital games ecosystem

The screen and digital games ecosystem includes studios and production houses, all levels of government, universities and training providers, industry workforce, and advocacy organisations.

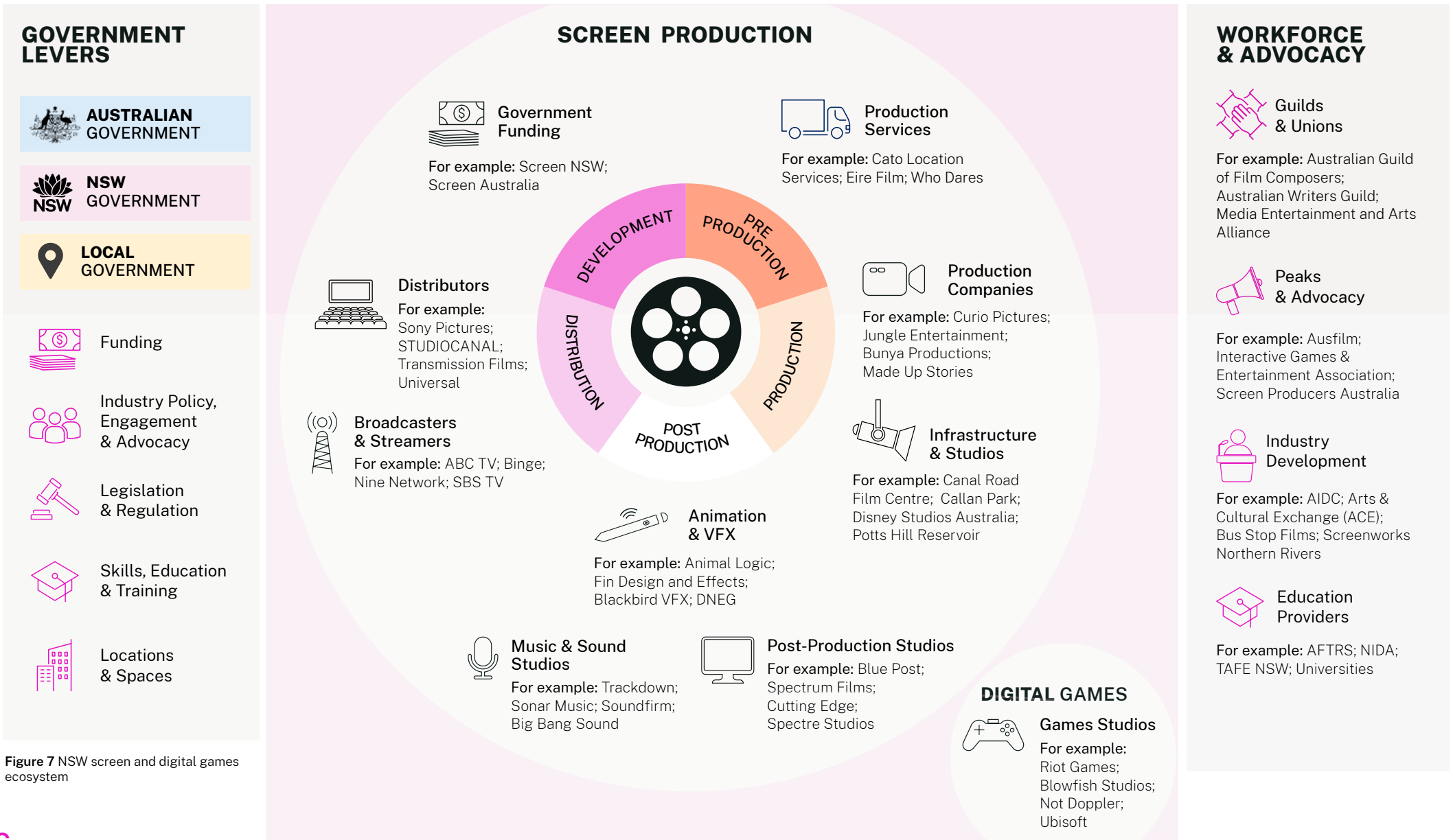


Figure 7 NSW screen and digital games ecosystem

# INDUSTRY NEEDS AND OPPORTUNITIES ACROSS ALL LEVELS OF GOVERNMENT

## Funding



Complementary funding and incentives



Combined (40%) Federal offset and NSW rebate

## Industry Policy, Engagement & Advocacy



Engagement with industry peaks, craft guilds & employee associations



Engagement with industry peaks (e.g. IGEA) and employee associations

## Legislation & Regulation



Working conditions, safety and conduct, film friendliness, environmental care



Content classifications, safe workplaces and conditions

## Skills, Education & Training



Workforce pipeline and career pathways, both above and below the line



Career pathways support for digital games practitioners

## Locations & Spaces



Studios, locations, production facilities, advice and permits



Studio and co-working facilities



## AUSTRALIAN GOVERNMENT



Producer, Locations, PDV & Digital Games Offsets (30%)



Screen Australia grants and investments



Revive National Cultural Policy



Industry research & data collection



National workplace laws and fair work pay & conditions



Industry regulation (e.g. content quotas)



Supported training institutions (e.g. NIDA & AFTRS)



University-funded places



Federal services, land & facilities



## NSW GOVERNMENT



Made in NSW Incentive, PDV & Digital Games Rebates



Screen NSW grants



Creative Communities policy & NSW sector strategy



NSW sector engagement & networking



Creative Communities policy & NSW sector strategy



Screen and Digital Games Act (to be introduced in 2025)



Attachments on Screen NSW supported projects



Education providers, pathways & partners (e.g. TAFE NSW)



Filming production facilities



Location advice and support



## LOCAL GOVERNMENT



Promote film-friendly policies & positive community interaction



Local Government Filming Protocol & Codes of Conduct



Public safety, environmental & land use policy



Parking & traffic management



Permits & protocols

Figure 8 Screen & Digital Games Industry Engagement with Government

## NSW GOVERNMENT LEVERS (DETAIL)

Through Screen NSW, the NSW Government is investing in and making it easier for screen and games producers to make world-leading content.



Figure 9 NSW Government levers to support screen and digital games

## Creative Communities Strategic Partnerships:

Each strategy developed from *Creative Communities*, commencing with this strategy, will:

- Identify a lead state cultural institution to champion and sponsor the sector
- Identify sector specific training organisations to drive education and training reform related to the sector
- Identify a lead or set of lead universities to map connections, provide key research input and sponsor key strategies

## Screen and Digital Games Strategy Partnerships:

- Lead state cultural institution to champion and sponsor the sector and this strategy: Sydney Opera House
- Lead sector specific training organisations to drive education and training reform related to the sector: AFTRS, NIDA and TAFE NSW
- Lead creative industries focused universities to map connections, provide key research input and sponsor this strategy: Western Sydney University and University of Technology Sydney
- Lead NSW Government agencies to drive broader audience development and partner on location use in collaboration with Screen NSW: Destination NSW, Transport for NSW, Department of Planning and Office of Local Government
- Federal Government partnerships: leveraging the national cultural policy *Revive* and complementary federal funding initiatives to partner with federal agencies for the benefit of NSW
- Lead Local Government Areas: program being introduced for local government screen friendly accreditation

## Part 5: Success measures

The following key performance indicators will help the NSW Government track its progress towards achieving the vision and outcomes outlined in this strategy. Reporting will be published annually to track progress toward our three-year goals.

KEY INDICATOR	MEASURE	BASELINE (2022-23)	TARGET (2027-28)
Economic contribution to NSW	Gross Value Add of NSW screen sector	\$1.06 billion (21-22)	\$1.36 billion
Employment in the screen industry	Number of NSW jobs across all screen sectors (including digital games)	13,589 (21-22)	15,552
Production	NSW share of national drama production expenditure	51%	Maintain 50% or more
	Value of NSW drama production expenditure	\$1.2 billion	\$1.64 billion
	NSW share of national PDV expenditure	50%	Maintain 50% or more
	Value of NSW PDV expenditure	\$356 million	\$498 million
Digital games	Digital games revenue	\$136.1 million (21-22)	\$406.39 million
Audience engagement	Number of views of supported projects that reflect NSW content	Baseline at 24-25	Target to be set and reported ongoing
Training and skills	Industry attachments for emerging and under-represented practitioners	Baseline at 23-24	Target to be set and reported ongoing
Spaces	Increase in new (temporary or permanent) filming spaces	Baseline at 24-25	Target to be set and reported ongoing
Legislation	Introduce NSW Screen and Digital Games Act and increase number of accredited Film Friendly Councils	New Act 2025 and introduce LGA accreditation Baseline at 24-25	At least five accredited film friendly councils
First Nations businesses	Number of NSW First Nations screen and digital games businesses	Baseline at 23-24	25% increase

The above measures will be used to inform annual monitoring, reporting and evaluation in order to understand the evolving context and longer-term impacts of the strategy.

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